Deskpro Agent Quickstart Guide

What is Deskpro?

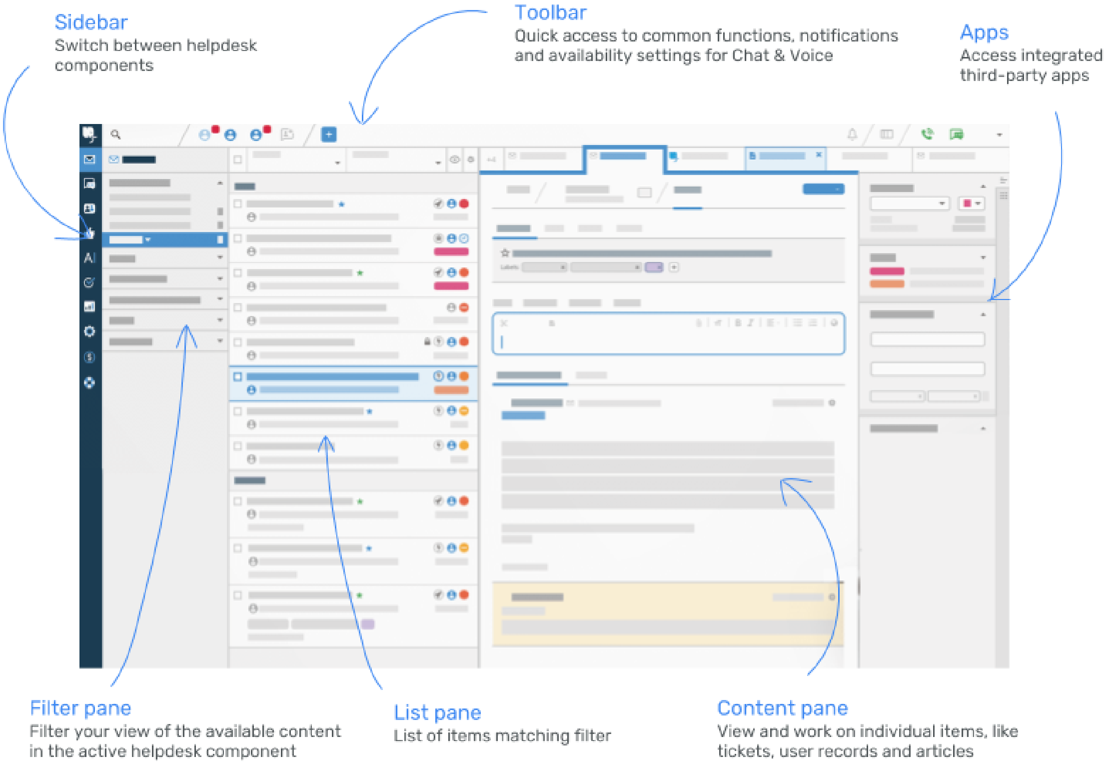
Deskpro is a helpdesk platform that's designed to help you deliver great support or communicate with your users with ease.

When users contact your organization through any of your connected channels, a ticket is created. All information and communication about the enquiry will then be captured in that ticket until it is resolved.

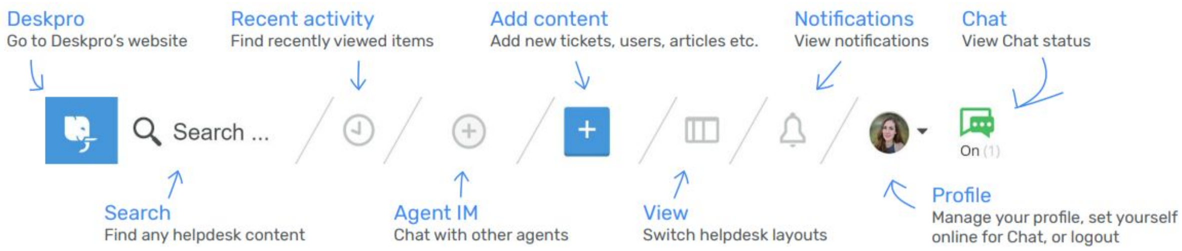
Deskpro includes other apps which may be enabled on your helpdesk, such as live chat, community, CRM, tasks and publish. We'll introduce you to each area below.

