

DeskPRO Helpdesk Software: Agent Interface Quick Start Guide

The DeskPRO helpdesk platform is designed to make it easy to handle problems and questions from your users. Your helpdesk ties together all the information about each issue into a single **ticket**. Managing these tickets via the Tickets app forms the basis of your organization's helpdesk.

DeskPRO includes other apps to help you manage communication with your users, including live chat, user feedback, CRM, tasks and publishing help content.

You should have an email called "Your new DeskPRO helpdesk agent account" with your login details.

Account types within DeskPRO

users

the people you are helping; if you're using DeskPRO for customer support, this will be your customers; for an internal helpdesk, this will be your organization's staff.

agents

you and other staff within your organization who use DeskPRO to provide help to your users.

admins

agents who have administrator access to configure your helpdesk.

After you log in, you'll see the Agent interface below.

The **toolbar** gives you quick access to common functions

App bar

The **filter pane** enables you to select lists of items you want to work on

The **list pane** shows the results of your selection in the filter pane

The **content pane** is where you view and work on individual items

Interface selection controls

The app bar lets you switch between working with different types of content.

The blue icon tells which app is currently selected. Red numbers tell you the number of items that need attention from an agent.

App bar

Tickets

Chat

in real time with users

CRM

user records

Feedback

user suggestions

Publish

help content

Tasks

Interface switching

These interface icons let you switch between different DeskPRO interfaces.

Agent

Reports

Billing

Admin

User portal

Other agents who are logged on and available to IM

Your account & preferences

Search bar

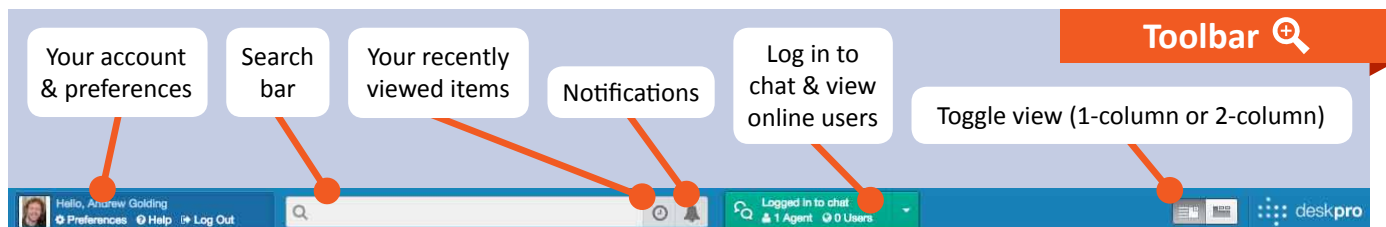
Your recently viewed items

Notifications

Log in to chat & view online users

Toggle view (1-column or 2-column)

Toolbar





The Tickets App

The filter pane is where you select a list of tickets to work on.



Finding Tickets

TICKETS	SEARCH
AWAITING AGENT	
My Tickets	10
Tickets I Follow	0
My Teams' Tickets	2
Unassigned Tickets	12
All Tickets	29
FILTERS	
Critical tickets from Acme	
Sales dept & older than 5 days	
SLAs	
4 hour first response	
VIP support level	
TICKETS	LABELS
Awaiting Agent	29
Awaiting User	60
Resolved	6
Archived	0
Spam	3
Recycle Bin	2

Advanced search for tickets

Tickets **awaiting agent** need attention

Custom filters

Shows if tickets are passing or failing your Service Level Agreement

All tickets by status

Ticket status

Each ticket has a status, which indicates who needs to act on the ticket next.

Awaiting Agent

An agent needs to perform the next action on the ticket; this will usually involve replying to the user.

Awaiting User

You're waiting for the user to contact your helpdesk, typically to provide more information about their issue.

Resolved

The issue is resolved and communication has ended. Resolved tickets can be re-opened if needed.

Agent assignment

Tickets start out unassigned but can be assigned to an agent and/or a team.

My Tickets

shows tickets that are assigned to you.

My Teams' Tickets

shows tickets that are assigned to any team which you're a member of.

Tickets I Follow

is a way to keep track of tickets that you're not directly assigned to, but you are still monitoring.

Unassigned Tickets

are neither assigned to a team nor to an agent.

Grouping tickets with "Awaiting Agent" status

You can group tickets with "Awaiting Agent" status by a number of fields, for example to find tickets assigned to each of the agents in your team.

