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Getting Started

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Getting Started with Deskpro

Whether you're a small team handling a handful of enquiries or a large organisation managing thousands of support requests daily, Deskpro provides the tools you need to deliver exceptional customer service. This guide walks you through the essentials so you can hit the ground running.

What is Deskpro

Deskpro is a helpdesk platform that centralises all your customer communication into a single, manageable workspace. Instead of juggling separate inboxes, chat windows, and social media accounts, every conversation arrives in one place — regardless of which channel the customer used to reach you. Tickets can come from email, live chat, social media, voice calls, SMS, and more, and your agents handle them all from the same interface.

Setting Up Your Helpdesk

Once your Deskpro instance is live, the first thing you'll want to do is configure the basics. Head to the Admin area by clicking **Admin** in the main navigation bar. From here, you can control almost every aspect of how your helpdesk operates.

Branding

Start by making Deskpro feel like your own. Under **Configuration → Branding**, upload your company logo, set your brand colours, and customise the look of your Help Centre. This is the portal your customers will see when they visit your support site, so it's worth spending a few minutes making it consistent with your brand identity.

Departments

Departments help you organise incoming tickets by team or topic. For example, you might create departments for Sales, Technical Support, and Billing. Each department can have its own set of agents, email addresses, and workflows. Navigate to **Ticket Structure → Departments** to set these up. Think about how your customers categorise their own problems — that's usually a good starting point.

Adding Agents

Your agents are the people who will be responding to tickets. Go to **Agents → Agent Profiles** to invite your team. Each agent can be assigned to one or more departments, given specific permission groups, and placed into teams. Deskpro supports granular permissions, so you can control exactly what each agent can see and do. For most teams, starting with two or three permission groups — such as Agent, Team Lead, and Administrator — covers the basics well.

Connecting Your Channels

The real power of Deskpro comes from connecting all your support channels so that every customer message becomes a ticket.

Email

The most common channel. Under **Channels → Email → Accounts**, you can connect your existing support email addresses. Deskpro supports IMAP, POP3, Microsoft 365, and Gmail integrations. Once connected, any email sent to that address automatically creates a ticket. Agents reply from within Deskpro, and the customer receives the response as a normal email — they never need to know a helpdesk is involved.

(Live Chat (Messenger

Deskpro's Messenger is a real-time chat widget you embed on your website. Customers can start a conversation, and agents pick it up instantly. To set this up, go to **Channels → Messenger → Messengers** and create a new Messenger. You'll configure which cards to display — such as a Help card showing your knowledge base articles, a Chat card for live conversation, and a Tickets card so customers can check on existing requests. Once configured, Deskpro gives you a snippet of code to paste into your website

Social Media and Other Channels

Deskpro also supports Twitter, Facebook, Instagram, WhatsApp, and SMS. Each channel is configured under **Channels** in the Admin area. Connecting these means your agents can respond to a tweet, a Facebook message, or a WhatsApp enquiry without ever leaving the helpdesk

Working with Tickets

Tickets are the core of Deskpro. Every customer interaction becomes a ticket, and every ticket follows a lifecycle from creation to resolution

The Ticket View

When you open a ticket, you'll see the full conversation history, customer details on the right-hand side, and a reply box at the bottom. You can send email replies, internal notes (visible only to agents), or forward the ticket to a third party. The interface keeps everything in one thread so nothing gets lost

Statuses and Workflows

By default, tickets move through statuses like Awaiting Agent, Awaiting User, and Resolved. You can customise these under **Ticket Structure → Statuses** to match your own process. For example, some teams add statuses like "Escalated" or "On Hold" to better reflect their workflow

Assigning and Collaborating

Tickets can be assigned to individual agents or teams. You can use round-robin assignment to distribute tickets evenly, or let agents manually pick from a queue. The **@mention** feature lets agents loop in colleagues without reassigning the ticket, and internal notes keep behind-the-scenes discussion separate from customer-facing replies

Building Your Knowledge Base

A good knowledge base reduces ticket volume by helping customers find answers themselves. Under **Help Center → Knowledge Base**, you can create categories and articles covering common questions

Write articles that address the issues your agents see most often. Each article can include formatted text, images, and embedded videos. Organise them into categories that make sense to your customers — "Getting Started", "Account Management", "Billing FAQ", and so on. Once published, these articles appear on your Help Centre and can also be surfaced through Messenger's Help card

If you support multiple languages, Deskpro's translation system lets you provide localised versions of your articles and category titles, ensuring customers see content in their preferred language

Automating Your Workflow

Once the basics are in place, automation is where Deskpro really starts saving you time

Triggers

Triggers run automatically when certain conditions are met. For example, you can create a trigger that assigns any ticket containing the word "invoice" to the Billing department, or one that sends a satisfaction survey when a ticket is resolved. Set these up under **Business Rules → Triggers**

SLAs

Service Level Agreements let you define response and resolution time targets. Under **Business Rules → SLAs**, you can create different SLA policies for different customer groups or departments. Deskpro tracks SLA compliance in real time and can alert agents when a deadline is approaching

Snippets

Snippets are pre-written reply templates that agents can insert with a couple of clicks. If your team finds themselves typing the same response to common questions, create a snippet for it. Go to **Features → Snippets** to build your library. Snippets support dynamic placeholders like the customer's name or ticket reference, so they still feel personal

Reporting and Insights

Deskpro includes a built-in reporting suite under the **Reports** tab. You'll find pre-built dashboards covering ticket volume, response times, agent performance, and customer satisfaction. These reports help you identify bottlenecks, track trends, and make informed decisions about staffing and processes

For more specific needs, you can build custom reports using Deskpro's query language, filtering by any combination of fields, dates, and agents

Next Steps

With your channels connected, departments configured, and a few knowledge base articles published, you're ready to start handling customer enquiries through Deskpro. As your team settles in, explore the automation features to streamline repetitive tasks and review your reports regularly to keep improving

For more detailed guidance on any of these topics, visit the Deskpro support portal or browse the in-app documentation. The platform is designed to grow with your team, so start simple and add complexity as you need it