Navigating the Agent Interface

The Deskpro Agent interface has six main sections. Depending on the helpdesk component you're using they might look slightly different, but the basic functionality is the same.



Header

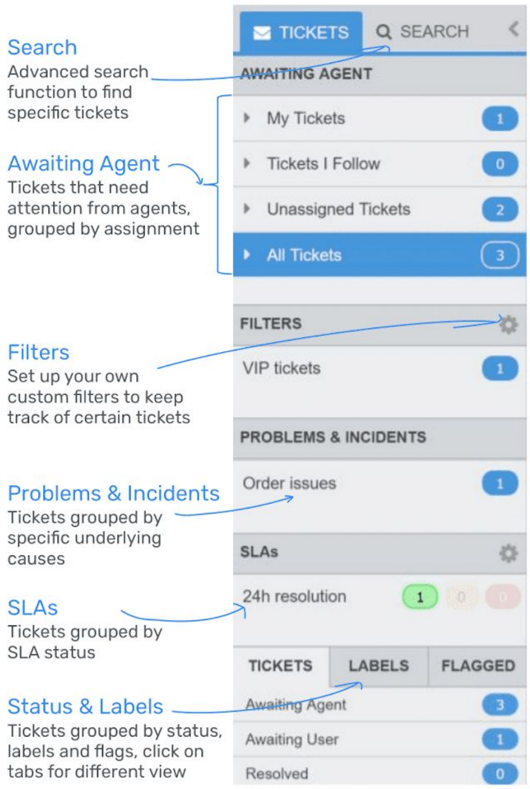


TICKETS

You will probably be spending most of your time resolving user queries in the Tickets interface. Use the filter and list panes to find and group tickets that require your attention.

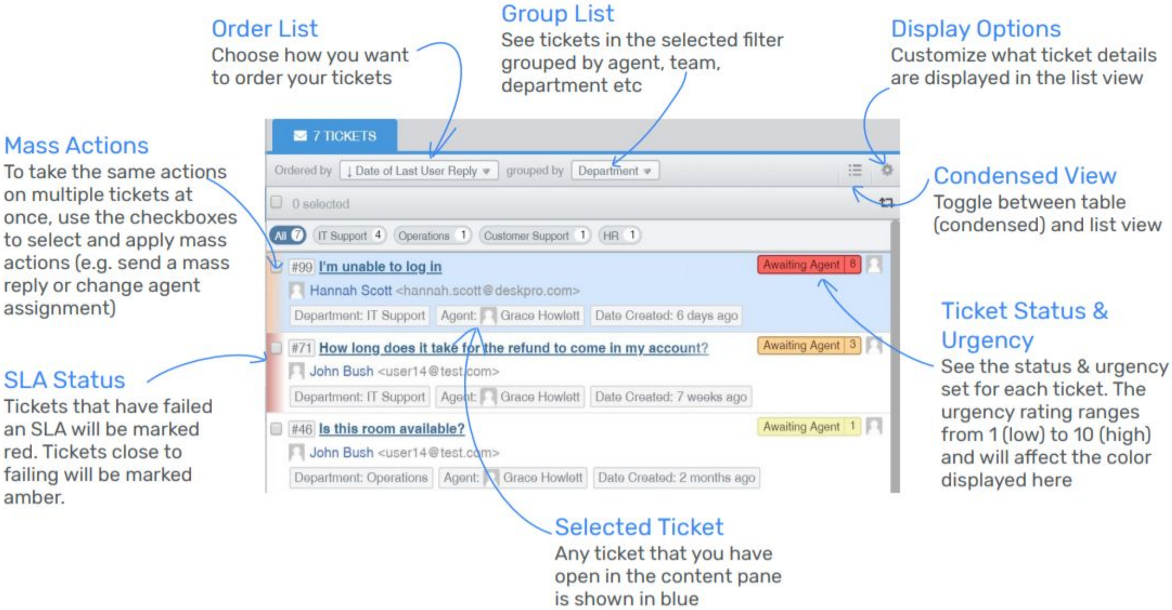
Filter Pane

The **Filter pane** lets you filter ticket items based on specific criteria:



List Pane

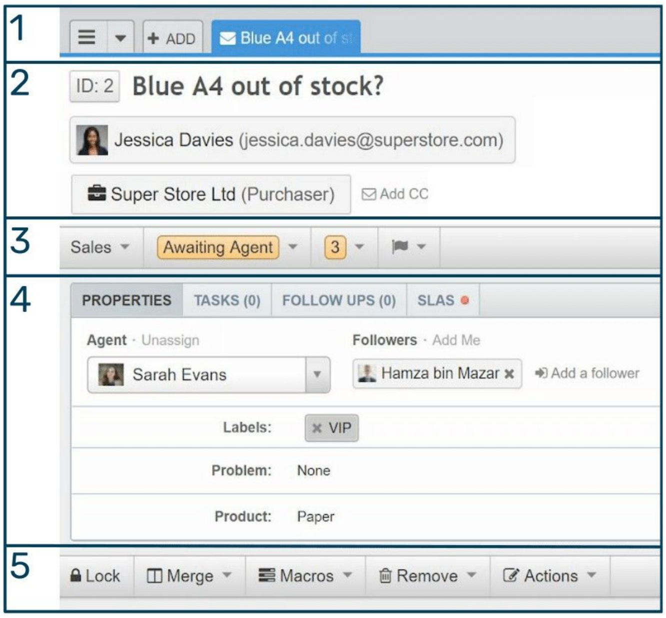
The **List Pane** shows tickets matching your filter selection. The list shows some key information about each ticket, such as the subject and user. Click on a ticket to open it in the content pane.



Content Pane

Anatomy of a ticket

1. Switch between your active tabs and quickly create a ticket with **+ ADD.**
2. View ticket ID, subject, user and email. Click on the user's name for **CRM profile**.
3. View and change ticket department, status, urgency score and flag status.
4. View and change ticket properties, assigned agent/team and followers, tasks, follow ups & SLAs.
5. Lock, merge or assign macro actions to tickets, plus link other tickets & feedback.



Ticket statuses

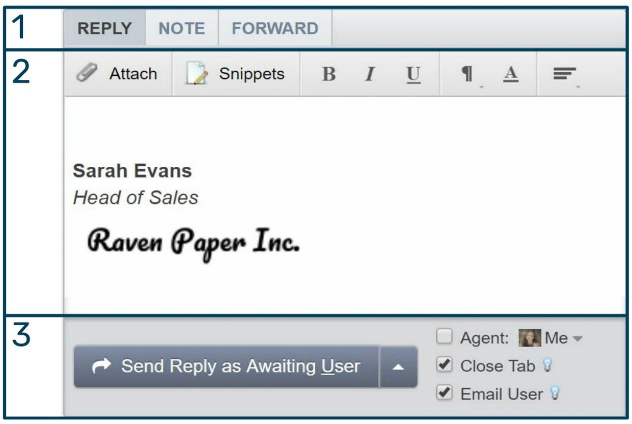
Awaiting Agent - requires action by Agent.
Awaiting User - requires action by User.
Resolved - ticket issue has been resolved.
Pending - tickets waiting for an action.

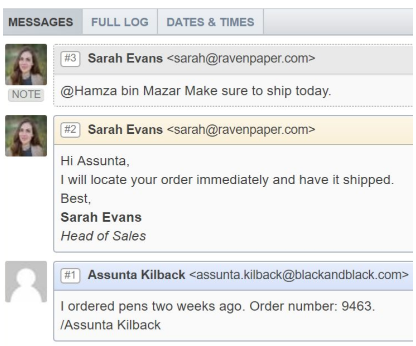
Assigned agents

- Tickets can be assigned to an agent or a team of agents.
- Agents can follow tickets to be notified of changes without being assigned.
- Tickets can be easily re-assigned between teams and agents at any time.

