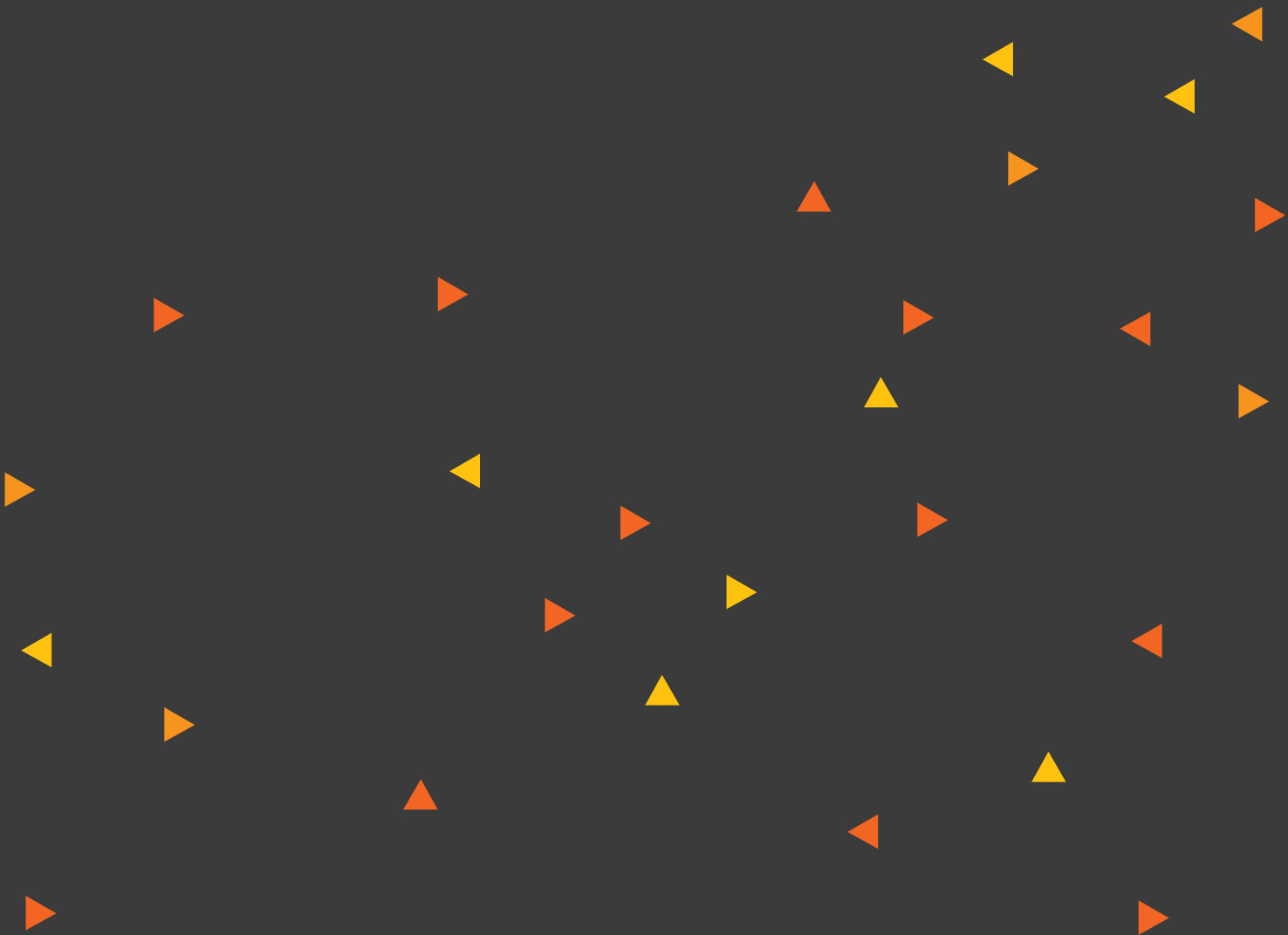
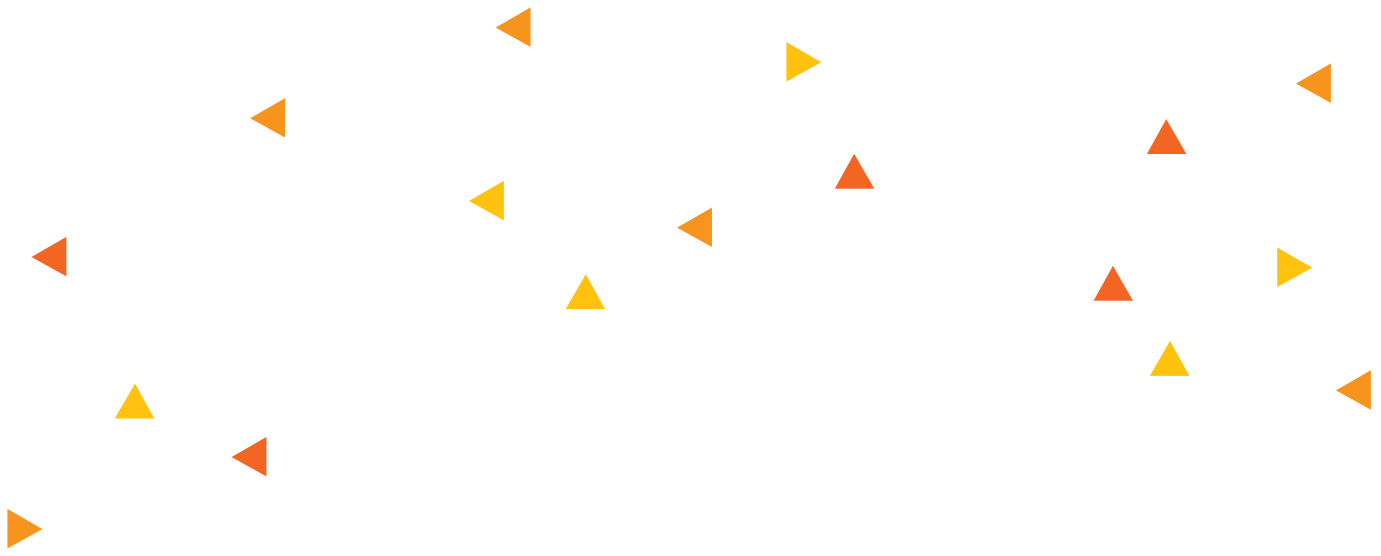




