

## Quick Start Guide

Welcome to DeskPRO!

Your login details are in your welcome email.

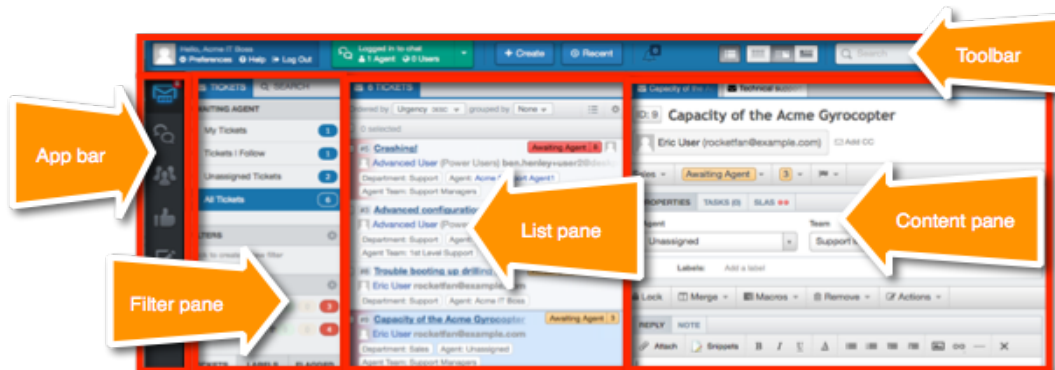
After you log in for the first time, you'll see the **agent** interface below.

### DeskPRO terminology

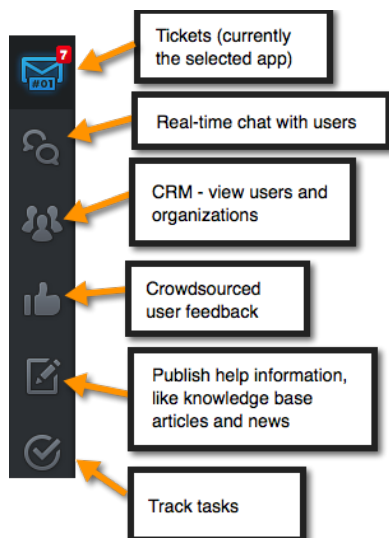
**agents:** staff within your company who use DeskPRO to provide help

**users:** the people you are helping

**admins:** staff within your company who have administrator access to configure your helpdesk



The **app bar** is where you select from the applications which make up DeskPRO:



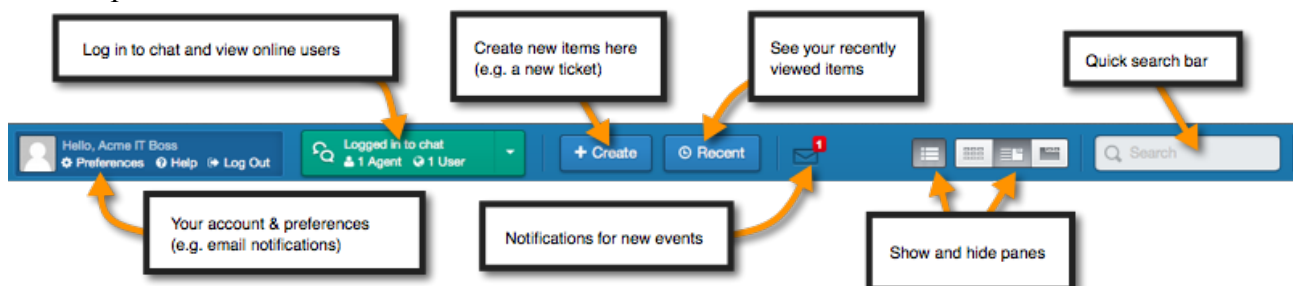
The **filter pane** enables you to select groups of items to work on – for example, a list of all the tickets that are assigned to you.

The **list pane** shows the results of your selection in the filter pane. You can click on items here to open them.

The **content pane** is a workspace for viewing and working on individual items. You can switch between open items (such as tickets, user records, or chats) using a tabbed interface, like in a web browser.



At the top is the **toolbar**:





# The Tickets App

## Finding tickets

The filter pane is where you select groups of tickets to work on. For example, you might want to see all tickets that are awaiting an agent and are assigned to your **team**.