Replying to a ticket

1. **Reply** to user, add an **internal note** for your colleagues, or **forward** the ticket.
2. Craft a response in the fully featured text editor. Utilize Snippets (pre-written replies) and attachments. Use internal notes to **@mention** colleagues & get their attention.
3. Set ticket status and assigned agent as you reply.





View ticket messages

A full message history is available under the reply interface. Agent replies, user replies and internal notes are clearly differentiated.

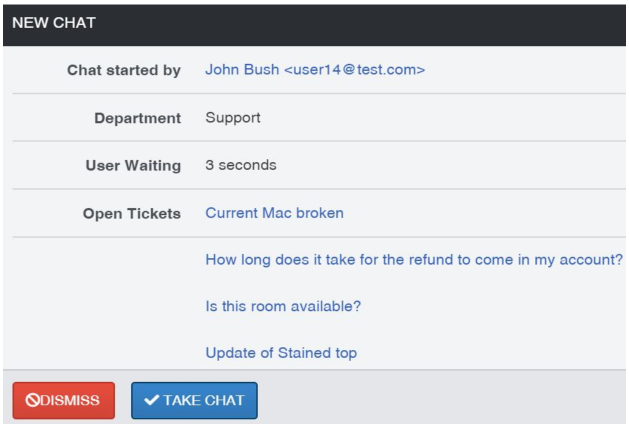
CHAT

The **Chat** channel enables you to talk with users in real-time. Users can initiate a live chat from your helpdesk portal, or your website.

From the Chat interface, you can view currently active chats, missed chats and view the content of past chat sessions.

You can also manage your availability for chat from you profile menu in the top right corner of the header. The chat icon shows how many agents are available to chat at a glance:

On (2)	Off (1)	Off (0)
You're available	You're not available, but other agents are	No agents are available



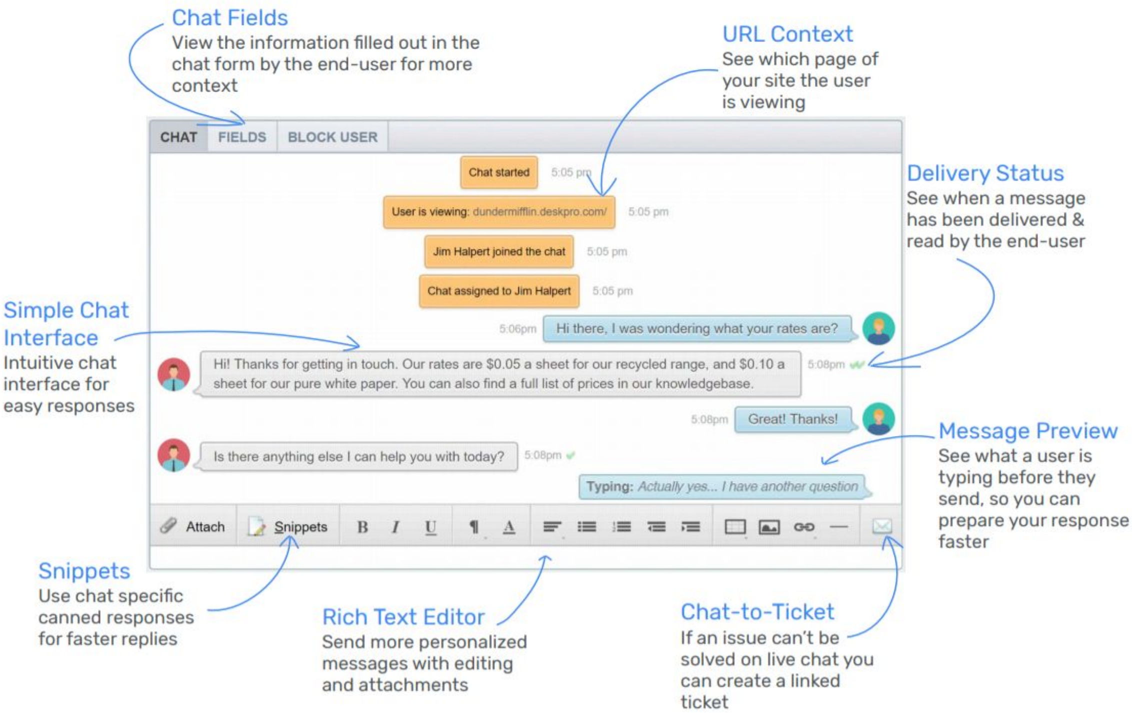
If you're online for chat and a user initiates a new chat, you will see a 'New Chat' pop-up window and hear a ringing audio notification.

