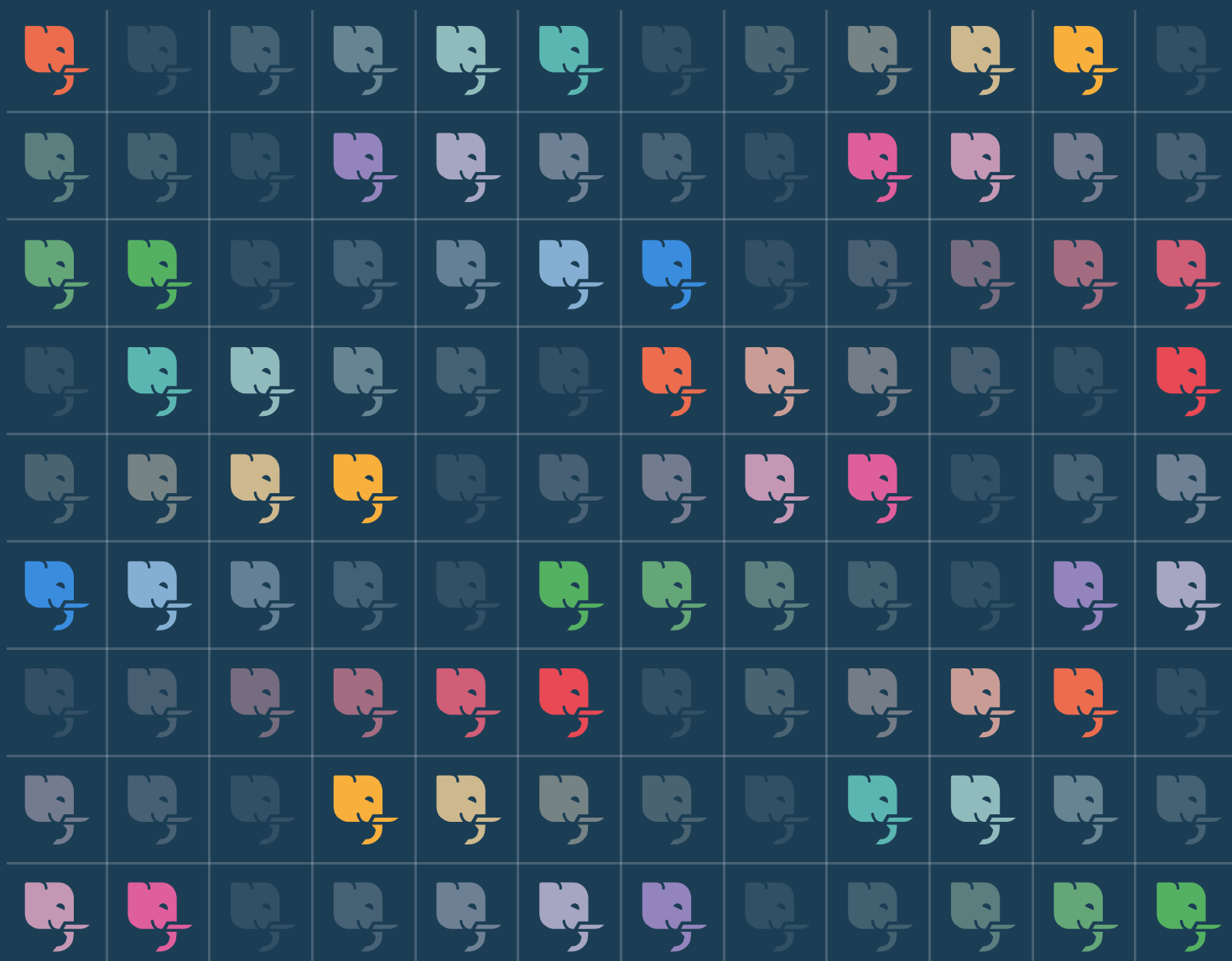


ADMIN QUICK START GUIDE - ON-PREMISE



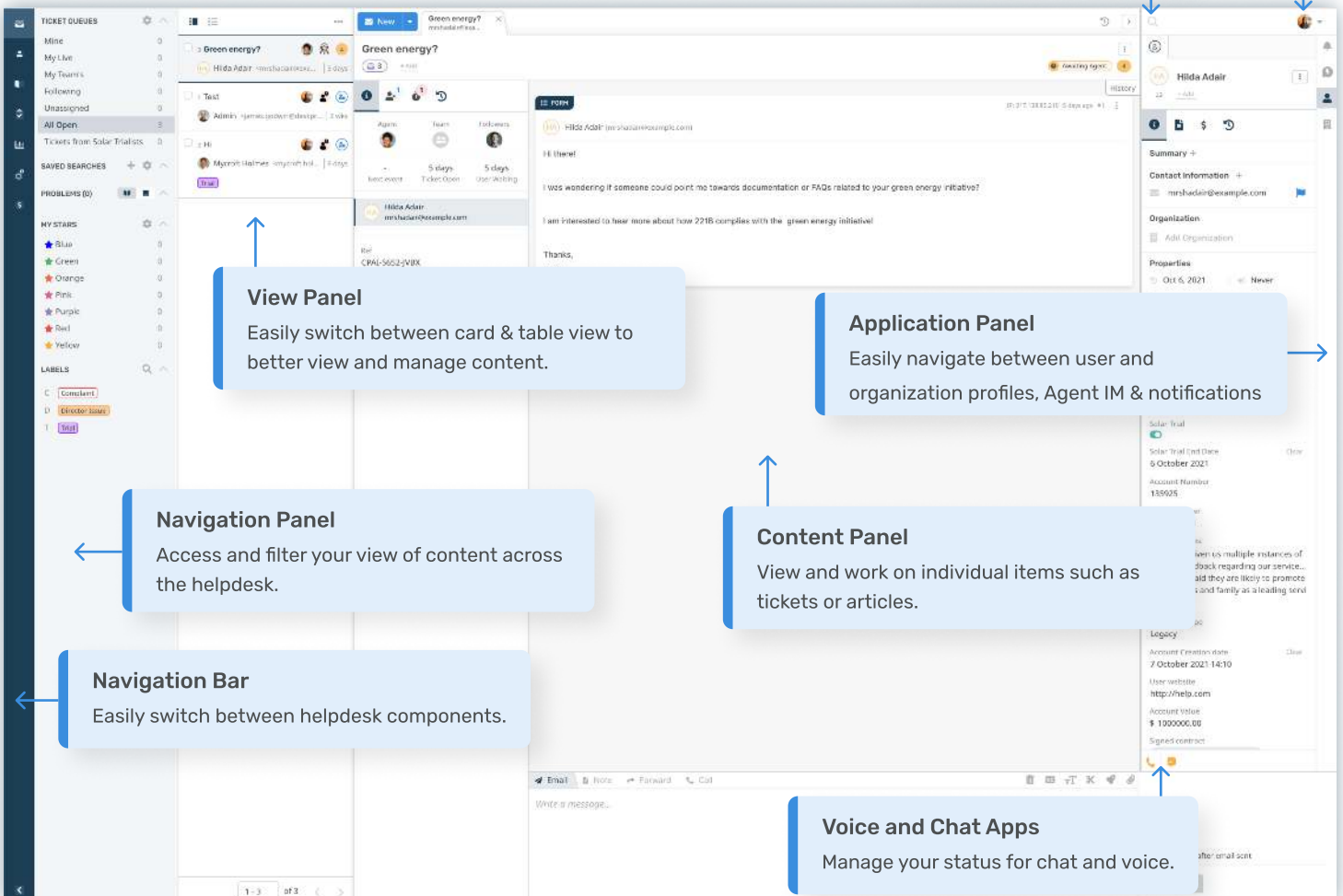
5

5 easy steps to set up your brand new helpdesk

Welcome to Deskpro. This guide will show you how to get your new helpdesk up and running in 5 easy steps. You can also take a look at our [Agent Quickstart Guide](#) for more information about the interface and how you and your agents will be using Deskpro day-to-day.

Take a look at your new helpdesk

Investing in new software is a big decision that needs to be made carefully. Helpdesk software should be able to accommodate and support the way your organization does business. Deskpro can be customized to your specific requirements.



