



# 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 **USERS & DEPARTMENTS**.



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.

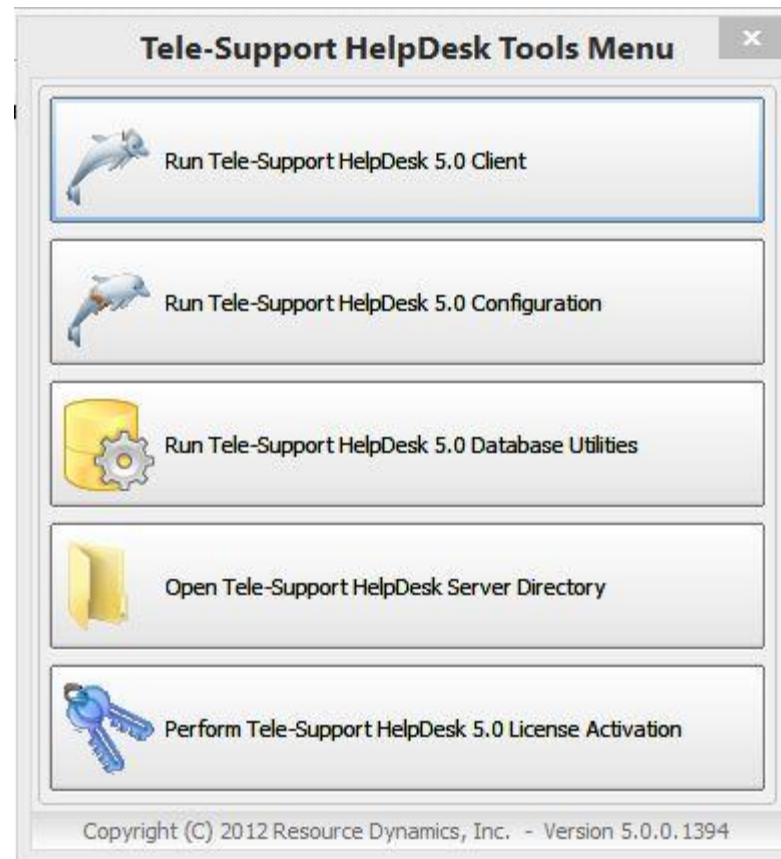
Once installed you will see a short-cut on your desktop called HDTools5. This is a quick access tool.



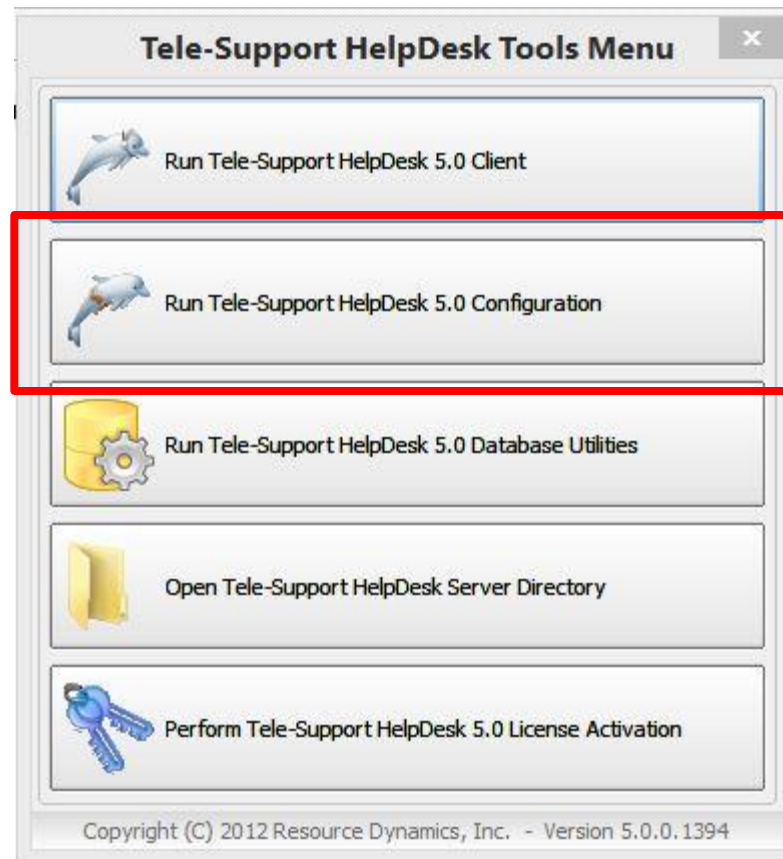
You can also access configuration from your main \server folder