Click any of the small arrows to filter by custom groups

TICKETS	SEARCH
AWAITING AGENT	
My Tickets	10
Tickets I Follow	0
My Teams' Tickets	2
Unassigned Tickets	12
All Tickets	29

TICKETS	SEARCH
AWAITING AGENT	
My Tickets	6
Tickets I Follow	0
My Teams' Tickets	23
Select Field to Group Tickets	
Department	
Product	
Organization	
Person	
Language	
Urgency	
Agent	
Agent Team	
Waiting Time	
4 hour first response	
2	

TICKETS	SEARCH
AWAITING AGENT	
My Tickets	6
Tickets I Follow	0
My Teams' Tickets	23
Unassigned	
Abed Nadir	
Annie Edison	
Jeff Winger	
Shirley Bennett	
Troy Barnes	
Unassigned Tickets	
All Tickets	

Tickets in the list pane

Change how tickets are ordered: currently in descending order of urgency

Subject

User

Ticket is close to failing an SLA (amber)

Ticket has failed an SLA (red)

An **SLA** is a condition to meet (such as replying to a new ticket within 4 hours). When a ticket is close to failing an SLA, it is marked amber; when it fails, it is marked red.

SLAs			
4 hour first response	2	0	3
VIP support level	0	5	0

The tickets which match the criteria you select in the filter pane are then shown in the list pane. Click a ticket to open it in the content pane. A ticket that is open in the content pane is highlighted in blue.

Change the information displayed for tickets in list

Urgency is 9

Ticket is open in content pane (blue highlight)

Urgency is a score from 1 to 10 – where 10 is most urgent. It can be changed by agents or by automatic rules set up by your DeskPRO administrators. It is designed to help you prioritize tickets.

1
2
3
4
5
6
7
8
9
10

Select multiple tickets

Selected tickets

You can select multiple tickets with checkboxes. This is useful if you need to apply the same action to multiple tickets – for example, assigning several tickets to an agent, mass replying or bulk deleting.

The screenshot shows the '7 TICKETS' list pane with three tickets selected (checkboxes checked). The 'Apply actions to selections' pane is open on the right, showing options to 'Apply a macro', 'Change Status' (Set resolved, Set awaiting user, Set awaiting agent, Mark For deletion), and assign tickets to an 'Agent' (Unassigned, Abed Nadir, Annie Edison, Jeff Winger) or a 'Team'. The 'Language' dropdown is also visible.

Grouping tickets

You can group tickets in the list pane. If you've grouped tickets in the filter pane in one way, this allows you to sub-group them: for example, tickets assigned to a specific agent, grouped by the department.

The left screenshot shows the '7 TICKETS' list pane with the 'grouped by' dropdown menu open, displaying options: None, Department, Product, and Organization. The right screenshot shows the '4 TICKETS' list pane with tickets grouped by 'Department'. A sub-group for 'Sales' is highlighted, containing 4 tickets. The ticket list shows details for 'Parts for redundant model' assigned to Maria.

Anatomy of a ticket

The screenshot shows a ticket interface for 'Capacity of the Acme Gyrocopter'. Callouts point to the following elements:

- Support, Sales, Delivery, Returns:** Department selection menu.
- Awaiting Agent, Awaiting User, Resolved:** Ticket status selection menu.
- 1, 2, 3, 4:** Priority selection menu.
- Ticket ID:** ID: 103.
- User information - click to open user profile:** Example User (probs@example.com).
- Department, status, urgency: can all be changed:** Support, Awaiting Agent, 3.
- Agent this ticket is assigned to:** Annie Edison.
- Delete ticket options here:** Lock, Merge, Macros, Remove, Actions.
- Team this ticket is assigned to:** None.
- Add agents as followers:** Add a follower.
- Access more ticket properties here:** Cog icon in the top right of the Properties tab.

Properties

The cog in the top right of the ticket's **Properties** tab lets you access additional ticket fields.

What you see here will be determined by how your administrators have configured your helpdesk.

