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….

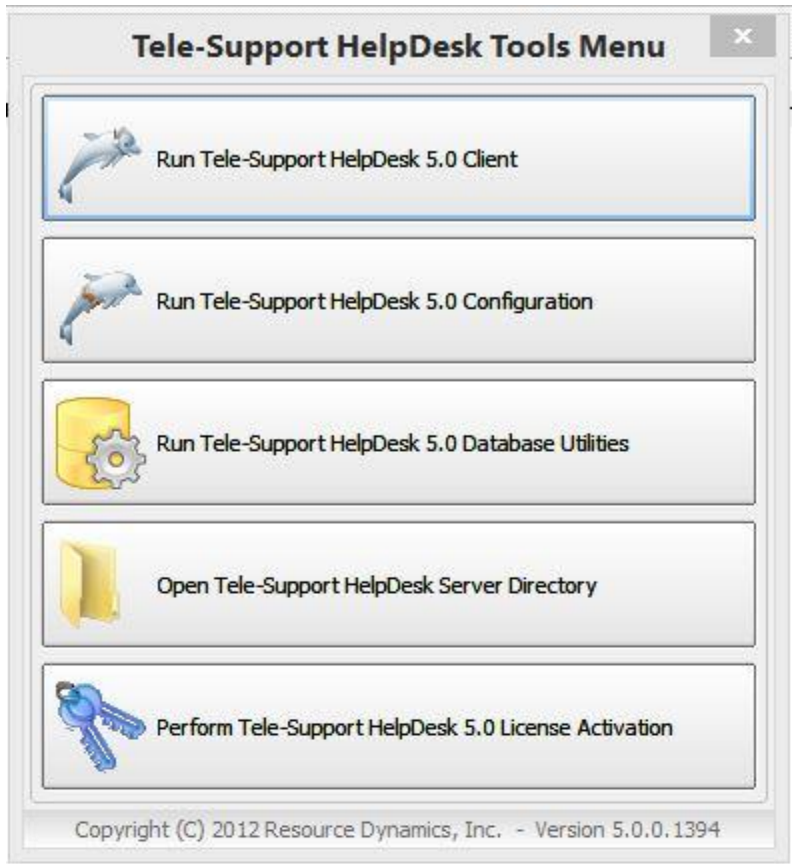
Once you install Tele-Support HelpDesk, you will have everything you need to get started with the trial version and we are here to assist you if needed.

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.

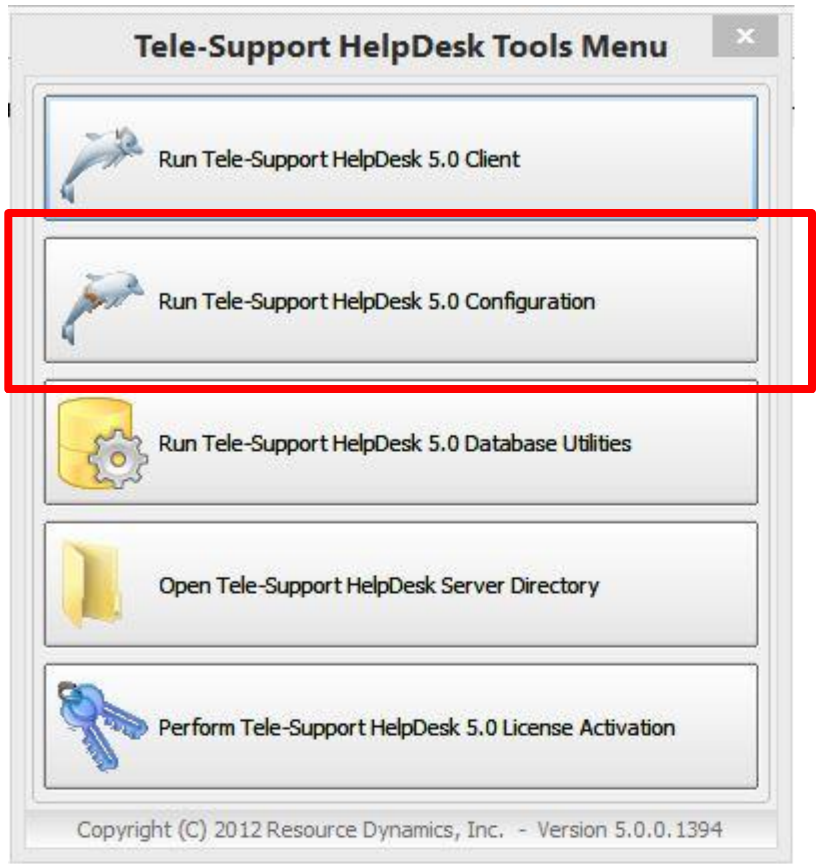
Once installed you will see a short-cut on your desktop called HDTools5. This is a quick access tool.