**Advanced search for tickets**

**Tickets awaiting agent need helpdesk attention**

**Set up custom filters**

**Shows if tickets are passing or failing your Service Level Agreements**

**All tickets by status**

AWAITING AGENT	
My Tickets	1
Tickets I Follow	2
My Teams' Tickets	6
Unassigned Tickets	4
All Tickets	9

FILTERS	
Submitted by email	21

SLAs	
First Response	2 (green), 1 (yellow), 2 (red)

TICKETS	LABELS	FLAGGED
Awaiting Agent		9
Awaiting User		13
Resolved		3
Awaiting Validation		0
Spam		0
Recycle Bin		1

## Ticket status

Each ticket has a **status**, which is based upon who needs to act on the ticket next.

**awaiting agent** - an agent needs to perform the next action on the ticket e.g. reply to the user

**awaiting user** - you're waiting for the user to contact your helpdesk

**resolved** - the issue is resolved and communication has ended. Resolved tickets can be re-opened.

## Agent assignment

Tickets start out as unassigned but can be assigned to an agent and/or a team.

**My Tickets** shows tickets that are assigned to you. These are typically either tickets you have worked on before, or were assigned to by another agent.

**Tickets I Follow** is a way to keep track of a ticket that's not assigned to you. You can follow a ticket using the content pane.

## Labels and flags

**Labels** let you categorize items; they are shared by all agents.

You can also put **flags** in various colors on tickets to help you keep track of them. Flags are for your own reference only.

You can group tickets that are “awaiting agent” by a number of fields, for example to find tickets assigned to each of the agents in your team.

**Click any of the small arrows to filter by custom groups**

**Select Field to Group Tickets**

- Department
- Product
- Workflow
- Organization
- Person
- Language
- Urgency
- Agent

AWAITING AGENT	
My Tickets	3
Tickets I Follow	1
My Teams' Tickets	12
Unassigned Tickets	4
All Tickets	13

AWAITING AGENT	
My Tickets	3
Tickets I Follow	1
My Teams' Tickets	12
Unassigned	4
Acme IT Boss	3
Acme Support Agent 1	4
Acme Support Agent 2	1
Unassigned Tickets	4
All Tickets	13

## Tickets in the list pane

The matching tickets from your selection in the filter pane are shown in the list pane, like search results.

Click a ticket to open it in the content pane. Open tickets turn blue. Click them again to close them.

Change how tickets are ordered: currently in descending order of urgency

This ticket has failed an SLA (red edge)

This ticket is close to failing an SLA (amber edge)

View more fields in the list e.g. Date Created

Urgency of this ticket is 10

**Urgency** is a score from 1 to 10 which can be changed by agents or by automatic rules set up by your DeskPRO administrator. It is designed to help you prioritize tickets.

An SLA is a condition to meet (such as replying to a new ticket within 4 hours). When a ticket is close to failing an SLA, it is marked amber.

SLAs			
First Response	1	1	7
Total wait < 3 days	5	0	5

You can select multiple list items using the checkboxes. This is useful if you need to apply the same action to multiple tickets – for example, you can assign several tickets to another agent at the same time.

12 TICKETS

Ordered by: Date of Last Agent Reply desc grouped by: None

3 selected

- #3 **Advanced configuration of ACME catapult** Awaiting Agent 4
- #5 **Crashing!** Awaiting Agent 10
- #18 **Warranty terms** Awaiting Agent 5
- #17 **Quote for custom 100 ton weight** Awaiting Agent 3

**Apply actions to 3 selections**

**Change Status**

Set resolved Set awaiting user Set awaiting agent Mark For

**Agent** **Team**

**Followers**

Add Followers

**Department**

**MASS REPLY**

Attach Snippets B I U A

Ordered by: Date of Last Agent Reply desc grouped by: None

Group list items with this menu - this gives you a second level of filtering

Waiting Time

#3 **Advanced configuration of ACME catapult**

Can you let me know how best to configure the ACME catapult to hit a fast-moving target near

Mouse over ticket for a preview

## Working on a single ticket

The screenshot shows a ticket titled "Capacity of the Acme Gyrocopter" with ID 9. The interface includes a header with the user "Eric User (rocketfan@example.com)" and the company "DreadCo". Below the header, there are tabs for "PROPERTIES", "TASKS (0)", and "SLAS". The "PROPERTIES" tab is active, showing the "Agent" as "Acme Support Agent 2" and the "Team" as "2nd Level Support". There are also "Labels" and "Followers" sections. A "Delete ticket with this menu" annotation points to a "Remove" button in the "Actions" bar. The "REPLY" section has a rich text editor with various formatting options. Below the editor, there are checkboxes for "Send Reply as Awaiting User", "Agent: A2", "Team: Support Managers", "Close Tab", and "Email User". The "MESSAGES" section shows a list of previous messages and agent notes.

