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:
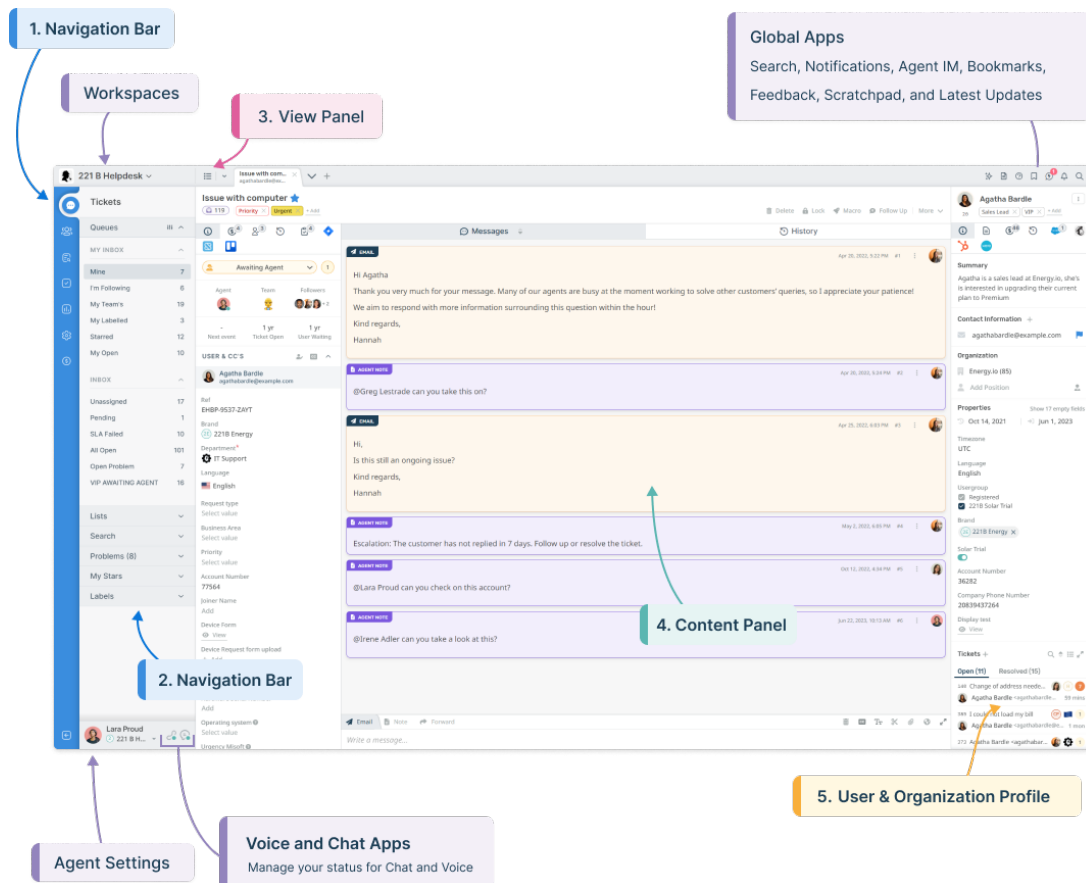
Video Tour & Webinar

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- **Ticket Access**: Filters have been replaced by Queues, Lists, and Search.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: [Contact us](#).