The Properties tab shows the following fields:

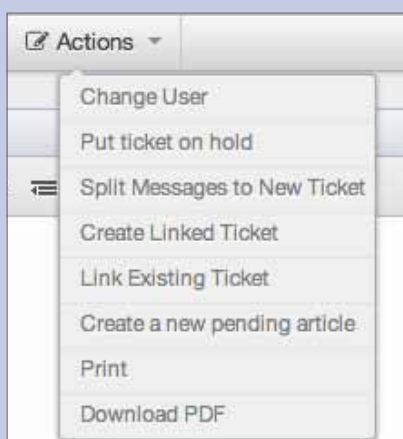
- Agent:** Annie Edison
- Team:** 1st Level Support
- Followers:** Add a follower
- Language:** English
- Product:** Robo-cat Mk 2
- Priority:** Critical
- User confirms T&Cs:** ☐ I have read the A1 terms & conditions
- Labels:** Add a label

Actions menu

The **Actions** pull-down menu above the reply box offers advanced functions:

You can put a ticket on **hold** status – this is useful if the user is awaiting a reply, but you are waiting for something else to happen (for example, hearing back from a third party) before you can answer.

Create a new pending article is a way to note that a knowledgebase article should be created based on the ticket.



Ticket messages

By default, messages are displayed with the newest message first and the reply box at the top.

You can use **Preferences** to switch to displaying the oldest message first, with the reply box at the bottom.

MESSAGES FULL LOG DATES & TIMES

#5 Example User <probs@example.com> 4 minutes ago

One more question: how much luggage can I add to the gyrocopter if there are 2 passengers? Thanks.

#4 Jeff Winger <sales.exec@a11c.example.com> 5 minutes ago

Hi, I just wanted to check that you got all the information you needed from your phone conversation with my colleague?

#3 Annie Edlson <adderallfan5gpa@example.com> 104 minutes ago

I spoke to her on the phone and confirmed that the answer is 2 people max.

User message

Agent message

Agent note
(users can't see this)

Replying to a ticket

When you reply to a ticket, by default the ticket is assigned to you, your reply is emailed to the user, and the ticket status is set to "awaiting user".

In some situations, you'll want to keep the status as **awaiting agent** or mark the ticket as **resolved** after you reply.

You can also change the assigned agent.

Snippets speed up the entry of phrases or replies you use repeatedly.

Ticket Snippets

Categories + Filter Any Language Add Snippet

All Snippets Troubleshooting Shared

Troubleshooting

Have you tried turning it on and off again?

Shared

Standard greeting Greetings valued customer!

Click to insert snippet into current message

Edit snippet

Use the **Attach** button to add attachments, or just drag files onto the reply box. You can paste images with Ctrl-V if you use Chrome or Firefox.

acme-gyroc...ua1-v2.2.pdf

REPLY NOTE

Attach Snippets B I U A

I will have one of our agents check with our supplier.

Reply and apply a macro

Reply and set a status

Awaiting User ✓

Awaiting Agent

Resolved

Send Reply as Awaiting User

Agent: Me Team: 1st Level Support

Close Tab Email User

Set ticket status after reply

Set assigned agent after reply

Write your reply to the user here

You can write a **note** which is visible only to other agents, but not to the user. Just click on the **Note** tab.

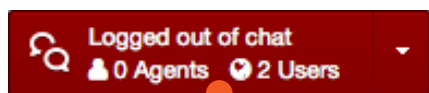
REPLY NOTE

Attach Snippets B I U A

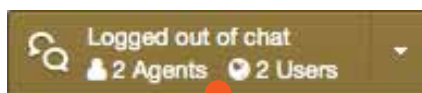
I called this user to follow up; he seems interested but do NOT bring up the topic of flightless birds as it gets him very agitated.

The Chat App

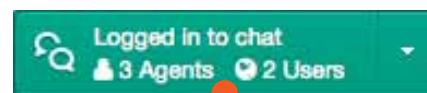
Users can initiate a real-time chat conversation from your web portal or website. You can sign in and out of the chat system using the pull-down menu in the toolbar.



No agents logged in;
chat is disabled



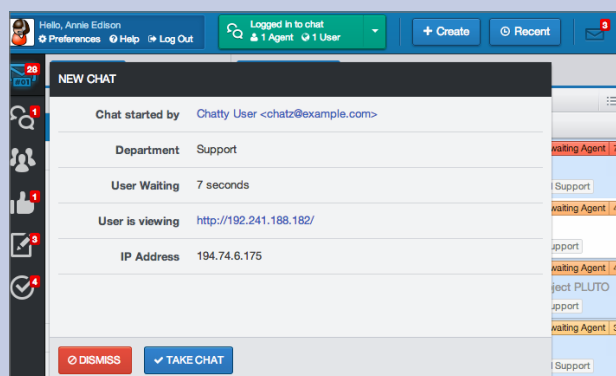
You are logged out, but
other agents are logged in