Quick Start Guide

Setup HappyFox in 5 minutes





This Quick Start Guide will help you setup your HappyFox helpdesk in a jiffy. Learn to setup your support email, invite your support staff, setup your self- service helpdesk and also customize your helpdesk, to make your helpdesk up and running. If you have further queries, feel free to drop us an email at support@happyfox.com

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Setup email

With HappyFox you can setup multiple mailboxes, locally called Categories, that allow different departments or groups to handle relevant tickets with one HappyFox Help Desk instance.

To create a category, click **Manage > Categories > Add Categories**.

1. Add a **Name** to your Category.
2. The **Prefix** is what will be a part of the ticket ID. (Eg: “HF” is the prefix for our HappyFox Support tickets HF00017367).
3. Use the **Availability** drop-down to set the category for internal use or make it available to customers also.
4. The **Signature** text will get appended to all outgoing emails from this category of tickets.
5. Set **Mailbox Type** as “No Incoming Mailbox” if you want the category for internal ticket management only. In this case you can optionally set an outgoing email address below.
6. Or if you want emails forwarded to this category to be created as tickets, set the field to “Email Forwarding” and enter your support email address (typically it would look like support@yourcompany.com). Note the HappyFox forwarding address mentioned in the greyed section. This is essential to configure email forwarding in your email client (Gmail/Outlook/Apple mail/).
7. **Associate staff** that you would like to give access to this category. You can leave rest of the fields intact to default values unless required and **Save Settings**.





Invite Staff

You can add new staff or deactivate them effortlessly, and still retain the ticket history after deactivation.

To help support teams solve customer problems together, collaborate and share tickets HappyFox allows administrators to invite more members to handle the help desk tickets.

To add staff to HappyFox, click **Manage > Staff > Add Staff**.

Type in the required fields.

1. Enter staff **First Name** and **Last Name** and **Email id**.
2. Assign a **Role** to the staff and select the categories to which the staff belongs to or can handle the tickets from, and click **Save Settings**.
3. The staff would receive an email with a link to activate their account. The staff can setup their password during the activation process.





Setup Knowledge Base

Empower your customers with product or service knowledge. Add documents, images, videos and file attachments to enable self-help.

To build your **Knowledge Base** or FAQ section do the following:

Decide the structure of your knowledge base before you start building the sections and articles.

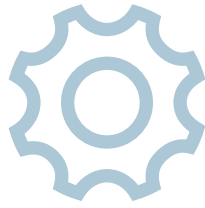
To create sections go to **Knowledge Base > Sections > New Section**.

1. Type the **Name** of the Section, select the **Parent Section** in case it is a sub-section or leave it to default value, and give a section **Description** which will appear on your Support Center home page.

2. Select the **Categories** this section associated with, and click **Create Section**.

To create a KB article go to **Knowledge Base > Articles > New Article**.

1. Type in the **Title** and the body of the article in **Contents** text box.
2. Select the **Section** to which this article belongs and deselect the **Visibility** checkbox to make this article public.
3. To **Attach a File** or record a **Screencast** to show a demo, use corresponding options.
4. Type in the **Tags** to make the article searchable for your customers. Click on **Publish Article** to finish.



Setup Support Center

The **Support Center** is the home to your customers. Your Support Center is where your Knowledge base and your Customer portal is located. One can access Support Center with same account URL sans the **“/staff”** part.

To setup your Support Center, go to **Manage > General**.

1. Scroll down to Support Center Settings section.
2. Type your desired **Support Center Name**.
3. Choose the **Client Login Option** from the drop-down.
4. You can leave the fields, Client home page description, Support center custom CSS, Support Center Announcement banner and Additional link on KB header, intact unless required.
5. Select the **KB Section Template** from the drop down. This would decide how you would want your articles and section to appear on your Support Center home page.
6. Select your customer **Visibility Preferences** and click on **Save Settings**.





Customize your helpdesk

Personalize the support experience to sync with your company by creating your custom workflow and customizing your HappyFox Helpdesk.

To customize your help desk to make it reflect your brand's look and feel, go to **Manage > General**.

1. Scroll to **Basic Settings**.
2. Type your **Company Name**, set the **Default Time Zone**, set the **Default Language** and the **Country Code**. Add your **Logo** which would appear on your Support Center. Click on **Save Settings**.
3. Scroll down to the **Application Personalization** Section. Enter the **Helpdesk Application Name** and the **Footer** section contents. Update your **Favicon** and click **Save Settings**.
4. Scroll down to the **Color Theme** section. Set the color scheme of your helpdesk background and font by choosing from the color palette. Click **Save Settings** to confirm.
5. To change the **Domain Name** of your HappyFox helpdesk instance to suit your custom domain requirements such as, support.companyname.com, change the A record of your organization support web address to point to the IP address of the HappyFox servers.





happyfox

Created and distributed by

HappyFox Inc CA, USA

HappyFox is a help desk ticketing system that is hosted on cloud, supporting multiple customer support channels like email, voice, social media and live chat.

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