

# MOJO HELPDESK

## Quick Setup Guide



Congratulations on deciding to build a more efficient support team and deliver exceptional customer service! This Quick Setup Guide will assist you in quickly setting up your Help Desk and learning more about Mojo Helpdesk in the process.



If you have any questions, please visit us at [help.mojohelpdesk.com](http://help.mojohelpdesk.com).

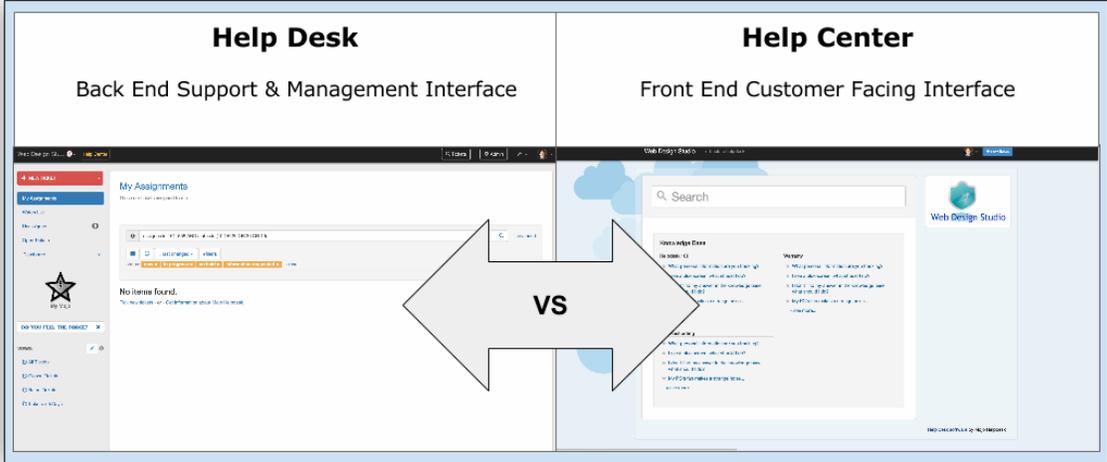
The first two topics are for those users unfamiliar with the concept of Help Desk and Ticket Tracking Systems, so skip to page 5 if these concepts are already familiar to you.

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# Help Desk vs. Help Center

Mojo Helpdesk has two interface consoles to manage and serve your customers. The Help Desk Owners, Administrators, Managers, and Agents will use the **Help Desk** as their primary interface for configuring settings and managing tickets. The main interface for your users and/or customers is the **Help Center** where they can search your knowledge base articles, view your social streams and contact information, or submit a support ticket request. Regular users, also called customers, do not access the Help Desk side.



## User Roles and Privileges

Like many management systems, Mojo Helpdesk uses the concept of user roles to determine the type of access rights and privileges each user has within the Help Desk and Help Center.

Mojo has seven types of user roles:

1. **User:** Any person using the Help Desk is a user. A user could be a customer or an agent.
2. **Customer:** A Customer is a user that submits tickets to the Help Desk. Customers can only view the Help Center, not the Help Desk side.
3. **Agent (Technician):** An Agent is Help Desk staff and can view/access all tickets in the Help Desk. Agents can also access file attachments and some reports.
4. **Restricted Agent:** A Restricted Agent is an agent that is restricted to view tickets for selected queues only. Restricted Agents cannot access settings or reports.
5. **Managers:** The Manager role in the Help Desk can do everything an agent can do but has access to certain settings and reports. Managers can also export/import data, view the event log, access/edit user profiles and groups and create/manage automation rules.
6. **Admins:** Admins are Help Desk staff that have full access to all helpdesk functionality. For example, Admins can update billing information, configure the Help Desk settings, update the owner's profile information and close the Help Desk account.
7. **Owners:** The Help Desk Owner is typically the person that created the Mojo Helpdesk account. He/she has all access rights and will receive emails for billing receipts and new user accounts.

## Creating your Ticket Queues

Queues are how you categorize your tickets, such as support, billing, maintenance, questions, etc. You can automate actions, report on and route by the queues. You can also specify an email address for each ticket queue, so emails sent to that queue's address will create tickets in the appropriate queue.