You are logged in to chat

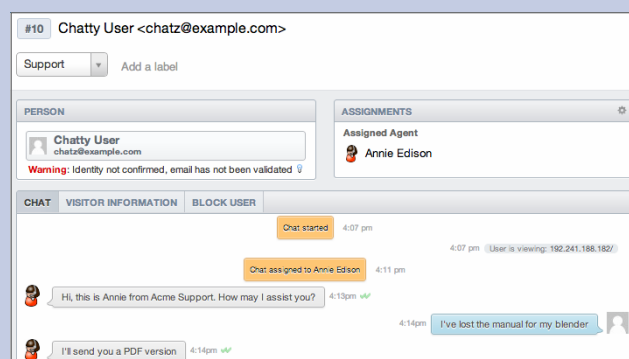
New chat

When a user initiates a chat, you will see a **New Chat** notification at the upper left of the interface.



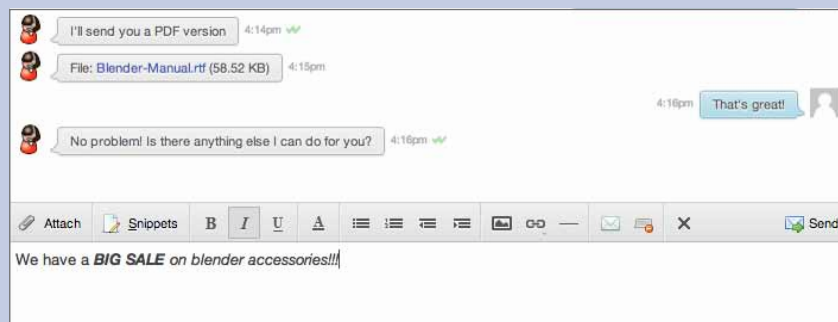
Chat accepted

If you accept the chat, it opens in the content pane.



Chat format

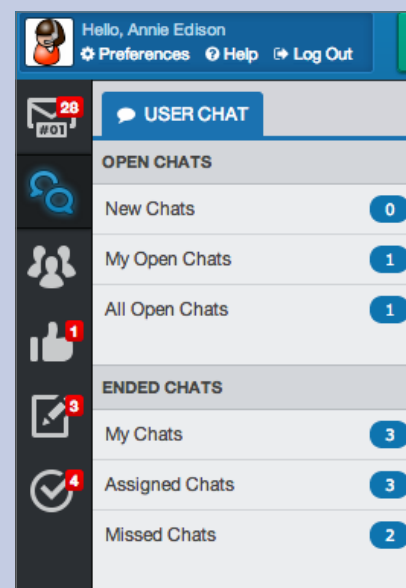
Chatting works much like any instant messaging service.



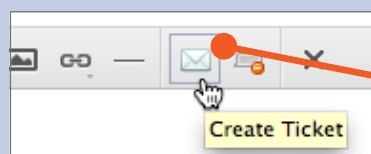
You can format your messages, send attachments and use snippets just as you do when replying to a ticket.

Chat app

You can use the Chat app to accept open chats, or view missed chats and the content of closed chat sessions.



Creating a linked ticket from a chat



Use this button while chatting to create a ticket linked to the chat. This is particularly useful if an issue raised in chat needs to be followed up

You can also create a linked ticket from a closed or missed chat





The CRM App

The DeskPRO CRM app helps you keep track of your users.

User records

You can see detailed user information by clicking on a user's name in various places:

ID: 39 Rocket sled refuelling problem
Sue Cheam <suey333@example.com> Add CC

Ticket

#39 Rocket sled refuelling problem
Sue Cheam <suey333@example.com>
Department: Support Agent: Annie Edison Agent Team

List pane

#11 Sue Cheam <suey333@example.com>
Support Add a label
PERSON
Sue Cheam <suey333@example.com>

Chat

Users can belong to **organizations** and **usergroups**. Edit them with these cogs.

