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Upgrading to Deskpro Horizon: A Guide for Agents

Lara Proud - 2024-10-21 - Comments (0) - Horizon Migration

Your Helpdesk is Evolving

The Deskpro team has been diligently working on a revamped design and enhanced experience for the Agent Interface of your Deskpro helpdesk. If you're reading this, it means your system is about to be upgraded to our new version, known as Deskpro Horizon.

While the design has been updated, we have ensured that the core features and functionalities you rely on remain intact. It might take a brief period to adjust to the new layout, but this article will guide you through the changes so you know what to expect.

Key Information

- **Upgrade Schedule**: Your admin will inform you of the exact date and time for your upgrade. The upgrade process is expected to take less than 30 minutes, during which the platform will be inaccessible.
- New Login URL: You will now login at https://<accountname>.deskpro.com/app. The previous URL ending in /agent will automatically redirect to the new one.
- **New Mobile Apps**: Deskpro Horizon comes with new mobile apps. Please download the updated apps as the old version will no longer be functional.
 - App Store
 - Google Play

Interface Highlights

Here's a screenshot outlining some of the key updates to the agent interface:

1. Na	avigation Bar Workspaces		3. View Par	Feedback, Scratchpad, and L	Global Apps Search, Notifications, Agent IM, Bookmarks, Feedback, Scratchpad, and Latest Updates	
1.	221 B Helpdesk ~		III V Issue with com X V +		* B © □ છ ⁹ ¢ ⊂	
	Tickets		Issue with computer 🚖	≣ Deleter — A Look → ¶ Mores → Prefervite i Mores →	Agatha Bardle	
	Queues	ili o	0 6* 2* 5 5* 4	O Messages U O History	0 b 6 [#] 5 4 ³ 6	
	MY INBOX		8	Apr 20, 2027, 522 700 - 01 - 1	>> 🗢	
e	Mine I'm Following	7	Awaiting Agent	14 Agatha Thank you very much for your message. Many of our agents are busy at the moment working to solve other customer' queries, to I appreciate your patience!	Summary Agatha is a sales lead at Energy.io, she's is interested in upgrading their current plan to Premium	
	My Team's My Labelled Starred	19 3 12	2 2 2 - 1 yr 1 yr Next event Ticket Open User Waiting	We aim to respond with more information surrounding this question within the hour! Kind regards, Hannah	Contact Information + agathabardie@example.com	
	My Open	10	USER & CC'S & D III ~		Organization	
	INBOX		Agatha Bardle agathabordle@evample.com	🖡 ALEXANDER 🕴 AQU 20, 2023, 5.34 PM #2 🐇	Energy.io (85)	
	Unasskined	17	Ref	@Greg Lestrade can you take this on?	🚊 Add Position	
	Pending	1	EHBP-9537-ZAYT Brand	d Data 4(25,102,45370) ()	Properties Show 17 empty fields ○ Oct 14, 2021 → Jun 1, 2023	
	SLA Failed	10	(II) 2218 Energy		Timezone	
	All Open	101	Department*	Hi, Is this still an ongoing issue?	utc	
	Open Problem	7	Language	Kind regards,	Language English	
	VIP AWAITING AGENT	16	English Request type	Hannah	Usergroup S Registered 2218 Solar Trial	
	Lists	~	Select value Business Area	b Addent water	Brand	
	Search	~	Select value	Escalation: The customer has not replied in 7 days. Follow up or resolve the ticket.	(32 2218 Energy x	
	Problems (8)	~	Priority Select value		Solar Trial	
	My Stars Labels	×	Account Number 77564	Gent Little Annual Control Con	Account Number 36282 Company Phone Number	
			Joiner Name Add		20839437264	
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5. User & Organiz					zation Profile	
Agent Settings Voice and Chat Apps Manage your status for Chat and Voice						

Video Tour & Webinar

We've created a brief video tour to walk you through the key changes in the interface:

Notable Changes

Here are some important layout and naming changes to be aware of, many of which are detailed in the video and screenshots:

• **Automatic User Profile**: The user profile now loads automatically on the right when you open a ticket, eliminating the need to click to view it.

- **Embedded Chat**: Chat is now integrated within a ticket, making it easier to respond via email.
- Live Status: New live status indicators show tickets that are active chats or voice calls.
- **UI Management**: The interface layout is now easier to manage. You can collapse/expand the first column and choose between a "dual", "list", or "kanban" view for tickets.
- **Ticket Menu**: A crucial menu in the top-right corner of a ticket allows actions like Delete, Merge, Add Task, or Bill.
- **Ticket Access**: Filters have been replaced by Queues, Lists, and Search. Queues, managed by admins, display counts and typically include tickets needing action. Lists, customizable by admins or agents, can include resolved tickets. Custom Filters will transition to Lists. Email subscriptions are available only for Queues, so request your admin to create a Queue if needed. Our new search experience is optimized for textual searches within ticket messages.
- **Ticket Actions:** Ticket Actions can be applied from a dropdown **More** menu on the top right-hand corner of a ticket, with the option to pin the more useful actions in your workflow to be displayed.
- Icons for Global Functions: Global Search, IM, and Notifications are now icons in the top-right corner, offering a column view that can be locked for widescreen displays.
- **Snippet Search**: The search shortcut for Snippets has changed from %shortcut to /shortcut. Look for new features in this menu soon. The snippet list is accessible via an icon in the top-right of the reply box.
- Macros: Now managed by Admins and executed from the rocket icon.
- Flags to Stars: Flags have been renamed to Stars.
- **User Profile Location**: Found in the bottom left corner, where you can log out, manage preferences, control email notifications, and find a QR code for mobile login. Chat and voice indicators for setting online/offline status are located to the right.

We're Here to Help

We hope you enjoy the new Deskpro experience. If you encounter any issues, our friendly support team is ready to assist you: <u>Contact us</u>.