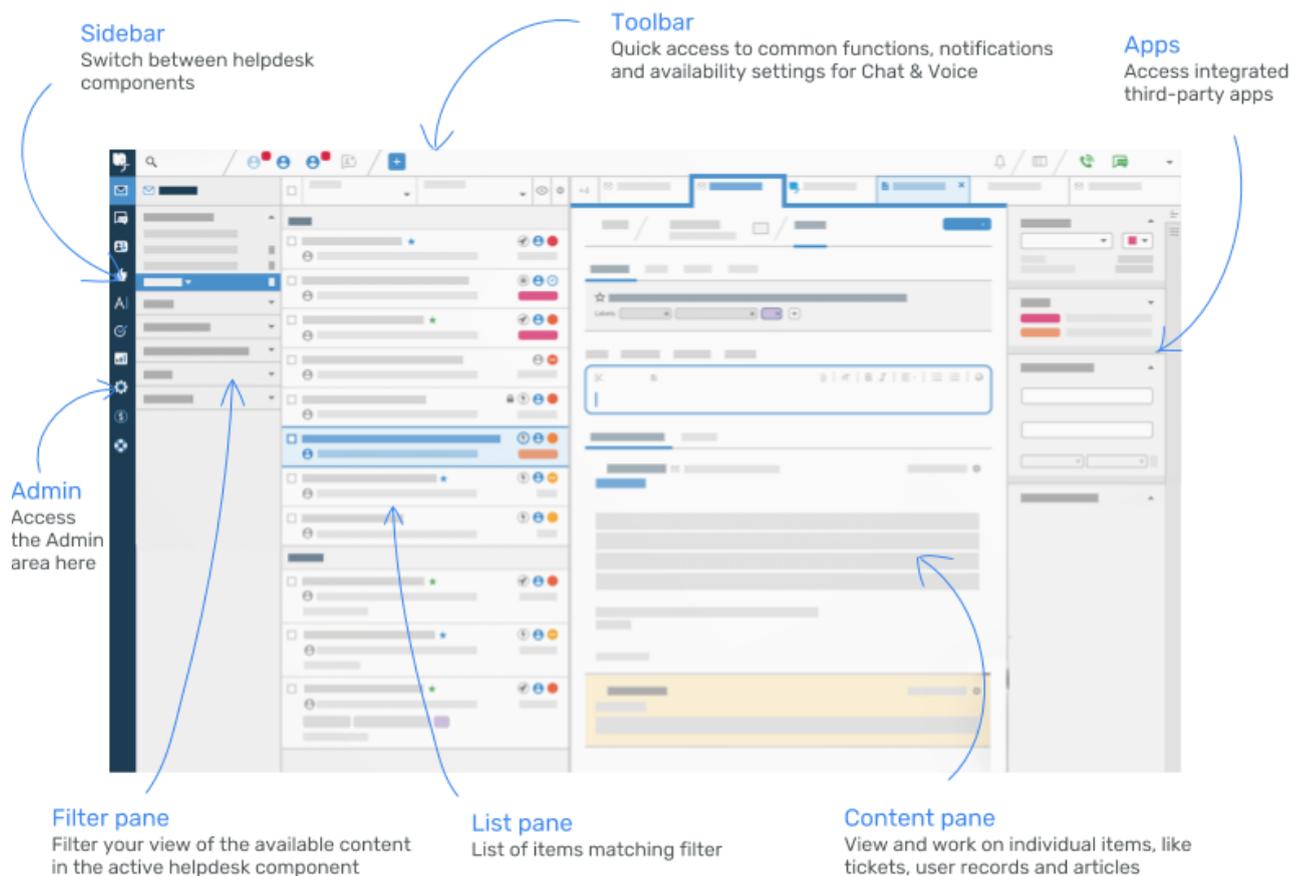# Admin Quickstart Guide
Deskpro Cloud

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.

Sidebar
Switch between helpdesk components

Toolbar
Quick access to common functions, notifications and availability settings for Chat & Voice

Apps
Access integrated third-party apps

Admin
Access the Admin area here

Filter pane
Filter your view of the available content in the active helpdesk component

List pane
List of items matching filter

Content pane
View and work on individual items, like tickets, user records and articles

Step 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 > Tickets > 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**. You can add as many Departments as you want.