Sue Cheam #22 Sue Cheam regular
Create Ticket Merge Login As User More
SUMMARY
CONTACT INFORMATION
suey333@example.com Download vCard
ORGANIZATION
USERGROUPS
Registered
PROPERTIES
Timezone UTC (GMT +0)
Local Time Thur, 12th Jun 2014 3:58pm
TICKETS 2
#39 Rocket sled refuelling problem Awaiting Agent 1
#79 test Awaiting User
NOTES 0 ACTIVITY STREAM DETAIL
NEW NOTE

Usergroups & organizations

CRM SEARCH
PEOPLE
Registered 25
Troublemakers
VIPs 6
LABELS
CLOUD LIST
early-adopter regular
recurring problems
painful help expert
ORGANIZATIONS
Organizations 3

Usergroups

"VIPs" usergroup

6 PEOPLE
Ordered by Date Created
Orlando Frumious <user@example.com> Archon
Tickets: 3 Labels: expert English
Ernold Same <user7@example.com> Archon
Tickets: 5 English
Chatty User <c.cathar@example.com> Desk
Tickets: 2 Labels: recurring problems English
Brian Coyote <coyote1@example.com> Archon
Tickets: 0 English

Usergroups affect what the user can do with tickets, chat and web portal content – your administrator decides the settings.

3 ORGANIZATIONS
Ordered by Name
Project PLUTO
Members 3
Ace Tomato
Members 4
DHARMA
Members 2
Showing results 1-3 of 3

Organizations track who the user works for. DeskPRO can automatically assign users to an organization based on their email addresses.

More functions

Open an organization in the content pane to access more functions:

Click this flag to make user a **manager** - they can now see all tickets for the organization.

MEMBERS 4 TICKETS 3
Add a person to this organization
Suzie Blank CTC
Brian Coyote Junior IT Tech
Orlando Frumious Doorman
Ernold Same No position set
EMAIL DOMAIN ASSOCIATIONS
Users with emails at these domains will be automatically associated with this organization.
cia.gov
USERGROUPS
VIPs
Troublemakers

Add everyone in the company to a certain **usergroup**



The Feedback App

Users can submit feedback, such as ideas for new products or suggestions for how to improve your services, through your web portal. Other users can vote on this feedback, enabling you to crowdsource the most popular ideas.

Feedback types

Feedback **types** are set by your administrator

Feedback

These suggestions have been submitted by customers like you; we encourage you to discuss and vote on those you agree with and to submit your own suggestions if the idea is not already listed.

I have a... ✓ Suggestion Feature Request **Bug Report** Complaint Go

There are 5 items of feedback

Filter feedback by type

You may need to approve feedback and comments before they are shown on the portal.

Number of votes for each item

FEEDBACK		Q SEARCH	3 SUBMISSIONS	
PENDING		Ordered by Votes		
Feedback to Validate		1	All 3 Bug Report 1 Suggestion 2	
Comments to Review		0	<input type="checkbox"/> 0 selected Perform Actions	
STATUS		TYPE		LABELS
New		2	1 Bigger rotors Type: Suggestion Date Created: Apr 16 2014	
Active		3	1 Free cookies in all packaging Type: Bug Report Date Created: Jun 11 2014	
Planning		1	<input type="checkbox"/> 1 New module? Type: Suggestion Date Created: Jun 11 2014	
Started		1		
Under Review		1		
Kickstarter		0		
Showing results 1-3 of 3				

Feedback statuses

The **status** of feedback lets you track how your company is going to deal with each item.

You can change the status by opening an item of feedback in the content pane, or with mass actions in the filter pane.

Active statuses mean that your company is acting on the feedback, or at least considering it.

Archived statuses mean that the feedback has been dealt with, either acted on or rejected.

Free cookies in all packaging

#3 Free cookies in all packaging

dumb

Under Review Type: Suggestion

New

Active

Planning

Started

Under Review

Kickstarter

Testing

Archived

free-cookies-in-all-packaging Edit Slug

1 vote +1

Annie Edison (adderallfan5gpa@example.com)

Delete Mark as spam Merge Copy permalink

NTS (0) REVISIONS (1) RELATED CONTENT (0) SEARCH

Use cookies to fill up empty spaces in packaging



The Publish App

The Publish app is where you manage the content available on your web portal.

- **Knowledgebase** articles are used for help or how-to information. You can organize them into categories. Articles are formatted with rich text, and can include images and attachments. You can quickly create an article based on a ticket to help other users with the same problem.
- **News** posts are designed for announcements. They're displayed on the portal with the most recent post first, like blog entries.
- **Downloads** are files you want to make available to your users (such as electronic manuals, product brochures, or software).
- **Glossary** items are terms you want to define for users, for example because they're technical jargon or product names. When a glossary term first appears in a knowledgebase article, users can mouse over it to see the definition.

