# Set up your help center with the setup wizard

**Getting started**

The setup wizard turns your new account into a help center that has a name, a language, its first content, a design in your brand colors and a team, in about 3 minutes. It opens on its own right after you sign up, and you can stop at any point and pick up where you left off.

**Who can do this:** The person who signed up and created the help center · **Plans:** All plans, including the free trial

## How the wizard works

When you sign up, you first choose your help center's address and click **Create my help center**. See Create your HelpCenter.io account. The wizard opens next, and the progress bar at the top shows its steps: **Address** (already done), **Goal**, **Basics**, **Content**, **Look**, **Team** and **Finish**.

- Each step saves when you click **Continue**, and the live preview on the right shows your help center as you go.
- Click **Back**, or a finished step in the progress bar, to change an answer.
- Most steps start with a sensible answer, so **Continue** is often all you need. **Content** and **Team** have their own skip buttons.

Your help center stays unpublished the whole time, so nobody outside your team sees it until you decide to publish it.

## Goal: what are you building?

Pick one, then click **Continue**:

| Choice | What it sets up |
| --- | --- |
| **A public help center** | Self-service answers for your customers. Your help center stays public, and goes live when you publish it. |
| **An internal knowledge base** | Processes, policies and how-tos for your team. Your help center is set to **Private**, so only the people you invite can sign in and read it. See Use a private help center as an internal knowledge base. |
| **Both** | Public answers for customers, plus private categories only your team can see. |

Your goal also decides which starter categories the **Content** step offers. You can change your mind later: go back to this step, or change who can see your help center in **Settings**. The wizard changes the visibility for you only while your help center has never been published.

**How many people work at your company?** is optional. Pick a size, or leave it blank.

## Basics: name your help center

1. Under **Help center name**, enter the name readers see in the header, the browser tab and search results (up to 100 characters).

2. Under **Main language**, choose the language you write in. You can add more languages later. See Add a language to your help center.

3. Optional: under **Your website**, enter your company's website, such as yourcompany.com, and tick **I own or control this website and may use its branding.** Then click **Read my brand**.

4. Click **Continue**.

**Read my brand** sends the AI theming agent to your website to read its colors, fonts and logo. It brings your logo over only when you tick the ownership box. The reading takes about a minute and goes on while you carry on with the wizard: its result is waiting for you on the **Look** step. Each reading counts toward the agent's runs from a website: 3 a day for each help center, or 10 on Catalyst and on older plans that include AI. See Brand your help center from your website with the AI theming agent.

To rename your help center after setup, change **Site name** in the **Brand** tab of the template editor, then publish. See Add your logo, favicon and brand name. Once your help center has articles in its main language, you change that language under **Localization** in **Settings**, not here. See Release translations and change your default language.

## Content: bring your existing content

Choose where your first articles come from. You can do any of these later from the **Articles** page too.

- **Import your current help center.** Paste its address under **Your current knowledge base URL**, tick **I own this help center, or I'm allowed to copy its content** and click **Find my content**. Zendesk, Intercom, Help Scout, Document360, Front and HelpDocs are copied automatically: you see what was found, pick the categories and languages, and choose when to import. For anything else, our

migration team moves it for you, free. See Import your existing help center.

- **Connect Notion.** Import pages and databases, then keep them in sync. See Import and sync your Notion knowledge base.
- **Upload files.** Word, Markdown, HTML or a ZIP of your docs.
- **Start fresh.** Adds six starter categories for your goal, ready for your first articles. With **Both**, two of them are visible to your team only.
- **Skip, I'll add content later.** Your help center keeps its sample article to edit or delete.

Have a large or unusual setup? Click **Request an assisted migration**, and our team emails you to plan the move. Nothing changes in your help center until you agree on the details.

## Look: pick a starting look

1. Pick a template: **Compass** (marked **Recommended**), **Aurora Support**, **Support Classic**, **Docs Classic**, **Notion Airy** or **Support Columns**. The preview shows your help center on it.
2. If the AI theming agent read your website, its card **Your brand from** your site lists what it found: **Colors**, **Typography** and your **Logo**, each with a tick box. Untick anything you'd rather keep from the template.
3. Click **Continue**. The template and your brand are applied to your help center's design.

Started from a template in the template gallery? It comes selected here. Not sure which one to pick? See Which theme is right for you? More templates, including industry layouts, are in the template editor.

Not happy with the brand reading? Click **Run again**, type a hint such as "lighter, and lean into the purple" (up to 300 characters) and click **Run again** once more. The panel says how many runs you have left today. Once they're used up, **Or adjust it yourself** lets you set a **Brand color** (a six-digit hex code), a **Heading font** and the **Corners** by hand. If you click **Continue** while the agent is still reading, your help center gets the template without your brand. You can add your brand later in the template editor.