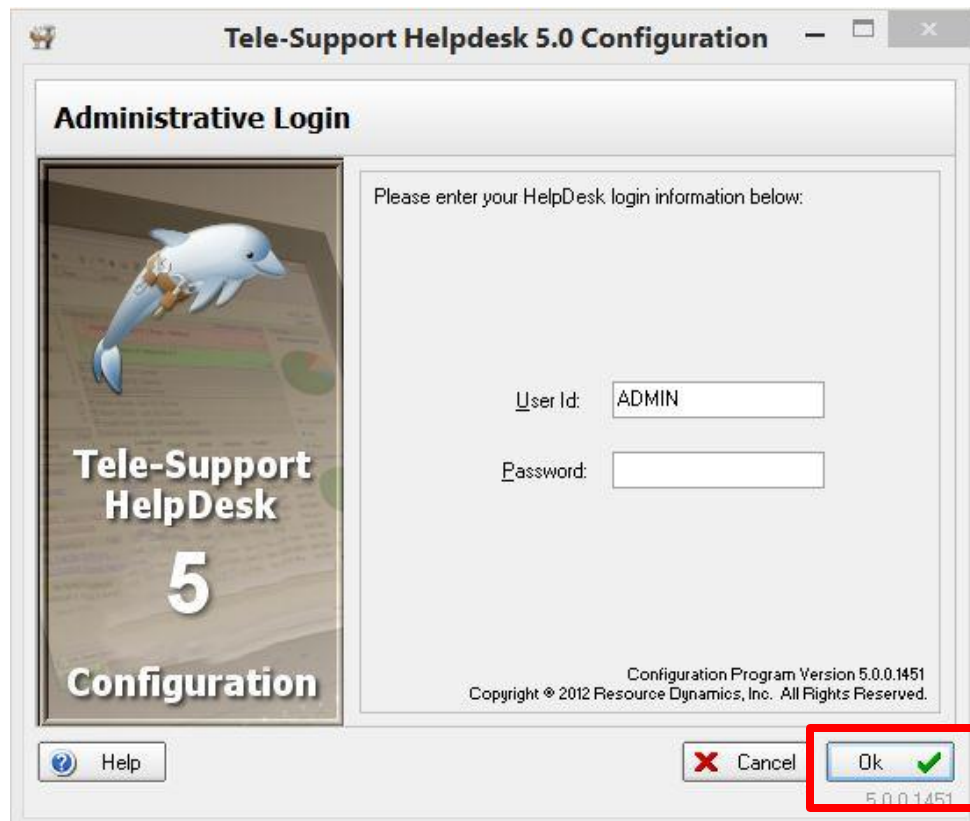
When you open the HDTools5 you will see these menu options.....



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



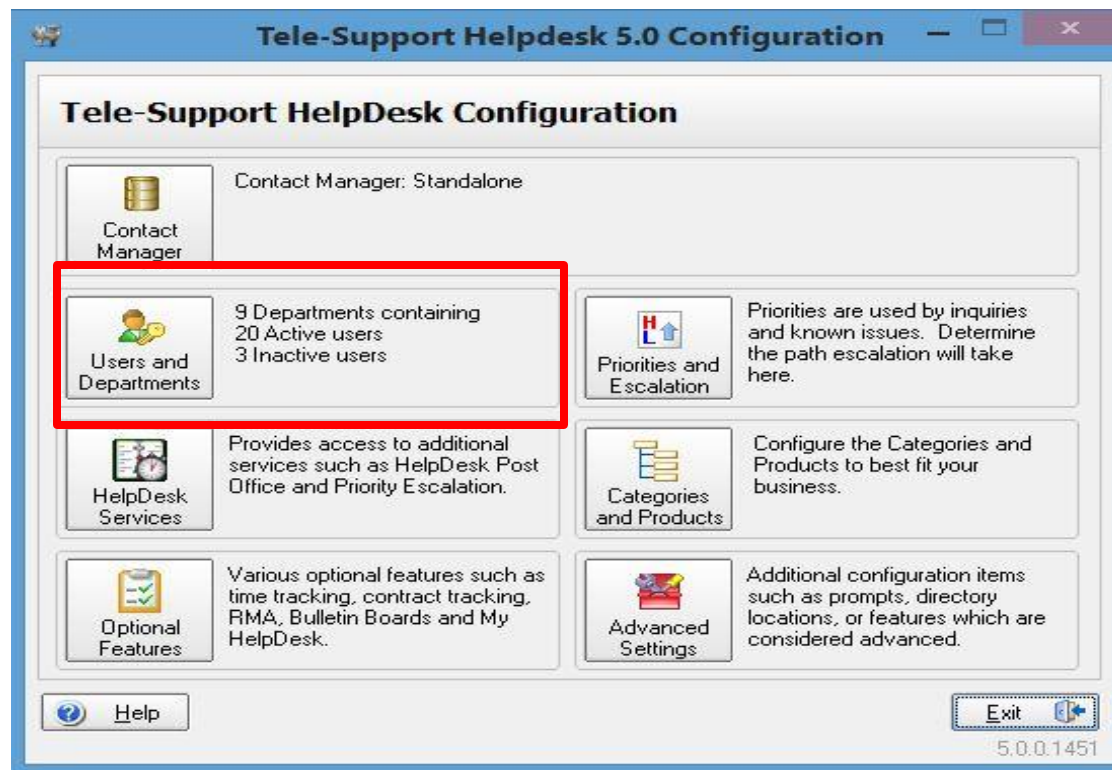
Only Users with Supervisor rights will have access to Configuration. We include one User ID: ADMIN no password. Click OK.



The screenshot shows a dialog box titled "Tele-Support Helpdesk 5.0 Configuration". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. The main content area is titled "Administrative Login" and contains a graphic on the left with a dolphin and the text "Tele-Support HelpDesk 5 Configuration". To the right of the graphic, there is a text prompt: "Please enter your HelpDesk login information below:". Below this prompt are two input fields: "User Id:" with the text "ADMIN" entered, and "Password:" which is empty. At the bottom of the dialog, there are three buttons: "Help" (with a question mark icon), "Cancel" (with a red X icon), and "Ok" (with a green checkmark icon). The "Ok" button is highlighted with a red rectangular box. At the very bottom of the dialog, there is small text: "Configuration Program Version 5.0.0.1451" and "Copyright © 2012 Resource Dynamics, Inc. All Rights Reserved.".



Users and Departments is where you will define who and what Users can do when they logon to their client. By default we include user ADMIN with no pw which you can edit (recommended) by adding a pw.