3. You can create customized **Contact Forms** for each individual Department. They can include custom fields with separate layouts for Users and Agents.
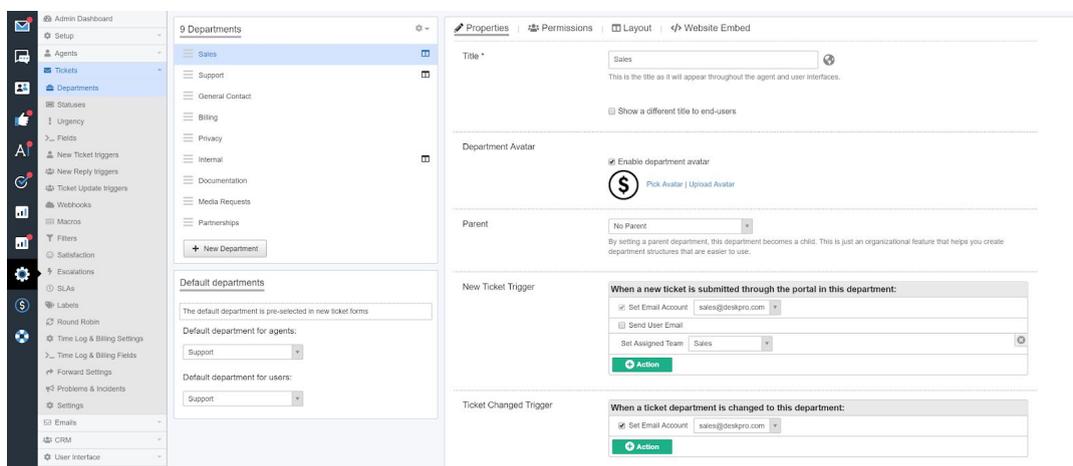
Step 2: Add your Agents

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 > Agents**.

2. Add individuals using **+ Add** or use the **+ Bulk Add Agents** function to quickly add your whole team. By default, Agents will have all Permissions & Notifications enabled.

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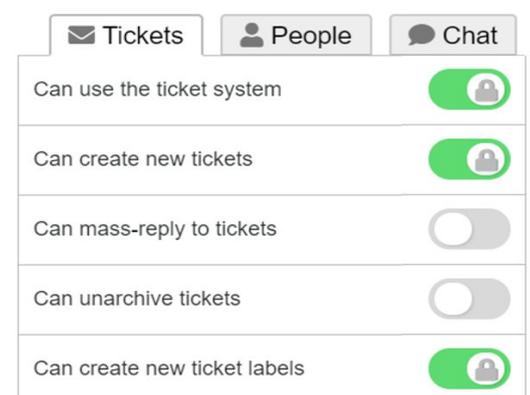
Step 3: Link your communication channels

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

Email

Users can submit tickets by sending a message to an email account linked to your helpdesk. By default, your helpdesk email address is contact@*your-account*.deskpro.com.

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

2. If you want to add an existing email address like contact@yourdomain.com, check **Use a custom email address** and enter the relevant email account details. *NOTE: You need to forward emails from your account to the Deskpro address.*

3. Link the email account to a Department from the dropdown menu. All tickets generated through that email will be assigned to the linked Department.

Live Chat

The quickest and easiest way to assist your Users in-the-moment is by using Live Chat. Customize the chat & ticket widget to your brand, and embed it anywhere on your website.

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

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

3. See *Embedded Widgets* section (on page 6) for embedding chat widget.

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.
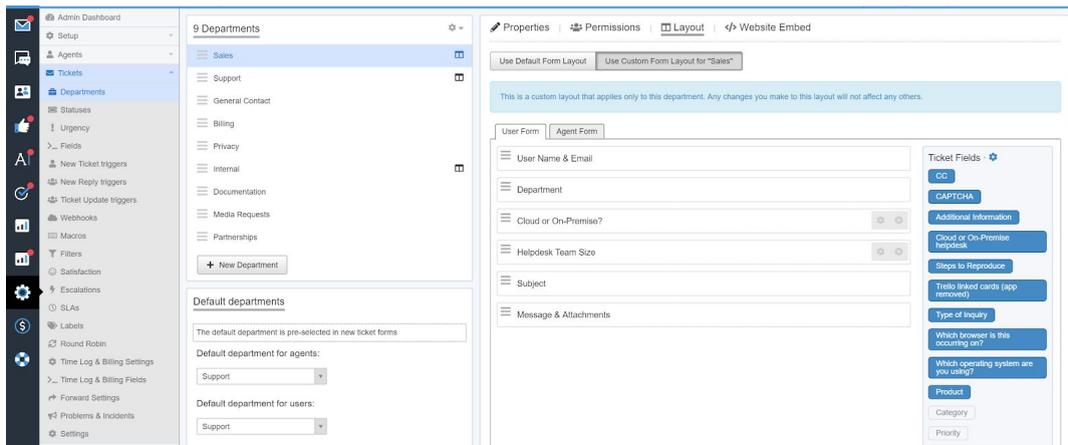

1. Responsive dynamic forms are created using *Custom Form Layouts* at **Admin > Tickets > Departments > Layout**.

2. Contact Forms automatically appear on your support portal, click on the *Contact Us* tab, on your support portal.

3. To put a form anywhere on your website, select **</> Website Embed**. Pick from an *Embedded Form, Direct Link* or *Popup Window* on your site by adding the code.

