Tele-Support HelpDesk
Here are some of our top features…..

"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 its contents. Until that operator opens the inquiry, the icon will remain. That lets 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 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.

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 Tele-Support HelpDesk www.resource-dynamics.com Page 8 indicating that something new has been posted to a particular board and that they as an individual user has not read it.

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.

Email Post Office We've brought the complete email system, both inbound and outbound Email, 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' or from ‘individual user’. 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. Tele-Support HelpDesk Inbound email can be linked to inquiries, including attachments (which will be filed according to a user defined scheme), along with full message information.   Setup multiple out-bound Email accounts. Version 5.1.1 includes SSL/TCL Support and Support for IMAP and GMAIL.

HelpDesk Calendar This feature allows Users to view scheduled inquiries, task and known issues on a monthly calendar view. Filter settings allow to view items with a Due Date, Scheduled Date and Waiting Date.

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 User.

iForms We'll provide an easy way to extract information from web forms that can easily "form fill" information into your new inquiry from the posted forms arriving via email. If you're using HelpDesk as a stand alone, you can also automatically create a new contact from the iForm inbound information.

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

Inquiry Work Flow 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.

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!

Known Issues 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'. You have 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.

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.

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 Tele-Support HelpDesk www.resource-dynamics.com Page 3 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.

My HelpDesk Dashboard 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....

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.

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

Reporting Built into HelpDesk are standard reports that are most common. Inquiry Analysis, Billin Report, RMA Report, etc.. The best part about reporting, you are not limited to our reports. You can customize your own reports, using any report designer you have. Custom reports you create are executed outside of the HelpDesk application. The database for HelpDesk is MS ACCESS. Just about any reporting tool can read ACCESS tables. What to run your custom report inside HelpDesk from the Reports menu? Ask us about custom report design services.

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

"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.

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.

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 unlimited option to add your own custom tabs and as many fields onto each tab as desiged. A built in forms design tool will allow you to place and add fields from the inquiry and/or from the ACT! contacts database.

Task Management 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.

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.

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.

User Security Settings define each user or group with specific security settings within Tele-Support HelpDesk.

These are just some of our features. Tele-Support HelpDesk is feature rich, something for everyone.

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