Tele-Support HelpDesk

software for:

- Customer Service
- HelpDesk
- Call Tracking
- Tech Support

A powerful **Help Desk and Customer Service** program
that runs **Stand Alone!** and also integrates with **ACT!**, **GoldMine**,
Outlook and other **CRM** applications.

Tele-Support HelpDesk has served the ACT! Community for over twelve years with this powerful yet easy to use program to manage customer service and call tracking. (Supports versions 2000 to 2009).

Tele-Support HelpDesk is for companies who take calls or requests from customers, whether for pre-sales help, technical support, or just plain questions on products and services. With features like a built-in Knowledgebase, answers and solutions are easily at your fingertips, ready to forward to your customers' 'in box' in seconds.

With **Tele-Support HelpDesk's** priority escalation system, overdue tasks and inquiries easily become visible, allowing your staff to keep on top of customers' needs. Easily track issues from inception to resolution. Reporting tells you which customers, categories, and products are requiring the most time and energy to resolve.

Tele-Support HelpDesk runs over a company's **local area network**, or over the **Internet,** right from a web browser or any Windows desktop.

"Tele-Support HelpDesk is powerful stuff. My helpdesk staff depend on this program throughout the day to help make our customers 'happy campers'. It's nice to know there are other companies out there that truly care about customer satisfaction and service."
Timothy Johnson, Computer Support Services, Springfield, Mass.

View our on-line
VIDEO DEMO

"If you don't take care of your customers, someone else will."

Tele-Support HelpDesk keeps you "in touch",
and keeps your customers 'happy'.

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Tele-Support HelpDesk
Version 4 Features

My HelpDesk
My HelpDesk is a "new way to start your HelpDesk day". My HelpDesk gives you a 'starting point' and a personal view of your HelpDesk world. Easily view individual inquiry statistics, analyze open inquiries by department or by company or priorities by department or company.

View last inquiries opened, known issues added, knowledgebase items added, reminders, manage a personal launch pad, and go directly into desired inquiries.

At a single glance or a click away, you can know such things as how many inquiries are open for you, your department, or for everyone. See the last inquiries you worked on, last known issues resolved, or last Hot Tip knowledgebase items added.

Look at a breakdown of inquiries by user or by priority, for your department or company as a whole. Keep personal reminders or personal links at your fingertips. All this and more.... See more details of "My HelpDesk" here.

Inquiry Tracking
Every call is tracked from initial inquiry to problem resolution. Inquiry history makes it easy to reopen an already closed inquiry. HelpDesk can detect if the inquiry's subject already exists and eliminate duplication and additional effort by your support staff. Quick find feature speeds contact look-up. Open inquiries stay on screen until finished. System tracks number of inquiries opened and closed each day.

Real Time Call Forwarding
Inquiries can be forwarded to any operator or department. If forwarded to a department, the inquiry is opened on the workstation for next available operator, ready for them to pick up the phone and handle the situation or problem. Referral system tracks who is logged on. Callbacks to be scheduled for any date, time, and staff member. Calls can be assigned on a next available basis. Referrals can automatically notify the receiving staff member via email for easy notification of staff not logged into HelpDesk

Priority Escalation System
A few new additions to the escalation system, including a 'drop dead' date to flag specific inquiries as to their special status and special escalation date. The system will allow you to define priorities and select when they are to be escalated, how they will appear (color change) and if they should be rerouted to a different person or department. Automatically generate email notification at user defined priority levels. Example, when reaching 'Critical' notify assigned user and Department Manager with full details. Is managed by a separate escalation 'server' that can be dedicated to this task, removing valuable processing tasks away from individual helpdesk users.

Links Database
This allows you to link almost anything to an inquiry record and to the contact record as well. This includes anything you can drag and drop from your windows desktop or applications, including

shortcuts, documents, spread sheets, graphics, web URL addresses, ANYTHING. Also included is a special type record, the email linked record, which will preserve the message body content for easy reviewing both inbound and outbound email for this inquiry/contact. If you are using HelpDesk Post Office, inbound and outbound email linked to inquiries will also be found in the Links database and shown individually attached to individual inquiries.

Task Management (see video clip)

This adds the ability to add one or more tasks that can be linked to an inquiry or to create tasks that are only linked by user and not inquiry. Ability for user to examine tasks in various ways, both as a user, per inquiry, per status or priority, or by due date.