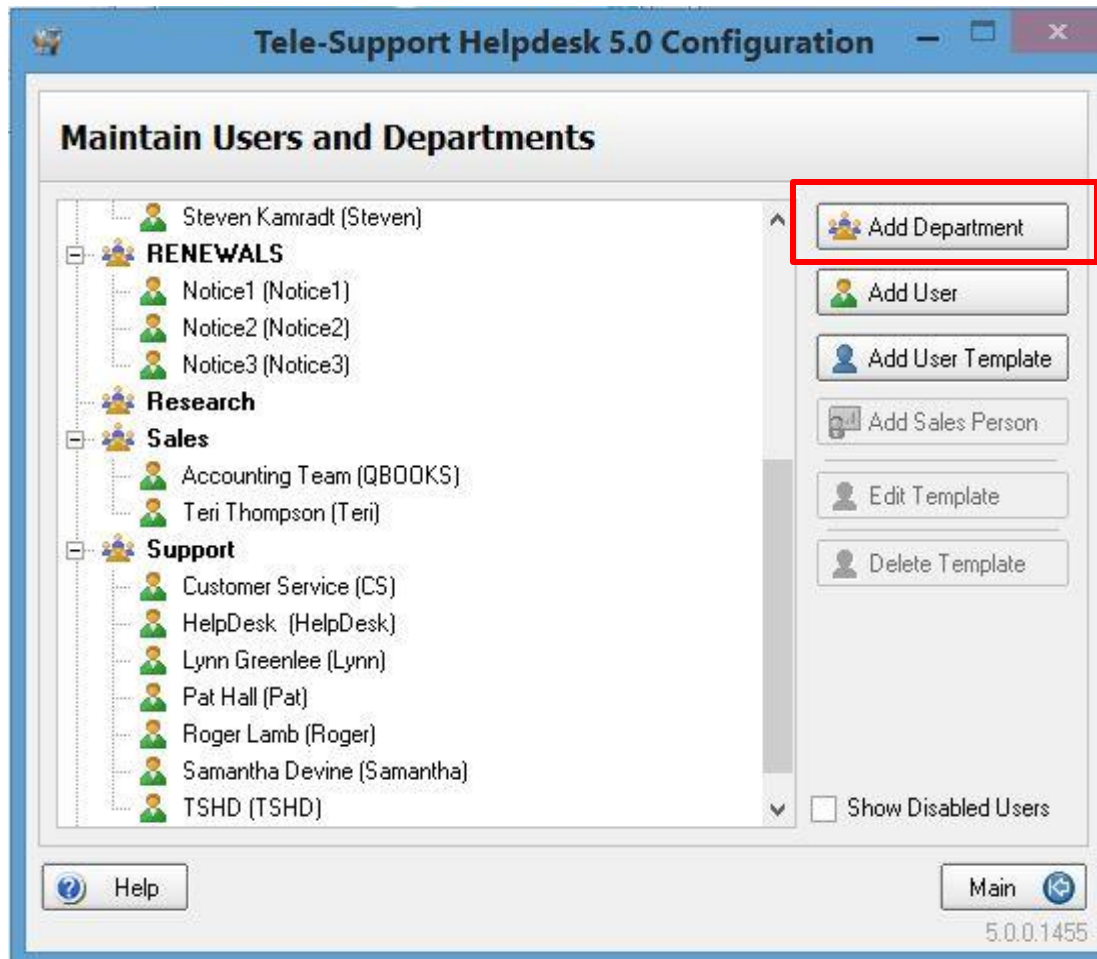


Full details with instructions included in the HDADMIN5 – Chapter 5





Once you add your Departments and Users, they will appear here. Every User requires a Department. Start with Add Department



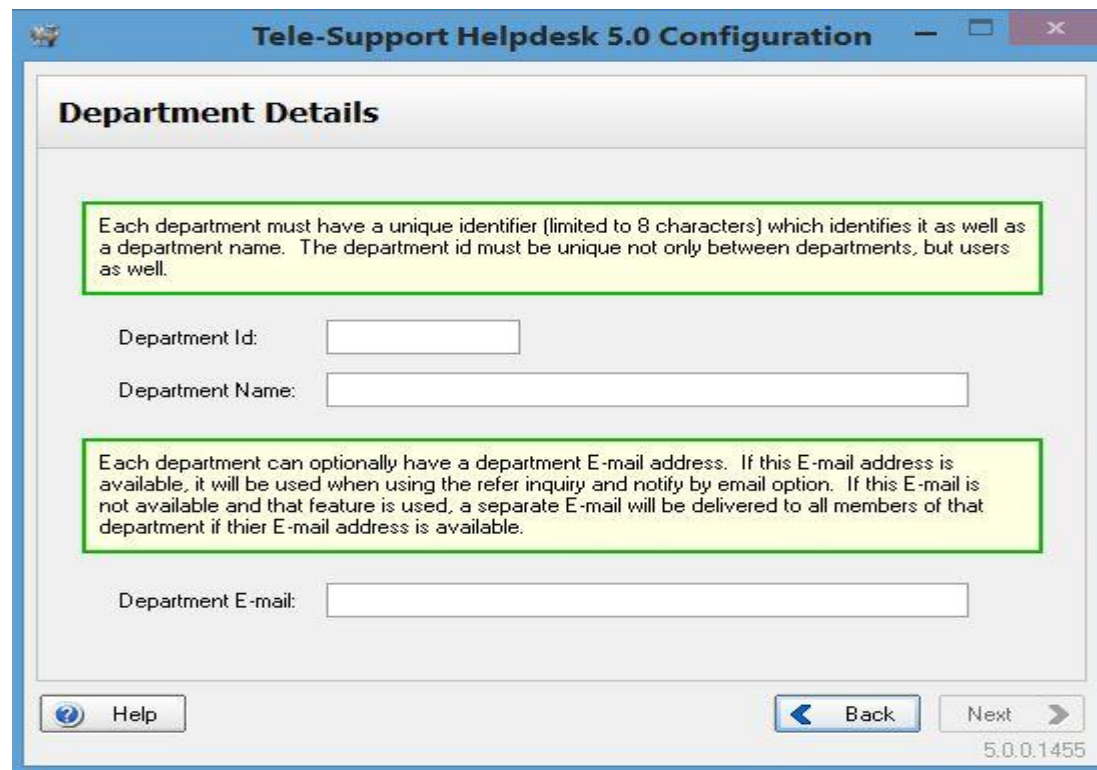
User Templates are great when you have a lot of Users with the same security.