The screenshot shows the Deskpro helpdesk interface with several callout boxes pointing to different components:

- Agent Profile**: View and manage your preferences.
- Global Search**: Search the whole helpdesk for the content you need.
- View Panel**: Easily switch between card & table view to better view and manage content.
- Application Panel**: Easily navigate between user and organization profiles, Agent IM & notifications.
- Navigation Panel**: Access and filter your view of content across the helpdesk.
- Content Panel**: View and work on individual items such as tickets or articles.
- Navigation Bar**: Easily switch between helpdesk components.
- Voice and Chat Apps**: Manage your status for chat and voice.

1 Organize your helpdesk into departments

Departments are the main organizational structure in your helpdesk. You can use them to represent internal divisions within your organization, for example, different departments or regions.

1 To add Departments, go to **Admin > Ticket Structure > Departments**. There are already Sales and Support departments that you can edit or delete.

2 Click the **+ New Department** button, add a new department title, and click **Save**.

Add: New ticket department

id: 111232

Information

Permissions

Form

Website Embed

Title*

☐ Display an alias to end-users

Department avatar

Pick Icon


Upload Image


Parent

None

By setting a parent department, this department becomes a child. This is just an organizational feature that helps you create department structures that are easier to use.

Brands

☐  Brand 1

☐  Brand 2

New Ticket Trigger

When a new ticket is submitted through the Help Center in this department:

Then

the following actions will run:

☒

Set email account

support@221b-energy.com

Ticket Changed Trigger

When a ticket department is changed to this department:

Then

the following actions will run:

Top tip!

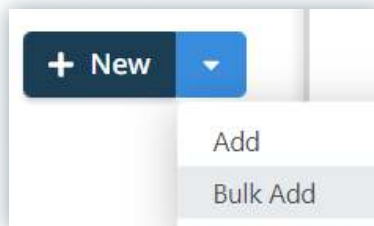
You can add as many Departments as you want, for each department you can customize the permissions and contact form with custom fields!

2 Add your Agents

Testing Deskpro works best when you get others involved, so let's add your co-workers to Deskpro as Agents. They will receive an email notifying them of their new Deskpro login details & also our Agent Quickstart Guide to get them up to speed ASAP.

1 Go to **Admin > Agents > Agent Profiles**.

2 Add individuals using **+ New** or bulk add agents to quickly add your whole team!



3 You can restrict an Agent's access by clicking on their **Permissions tab**. For Department permissions, click on the **Departments tab**.

Information
Permission
Department
Notifications

Permission groups are pre-defined sets of permissions you can easily apply to multiple agents. Select the permission groups to apply to this agent:

Permissions Groups (1 of 6 selected) Select All

- ☐ All Non-Destructive Permissions
- ☐ All Permissions
- ☐ Customer Support Trainees
- ☒ Customer Support
- ☐ Customer Support Managers
- ☐ IT Support

Ticket
People
Chat
Voice
Help Center
Others

Ticket Permissions
Toggle All

Can use the ticket system	<input checked="" type="checkbox"/>			
Can create new tickets	<input checked="" type="checkbox"/>			
Can mass-reply to tickets	<input checked="" type="checkbox"/>			
Can unarchive tickets	<input checked="" type="checkbox"/>			
Can create new ticket labels	<input checked="" type="checkbox"/>			
	Own	Unassigned	Followed	Assigned
Can view tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Can reply to tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Can modify tickets	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Top tip!

Agents will be created with no access or permissions so remember to set some basic permissions!



3 Link your communication channels

Users can interact with your organization and create tickets in several ways through Deskpro. The three main channels are Email, Live Chat & Forms.

Email

Users can submit tickets by sending a message to an email account linked to your helpdesk.

1 To add linked email accounts, go to **Admin > Channels > Email > Accounts** and click the **+ New Email** button.

2 You can set your custom email address e.g. support@yourcompany.com

3 Leave Type as Ticket Email Account.

4 Select email account type (IMAP, POP3, Gmail/Google Apps or MS Exchange, Office365) and enter the Account Details.

5 Specify how to send outgoing mail, then click Test Account Settings.

Top tip!