RMA Database

A special database to hold information regarding RMAs. You'll easily record (using a user defined RMA numbering system) RMAs and report information from this file.

Known Issues "Bug" Database

Don't spin your wheels researching or looking up known problems. Check the 'bug' database. Contains fields such as when reported, nature of the problem, who is responsible for it, expected completion date, and customers waiting on the 'fix'.

New in 3.0 is the ability to utilize Known Issues for other uses, including recording "wish list items" from internal staff or customers, "suggestions" from customers and staff, "documentation" or "other" types of information you wish to manage its development.

We use it in house to manage bugs, new features, the versions in which they will be included, priority, and quality assurance and testing managed by priority and status. Check back or email for a case study being developed on this versatile feature set.

Inquiry Work Flow (see video clip)

Work Flow allows you to predefine actions that you want to take upon the occurrence of certain activities. In the case of HelpDesk, these events are "Inquiry Creation", "Inquiry Completion", "Inquiry Reopen", and "Inquiry Open and Close in One Call". Here are the actions that you will be able to define in the initial implementation of 'work flow'.

Inquiry Creation: When an inquiry is started for a company or contact, you will have the ability to automatically send an email to the associated account sales representative informing the rep of the new issue and some details about the issue.

Inquiry Completion: When an inquiry is completed, you will be able to take several actions. The first one is to again notify the sales rep for the account that the issues is being closed. You can likewise send the same email to a HelpDesk user. Also upon completion, you may select or automate an email(s) that will go out to the customer with a comment regarding the closing of the inquiry and perhaps an survey about the service provided.

HelpDesk Post Office

We've brought the complete email system, both inbound and outbound, under the control of HelpDesk with built-in email processing, and dedicated solely for HelpDesk's use. This means that outgoing mail can be sent from a global 'support department' but still maintain individual staff names.

Inbound email may be easily routed to the 'responsible' staff person handling a particular inquiry. Easily attach an email to an existing inquiry or create a new one with the information contained.

It allows single inbound email address to be shared by entire support staff and for the routing of inbound email.

Inbound email will automatically link to inquiries, including attachments (which will be filed according to a user defined scheme), along with full message information.

iForms

(see video clip)

We'll provide an easy way to extract information from web forms that can easily "form fill" information into your inquiry from the posted forms arriving via email. We will provide several web form templates that you can use as examples in building your own personal web forms for "user inquiry submission".

If you're using HelpDesk as a stand alone, you can also automatically create a new contact from the iForm inbound information.

Flexible Tab Design

First, we are allowing you to re-sequence the tabs in any order that you like. All tabs are available for sequencing.

Secondly, the center view tabs, which are limited to three tabs currently (often mapped to and showing contact manager fields), can now be expanded to more than three if desired. Also, each tab will no longer be limited to 14 fields. A built in forms design tool will allow you to place and add more than the 14 fields currently available on each tab.

HTML Email Templates and Signatures.

Design, develop, and store email templates for specific types of emails. You'll be able to design a message to fit each situation. You'll also be able to merge data from the open inquiry, including contact data, into the email.

Also, choose from a list of developed signature lines, choosing either global signatures or one associated with a particular HelpDesk operator.

"Stand Alone" HelpDesk.

The stand alone version of HelpDesk has been vastly improved with the addition of the following items:

- Import capabilities have been added to Stand Alone HelpDesk. Sources can be tab delimited, comma delimited, or ADO. Using ADO gives much latitude in attaching to many file systems, including anything to which an ODBC or ADO connection can be established.

- Configurable 'tabs' and 'screens'. You can separate user defined fields into manageable screen tabs. Each tab has a screen which is highly configurable via a forms design feature.

- List box capability has been added to all custom fields added to the stand alone contacts table.

- Multiple entry points (rights access) has been given that will allow such things as the ability to enter, edit, and maintain the contacts table without being a regular HelpDesk user. This would be helpful for a company that wants non HelpDesk clerical users to maintain the contacts table but not go into the HelpDesk program directly.

- The ability to print individual contact records or print contact lists.

Time Line Analysis.

This feature gives you the ability to have a "special event" time log entry added automatically in order to record and display when certain types of events take place. These events are 'inquiry referrals' (ownership changes, either by manual referral or during an inquiry escalation), 'priority changes' (from either priority escalation or manual priority changes), 'inquiry finish' (closing an inquiry), and 'reopens' (whenever an inquiry is reopened).

