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TIP SHEET

Help Desk Setup Checklist

1 Plan the help desk workflow

- [ ] Choose the customer service channels to be added
- [ ] Decide on the number of agents and groups to be created
- [ ] Determine the metrics you want to track
- [ ] Consider self-service options

2 Add customer service channels

- [ ] Link your support mail address
- [ ] Set up forwarding rules in your mailbox
- [ ] Add chat, Whatsapp, and social media accounts

3 Bring your team in

- [ ] Create agent profiles
- [ ] Set agent roles and permissions

4 Define SLA policies

- [ ] Configure help desk operational hours
- [ ] Set SLA targets for response and resolution times

5 Ticket workflow creation

- [ ] Set up ticket routing and assignment rules
- [ ] Create time-triggered rules for escalations and follow-ups
- [ ] Automate notifications to customers on request updates

6 Configure agent productivity features

- [ ] Create canned responses
- [ ] Curate an internal knowledge base
- [ ] Create automated agent workflows for common scenarios

7 Customize your self-service portal

- [ ] Customize the branding of your support portal
- [ ] Add contact forms to the portal
- [ ] Add FAQs, how-to guides, video tutorials

8 Integrate other essential apps

- [ ] Integrate your CRM
- [ ] Link MS teams, Slack, or GSuite for collaboration
- [ ] Add Shopify or WooCommerce app (e-commerce)

9 Check help desk security settings

- [ ] SSL certificates for help desk URL
- [ ] Single sign-on for agents
- [ ] DKIM email server verification

10 Test and optimize deployment

- [ ] Create your first ticket
- [ ] Check integration of all channels
- [ ] Collect help desk usage insights

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