Tele-Support HelpDesk

From Sales to Support

All-in-one Stand Alone Solution

Covering Customer Service, Call Tracking, HelpDesk, Knowledgebase and

Built in Contacts Database

and more.....

Thank you for your interest in Resource Dynamics and our product Tele-Support HelpDesk for your customer service and helpdesk solution.

If you are already a customer, this is a great training presentation or quick refresher.

This presentation is an **overview** of our software configuration process specific to CATEGORIES and PRODUCTS.

Tele-Support HelpDesk may run in several modes. Both modes perform almost the same except for how they access the contact manager of choice. The modes are:

Stand Alone, which includes a built in 100% customizable contact manager.

Or

Interface to ACT!, which will read and write to ACT! and share its contact manager data

Tele-Support HelpDesk is an executable program that runs on its own. It may run over a network or over the internet using a remote access software such as GO-Global (ask us about our web bundles).

So lets get started….

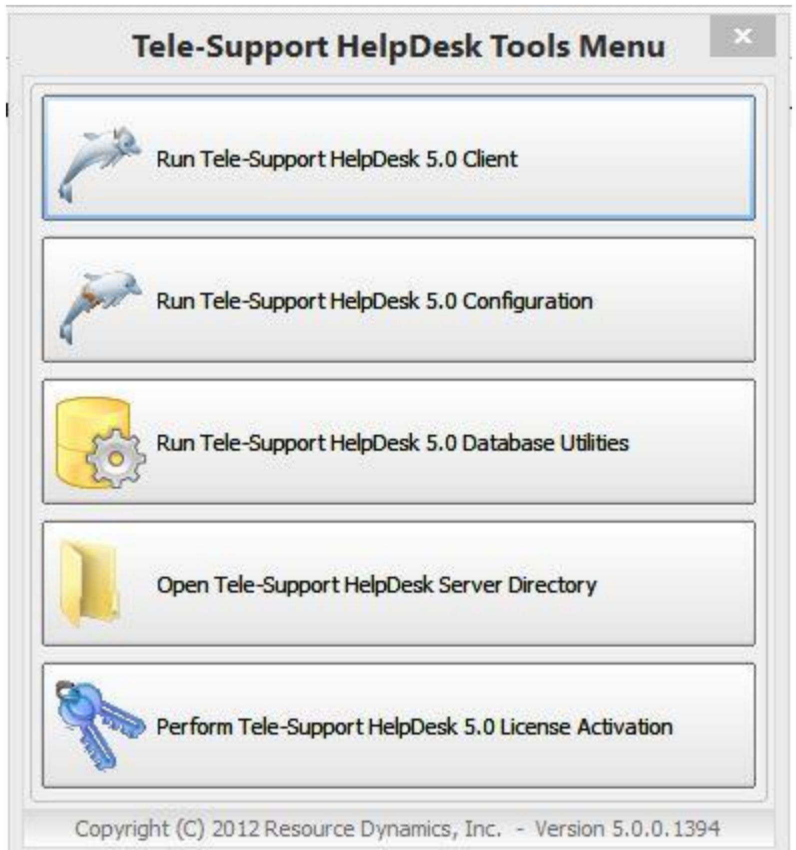
Once you install Tele-Support HelpDesk, you will have everything you need to get started with the trial version and we are here to assist you if needed.

Installation of our software is wizard driven. Be sure to install the main files from the installation process to a sharable network location for all users to have full access. (Client install comes later). If you are a single User, you can install locally for both the main \server files and client files.