With the above information recorded, you'll be able to analyze and see in a list not only when an inquiry was worked on, how long, and by whom, but also when an inquiry priority changed, when an inquiry ownership changed, and even see when and by whom inquiries were closed and even later reopened.

Inquiry Status Publisher (add-on)

One of the most sought after features. Now you will be able to "publish" status and other information about inquiries to a web site where customers may access their individual entries and check status and other related information. You will decide which customer records qualify for publishing, which inquiries and how long after they are closed, the method that customers will access, the look and feel of the template that is presented to the inquiring customer, and what fields are to be published, including some special fields that can be set aside just for 'publishing', including an additional Notepads. And best of all, you can run this on any web site, shared hosting or not.

Hot Tips Publisher (add-on)

Publish selected Hot Tips from Tele-Support HelpDesk knowledgebase to your
web site, **intranet**, or field **technician's laptop**.

Contains powerful key word and text search ability. Allows you to link attachments to your Hot Tips. Change the look feel of your published pages to suit your company's needs, including graphics, logo, and linked pages. Publish to an area on your web site available to all visitors or in a 'subscribers only' folder on your site. Requires no special software or hardware. Publish on either a **d**edicated or shared hosted web server, intranet, or a technician's laptop.

Contract & Pre-Paid Support Tracking

This feature allows you to store in your contact manager information about service contracts. You determine the type (per hour or per incident), expiration date or 'must use by' dates, and user defined break points where you are warned and/or blocked from opening an inquiry. Example, warn me when contract time becomes 30 minutes or less or time until reaching expiration date is 15 days or less. You determine the break points and the action that is to happen. Time and/or incidents will be updated back to the contact manager. In the contact manager, you will be able to set filters and call or make lists of impending contract expirations.

Inquiry "Alert" System

There are certain conditions that a HelpDesk user would like to know. HelpDesk now puts icons in an alert column for the following conditions.

A "red dot" is inserted to indicate that the owner of an inquiry has not yet opened and read it's contents. Until that operator opens the inquiry, the icon will remain. That let's a helpdesk operator quickly see which inquires are unread by them since being assigned to them and let's management see system wide if inquiries are being left idle or unread.

A "chain link" is inserted to indicate that there is either a new email that has been attached to the inquiry or a new linked file has been attached.

A "form" is inserted to indicate that there is a new Intake Form has been created for this inquiry.

Once the operator enters the inquiry, these alert icons are automatically cleared.

User Defined Fields in Inquiry Record

You have the ability to add new user defined fields that are part of the inquiry record itself. Some of these fields are indexed so that they can be used as lookup fields. These fields will also be available in custom designed reports.

Internet Email

This feature provides for sending outbound internet email using any windows MAPI compliant email client, such as Explorer, Outlook, Eudora, Exchange, etc. You will be able to send messages, hot tips, or attachments of any kind via Email. This email will be logged in the new Link Database (see below) and the message body will be preserved. You'll be able to quickly browse all emails per inquiry or client in the Link Database.

Drag and drop of inbound email and attachments directly from Outlook and other mapi email programs to the "links" database in HelpDesk is supported. You may optionally wish to use the new HelpDesk Post Office "new" in version 3.1.

Launch Menu

This is an advanced feature that will allow you to build a menu of custom programs that can be called from an open inquiry. The menus allow you to pass parameters from both HelpDesk (such as inquiry number) and from the contact manager (such as the unique identifier that ties HelpDesk to the contact manager).

The purpose of this is to allow, while an inquiry is open, the ability to call a custom program (your responsibility) to go and retrieve information and present it to the HelpDesk operator. An example would be to go and pull up a list of everything sold to this particular customer and display it on the screen. The HelpDesk user could then choose the appropriate item and pull that information into HelpDesk. This is most helpful when you want to go to another system or back to the contact manager) to pull up inventory or assets linked to a particular contact.

HelpDesk Screen Shooter (see video clip)

Do you use "GoToMeeting", "GoToAssist", "Citrix", or other on-line tech support remote viewing programs? Is so, we're designing an interface that will allow you, among other things, to do screen captures and link the images to an inquiry. You'll also be able to annotate and add text descriptions to each graphic screen image if desired, capture them in groups, and to link these images to the current open inquiry.

This is a full screen capture utility that will capture and link any screen image to a HelpDesk inquiry, whether local or remote.