Departments are unique. Users can be linked to one department.

Examples of Departments;

Sales, Administrators, Support, Gold Team, R&D, DEV, etc.)



The screenshot shows a configuration window titled "Tele-Support Helpdesk 5.0 Configuration". The main content area is titled "Department Details". It contains two informational boxes with green borders and yellow backgrounds. The first box explains that each department must have a unique identifier (8 characters) and a unique name. Below this are input fields for "Department Id" and "Department Name". The second box explains that a department can have an optional E-mail address, which will be used for inquiries and notifications. Below this is an input field for "Department E-mail". At the bottom of the window, there are "Help", "Back", and "Next" buttons, and the version number "5.0.0.1455" is displayed in the bottom right corner.

**Department Details**

Each department must have a unique identifier (limited to 8 characters) which identifies it as well as a department name. The department id must be unique not only between departments, but users as well.

Department Id:

Department Name:

Each department can optionally have a department E-mail address. If this E-mail address is available, it will be used when using the refer inquiry and notify by email option. If this E-mail is not available and that feature is used, a separate E-mail will be delivered to all members of that department if thier E-mail address is available.

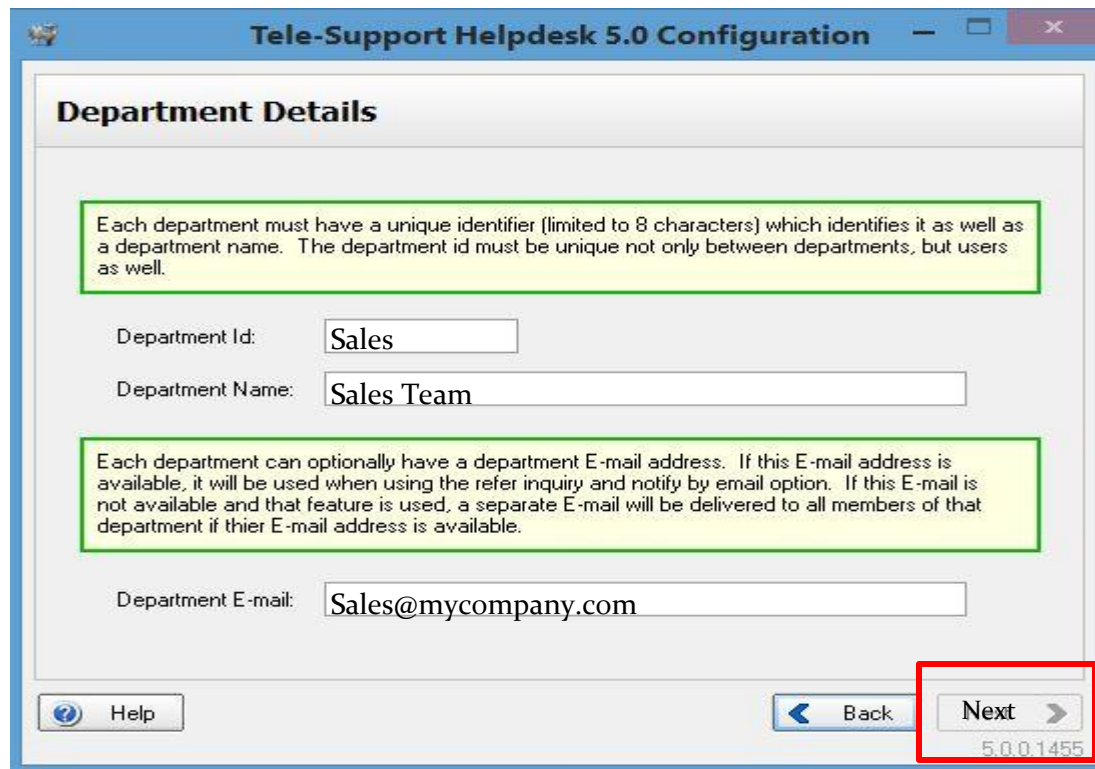
Department E-mail:

Help Back Next

5.0.0.1455



IDs are limited to 8 characters (we keep it simply)



The screenshot shows a configuration window titled "Tele-Support Helpdesk 5.0 Configuration". The main section is "Department Details". It contains two informational boxes with green borders and yellow backgrounds. The first box explains that each department must have a unique identifier (limited to 8 characters) which identifies it as well as a department name. The second box explains that each department can optionally have a department E-mail address, which will be used when using the refer inquiry and notify by email option. Below these boxes are three input fields: "Department Id:" with the value "Sales", "Department Name:" with the value "Sales Team", and "Department E-mail:" with the value "Sales@mycompany.com". At the bottom of the window, there are three buttons: "Help", "Back", and "Next". The "Next" button is highlighted with a red box. The version number "5.0.0.1455" is displayed at the bottom right of the window.