1. To set up and manage queues, click **Admin > Queues and Emails**
2. Mojo provides three queues to get you started: (1) Billing, (2) Other, (3) Tech Support.

Click the **Pencil Icon** to change them to your requirements.

<b>Billing</b> billing@coffeecup.mojohelpdesk.com	  
<b>Other</b> no email address set	  
<b>Tech Support</b> support@coffeecup.mojohelpdesk.com	  

3. Click the **+ New Queue** button to create an additional queue
4. In the first field, enter your **New Queue Name**

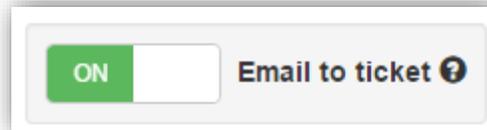
Enter new queue name	
Optionally enter email address	@coffeecup.mojohelpdesk.com
Optionally enter email forward address	e.g. support@yourco.com

5. Enter an **Email Address** for the ability to create tickets by emailing the address associated with each queue.
6. Enter the **Email Forwarding Address** if you have set up **your organization's email address** to filter to the queue address to create tickets. This field is a placeholder to remember which email address is forwarding to the Mojo queue email address.

E.g. **support@yourco.com** would forward to the address  
[support@yourco.mojohelpdesk.com](mailto:support@yourco.mojohelpdesk.com)

## Create Tickets by Email

Toggle the **Email to Ticket** setting to enable or disable the ability to create tickets from email.

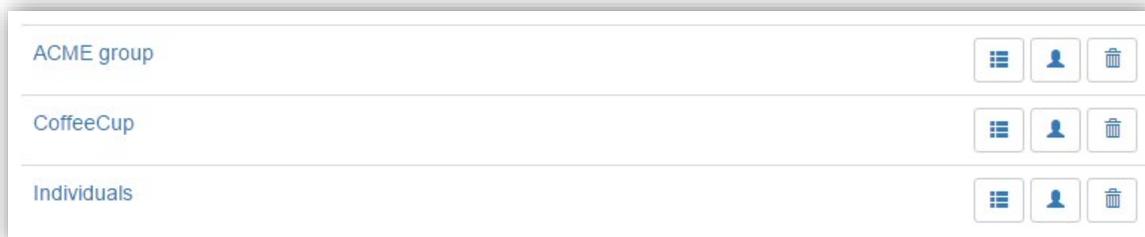


## Setup and Manage your Groups

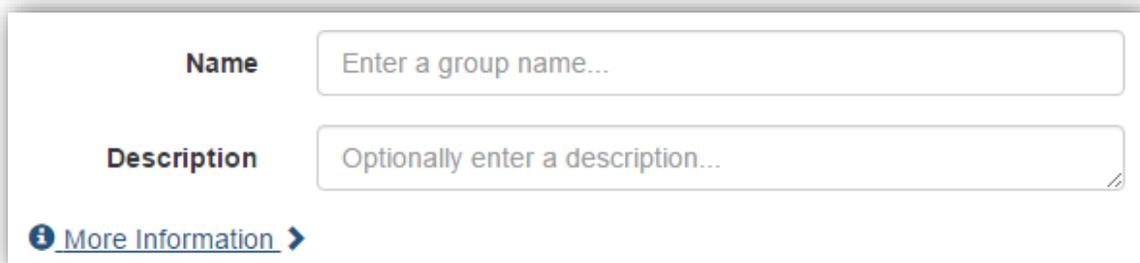
Groups help you manage customers by location, department, store, client name, campus, etc. Grouping customers allow for better reporting and automating of tasks. A customer with Group Access can view tickets submitted by all users in their group. By default, groups have access to submit tickets to all ticket queues.

To set up and manage groups, **click Admin > Manage Groups**. Mojo provides three groups to get you started: (1) ACME group, (2) <your organization name>, (3) Individuals.

1. To change these to meet your requirements, Click the **Group Name** to open the group information prompt.
2. Then click the **Pencil Icon** to update the group information.



3. Click the **+ New Group** button to create additional Groups.

A screenshot of the 'New Group' form. It has two input fields: 'Name' with the placeholder text 'Enter a group name...' and 'Description' with the placeholder text 'Optionally enter a description...'. Below the fields is a link that says 'More Information' with an information icon and a right-pointing arrow.