Configurable Inquiry Screen

The Open Inquiry screen is now highly configurable, allowing you three custom views of all data, tabs for products, RMAs, Links, Time Logs, and History Records.

We have Original Problem Notes which contains a text description of the problem as first described, and Resolution Notes, where notes relating to the problem solving are kept. Also, you can use Intake Forms (as described above) to further enhance you view of pertinent information. We've added functionality to the timer, allowing you to stop it if you walk away from your desk (under supervisor control) with a flashing timer indicating its 'stopped' mode.

Configurable History Queue Filtering

The History Queue has a 'quick' filtering system to allow you to quickly find the closed inquiry you are seeking. It filters by date range and a number of other search values allowing quick filtering with each key stroke. Makes for faster response in finding the information you want.

Report Writer Management Reports

Analysis reports are provided by our internal reporting system. Inquiry analysis measures number of inquiries as well as actual time and billing time by a number of different measures. Prevention report allows you to improve documentation and systems to guide product development and knowledge-base text. Reports on inquiries open/closed/all per timer period by category, product, client, priority, or operator. Complete time tracking reports as well as detailed billing report/analysis. Prevention notes by product and company.

Intake Forms

You will now have the ability to design what is called 'Intake Forms'. These are user-designed forms whose purpose is to ask and store questions and answers as part of the inquiry record, predetermined critical and important information that pertains to a particular type of problem or issue. You may develop and use as many types of forms as may be needed in your organization and assign (link) multiple forms to a single inquiry. Fields on a form may be declared mandatory (desired) or optional.

Example: Your company sells and supports software applications. Incoming issues may fall into the categories of installation, configuration, reporting, or operating system. So when a call comes in that involves 'configuration issues', you would quickly select the configuration form and link it to the inquiry. This form would have questions specific to this type of problem, such as operating system in use, problem occurs at one or all workstations, problem is recurring, operating system version, software version, etc.

This feature means you have unlimited information that you can acquire and linked to an inquiry in a format that best suits your organization's needs. This is power!

Spell Checking.

We're adding a full featured spell checker that can be used in sending your HTML formatted emails. Eventually, it will be available for use in Hot Tips, Known Issues, and Notepads.

Sticky Notes

This gives you the ability to attach a "sticky note" to an inquiry, easily flagging the inquiry with a special message for others to see.

Bulletin Board System

HelpDesk now has the ability to create one or more bulletin boards to aid communication internally for HelpDesk staff and users. As many BBS boards as desired can be created. Each board can have unlimited "sticky notes" attached to it.

Each board can have designated users who "subscribe" to the board. So, you could possibly have something like a "General" board, a "Support" board, and/or a "Developer" board. Each board will have designated subscribers and each will have various abilities based on their security rights.

Boards and messages can have a special "alert" status whereby each subscribed user will be notified of the special alert status. When messages are posted, each user will see a special flag indicating that something new has been posted to a particular board and that they as an individual user has not read it.

Contact Manager Interface

With ACT!, GoldMIne, TeamScope CRM, Business Contact Manager, Outlook 2007, or the Stand Alone contact manager, you'll be able to display and/or edit limitless fields from the contact manager. With GoldMine, you can display an open inquiry in GoldMine's Pending tab and then have it moved to the History tab upon completion. ACT! allow for activity history stamping as well. These features allow for non HelpDesk staff to have a 'heads up' awareness of HelpDesk issues without having to go into the HelpDesk module itself.

HelpDesk Viewer for ACT!

For those of you using ACT! 2007 and above, we've created a whole new way to display HelpDesk issues for your ACT! contacts. Previously (and you can keep it he same), we created feedback to the ACT! user via the Notes History on a contact record.

Now you can use HelpDesk Viewer for ACT! which will create a "HelpDesk" tab on your contact screen. Click on the tab and it will retrieve all HelpDesk activity for this contact record. See HelpDesk Grid screen shot.

You can even choose to see only 'open' inquiries, only 'closed' inquiries, or 'all' inquiries.

If you click an inquiry in the grid, it will display more details about that inquiry, including notepads. See inquiry details screen shot.

Miscellaneous features

- **Email Suspend** – Suspend email while you go back to display or edit inquiry info.
- **Merge Inquiry Values to Email Subject** – Include on email subject line either inquiry number, company, and/or contact.
- **Display 'number of days since opened' on inquiry Queue** – Add column to current Inquiry queue.