

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, the setup wizard walks you through six steps: **Goal** (a public help center, an internal knowledge base, or both), **Basics** (name, web address 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 **Private** until you make it public, so nobody outside your team sees it while you work.

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. **Make it public.** Open your help center to everyone once your first articles are live. Going public needs an activated plan; you can activate during the trial and keep the days you have left. See [Make your help center public](#). 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

- [Write and publish your first article](#)
- [Make your help center look like your brand](#)
- [Make your help center public](#)
- [Use your own domain](#)
- [Add the widget to your website](#)
- [Invite your team](#)

- [Turn on AI Answers](#)