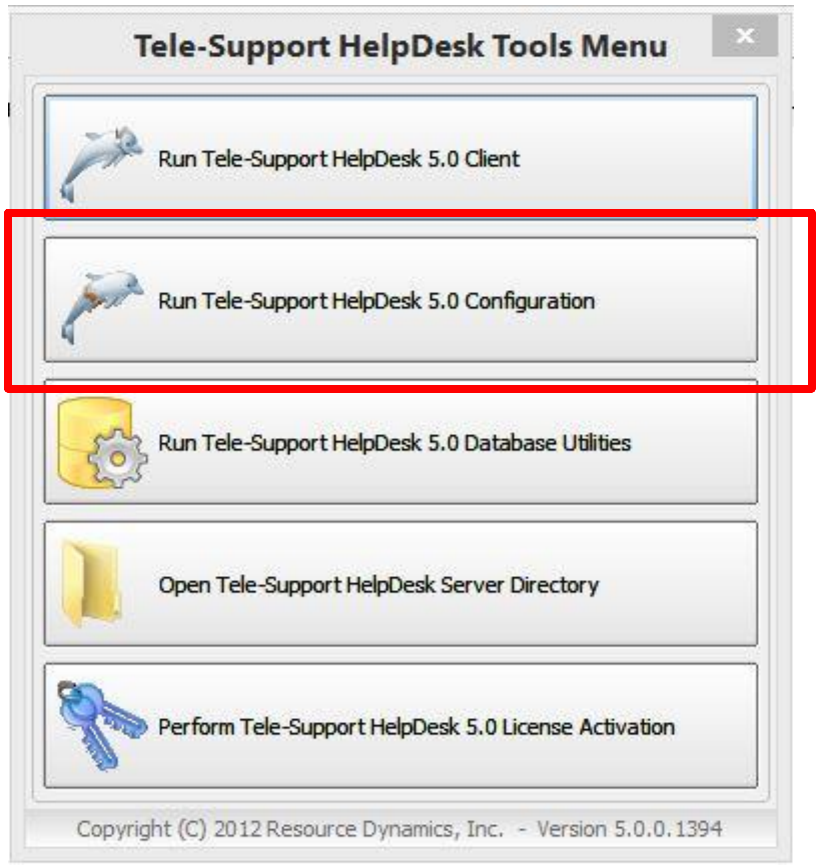
Once installed you will see a short-cut on your desktop called HDTools5. This is a quick access tool.

You can also access configuration from your main \server folder

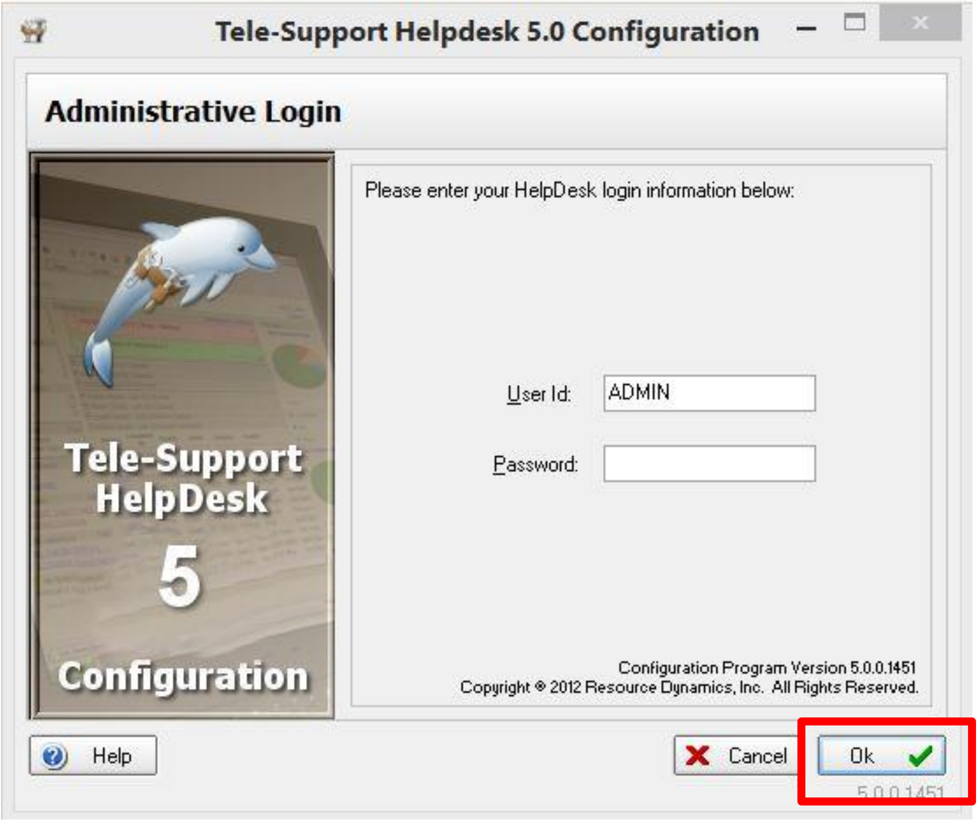
When you open the HDTools5 you will see these menu options……



First you want to launch and go through the basic contact manager by selecting CONFIGURATION.