You can also access configuration from your main \server folder

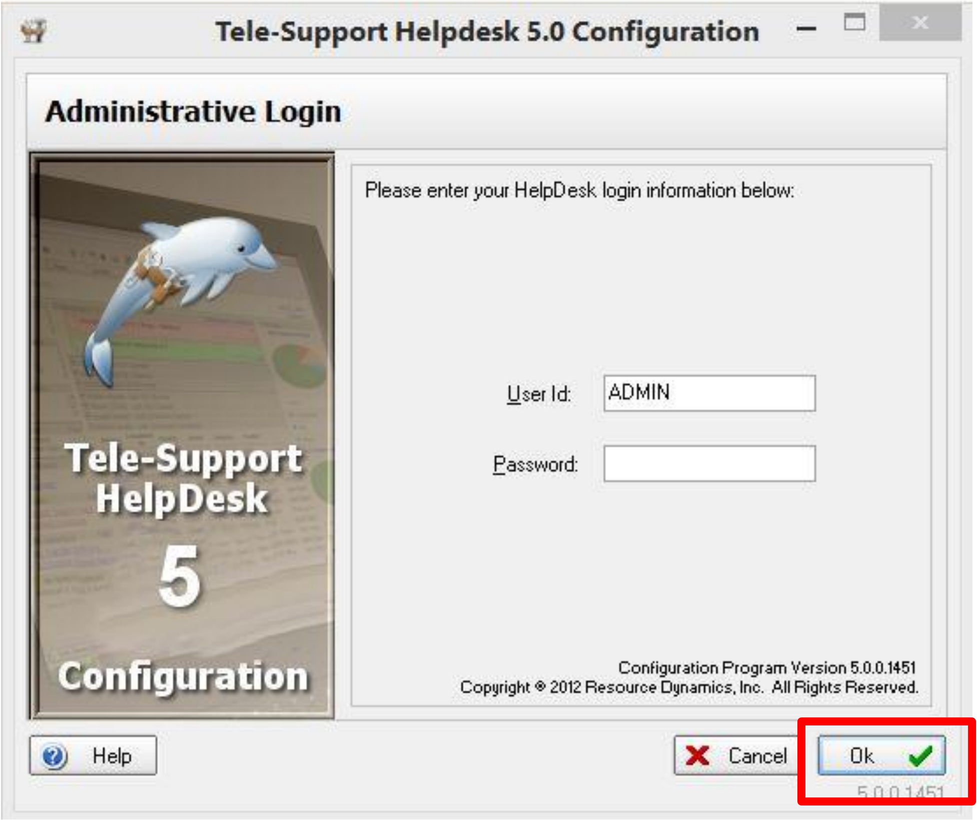
When you open the HDTools5 you will see these menu options……



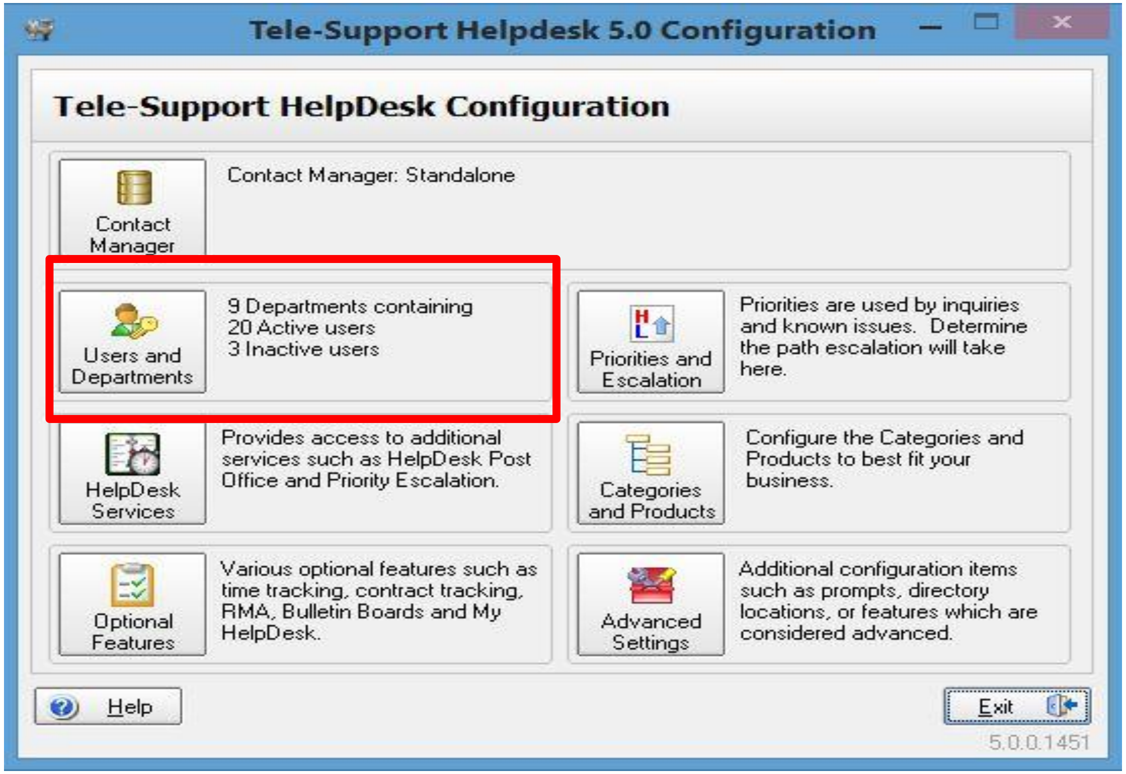
First you want to launch and go through the basic contact manager by selecting CONFIGURATION.