If the user is known to you and has previously submitted tickets, you will see their name and a summary of their recently submitted tickets in this window.

You can manually accept or decline the chat.

Chat Interface

Once you have accepted a chat, you will be able to respond using a variety of tools to help you.



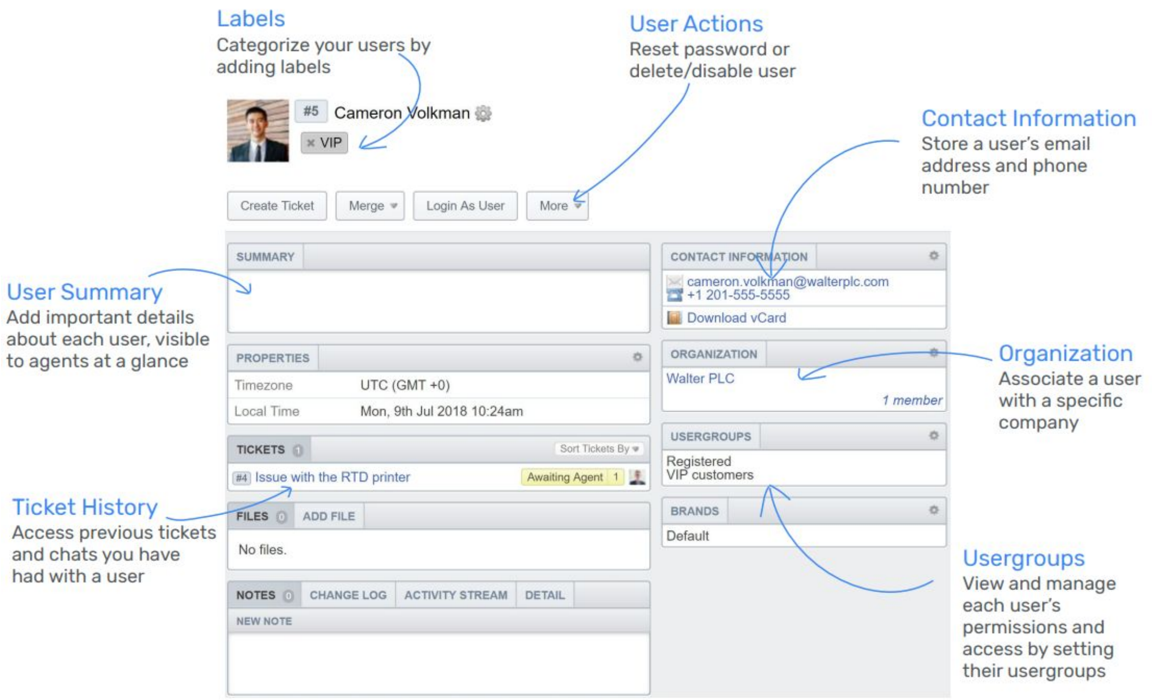
CRM

Deskpro comes with a comprehensive CRM system, where you can view, manage and edit **User Records** within your helpdesk.

