Bold Desk
by Syncfusion

Help Desk Setup Checklist

Tip Sheet

1 Initial system setup

□ Create your help desk account

□ Configure your company profile (name, logo, time zone)

□ Add support email addresses and set up email forwarding

□ Set up custom domain or subdomain (if applicable)

2 Add users and define roles

□ Invite support agents, admins, and other team members

□ Assign roles and permissions based on responsibilities

□ Group users into departments or functional teams

3 Ticketing workflow configuration

□ Customize ticket statuses (e.g., New, In Progress, Resolved)

□ Define priority levels for tickets

□ Set up automation rules (assignment, SLAs, notifications)

□ Create ticket categories and tags

□ Add canned responses for common replies

4 Enable communication channels

□ Set up email, live chat, and contact form channels

□ Integrate with social media platforms (Facebook, Twitter, WhatsApp, Telegram)

□ Enable chatbot or AI assistant (if supported)

5 Define business rules and SLAs

□ Set your business hours and holiday calendar.

□ Create SLA policies for various ticket types or teams.

□ Configure escalation rules for delayed or unattended tickets.

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6 Tool and system integrations

□ Connect CRM, project management, or communication tools

□ Configure APIs or webhooks for advanced integrations

□ Enable marketplace apps or third-party integrations

7 Setting self-service options

□ Build a knowledge base with categories and articles

□ Enable and brand your customer portal

□ Add FAQs and enable article rating/feedback options

8 Agent training and knowledge sharing

□ Conduct onboarding or walkthrough sessions

□ Share help articles, videos, or guides with the team

□ Educate agents on ticket handling and best practices.

9 Launch and ongoing monitoring

□ Go live with your help desk for real customers

□ Monitor ticket flow, SLA adherence, and agent performance

□ Collect customer feedback and refine workflows regularly

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