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

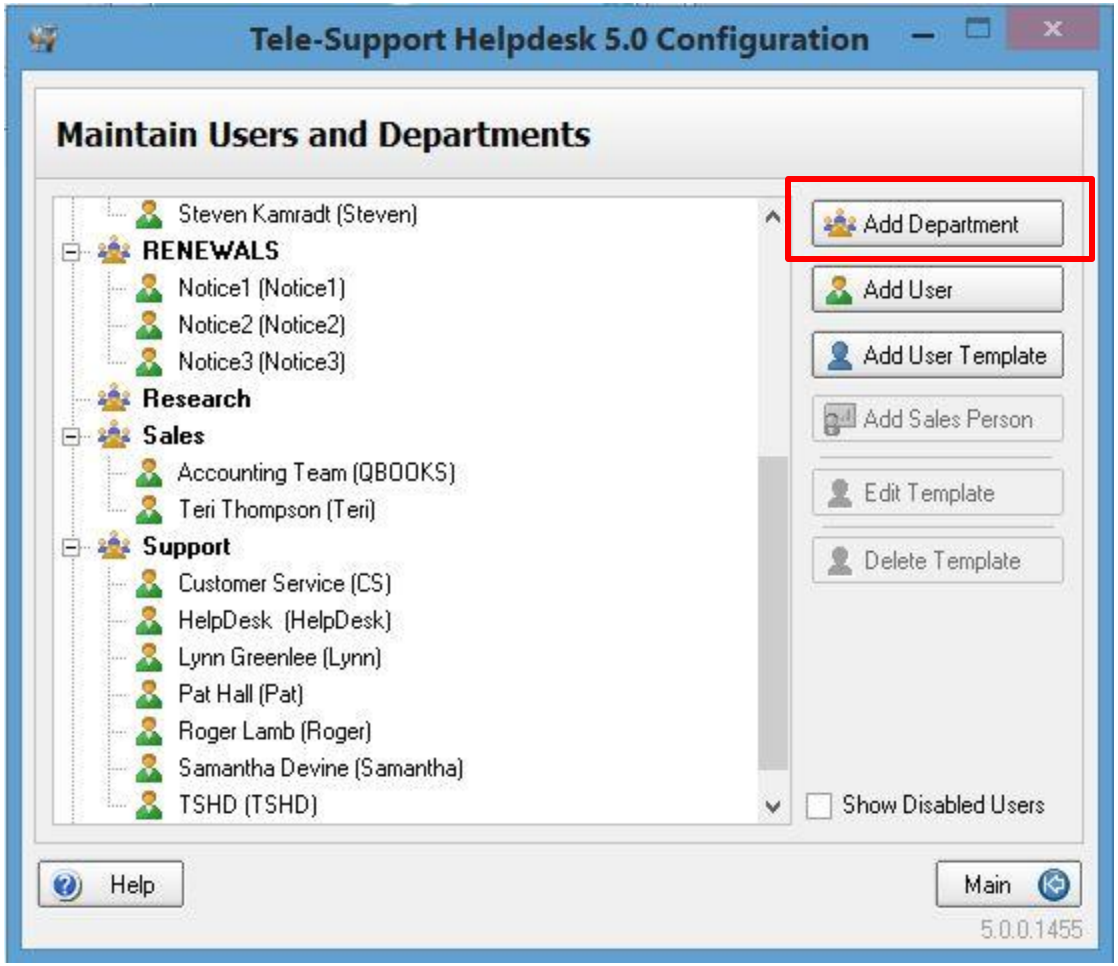


Users and Departments is where you will define who and what Users can do when they logon to their client. By default we include user ADMIN with no pw which you can edit (recommended) by adding a pw.