Annotations in the image:

- Ticket ID - click for Ref code
- User information - click for details
- Agent assigned to this ticket
- Team assigned to this ticket
- Click title to edit
- Delete ticket with this menu
- Rich text formatting options
- Write your reply to the user here
- Previous messages and agent notes on ticket

By default, your reply is emailed to the user and the ticket status is set to "awaiting user".

If you're replying to an unassigned ticket, by default it will be assigned to you.

In some situations, you'll want to keep the status as "awaiting agent" or mark the ticket as resolved after you reply.

You can also change the assigned agent.

The screenshot shows the "Reply and apply a macro" dropdown menu. The options are "Reply and set a status", "Awaiting User", "Awaiting Agent", and "Resolved". The "Awaiting Agent" option is selected. Below the menu, there are checkboxes for "Send Reply as Awaiting Agent", "Agent: A1", "Team: Support Managers", "Close Tab", and "Email User".

Annotations in the image:

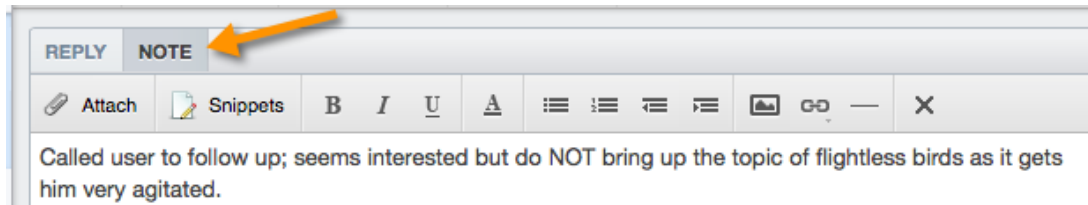
- Set ticket status after reply
- Set assigned agent after reply

Add attachments to a message using the **Attach** button, or just by dragging the file onto the bar above the reply box.

To insert an image in the message, drag it into the reply box (it must be in PNG, JPEG or GIF format).

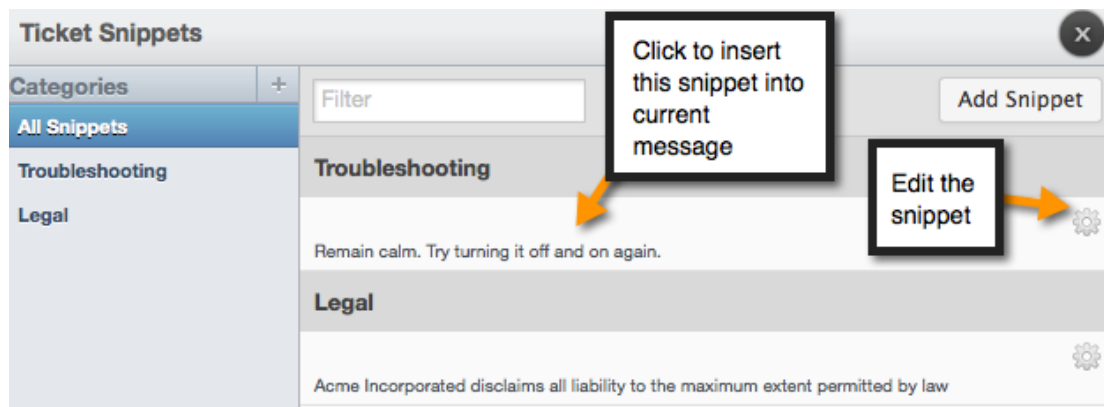
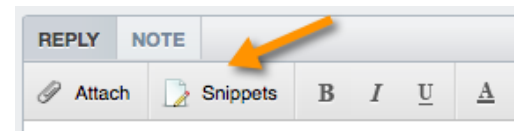
The screenshot shows the reply box with a "Drop your file here to attach it to your reply" instruction and a "Drop your image here to insert it into your reply" instruction. A file named "acme-gyrocopter-manual-v2.1" is being dragged into the image drop area. Below the reply box, there are checkboxes for "Send Reply as Awaiting User", "Agent: Me", "Team: 1st Level Support", "Close Tab", and "Email User".

You can write a **note** – for internal reference within your helpdesk - instead of a reply. Just click on the **Note** tab.