User records can contain important information about the user, such as:

- Name, contact information and the organization they are associated with
- Tickets or chats submitted by the user
- Properties (including any custom fields setup by your admins), notes and files
- Usergroup and brand access

From the user record you can edit user information, create tickets, and manage user settings:



Organizations

Track which company the user works for. You can open an organization's CRM profile to view all tickets submitted from that organization and access more functions. For example, you can add the organization's email domain to automatically assign users to the matching organization.

Usergroups

Usergroups can affect how a user can interact with different parts of your helpdesk (such as tickets, chat and portal content). Your helpdesk admin decides on the settings but you can change a user's usergroup access here by clicking on the cog icon.

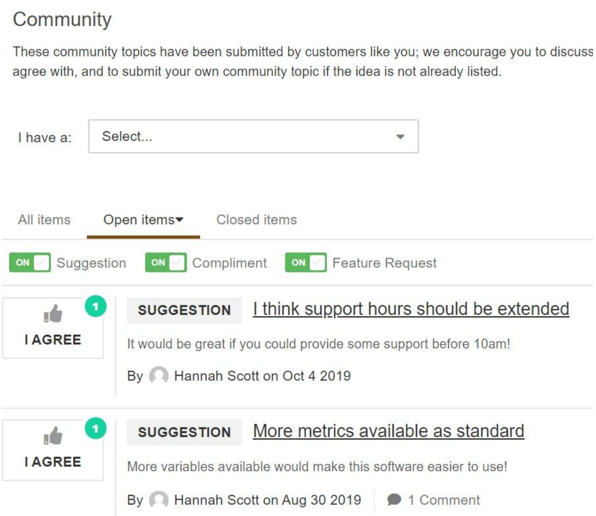
Brands

If your admins have set up a multi-brand helpdesk, you can control which brands each user has access to.

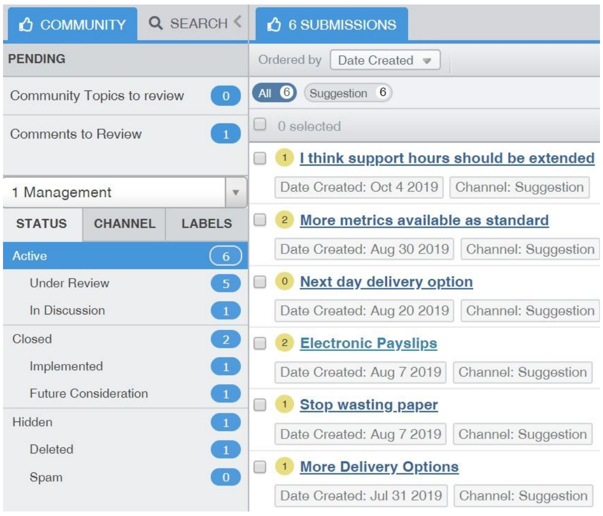
COMMUNITY

Users can submit comments, ideas or suggestions about your products and services through the user portal. Agents can view and manage everything in **Community**.

User portal



Agent interface



Users can submit new topics, subscribe to topics they are interested in, as well as vote & comment on other topics.

Use Community to review and manage user topic submissions. Sort topics by status, type, and labels.

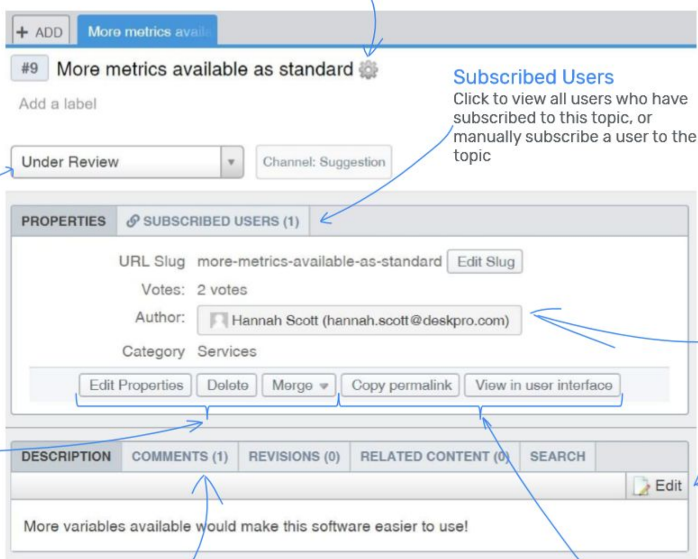
Managing individual topics

Edit Topic Title
Click on the cog to edit the topic title

Change Topic Status
The topic status helps you track how your company is going to deal with each topic. Users can see the status on the portal