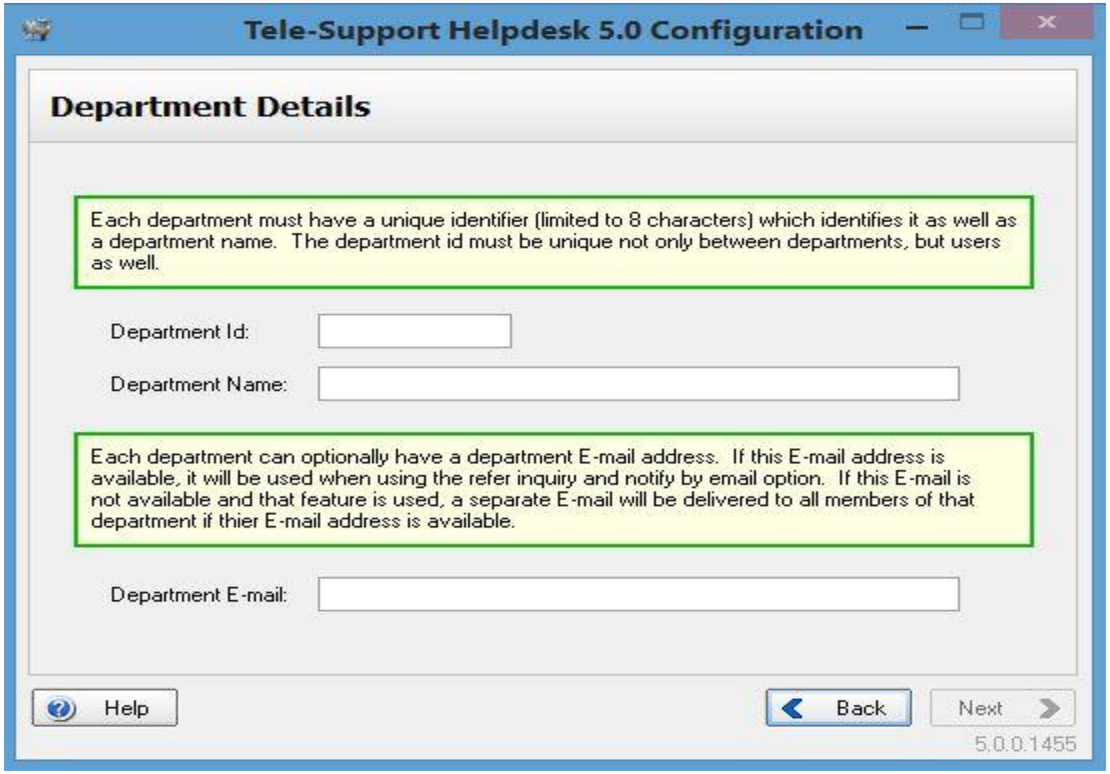
Full details with instructions included in the HDADMIN5 – Chapter 5