Voice* *(Beta)*

Deskpro Voice comes with all the features you expect from a [comprehensive call center solution](#) for your helpdesk.
Currently only available on Cloud

1. Enable Voice **Admin Dashboard > Beta Features > Voice (Beta) > Enable**

2. Provide access to Voice for Agents:
Admin > Voice > Agents Voice

3. Add a phone number for your helpdesk
Admin > Voice > Numbers

4. Create an *Auto-attendant (IVR)* for each number, allowing dialpad inputs for Queues and Agents.
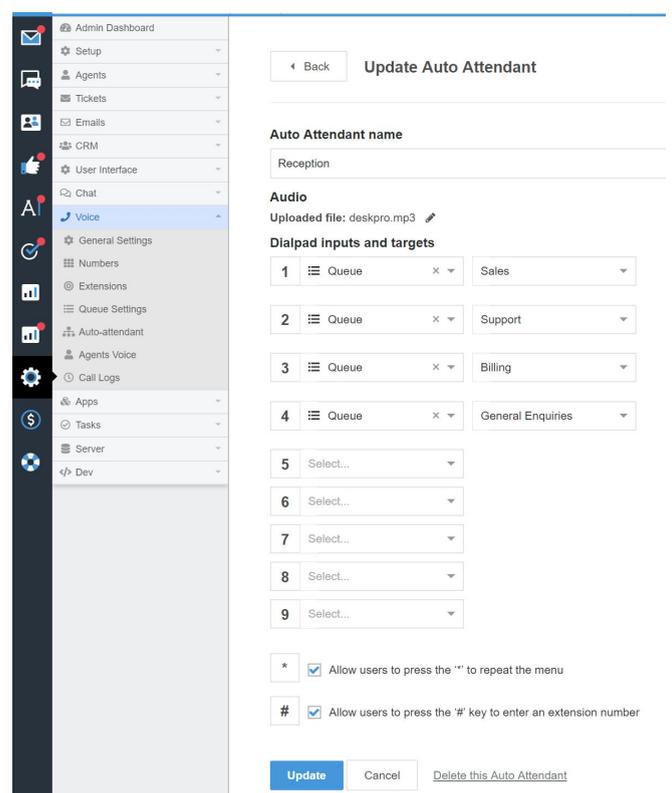
Step 4: Automate your helpdesk processes

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 > Tickets > New Ticket Triggers > + Add**

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

3. Click on **+Criteria > Email Subject > Contains** on the dropdown menu. Enter *Booking* into the text field.

4. Click on **+Action > Set Assigned Team > Sales**. Click Save. Why not submit a ticket to your helpdesk with Booking in the subject so you can see it in action!

You can read more about Automations in our [guide](#).

Step 5: Personalize your Portal and content

Web portal

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

1. Go to **Admin > User Interface > Portal** to customize your portal. Align the portal with your brand by adding your logo, brand colors & setting a welcome message.
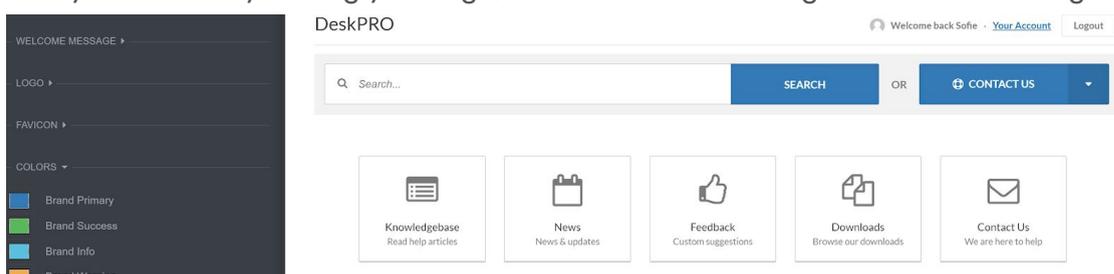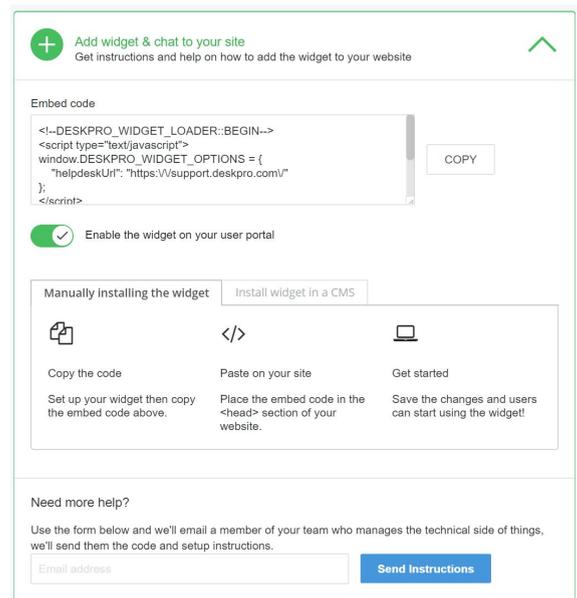
2. Your web portal can be found at *your-account*.deskpro.com. To add a custom domain, like support.yourdomain.com, go to **Admin > Settings > Domain / URL setup**. You'll need to be able to change the DNS record for your domain.

3. You and your Agents can create useful content - like knowledgebase articles - for your portal in the Publish app. Take a look at our comprehensive Agent 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 chat widget, go to **Admin > User Interface > Site Widget & Chat**.

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

3. When you're happy, click **Add widget & chat** to your site to get the code snippet and installation instructions.

4. 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 manual and an extensive library of guides and articles. You can also contact us directly at support@deskpro.com.

Good luck, and thank you for choosing Deskpro.