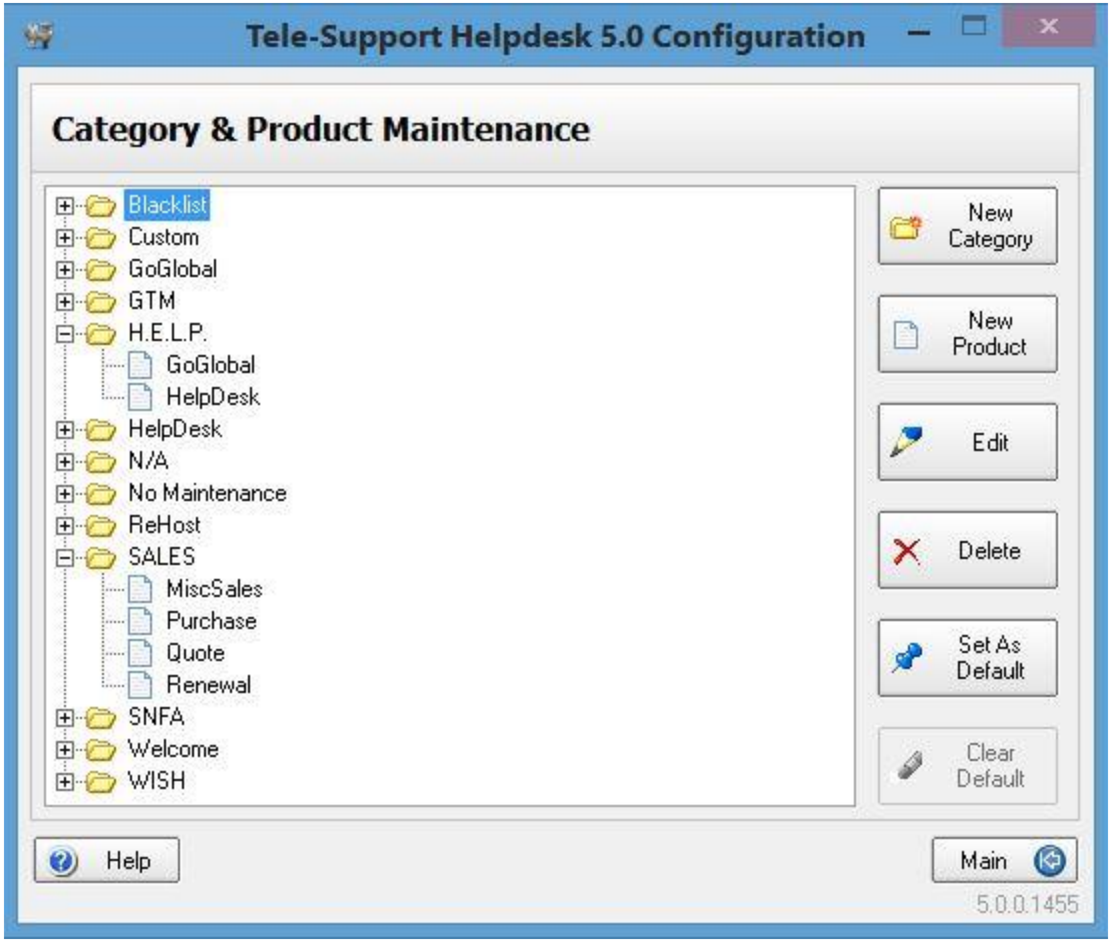
Only Users with Supervisor rights will have access to Configuration. We include one User ID: ADMIN no password. Click OK.