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

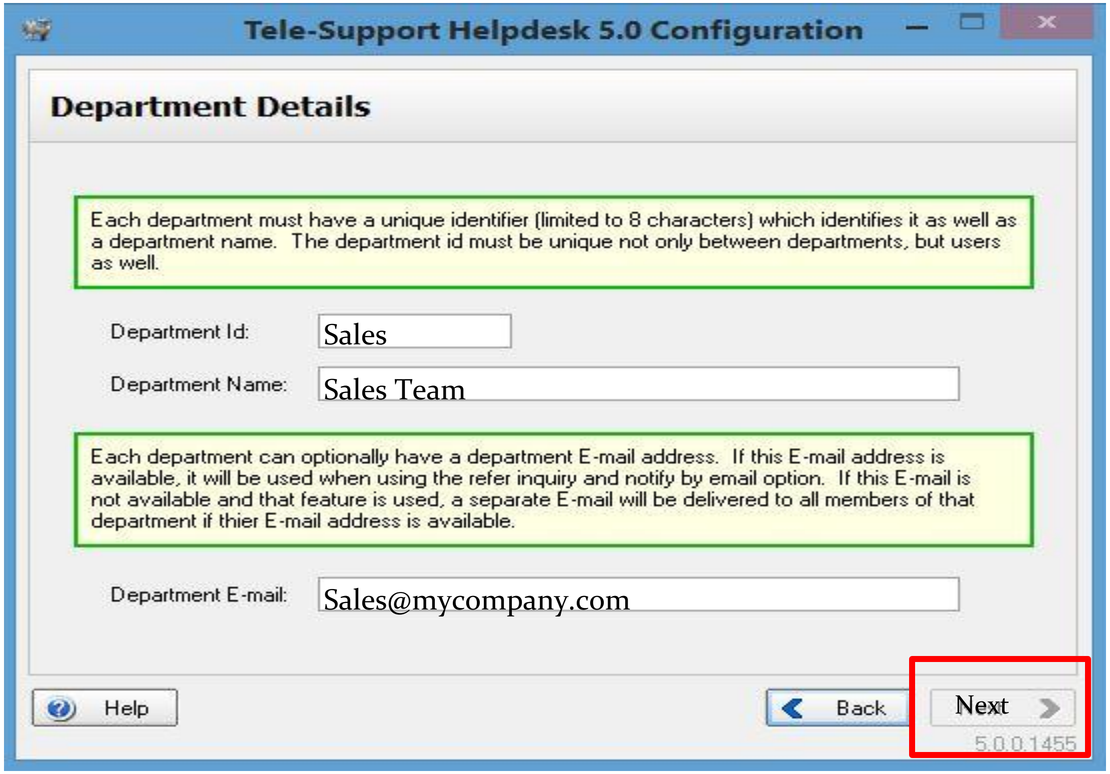


User Templates are great when you have a lot of Users with the same security.

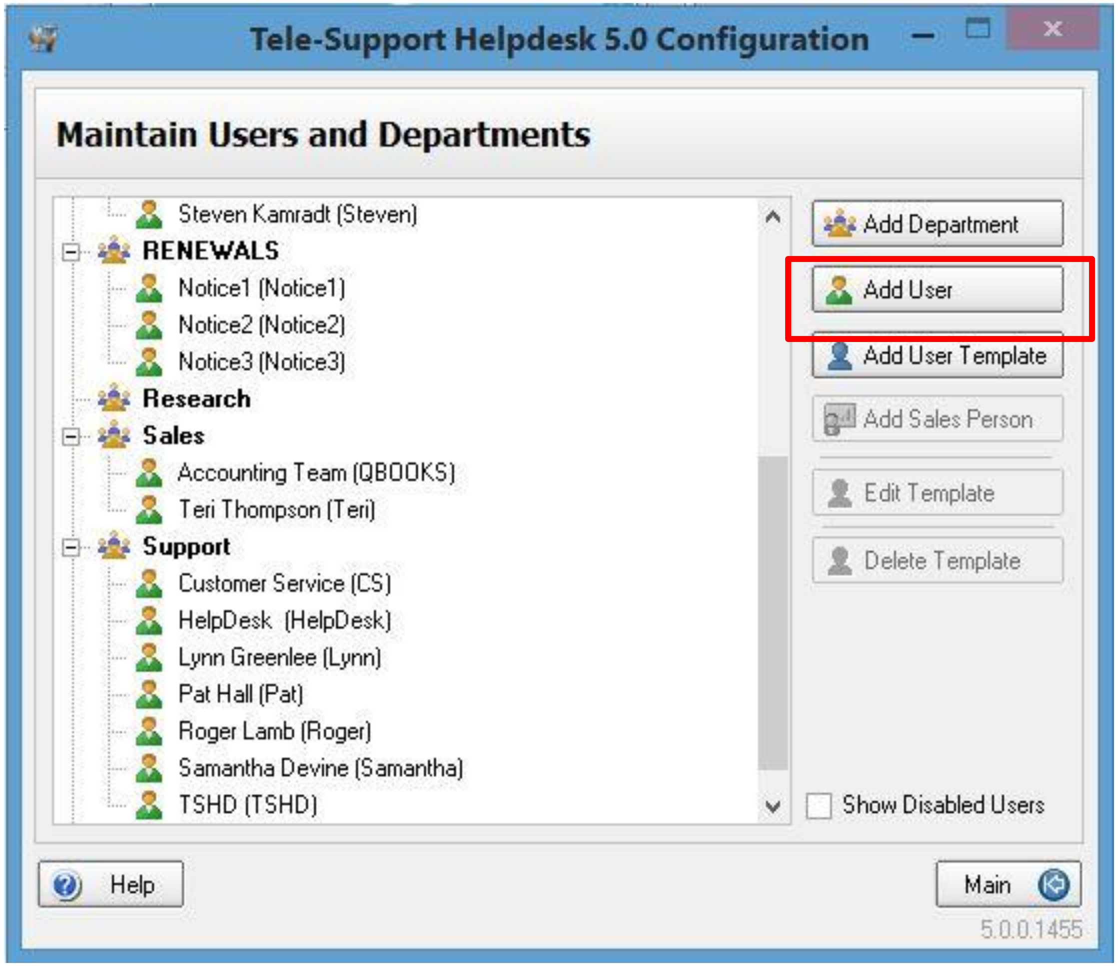
Departments are unique. Users can be linked to one department.
Examples of Departments;
Sales, Administrators, Support, Gold Team, R&D, DEV, etc.)