**Department Details**

Each department must have a unique identifier (limited to 8 characters) which identifies it as well as a department name. The department id must be unique not only between departments, but users as well.

Department Id:

Department Name:

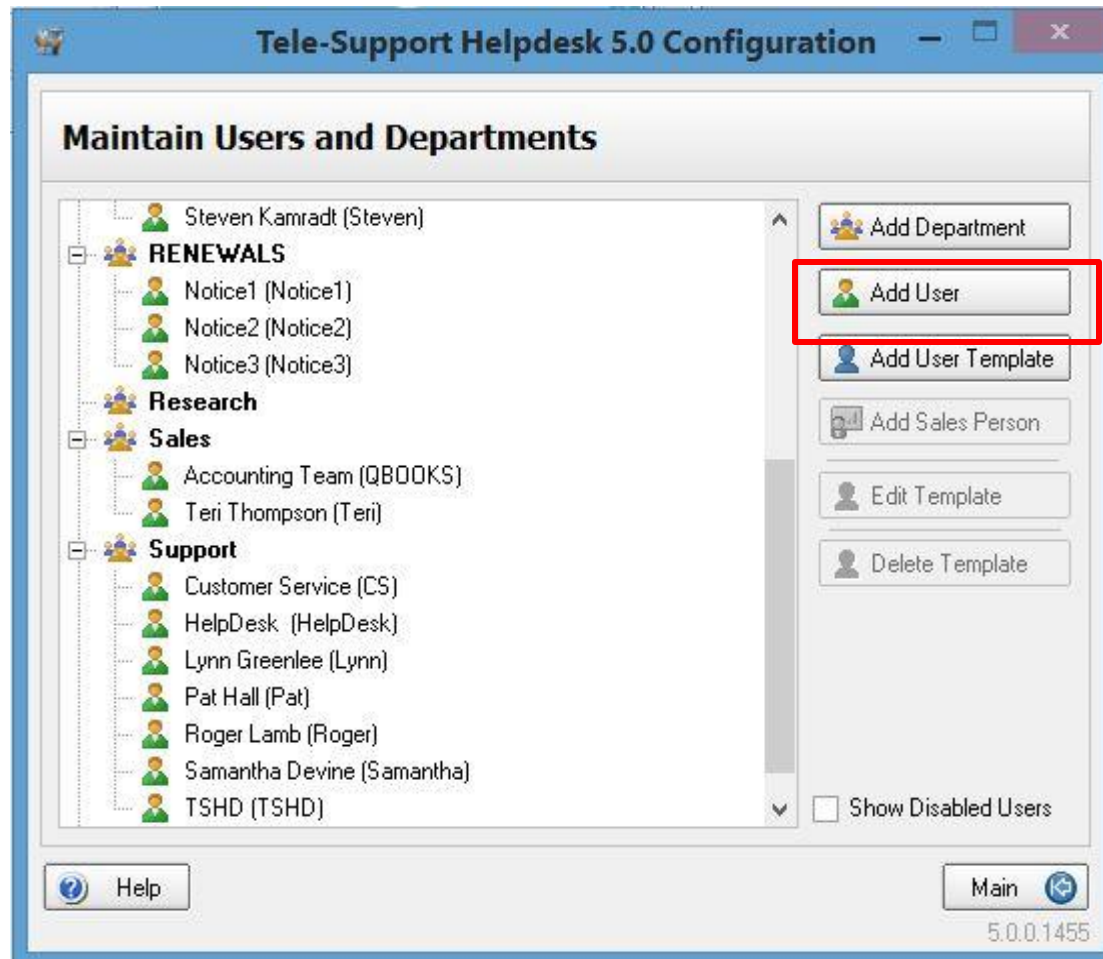
Each department can optionally have a department E-mail address. If this E-mail address is available, it will be used when using the refer inquiry and notify by email option. If this E-mail is not available and that feature is used, a separate E-mail will be delivered to all members of that department if their E-mail address is available.

Department E-mail:

5.0.0.1455



Now you can Add Users to your Department



User ID (max 8 characters). This is the User ID to logon to their local HelpDesk client.

The screenshot shows the 'Tele-Support Helpdesk 5.0 Configuration' window with the 'User Details' tab selected. The form is divided into three sections: 'General', 'Security Rights', and 'E-mail'. The 'General' section contains the following fields and options:

- User Id:** Text box containing 'SusanT'.
- Full Name:** Text box containing 'Susan Tempelton'.
- Supervisor:** A checked checkbox.
- Change Password:** A button.
- Profile:**
  - Department:** A dropdown menu with 'Support' selected.
  - Title:** An empty text box.
  - Extension:** An empty text box.
- Contact Manager Connection:**
  - Contact Manager User Id:** An empty text box.
  - Contact Manager Password:** An empty text box.
  - Test Contact Manager Connection:** A button.
- Active User:** A checked checkbox.

At the bottom of the window, there are buttons for 'Help', 'Back', and 'Save', along with the version number '5.0.0.1451'.

Every User has to be assigned to a department

Title and Extension are optional and ONLY display here.

See our online Knowledgebase TIP0000030 To see list of special rights that Users with the Supervisor option enabled will have through out HelpDesk.



When configured to ACT!, you must enter the Users ACT! logon details here and test connection.