Set the Department for tickets received to the email address with New Ticket Trigger.

Add: New Email Address

Email Address*

☐ This account has additional email addresses associated with it (aliases)

☒ Enabled ?

Brands

Enabled on all brands

Type

Ticket Email Account

Ticket accounts are email accounts that Deskpro will download emails from and process into tickets and replies.

Account Details

Account Type

Gmail or Google Apps

Email Address

Enter email address above

Authentication method

Manual

Password

⚡ Test Account Settings

Advanced Options

☐ Enabled Encryption and Signing (S/MIME)

Ticket accounts are email accounts that Deskpro will download emails from and process into tickets and replies.

New Ticket Trigger

When a user submits a new ticket by emailing this address:

<input checked="" type="checkbox"/>	Set brand	221B Energy	⌵	⌵	⌵	⌵
<input checked="" type="checkbox"/>	Set department	Customer Support	⌵	⌵	⌵	⌵

Live Chat

The quickest and easiest way to assist your Users at the moment is by using a Live Chat. Customize the messenger widget to your brand, and embed it anywhere on your website.

1 Go to **Admin > Channels > Chat > Departments** to manage Chat Departments & Agent Permissions.

2 Setting up Chat Queues allows communications to be shared evenly and managed automatically.
Admin > Channels > Chat > Queues

Top tip!

We'll cover embedding the chat widget later on in this guide!

Edit: Complaints

Name*

Complaints

Routing model*

Simulring

☐ All agents

Answer timeout


30

Seconds

Agents

Search.....

 James Moriarty

 Mycroft Holmes

Forms

You can create custom, dynamic forms that contain the specific information you need from Users to help your Agents with context. Route specific questions to departments & agents.

1 Responsive dynamic forms are created using Custom Form Layouts at **Admin > Ticket Structure > Departments > 'Select a department' > Form**

2 Use the **+ Field** button to add custom fields to the form.

Top tip!

You can make custom fields in **Admin > Ticket Structure > Ticket Fields**

[Information](#) [Permissions](#) [Form](#) [Website Embed](#)

Form

Default Form Editor ▼

This default layout is being used by no other departments.

[User Form](#) [Agent Form](#)

⋮

User Name & Email (Single-line Text)

⋮

Department (Select Field)

⋮

Subject (Single-line Text)

⋮

Business Area (Select Field)

⋮

Joiner Name (Single-line Text)

⋮

Any further comments you wish to add? (Multi-line Text)

⋮

Message & Attachments (Multi-line Text)

+ Field

3

Contact Forms automatically appear on your Help Center, click on the Contact Us tab.

4

To put a form anywhere on your website, select **Website Embed** and automatically generate the embed code you need!

4 Automate your helpdesk

You can automate routine and mundane tasks. Triggers, Escalations and SLAs run in response to ticket events and can perform almost any action an agent can do manually.

AUTOMATION	EVENT	ACTION
Trigger Ticket	> Subject contains 'Booking'	> Assign to Sales team
Escalation	> No reply from user in 7 days	> Send auto follow-up email
SLA	> If ticket not replied to in 1 hour	> Increase urgency to 4

To explore this powerful feature, let's set up a Trigger that assigns a ticket to the Sales team when a ticket subject contains 'Booking.'

1 Go to **Admin > Business Rules > Triggers > + New**

2 Give the Trigger a title, such as "Ticket containing Booking."

3 Set the event as '**New Ticket**'

4 In Criteria; add when **Email Subject - Contains - 'Booking'**

5 In Actions; add **Set Assigned Team - Sales**. Click Save.

Add: New Ticket Trigger

1 Properties

Title*

This title will be used throughout the admin interface to refer to this Trigger.

☒ Enabled

2 Event

Event

New ticket

☒ By User

☒ Help Centre
☒ Ticket Form Widget
☒ Messenger

☒ Website Widget
☒ Email

☒ API
☒ Phone

☐ By Agent

3 Criteria

The criteria section is a list of terms that must match before the actions are applied to the Ticket.

When the following conditions are met:

Email subject

contains

booking

4 Actions

These actions will apply when all of the criteria pass.