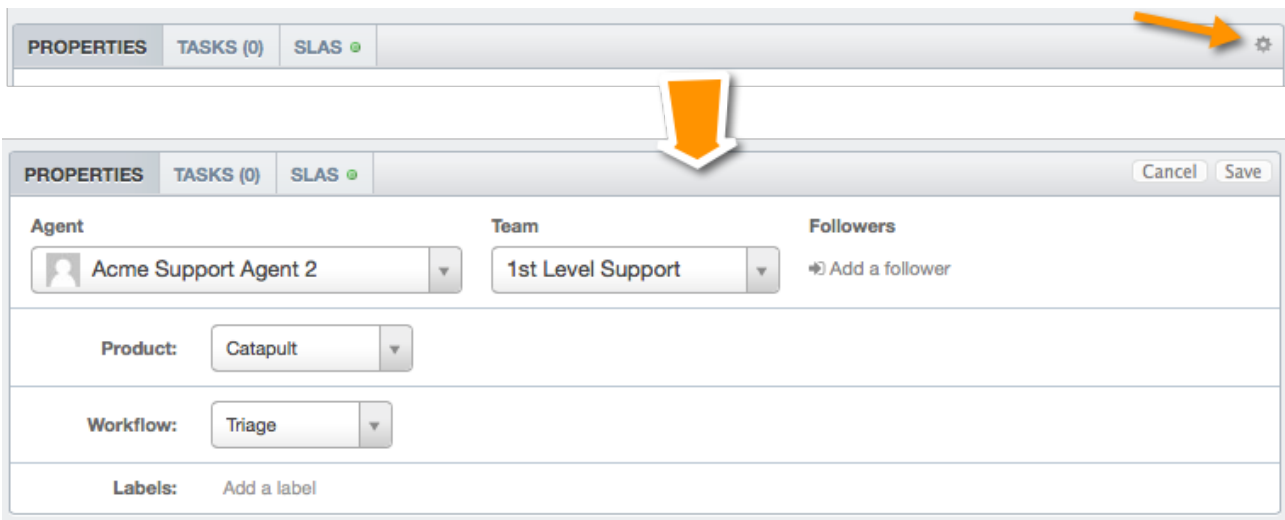


If you find you're using the same phrases over and over in replies, you can save time with **snippets**.

Use the **Snippets** button to see what snippets are available and create new ones.



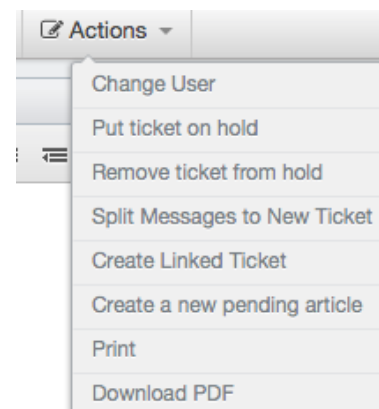
The cog in the **Properties** tab lets you access additional fields your helpdesk may use:



The **Actions** pull-down menu above the reply box offers advanced functions:

You can put a ticket on **hold** status – this is useful if the user is awaiting a reply, but you are waiting for something else to happen (for example, hearing back from a third party) before you can answer.

**Create a new pending article** is a way to note that a knowledgebase article should be created based on the ticket.



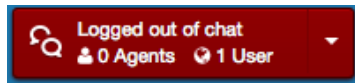




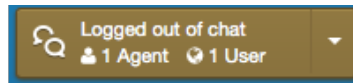
## The Chat App

Users can initiate a real-time chat conversation from your web portal or website.

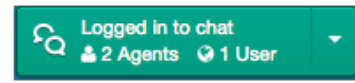
You can sign in and out of the chat system using the pull-down menu in the toolbar.