The screenshot shows the 'Tele-Support Helpdesk 5.0 Configuration' window with the 'User Details' tab selected. The 'General' sub-tab is active, showing fields for 'User Id' (SusanT), 'Full Name' (Susan Tempelton), and a 'Supervisor' checkbox (checked). The 'Contact Manager Connection' section is highlighted with a red box and contains the following fields: 'Contact Manager User Id' (Susan Tempelton), 'Contact Manager Password' (XXXXXXXXXX), and a 'Test Contact Manager Connection' button. The 'Active User' checkbox is also checked. The window includes a 'Help' button, a 'Back' button, and a 'Save' button. The version number '5.0.0.1451' is displayed in the bottom right corner.

TIP: When connecting to ACT!, you must have ACT! client installed first before you can install and run HelpDesk client.

HelpDesk does two logons, first to HelpDesk using the User ID and then to ACT! Using this logon.

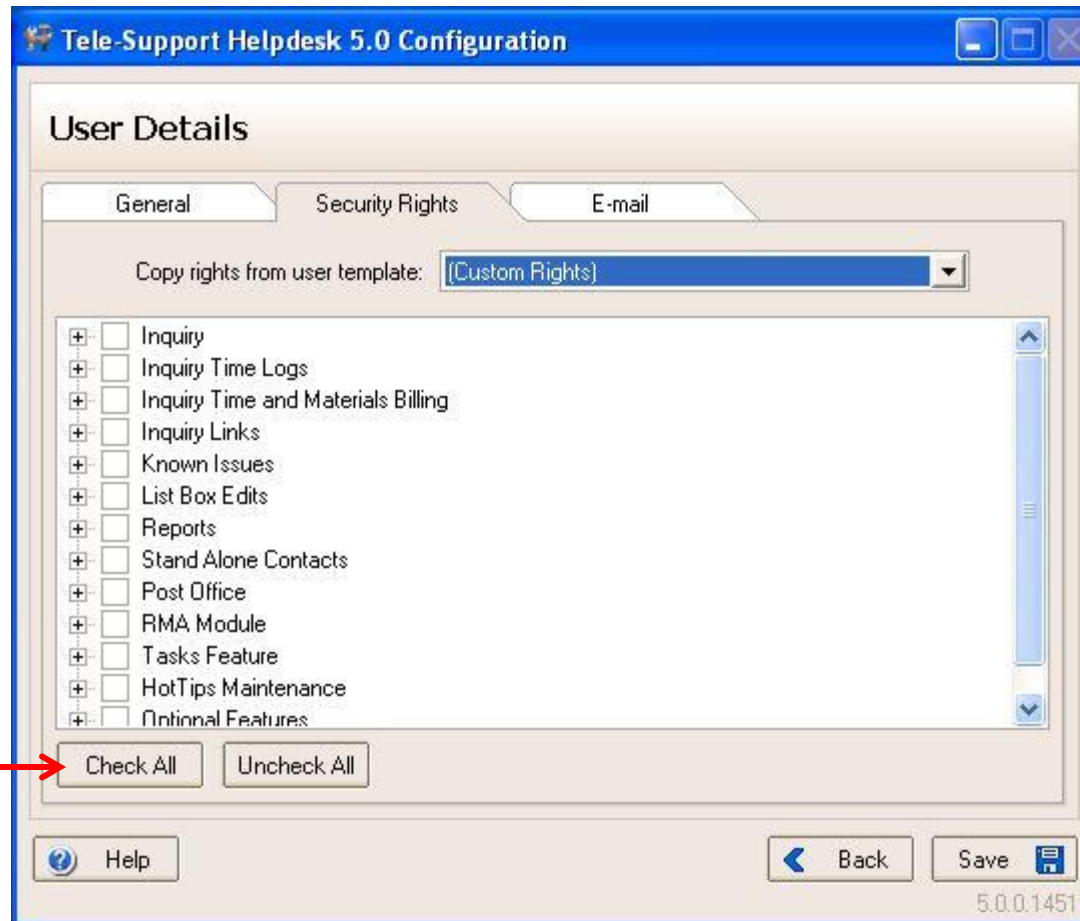


Active User is enabled by default. You can uncheck and make the User inactive if the User is no longer part of your HelpDesk. Users can also be deleted if they are not linked to any inquiries, hot tips or known issues.

The screenshot shows the 'Tele-Support Helpdesk 5.0 Configuration' window with the 'User Details' tab selected. The 'General' sub-tab is active, showing fields for 'User Id' (SusanT), 'Full Name' (Susan Tempelton), and a checked 'Supervisor' checkbox. The 'Profile' section includes a 'Department' dropdown set to 'Support', and empty fields for 'Title' and 'Extension'. The 'Contact Manager Connection' section has 'Contact Manager User Id' (Susan Tempelton) and 'Contact Manager Password' (XXXXXXXXXX) fields, along with a 'Test Contact Manager Connection' button. At the bottom right, the 'Active User' checkbox is checked and highlighted with a red box. Navigation buttons for 'Help', 'Back', and 'Save' are at the bottom, with the version number '5.0.0.1451' in the bottom right corner.



Every User requires one or more Security Rights. Expand tree next to topic to see specific rights available. For “Supervisor” User(s) recommend ‘check all’.