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



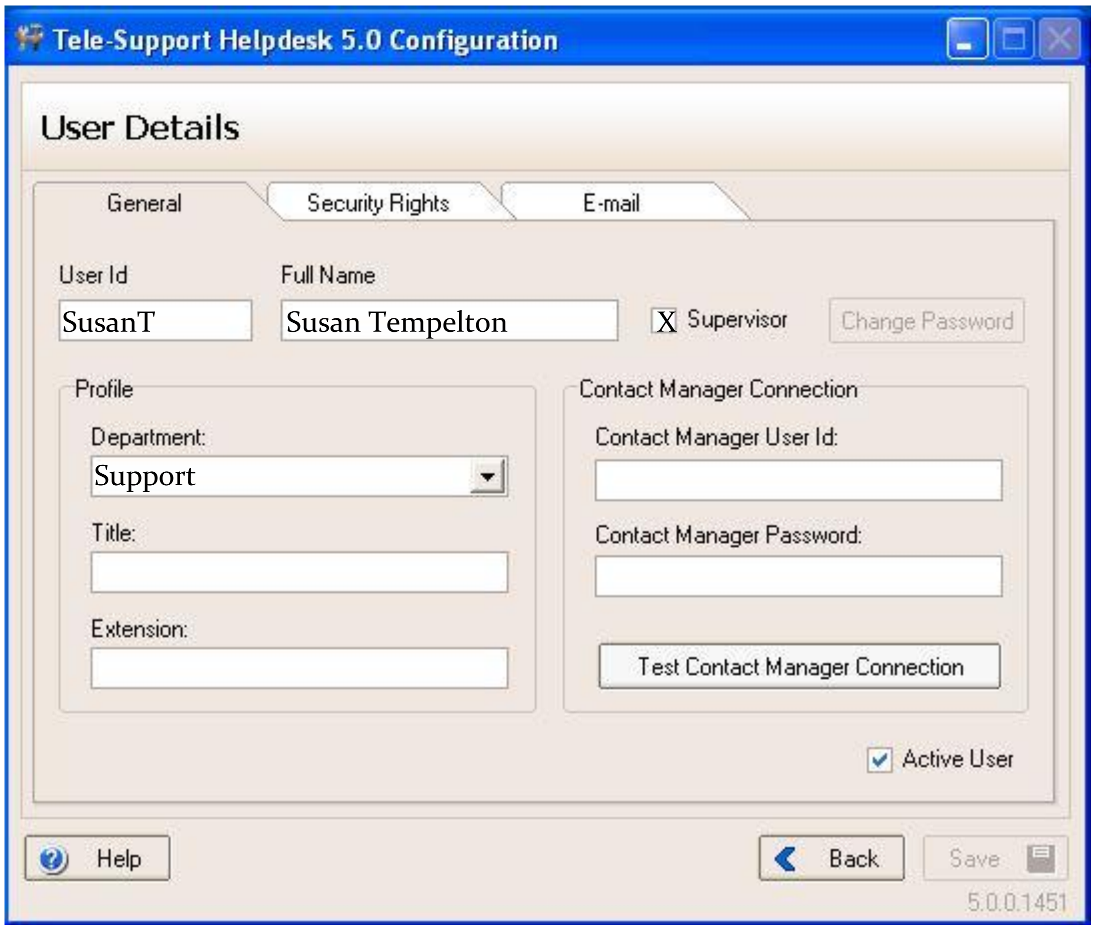
Now you can Add Users to your Department