Users waiting, no agents logged in

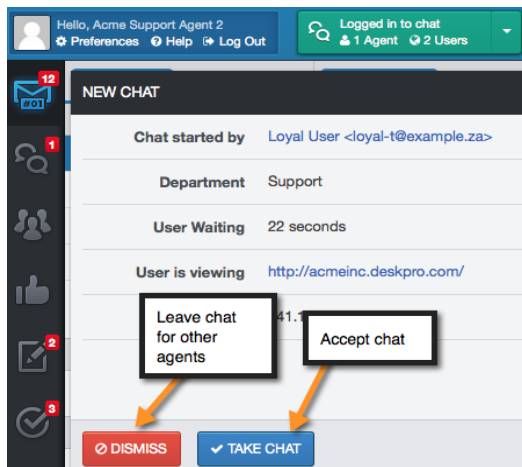


Users waiting, other agents are logged in

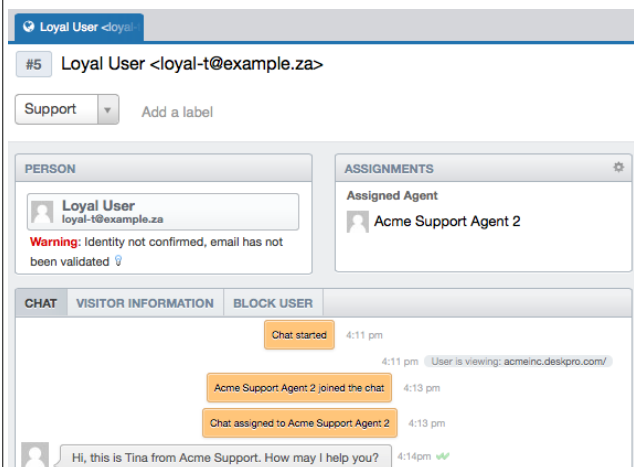


You are logged in to chat

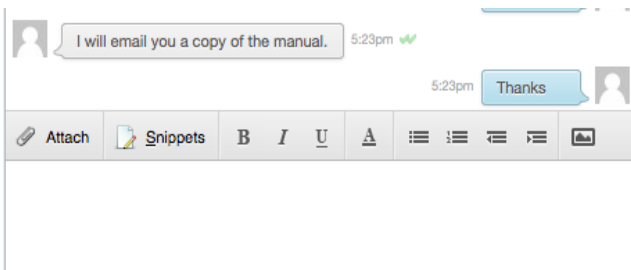
When a user requests a chat, you will see a **New Chat** notification at the top left of the interface.



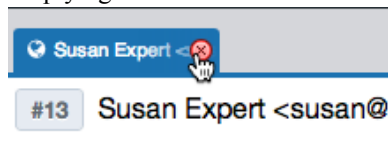
If you accept the chat, it opens in the content pane.



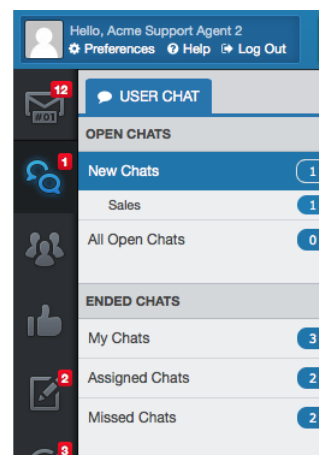
Chatting works much like any instant messaging service.



You can format your messages and send attachments just as you do when replying to a ticket.



Use the Chat app to filter chats and find earlier conversations.

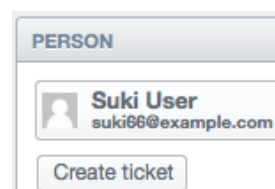


## Logging a ticket from a chat

Use this button while chatting to create a ticket linked to the chat:



You can also create a linked ticket from a closed or missed chat:





## The CRM App

The DeskPRO CRM app helps you keep track of your users.

You can see detailed user information by clicking on a user's name in various places:

The diagram illustrates three ways to access detailed user information in the CRM App:

- Ticket:** A callout from a ticket entry (ID: 22, "Rocket sled refuelling is...") pointing to the user's name "Brian Canid (coyote@example.com)".
- List pane:** A callout from a list of users (e.g., "#22 Rocket sled refuelling is...", "Brian Canid (CTO, DreadCo)") pointing to the user's name.
- Chat:** A callout from a chat window showing "Brian Canid (coyote@example.com)" with a "Create ticket" button.

The detailed user profile for "Brian Canid" is shown on the right, including:

- Summary: #18 Brian Canid, Add a label.
- Buttons: Create Ticket, Merge, Login As User, More.
- Summary section: Empty.
- Properties: Timezone (UTC (GMT +0)), Local Time (Thur, 13th Mar 2014 10:19am).
- Tickets: 1 (Warranty terms, Awaiting Agent: 5).
- Chats: 1.
- Notes: NEW NOTE.
- Activity Stream: Empty.
- Detail: Empty.
- Contact Information: coyote@example.com, Download vCard.
- Organization: CTO, Manager, DreadCo (14 members).
- Usergroups: Registered.

Users can belong to **organizations** and **usergroups**. Edit them with these cogs.

The diagram illustrates usergroups and organizations:

- Usergroups:** A list of usergroups (Registered, Power Users, Trial Users, VIPs) is shown. A callout points to the "VIPs" usergroup, which is highlighted. A text box explains: "Usergroups affect what the user can do with tickets, chat and web portal content – your administrator decides the settings."
- Organizations:** A list of organizations (DreadCo, DHARMA, Ace Tomato, Universal Products) is shown. A callout points to the "Organizations" section. A text box explains: "Organizations track who the user works for. DeskPRO can automatically assign organizations based on the user's email address."