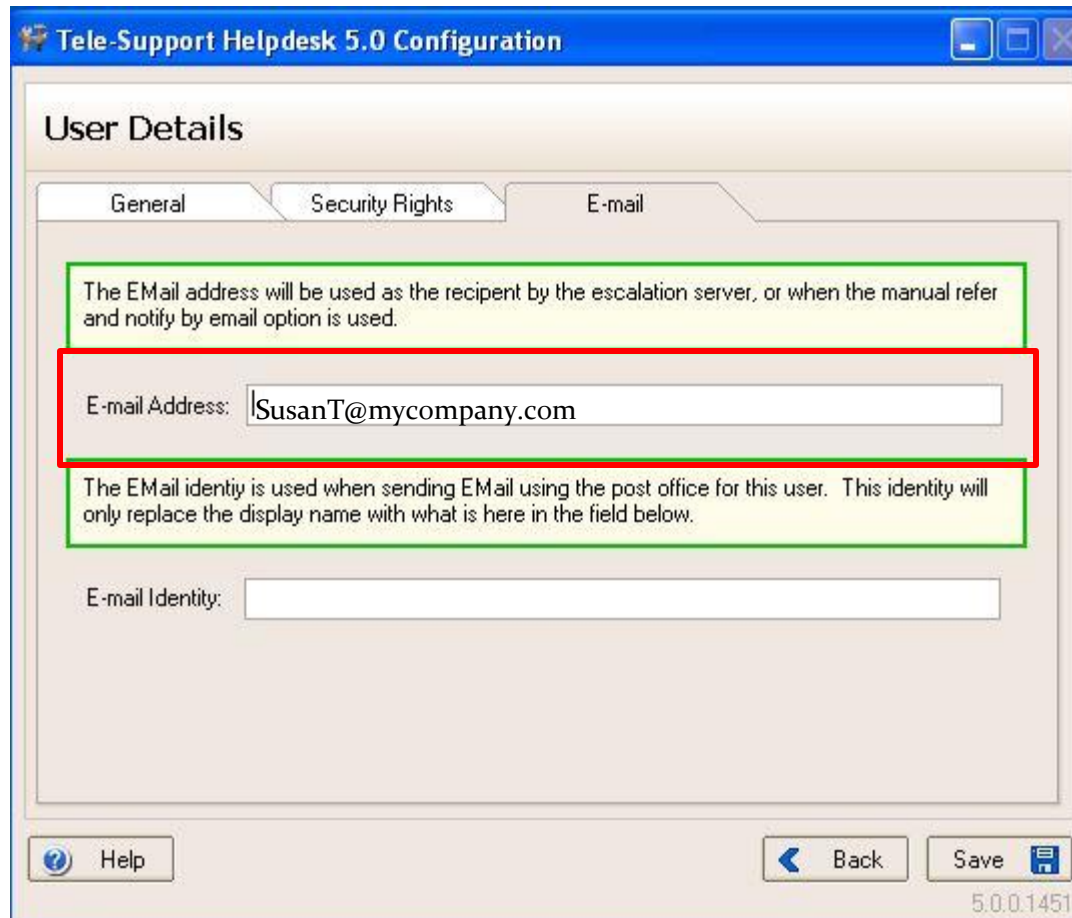


Custom Rights means you select each right as needed. If your User(s) have all rights, use the ‘Check All’ button





The Email address is the 'Users' email for notifications within HelpDesk such as when inquiries are referred and sending email to a User that is not associated with an inquiry.



The screenshot shows a window titled "Tele-Support Helpdesk 5.0 Configuration" with a "User Details" tab selected. The "E-mail" sub-tab is active. A red box highlights the "E-mail Address" field, which contains the text "SusanT@mycompany.com". A green box highlights the explanatory text above and below the field. The text above the field states: "The EMail address will be used as the recipient by the escalation server, or when the manual refer and notify by email option is used." The text below the field states: "The EMail identity is used when sending EMail using the post office for this user. This identity will only replace the display name with what is here in the field below." Below this is an empty "E-mail Identity" field. At the bottom of the window, there are buttons for "Help", "Back", and "Save", and the version number "5.0.0.1451" is displayed in the bottom right corner.



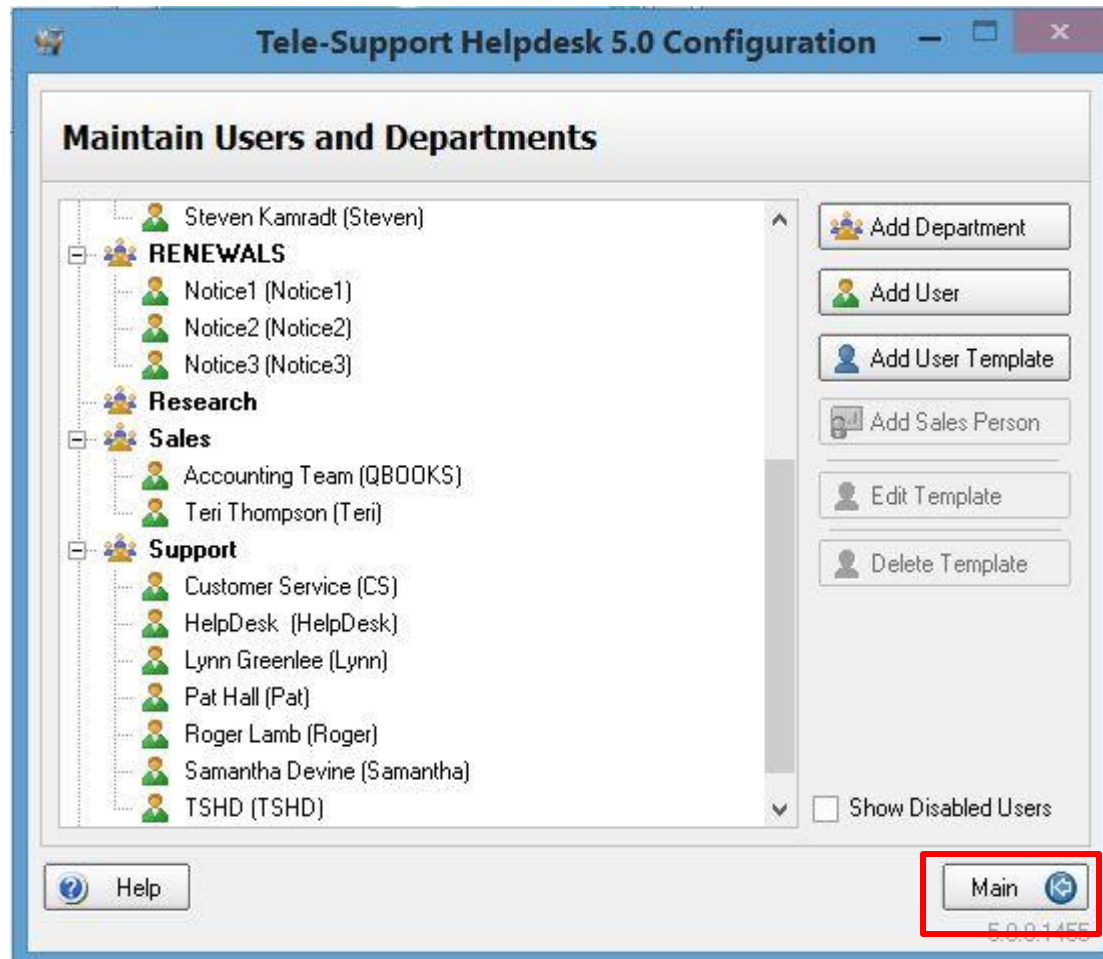
When using the built in Post Office (Email feature) This replaces the display name only, not the email address.