Subscribed Users
Click to view all users who have subscribed to this topic, or manually subscribe a user to the topic

View Author's CRM Profile
Click on the author's name to view their CRM profile & details



Edit, Delete & Merge Topics
Edit the category the topic is assigned to, delete the topic or merge similar topics into one, avoiding duplicates

Edit Topic Description
Agents can edit the wording of a topic description

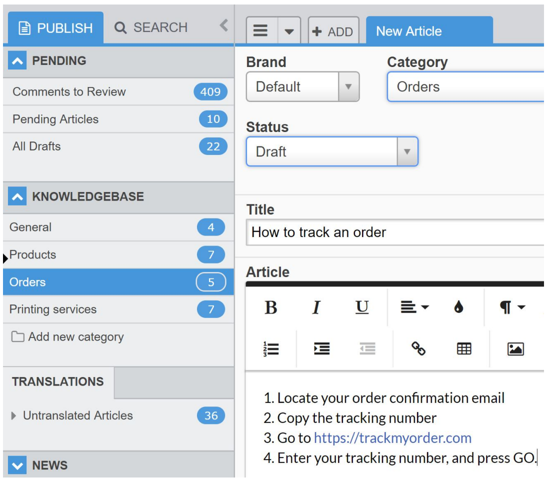
Manage Topic Comments
Click on the 'Comments' tab to view all comments. Click on the cog icon to edit, delete or create a ticket from any comment

View Topic
Click to view how the topic appears to users on the portal. Copy a permalink for this topic

PUBLISH

There are a few different types of content you can publish on your user portal:

- **Knowledgebase articles** - address common user issues and FAQs
- **News posts** - used for announcements, updates, blog posts
- **Guides** - indexed library of instructive user manuals
- **Downloads** - files you want to make available to your users, such as manuals, brochures or software drivers
- **Glossary** - 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 KB article, it is highlighted and, users can mouse over it to see the definition



To add new portal content, click the blue '+' button in the agent interface header, choose the type of content you want to create and get writing.

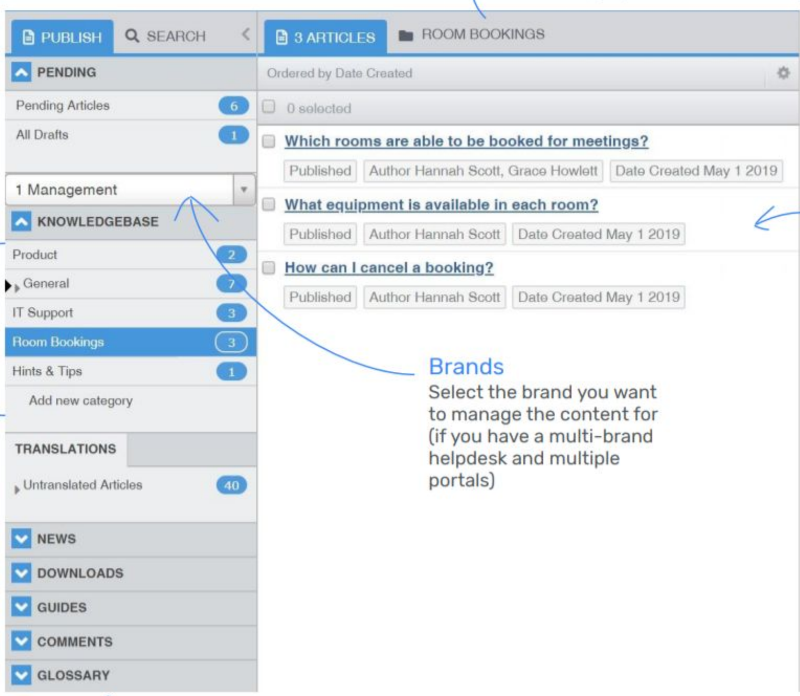
Managing publish content

Use **Publish** to manage the help content that users can access on your portal.