If you already changed your design in the template editor, this step leaves it as it is: click **Keep my design**.

## Team: invite your team

1. Under **Email addresses**, enter one or more addresses. You can paste a whole list.

2. Choose a role in the list next to it (**as Editor** unless you change it), then click **Add**. Each person's name is filled in from their address: click it to change it, and change anyone's role in their row.

3. Optional: under **Personal note**, write a line for everyone you invite, up to 300 characters. It's shown in the email, so use plain text, without web or email addresses.

4. Click **Send 1 invitation** (or **Send 3 invitations**, and so on). To move on without sending, click **Skip for now**. With nobody added, the button is **Continue**.

The roles are **Editor** (creates and publishes articles), **Admin** (full access, including the team and settings), **Translator** (translates existing content) and **Viewer** (reads the help center, not the dashboard). The preview shows the invitation email as it will arrive. Anyone who already has a HelpCenter.io account is added straight away, with an email saying so. During the free trial, the number of invitations you can send is limited, and the step shows how many you have left. See Invite your team and Roles and permissions.

## Finish and the Ready screen

On **Finish**, the wizard lists what it set up and saves your setup. While it works, it asks **How did you hear about HelpCenter.io?** Answering is optional. When the list is done,

click **Continue**.

The Ready screen shows your help center's address, with buttons to copy it and to **Preview** it in a new tab, and who you invited. **Find your way around** explains the four main areas of the dashboard: **Articles**, **Template editor**, **Statistics** and **Settings**. Then choose:

- **Show me around** for a one-minute tour of the dashboard.
- **Go to my dashboard** to start on your own.

An import you set to start right after setup starts when you finish the wizard.

## Finish later

Need a break? Click **Finish later** at the top right. Your answers are saved and you go to your dashboard, which confirms with **Setup saved**. Your help center works as it is in the meantime.

To pick up where you left off, click **Resume setup** on the **Finish setting up** card on **Overview** or the **Articles** page. **Not now** hides that card. An import you set to start right after setup starts when you click **Finish later**, too.

## After the wizard

The **Getting started** checklist on **Overview** takes over: it tracks what's left before you go live, such as **Make it yours**, **Add your first 5 articles** and **Go live on your own domain**. See Set up your help center: a first-hour checklist. When you're ready for readers, see Publish your help center.

## What your teammates see

The wizard is yours alone: teammates you invite, Admins included, never see it. The first time a teammate opens your help center's dashboard, a welcome greets them with their role and your personal note. They can click **Show me around** for a one-minute tour, or **I'll explore myself**. On a phone, the welcome has a single **Get started** button instead. A Viewer has no dashboard and goes straight to your help center.

# Troubleshooting

**Continue is grayed out on Basics.** Your help center needs a name. Enter one under **Help center name**.

**You can't change the main language.** Your help center already has content in that language, an import is bringing articles into it, or you changed it in **Settings**. Change it under **Localization** in **Settings** instead.

**"The agent couldn't read" and your website's name.** Check the address for typos, then click **Read my brand** again. A site that blocks automated visitors or is down can't be read. You can also carry on without it and brand your help center later from the template editor.

**The wizard says you've used today's branding runs.** You've reached today's runs from a website for this help center. They come back at midnight UTC, and the wizard shows that time in yours. Continue without them: on **Look**, set a color, heading font and corners by hand, or run the agent again later from the template editor.

**"Your brand reading changed while this page was open. Have a look at it, then continue."** A new reading finished, for example in another tab. Check the **Look** step again, then click **Continue**.

**"Your design has changed since this page opened, so we left it as it is."** Someone changed the design in the template editor while you were in the wizard. Click **Keep my design**, and switch templates in the template editor if you want to.

**An invitation shows an error, or "One invitation could not be sent."** Fix the address or remove that person, then send again. If the note is the problem, the message appears under **Personal note**: take out any web or email addresses.

**"Your trial has no invitations left."** Choose a plan to invite more people, or invite them later from **Users**. See Choose a plan and start your subscription.

**"That was a lot of saves in a row. Wait a moment and try again."** Wait a few seconds, then click **Continue** again.

**You don't see the wizard.** It opens only for the first help center you create when you sign up, and only for you. A help center you add later, or one you were invited to, starts on the dashboard. A help center an AI agent built for you opens the wizard at **Basics**,

where you also choose its address: see Claim a help center an AI agent built for you.

## Related articles

- Create your HelpCenter.io account
- Set up your help center: a first-hour checklist
- Brand your help center from your website with the AI theming agent
- Import your existing help center
- Which theme is right for you?
- Invite your team
- Publish your help center