Open an organization in the content pane to access these useful functions:

The diagram shows the organization management interface:

- Members:** A list of members (Brian Canid, Susan Expert, Horatio Gentlemen) with their roles (CTO, Senior IT Tech, Doorman).
- Tickets:** 13 tickets.
- Chats:** 3 chats.
- Email Domain:** A section for managing email domains. A callout points to the "EMAIL DOMAIN" section, explaining: "Users with emails at these domains will be automatically associated with this organization. example.com".
- Usergroups:** A section for managing usergroups. A callout points to the "USERGROUPS" section, explaining: "Add everyone in the company to a certain usergroup".

Click this flag to make user a **manager** - they can now see *all* tickets for the organization.



# The Feedback App

Users can submit feedback through your web portal.

I have a... ✓ Suggestion Feature Request Bug Report Go

Feedback types are set by your administrator

Depending on the settings chosen by your DeskPRO administrator, some types of feedback may only be available to certain usergroups.

You may need to approve feedback and comments before they are shown on the portal.

Filter feedback by type

STATUS	TYPE	LABELS
New		3
Active		3
Planning		2
Started		0
Under Review		1
Archived		0
Completed		0
Duplicate		0
Declined		0

Number of votes for each item

3 SUBMISSIONS

Ordered by Votes

All 3 Suggestion 1 Feature Request 1 Bug Report 1

0 selected Perform Actions

5 Integrate your robot horse and jetpack products for bigger jumps  
Type: Suggestion Date Created: Mar 12 2014

2 Bigger rotors  
Type: Feature Request Date Created: Mar 12 2014

1 Gyrocopter Deluxe vibration at top speed  
Type: Bug Report Date Created: Mar 13 2014

The **status** of feedback lets you track how your company is going to deal with it.

You can change the status by opening an item of feedback in the content pane, or with mass actions in the filter pane.

**Active** statuses mean that your company is acting on the feedback, or at least considering it.

**Archived** statuses mean that the feedback has been dealt with, either acted on or rejected.

Integrate your robot horse and jetpack products for bigger jumps

Add a label

New

Type: Suggestion

5 votes +1

Jethro Vortex (user@example.com)

Aviation

Delete Mark as spam Merge

View in user interface

EDITS (1) REVISIONS (0) RELATED CONTENT (0)

SEARCH

Edit

Why can't I buy a jetpack for my horse? Seems like a no-brainer.



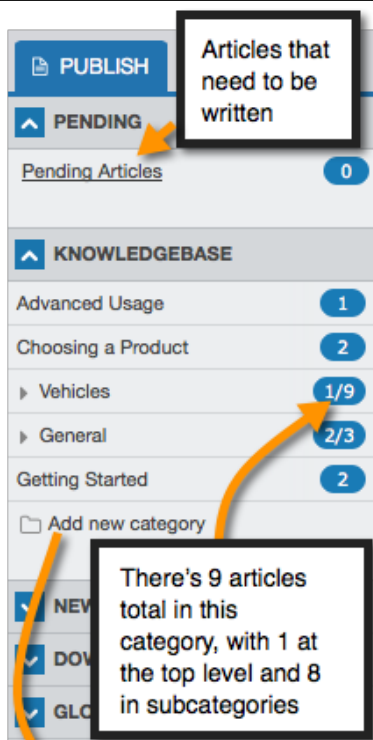


## The Publish App

The Publish app is where you manage the content you offer on your web portal.

- **Knowledgebase** articles are rich-text and can include images and attachments. A typical article might address a common user question or explain how to do something.
- **News** posts are designed for announcements.
- **Downloads** are files you want to make available to your users (such as electronic manuals, product brochures, or software).
- **Glossary** items are terms you want to define for users. When a glossary term is used in a knowledgebase article, the user can mouse over it to see the definition.


## Knowledgebase



### Add Category

PROPERTIES	
Title	<input type="text" value="Secret codes"/>
Parent Category	<input type="text" value="Advanced Usage"/>
Permissions	<div><input type="checkbox"/> Everyone <input type="checkbox"/> Registered <input checked="" type="checkbox"/> Power Users <input type="checkbox"/> Trial Users <input checked="" type="checkbox"/> VIPs</div>

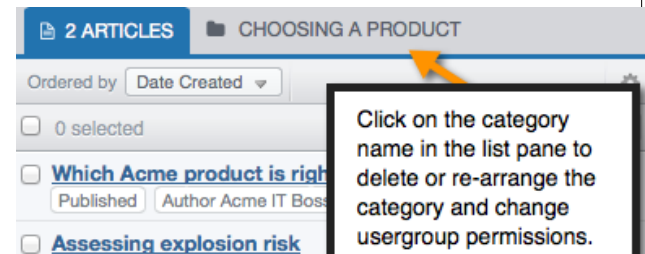
You can choose to make a category visible only to usergroups with certain **permissions**. In this example, all content within the “Secret Codes” category will be visible only to users from the “Power Users” and “VIPs” usergroups.