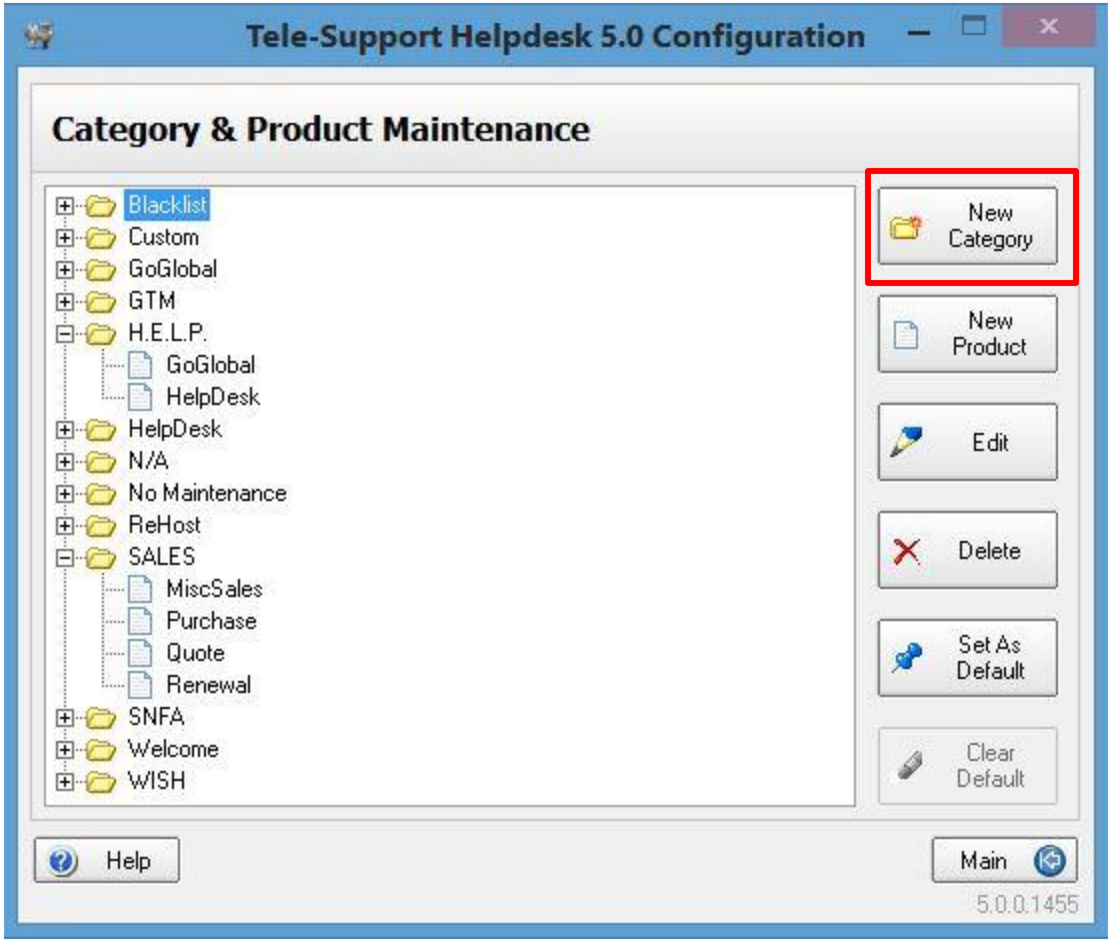
Categories and Products. You can build a database of Categories and Products. Each category can have unlimited products linked to it. You can also re-label the name "Category" & "Products" to better fit your needs.

Full details and instructions in your HDADMIN5 guide – Chapter 8

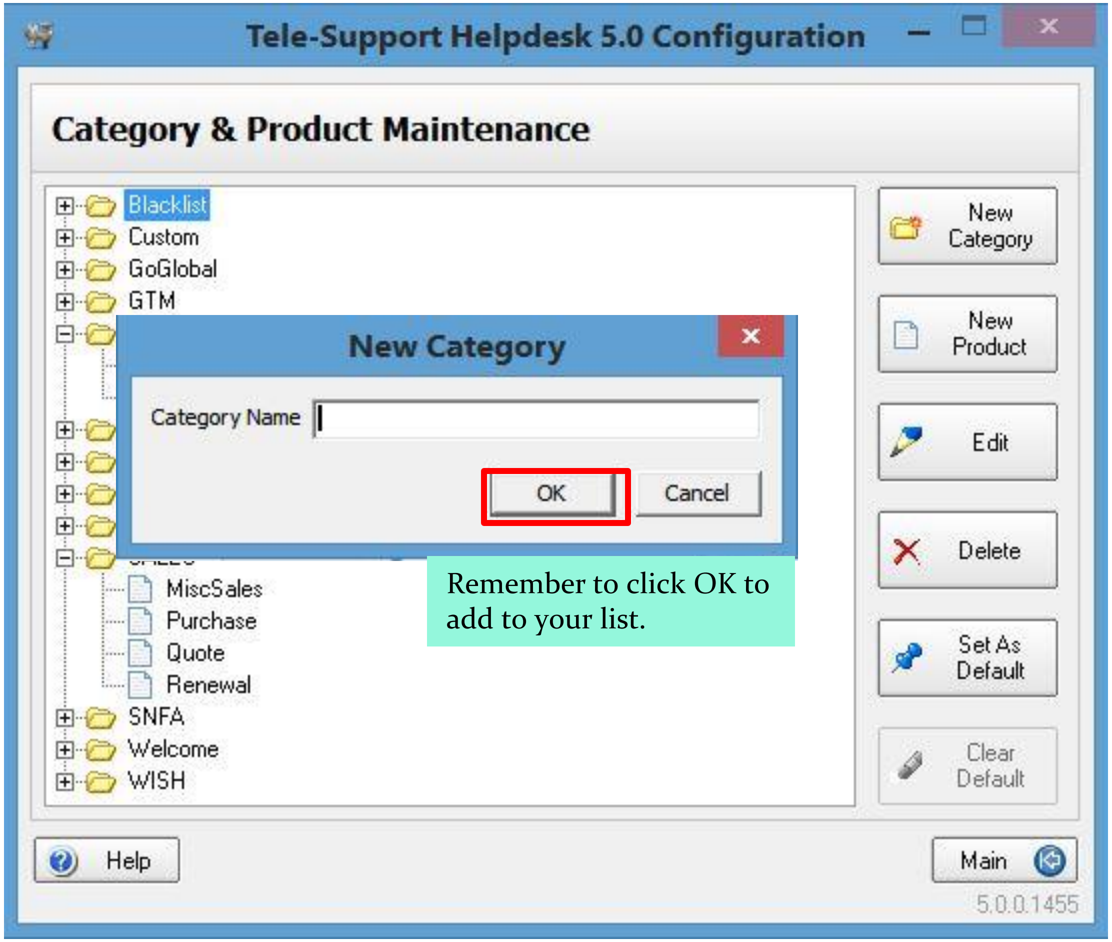
You create your own Categories and Products. Create as many as needed.