## Add Support Agents and Users

Support staff are those that work in the helpdesk and solve tickets. They will either have a role as a restricted technician, technician, manager, or admin. Users are your external customers/clients, internal employees or anybody submitting requests to your Help Desk.

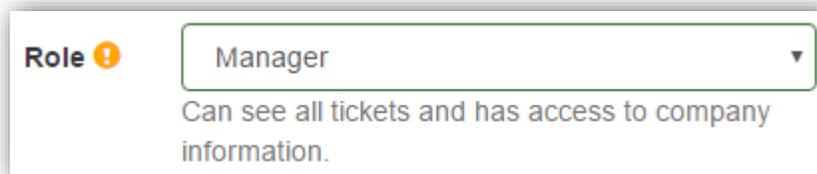
1. To add and manage all user types, click **Admin > Manage Users/Agents**
2. Click the **+ New User** button to create a new user or agent.
3. Enter User's **Name** information
4. Enter User's **Email Address**

**Note:** This is a required field because ticket messages are delivered through email and used as usernames. Mojo identifies a ticket based on the user's email address.

5. Enter the User's **Role**

This is also a required field because it determines their privileges.

**Tip:** As a friendly reminder, after you select a role you will see the access rights for the user type.



The image shows a user interface element for selecting a role. On the left, the label "Role" is followed by a yellow information icon. To the right is a dropdown menu with a white background and a green border. The selected option is "Manager", and a small downward-pointing triangle is visible on the right side of the dropdown box. Below the dropdown, the text "Can see all tickets and has access to company information." is displayed in a smaller, grey font.

## Start Creating Tickets

The two quickest ways to start generating and receiving tickets is through your Help Center and Queue email addresses. We will focus on those two here and provide information on creating tickets two additional ways.

As tickets arrive in your Help Desk, they will appear in the **Unassigned** ticket list. Assigned tickets will appear in the agent's **My Assignments** list.

1. Customers can click the **+ New Ticket** button at the top right of the **Help Center**. Agents can create tickets from the **Help Desk** side by clicking the red **+ New Ticket** button at the top left.
2. **Send Emails** to create tickets
  - a. By default, your Help Desk can create tickets by receiving emails from two Queue addresses: [billing@yourhelpdesk.mojohelpdesk.com](mailto:billing@yourhelpdesk.mojohelpdesk.com) and [support@yourhelpdesk.mojohelpdesk.com](mailto:support@yourhelpdesk.mojohelpdesk.com)
  - b. Alternatively, you can use whatever email addresses you created or change in the previous [Creating your Ticket Queues section](#).
3. Add a **Mojo Ticket Form** to your website

This allows anybody to create tickets from whichever web page you want using code from our Embedded Form widget. Simply copy/paste the code onto your selected web page.

Visit **Admin > All Settings > Embedded Form** to get started.

### Rest API

The Mojo Helpdesk API enables 3rd party developers to create, edit, update, delete, and export tickets, users, and comments. You can review the API documentation at <https://github.com/mojohelpdesk>.

Developers are encouraged to submit code snippets and pull requests.