Knowledgebase

PUBLISH **SEARCH**

PENDING 3

Pending Articles

KNOWLEDGEBASE 3

Troubleshooting 3

Getting Started 3

General 4

▶ Choosing a Product 1/6

— Robots 3

— Vehicles 2

□ Add new category

TRANSLATIONS 161

▶ Untranslated Articles

NEWS

DOWNLOADS

GLOSSARY

Articles that need to be written

There are 6 articles in this category, with 1 at the top level and 5 in subcategories

If you are viewing a ticket and decide that an article should be created to explain the problem, you can use the **Actions** button to create a **pending article** linked to that ticket.

To create a new article from scratch, use the **Add** button in the content pane.

3 ARTICLES **GETTING STARTED**

Ordered by Date Created

0 selected

Perform Actions

Missing pieces

Published Author Annie Edison Date Created Jun 3 2014

Click on the category name in the list pane to delete or re-arrange the category and change usergroup permissions.

3 ARTICLES **GETTING STARTED**

DELETE CATEGORY

Delete Category

EDIT CATEGORY

Title Getting Started

Permissions

☒ Everyone

☒ Registered

☒ VIPs

☒ Troublemakers

REORDER CATEGORY (DRAG & DROP)

Troubleshooting

Getting Started

General

▶ Choosing a Product

Save

You can choose to make a category visible only to members of certain usergroups. In this example, all content within the "Secret Codes" category will be visible only to users from the "Troublemakers" and "VIPs" usergroups.

Add Category

PROPERTIES

Title Secret codes

Parent Category General

Permissions

☐ Everyone

☐ Registered

☒ VIPs

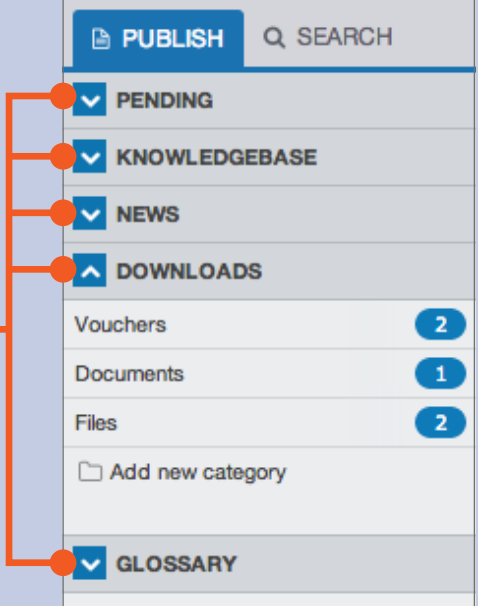
☒ Troublemakers

By default, a new article will be published on creation. If it's not ready yet, you can set its status as **Draft** – so it goes to the Pending section – or **Unpublished**.

Open an article in the content pane to change its status or category. An article that has been published can be set to **Archived** if it is out of date.

In the **Properties** tab of an article, you can set an automatic unpublish date. This is useful to make sure you review articles regularly or to remove aged content.

News and Downloads



Expand or collapse sections with these

Creating News and Downloads and arranging them into categories works a lot like creating Knowledgebase articles.

News posts are displayed on the portal in reverse chronological order.

A Download is a single file with a description. You can use downloads to offer manuals, brochures, software drivers etc.

Glossary

When you add a glossary word, it will be defined for users the first time it appears in a Knowledgebase article.

Press Tab to switch to writing the definition

Add new glossary word

x cromulent

universally acknowledged to be valid

GLOSSARY

Add new glossary word

C	cromulent
F	FAQ flammable
G	gyrocopter
I	inflammable
R	rotor

News
News & updates

Knowledgebase
Read help articles

Feedback
Customer Suggestions

Home → Knowledgebase → Choosing a Product → Vehicles →

Gyrocopter

cromulent

universally acknowledged to be valid

Annie Edison

The Acme Gyrocopter is a perfectly cromulent vehicle, despite wh
federally-mandated safety warnings.

users see



The Tasks App

The Tasks app allows you to track and assign agent tasks.

You can create a task from the **+ ADD** button in the content pane.