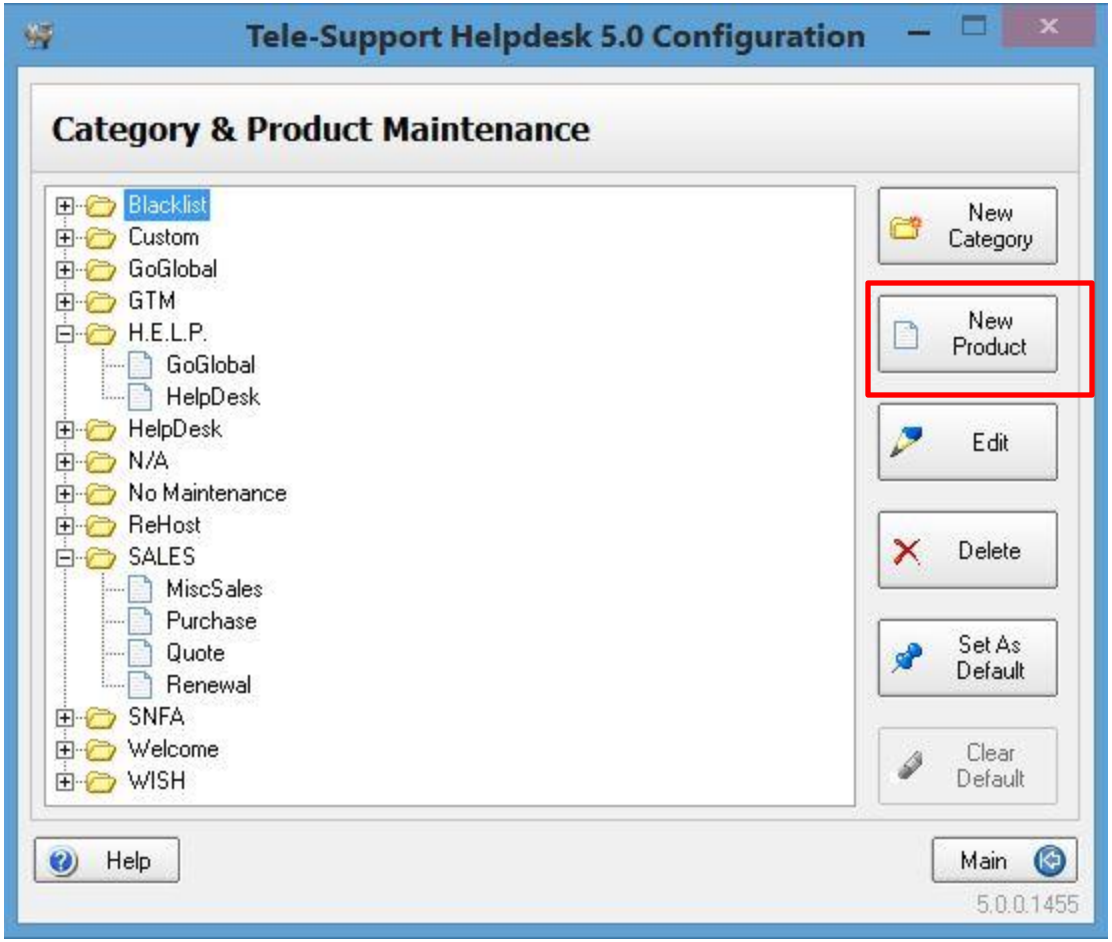
Every Product requires a Category. Start by creating your New Category.