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

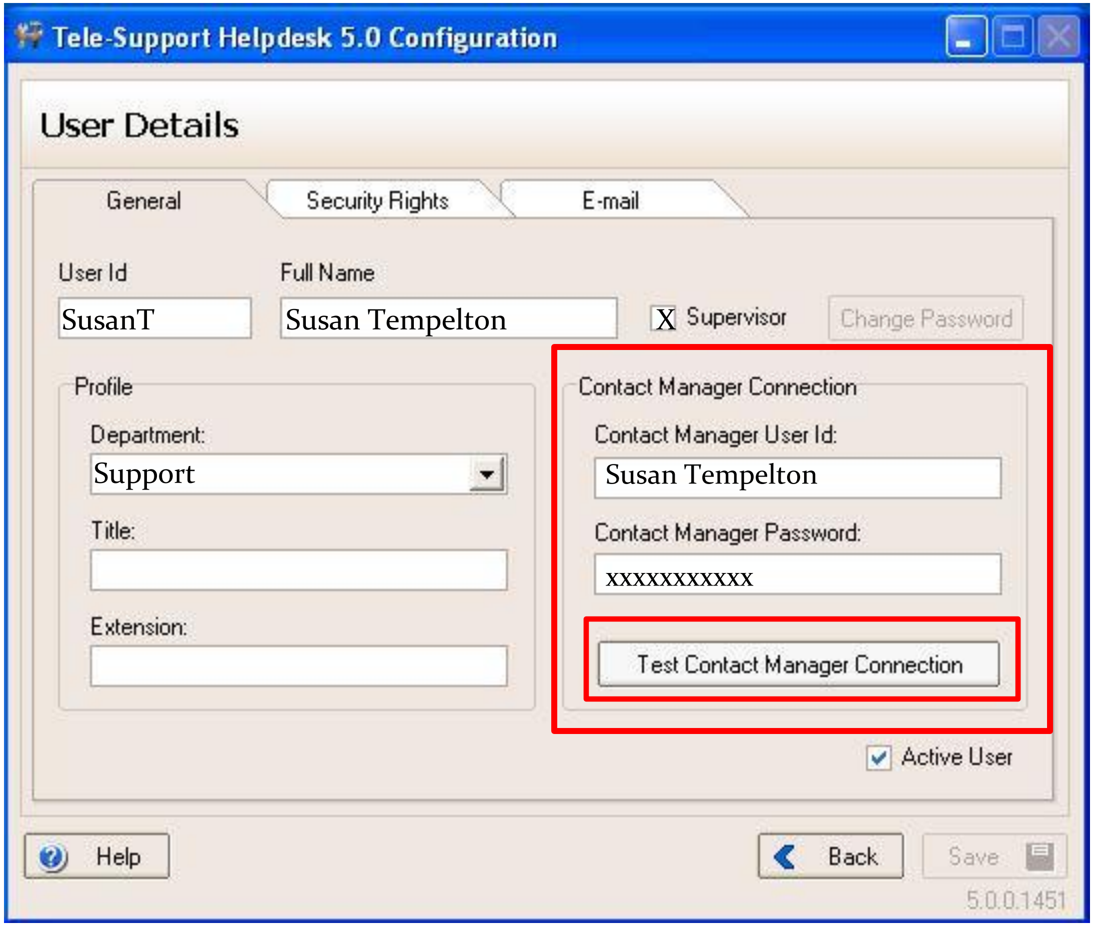
Every User has to be assigned to a department

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.

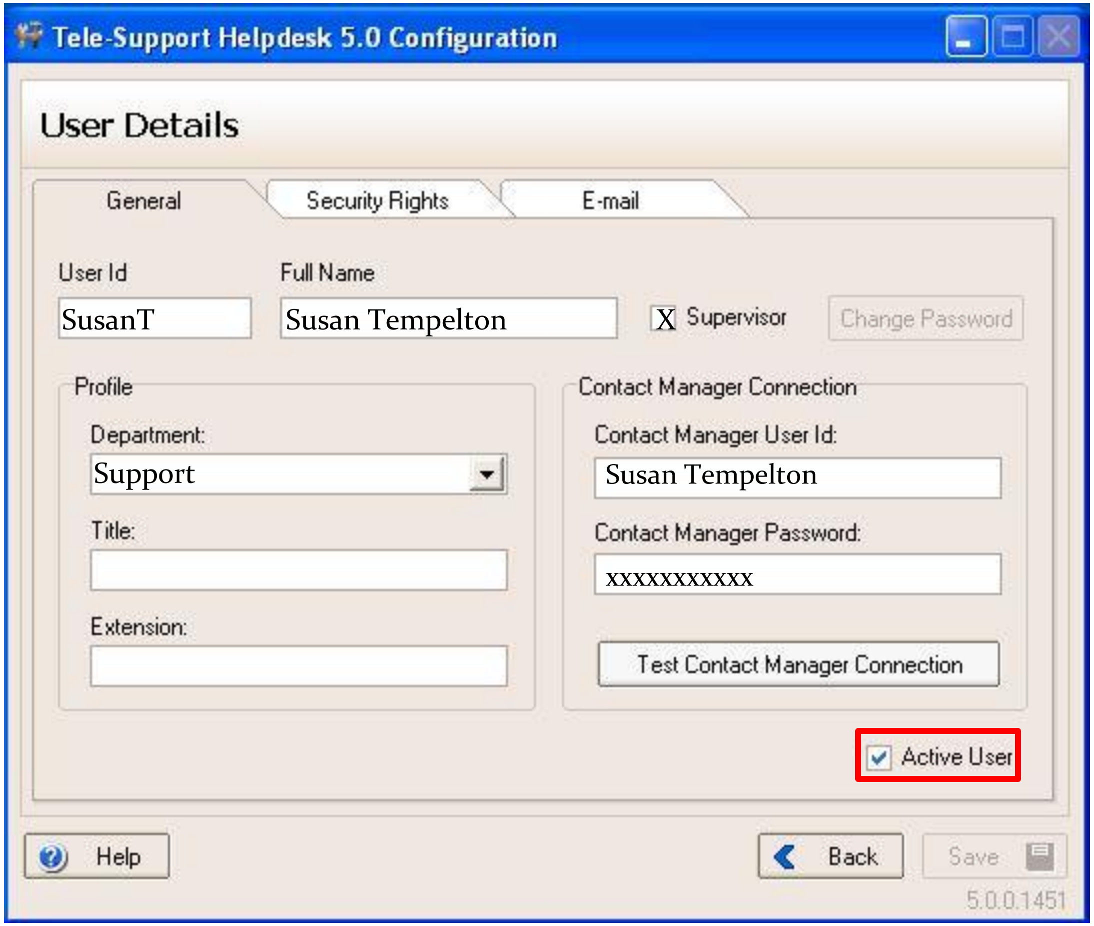
When configured to ACT!, you must enter the Users ACT! logon details here and test connection.