## Setup the Help Center

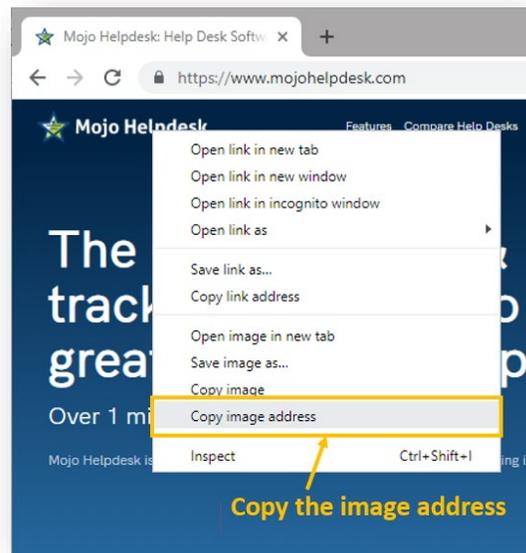
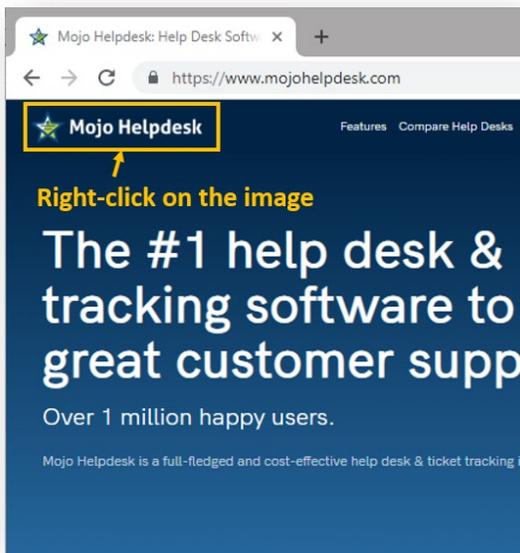
The Help Center is your customer facing landing page for your customers to search through support articles available in your Knowledge Base, read your latest social media streams, find contact information, or create a support ticket for your agents to review.

You can customize the look of the Help Center to match your organization's branding and determine what other content to show on the page.

### Branding

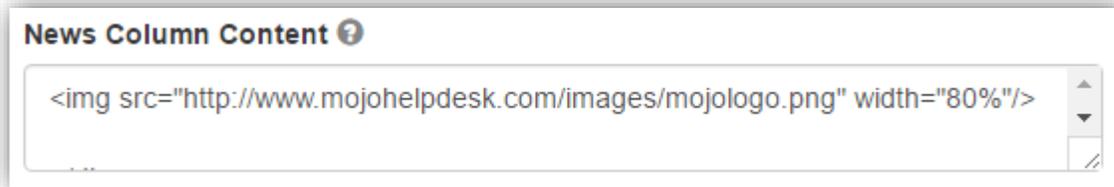
Mojo Helpdesk allows you to create some basic Help Desk branding to match your brand identity.

1. To pick a theme or color, click **Admin > All Settings > Help Center > Design**
  - a. Choose a theme from the predesigned options or select a solid color, then click save.
2. Add your **Organization's Logo**
  - a. Open a web browser tab and visit the web location of the image you would like to use.
  - b. Right-click on it and select **Copy image address**.



- c. In Mojo, click **Admin > All Settings > Help Center Settings**

- d. In the **News Column Content field**, highlight the area between quotes (also, noted in blue below) and paste your image address.  

You can optionally add a news feed to the **News Column Content** section, such as Twitter updates or other social media feeds.

**Note:** If the proportions of your image need adjusting, increase/decrease the number in blue (width="#%") until it meets your requirements. Click Save after each adjustment to reflect the change.

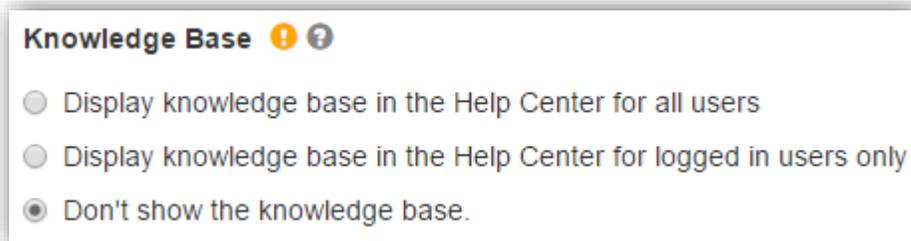
### Help Center Welcome Messaging

1. To personalize your messaging, click **Admin > Help Center Settings**
2. Update the HTML content under **Portal Main Content** and click Save

### Knowledge Base

You can enable or disable showing your Knowledge Base on Help Center Page

1. Click **Admin > Help Center Settings**
2. Under the **Knowledge Base**, make your selection



## Other Helpful Topics

Building upon what you setup and learned above, here are some additional helpful topics.

1. [Setup group access rights](#)
2. [Importing Users from a CSV file](#) \*\*
3. [Setting up multiple ticket forms](#)
4. [Customizing ticket forms](#)
5. [How-to Videos](#)

\*\* *Not available during trial*