Create a unique Category Name….
software, hardware, sale, support, printers, etc…

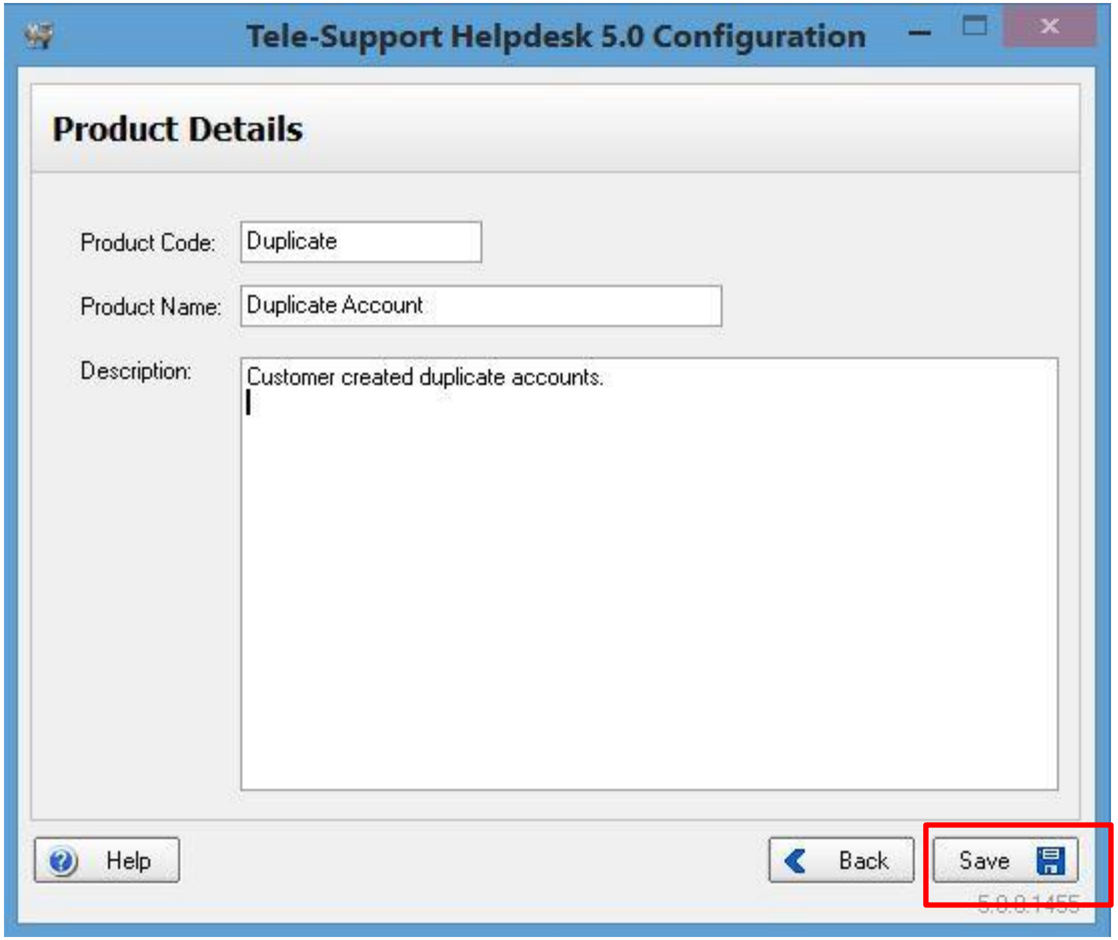


Next we will add a New Product. Select the Category you wish to add products.