Then the following actions will run:

Set assigned team

\$ Sales

Top tip!

Try submitting a ticket through email with Booking in the subject to see the trigger in action! You can see even more examples in our [Guide!](#)

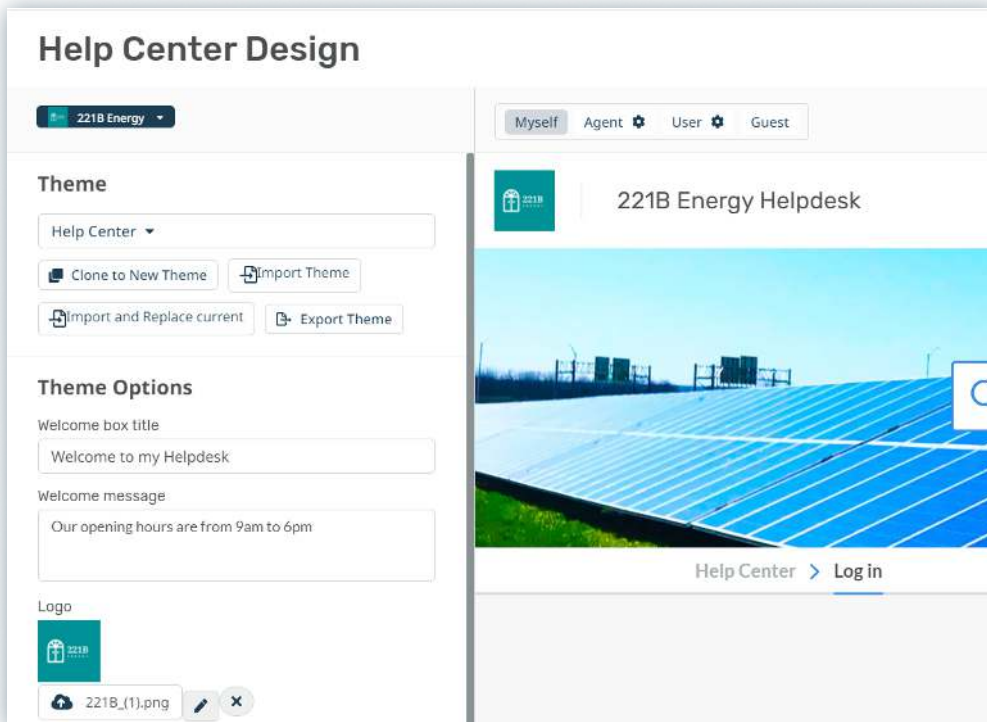


5 Personalize your Help Center and Content

Help Center

Your Help Center is where users are able to interact with a whole range of support services that Deskpro enables you to offer, such as knowledgebase articles, community forums and contact forms.

- 1 Making basic changes to Help Center is easy. Go to **Admin > Help Center > Help Center Design**. Align the Help Center with your brand by adding your logo, brand colors & setting a welcome message.



- 2 Your Help Center can be found at your-account.deskpro.com. To add a custom domain, like support.yourdomain.com, go to **Admin > Configuration > Branding > 'Select your Brand' > Help Center URL**. You'll need to be able to change the DNS record for your domain.

- 3 You and your Agents can create useful content - like knowledgebase articles - for your Help Center in the Publish app. Take a look at our comprehensive guide for more information.

Embedded widgets

Embedded widgets allow users to chat with agents and submit tickets directly from your website.

1 To access the Messenger widget, go to **Admin > Channels > Chat > Messenger Setup**

2 Customize the look and behavior of your widget to fit your needs.

3 When you're happy, go to **Add Messenger to Your Site** to get the code snippet and set the allowed domains.

Top tip!

When there aren't any agents available for live chat, the widget displays your Ticket Form for users to submit a ticket.



> Next steps

Well done. Your helpdesk is starting to take shape!

If you have any questions about using Deskpro, please visit our support center at support.deskpro.com, where you can find a complete Admin guide and an extensive library of articles and videos. You can also contact us directly at support@deskpro.com.

Good luck, and thank you for choosing Deskpro.