If you are viewing a ticket and decide that an article should be created, you can use the  **Actions** button to create a pending article linked to that ticket:

☐ Ticket [Trouble booting up drilling mach](#)

Document this better

To create a new article from scratch, use the **Create** button in the toolbar



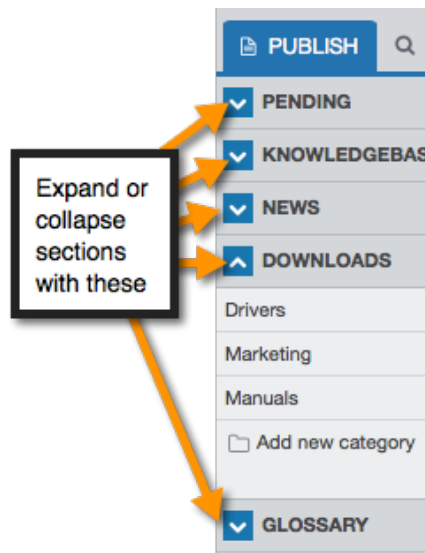
DELETE CATEGORY	
<input type="button" value="Delete Category"/>	
EDIT CATEGORY	
Title	<input type="text" value="Choosing a Product"/>
Permissions	<div><input checked="" type="checkbox"/> Everyone <input checked="" type="checkbox"/> Registered <input checked="" type="checkbox"/> Power Users <input checked="" type="checkbox"/> Trial Users <input checked="" type="checkbox"/> VIPs</div>
REORDER CATEGORY (DRAG & DROP)	
<div>Advanced Usage Choosing a Product ▶ Vehicles</div>	

By default a new article will be published right away. You can set its status as **Draft** – so it goes to the Pending section – or **Unpublished**.

Open an article in the content pane to change its status or category. An article that has been published can be set to **Archived** if it is out of date.

In the Properties tab of an article, you can set an automatic unpublish date. This is useful to make sure you review an article regularly.

## News and Downloads



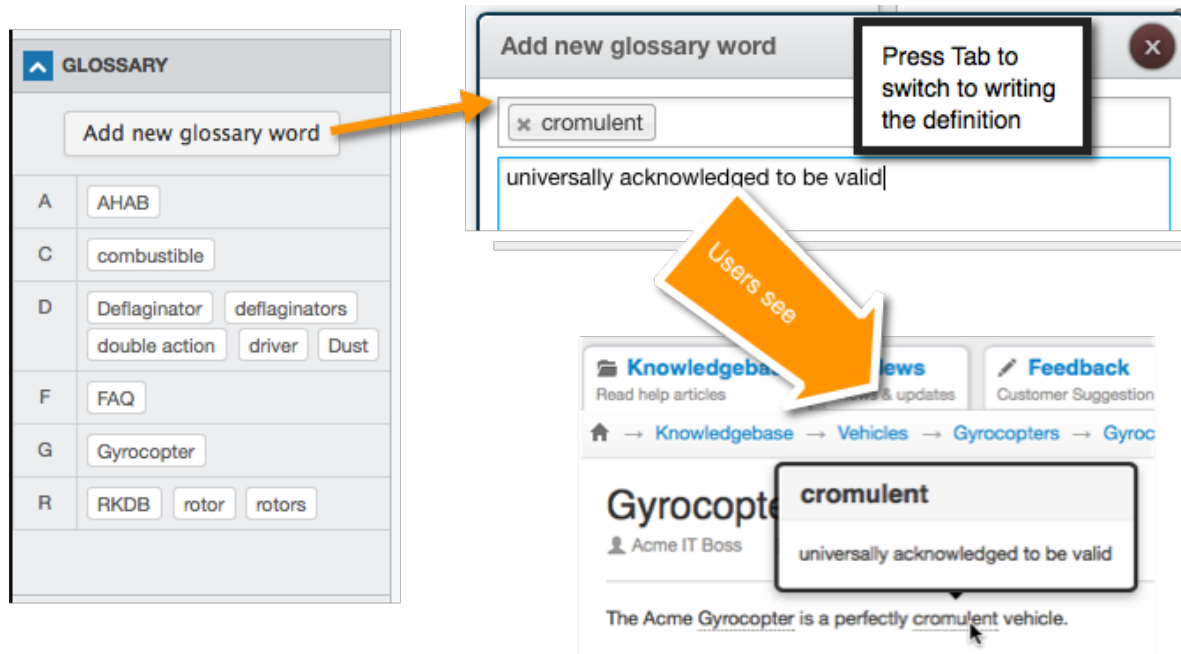
Creating News and Downloads and arranging them into categories works much like creating news articles.