The screenshot shows the 'User Details' configuration window for 'Tele-Support Helpdesk 5.0'. The 'E-mail' tab is selected. A green box highlights the explanatory text: 'The EMail address will be used as the recipient by the escalation server, or when the manual refer and notify by email option is used.' Below this, the 'E-mail Address' field contains 'SusanT@mycompany.com'. Another green box highlights the text: 'The EMail identity is used when sending EMail using the post office for this user. This identity will only replace the display name with what is here in the field below.' The 'E-mail Identity' field, which contains 'Support Team', is highlighted with a red box. At the bottom, a preview shows: 'The 'FROM' on the receiving end will look like this: Support Team <HelpDesk@mycompany.com>'. The 'Save' button is highlighted with a red box.

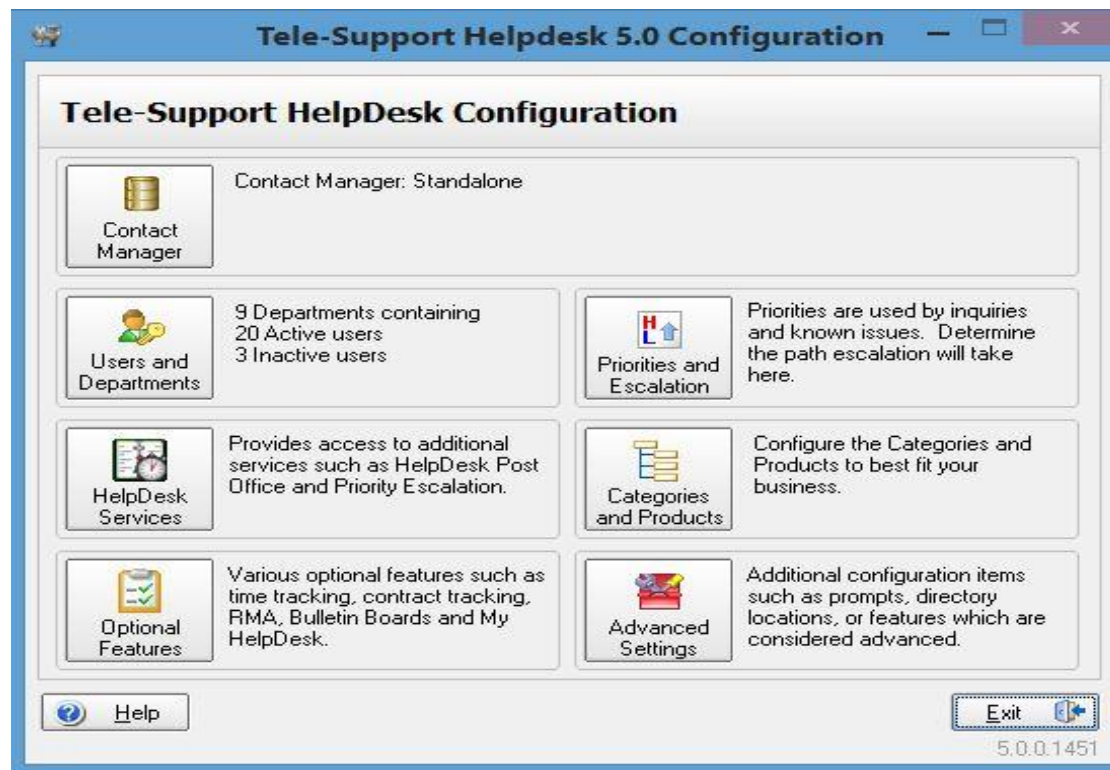
Click SAVE when you are done with User Details.



Once you are done with adding departments and users, return to the main menu.



Once you finish adding your Users and Departments, you will return to the main menu. Here you can move onto another section or exit.



Full details with instructions included in the HDADMIN5 – Chapter 5