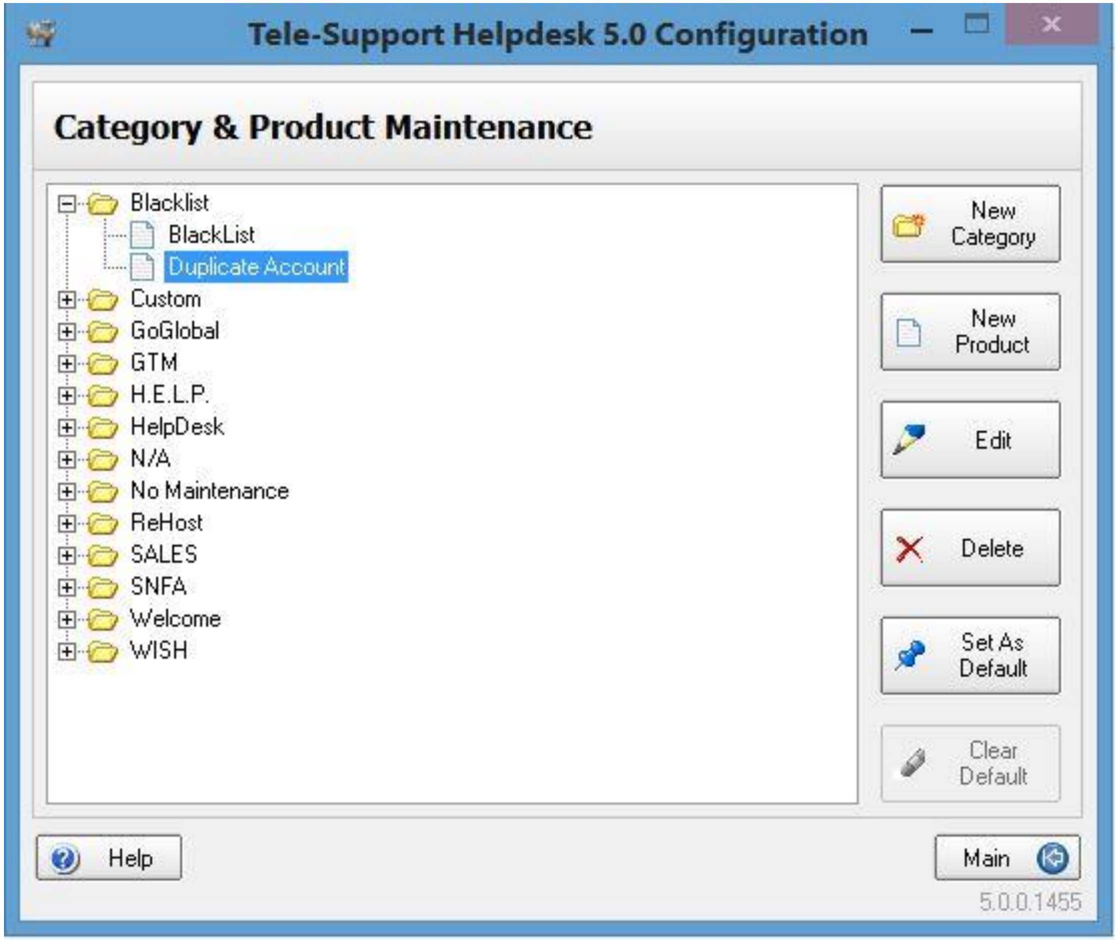


Create a unique Product Code. Product Name and Description.

Description is optional.