Review Pending Content
Review content that is awaiting approval or saved as a draft before publishing to the portal

Manage Category Settings
Click on the folder to manage the category you have selected. You can delete the category, edit which usergroups can see the content in this category & reorder the categories

View Content By Category
Articles, News & Downloads can be added into categories. Click on a content type (e.g. Knowledgebase) to add a new category or view the count of articles in each category



Edit Article
Click on an existing article in the list to view or edit it in the content pane

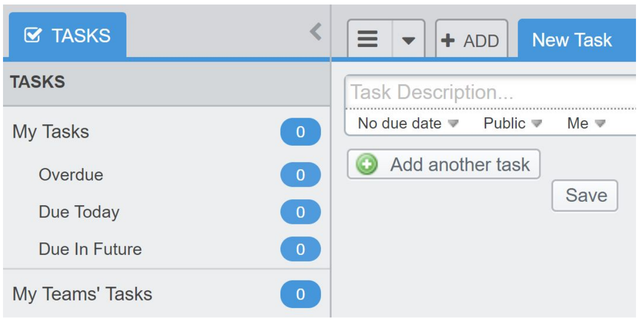
Brands
Select the brand you want to manage the content for (if you have a multi-brand helpdesk and multiple portals)

Manage Comments
View or edit all comments made within content on the portal. Tick the checkbox next to comments to approve or delete

Glossary Terms
Add/edit glossary terms and definitions here

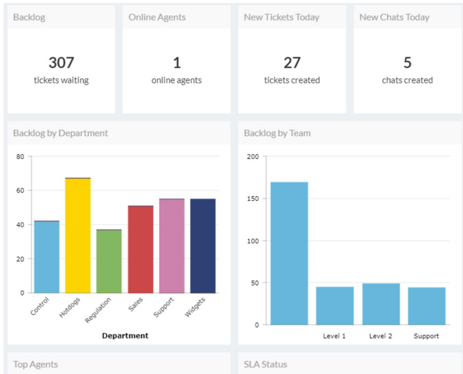
TASKS

The Tasks feature allows you to create, assign and track Agent tasks.



- You can create a standalone task using the blue '+' button in the header, or create a task linked to a specific ticket from the 'Tasks' tab inside a ticket.
- By default, a task you create is assigned to you, but you can assign it to another agent or team.
- Tasks can either be Public (visible to all) or Private (visible only to the creator and the agent assigned to the task).

REPORTS



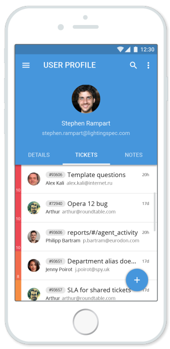
View and create reports from helpdesk performance data and metrics with Reports. For tips on making the most of this powerful feature, take a look at our [Reports guide](#).

Please note that this area of the helpdesk will only be available to you if your admin has given you report access.

Get Deskpro on mobile

Access your helpdesk anywhere by downloading our [iOS](#) and [Android](#) apps.

Perfect if you are out of the office, or need to check and answer tickets on-the-go.



Want to learn more about Deskpro?

If you're still eager to learn more about how Deskpro works, refer to our Help Center at [support.deskpro.com](#). It contains an extensive library of guides (including our complete [Agent Guide](#)), articles and news updates regarding Deskpro - and how best to use it.

And if you still run into any problems that can't be resolved with the help of your administrator, don't hesitate to contact us directly at [support@deskpro.com](#).