Creating tasks from tickets

You can also create a task from a ticket:

ID: 40

Parts for redundant model

Maria (maria1961@example.com)

Project PLUTO

Sales

Awaiting Agent

4

PROPERTIES

TASKS (0)

SLAS

FILLING & TIME LOG

Search the warehouse for a 201 valve

No due date Public Me

Assigned agent

By default, a task you create is assigned to you, but you can assign it to other agents.

Tasks can either be **Public** (visible to all) or **Private** (visible only to you and the agent assigned the task).

Tasks you assigned to other agents

TASKS	
TASKS	
My Tasks	1
Overdue	0
Due Today	1
Due In Future	0
My Teams's Tasks	0
Overdue	0
Due Today	0
Due In Future	0
Tasks I Delegated	3
Overdue	0
Due Today	3
Due In Future	1
All Tasks	4
Overdue	0
Due Today	4
Due In Future	0

Learning more about DeskPRO

We hope you found this quick overview of the DeskPRO agent interface useful. We designed the agent interface to let you work as quickly and efficiently as possible; there are a lot more features and options for power users than we could show you here.

For an in-depth guide to using DeskPRO as an **agent**, read the [DeskPRO Agent Manual](#), available as a PDF from the Downloads section of [support.deskpro.com](#).

If you need to set up and configure a DeskPRO helpdesk as an **admin**, we recommend you read the [DeskPRO Admin Manual](#), which is available from the same place.

Our Support Center at [support.deskpro.com](#) also has an extensive collection of articles which cover topics beyond the scope of the manuals, like troubleshooting specific problems, and advanced topics like the DeskPRO API.

If you run into a problem that you can't resolve with the resources above or by asking your admins, please email us at support@deskpro.com.



Admin: staff member within your organization who has administrator access to configure and customize your helpdesk.

Agent: staff member within your organization who uses DeskPRO to provide help.

Article: in the context of DeskPRO, an article refers to a **Knowledgebase** article.

Assignment: a ticket can be assigned to an agent or a team (or both) to specify who is responsible for that ticket.

CC: a user who is CCed on a ticket will receive notifications about its progress. The equivalent for agents is **following**.

Chat: real-time text messaging between agents and users; may be available to users from the web portal or integrated into a website.

CRM: the app used for managing users and assigning them to **organizations** and **usergroups**; short for **Customer Relationship Management**.

Downloads: files you provide to users through your web portal; e.g., software drivers or product manuals; maintained in the **Publish** app.

Feedback: crowdsourced suggestions from users submitted through your **web portal**; e.g. a feature request or new product idea.

Following: an agent added as a follower of a ticket can get notifications and see it in the **Tickets I Follow** filter; useful for keeping track of a ticket without being assigned to it.

Glossary: part of the **Publish** app used to maintain definitions of terms which are automatically displayed in **knowledgebase** articles.

Knowledgebase: part of the **web portal** which contains help **articles**.

News: part of the **web portal** which displays news posts chronologically.

Organizations: used to track the company or other enterprise a user belongs to; you can assign users to organizations using the **CRM app**, or DeskPRO can automatically assign users to an organization based on email address.

Permissions: settings which control what an agent or user can do with DeskPRO; your agent permissions are set by your admins and might, for example, prevent you deleting tickets; a user's permissions depend on their **usergroup**.

Publish: the app used to maintain content for the web portal: Knowledgebase articles, news posts, downloads and glossary entries.

SLAs: short for Service Level Agreements; goals for dealing with tickets that your helpdesk aims to meet, e.g. that you must reply to a new ticket within 4 hours; shown in the **Tickets** app.

Snippets: short pieces of text which you can quickly insert into messages to users; useful to save time entering standard greetings, phrases, "canned answers" etc.

Status: used to track who needs to act on a ticket next: **awaiting agent** means the helpdesk must do something related to that ticket; **awaiting user** means the helpdesk is waiting for the user to reply; **resolved** means the issue that ticket represents has been resolved.

Tasks: an app used to track "to-do" items for agents.

Teams: agents are grouped into teams to enable group ticket assignment.

Ticket: represents a user question, problem or complaint; can be created automatically from incoming user email, or by a user from the **web portal**, or by an agent on a user's behalf.

User: one of the people the helpdesk is trying to help.

Usergroup: users belong to usergroups which determine what they are allowed to do and see when interacting with DeskPRO; created by admins, assigned with the **CRM** app.

Web portal: the user-facing web interface of DeskPRO – can be integrated into your own website; help information on the portal is maintained using the **Publish** app.