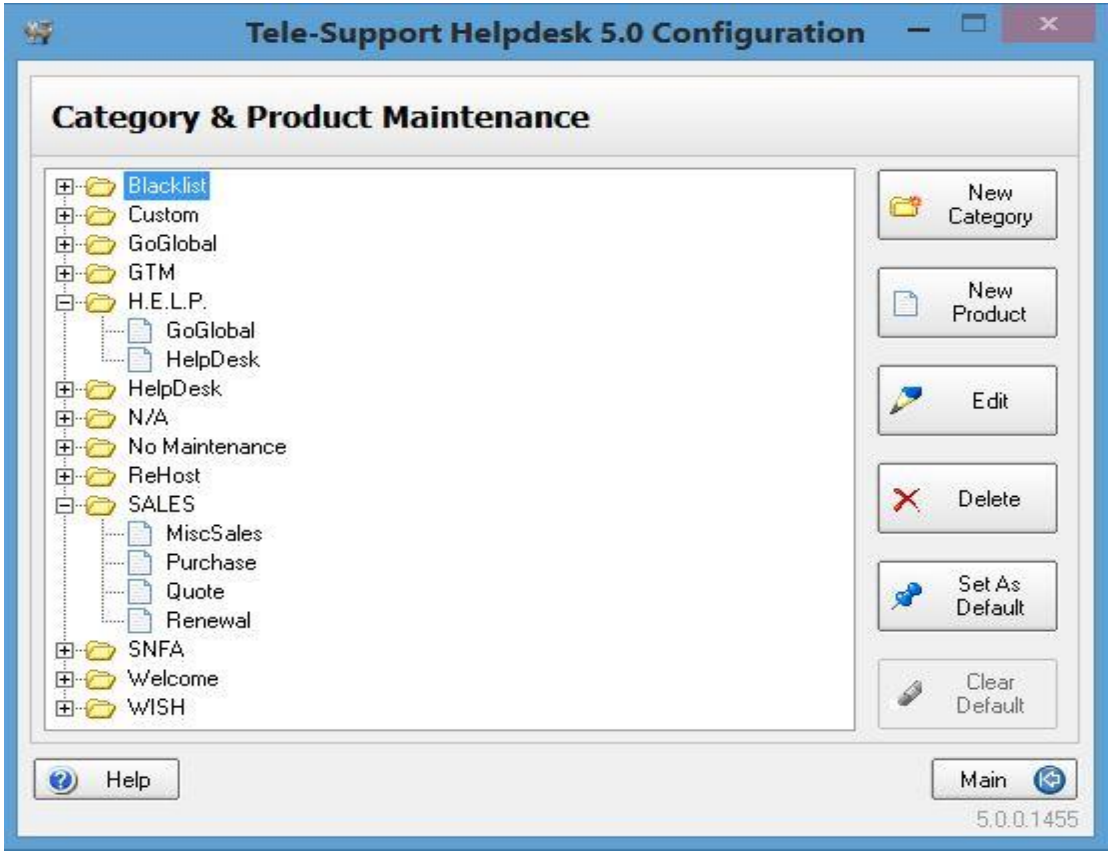


Now that we created our new Product, it displays on the tree view for the Category we had selected.



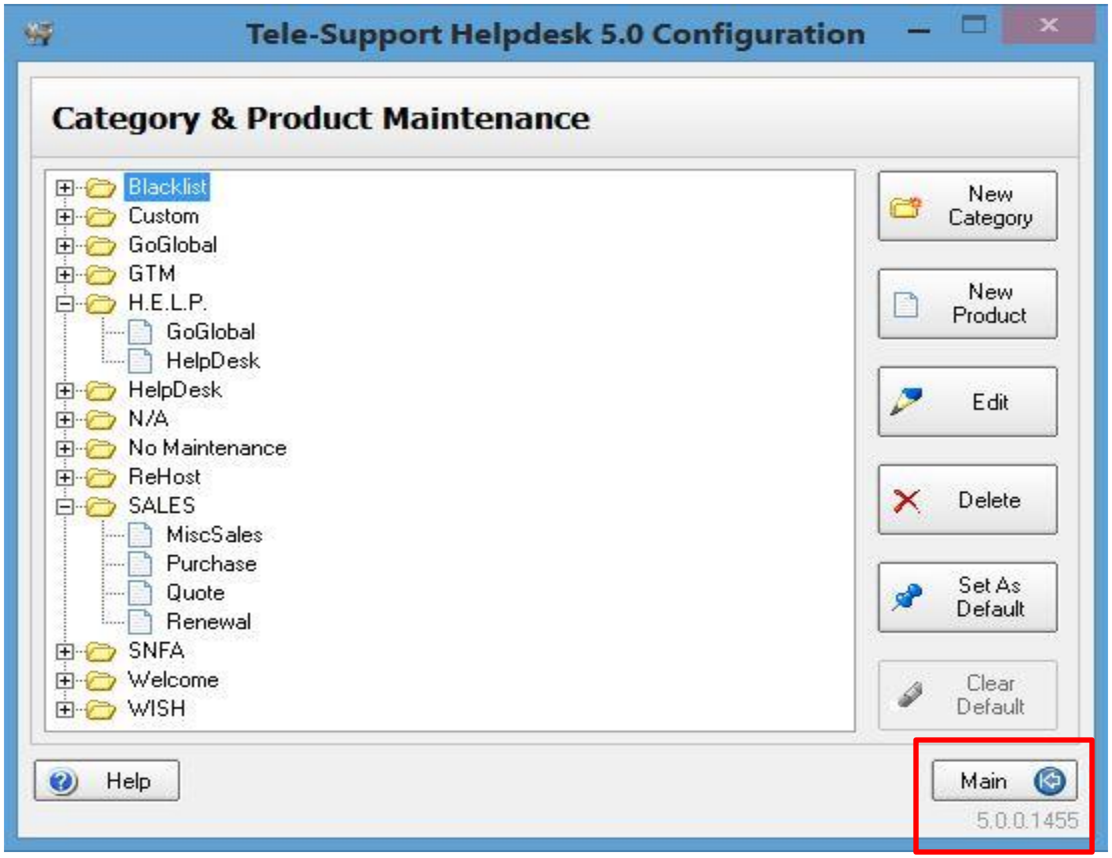
You can EDIT any Category or Product if needed. Changes will automatically update any inquiry, hot tip or known issue once you exit Configuration and restart your HelpDesk client.

TIP: If you have created custom reports remember to update if you are pulling for a specific 'name'



You can Delete a Product or Category. Must delete all 'Products' first. If your Product is linked to an Inquiry, Hot Tip or Known Issue, you must first choose a DEFAULT Category and Product to reassign the item.

TIP: ; Category and Product can not be blank. If you do not want a Category or Product, add a Category NONE and a Product NONE.



TIP: Set Default is optional. Best Used when your have one item that is most used.

Click MAIN to save and return to the main menu.

See how easy it is to add Categories and Products!

Full details and instructions in your HDADMIN5 guide – Chapter 8