Set up your help center: a first-hour checklist

Getting started

The setup wizard gets your help center started in a few minutes. Then work through this checklist in order to go from a fresh help center to one your customers can use. Each step links to a full guide.

Who can do this: Owners and Admins · **Plans:** All plans (AI Answers needs Catalyst or the AI add-on)

Where you start

Right after you sign up, you choose your help center's address and click **Create my help center**. The setup wizard then walks you through the rest: **Goal** (a public help center, an internal knowledge base, or both), **Basics** (name and main language), **Content**, **Look**, **Team** and **Finish**. It takes about 3 minutes, and you can skip any step.

- On **Content**, paste the address of your current Zendesk, Intercom, Help Scout, Document360, Front or HelpDocs help center and click **Find my content** to bring your articles over, upload your files, or click **Start fresh** for starter categories that match your goal.
- On **Look**, pick a starting template. You can change it any time in the template editor.
- On **Team**, paste your teammates' email addresses and choose a role for each, or click **Skip for now**.

Click **Finish later** to save your answers and stop. **Resume setup** on the Articles page takes you back.

When you finish, click **Show me around** for a one-minute tour of the dashboard. On the Articles page, a checklist then tracks what is left before you go live, such as **Publish your first article**, **Make it yours** and **Go live**, each with a button that takes you there. Its menu lets you replay the tour or hide the checklist.

Your help center stays unpublished until you publish it, so nobody outside your team sees it while you work. If you pick an internal knowledge base as your goal, it's set to **Private** instead.

The checklist

1. **Make it look like your brand.** Pick a theme, then add your logo, colors and fonts in the template editor, so readers know they're in the right place. See Make your help center look like your brand.

2. **Plan your categories.** Group articles the way your customers think about your product, and name categories in their words. See Create and organize categories and Plan your help center's structure.

3. **Write and publish your first articles.** Start with the questions your customers ask most. Click **View help center** at the top of the Articles page to see them the way readers will. See Write and publish your first article and The first 10 articles every help center needs.

4. **Publish it.** Open your help center to everyone once your first articles are live: in **Settings**, click **Publish help center**. Publishing needs an activated plan; you can activate during the trial and keep the days you have left. See Publish your help center. Building an internal knowledge base instead? Keep it private and invite your team: see Use a private help center as an internal knowledge base.

5. **Connect your own domain.** Serve your help center from an address like help.yourcompany.com, with free SSL, on every plan. See Use your own domain.

6. **Add the widget to your website or app.** Customers find answers without leaving the page they're on. See Add the widget to your website.

7. **Invite your team.** Give writers, translators and admins their own logins and the right role. See Invite your team.

8. **Turn on AI Answers.** Readers ask a question and get an answer written from your published articles, with its sources. It's included in Catalyst, and available as an add-on on Bootstrap and Growth. See Turn on AI Answers.

9. **Watch your statistics.** See what people search for, what they don't find and which articles need work. See Read your help center statistics.

After launch

A help center is never quite finished. Check your statistics regularly, write articles for searches that found nothing, and update articles whenever your product changes. See Keep your help center up to date.

Related articles

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