News posts are displayed on the portal in chronological order, rather than arranged by category. They have buttons to share them on social media.

Downloads are a single file with a rich-text description.

## Glossary

When you add a glossary word, it will be defined for users the first time they appear in knowledgebase articles.







## The Tasks App

The Tasks app allows you to track and assign tasks for agents.


You can create a task from the  button in the toolbar.

You can also create a task from a ticket:

ID: 22 **Rocket sled refuelling issue**

 Brian Canid (coyote@example.com)  DreadCo (CTO)

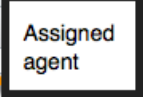
Support ▾ Awaiting Agent ▾ 3 ▾

PROPERTIES TASKS (0) SLAS 

Arrange a site visit for maintenance

Mar 17 2014 ▾ No specific time ▾ Public ▾ Me ▾

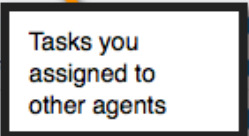
Lock Merge ▾ Macros ▾ Remove ▾ Actions ▾

 Assigned agent

By default, a task you create is assigned to you, but you can assign it to other agents.

Tasks can either be **Public** (visible to all) or **Private** (visible only to you and the agent assigned the task).

TASKS	
TASKS	
My Tasks	2
Overdue	1
Due Today	0
Due In Future	1
My Teams's Tasks	0
Overdue	0
Due Today	0
Due In Future	0
Tasks I Delegated	3
Overdue	0
Due Today	0
Due In Future	0
All Tasks	
Overdue	1
Due Today	1
Due In Future	3

 Tasks you assigned to other agents

## Learning more about DeskPRO

We hope you found this quick overview of DeskPRO useful. There are a lot more features and configuration options than we could show you here.

Please check out our Support Center at [support.deskpro.com](https://support.deskpro.com) for more information.

If you have any questions or need help, please email us at [support@deskpro.com](mailto:support@deskpro.com)

# Glossary

**Admin:** staff member within your company who has administrator access to configure and customize your helpdesk

**Agent:** staff member within your company who uses DeskPRO to provide help

**Article:** in the context of DeskPRO, an article refers to a piece of **knowledgebase** content

**Assignment:** a ticket can be assigned to an agent or a team to track who is dealing with that ticket

**Chat:** real-time instant messaging between agents and users; may be available to users from the web portal or integrated into a website

**CRM:** the app used for managing users and assigning them to **organizations** and **usergroups**; short for **Customer Relationship Management**

**Downloads:** useful files you provide to users through your web portal; e.g., software drivers or product manuals; maintained in the **Publish** app

**Feedback:** suggestions from users submitted through your **web portal**; e.g. a feature request or new product idea

**Glossary:** part of the **Publish** app used to maintain definitions of terms which are automatically displayed in **knowledgebase** articles

**Knowledgebase:** part of the **web portal** which contains rich-text help **articles**

**News:** part of the **web portal** which displays news posts chronologically; useful for product announcements

**Organizations:** used to track the company or other enterprise a user belongs to; you can assign users to organizations using the **CRM** app, or DeskPRO can automatically assign organizations based on user email addresses;

**Permissions:** settings which control what an agent or user can do with DeskPRO; your agent permissions are set by your admins and might, for example, prevent you deleting tickets; a user's permissions depend on their **usergroup**

**Publish:** the app used to maintain content for the web portal: knowledgebase articles, news posts, downloads and glossary entries

**SLAs:** short for Service Level Agreements; goals for dealing with tickets that your helpdesk aims to meet, e.g. that you must reply to a new ticket within 4 hours; shown in the **Tickets** app.

**Snippets:** short pieces of text which you can quickly insert into messages to users; useful to save time entering standard greetings, phrases, “canned answers” etc..

**Status:** used to track who needs to act on a ticket next: **awaiting agent** means the helpdesk must do something related to that ticket; **awaiting user** means the helpdesk is waiting for the user to reply; **resolved** means the issue that ticket represents has been resolved

**Tasks:** an app used to track “to-do” items for agents

**Teams:** agents are grouped into teams to enable group ticket assignment

**Ticket:** represents a user question, problem or complaint; can be created automatically from incoming user email, or by a user from the **web portal**, or by an agent on a user's behalf

**User:** one of the people the helpdesk is trying to help

**Usergroup:** users belong to usergroups which determine what they are allowed to do and see when interacting with DeskPRO; created by admins, assigned with the **CRM** app

**Web portal:** the user-facing web interface of DeskPRO – can be integrated into your own website; help information on the portal is maintained using the **Publish** app