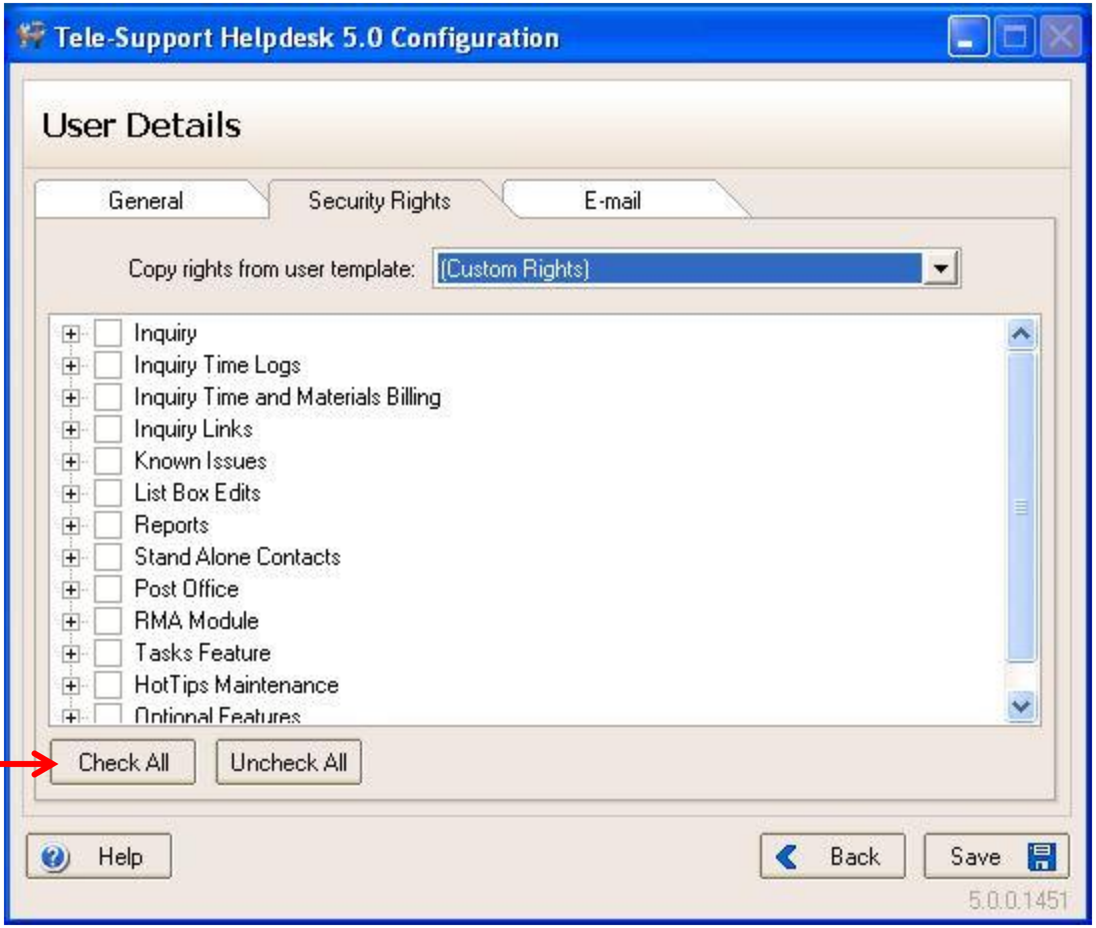
TIP: When connecting to ACT!, you must have ACT! client installed first before you can install and run HelpDesk client.

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.

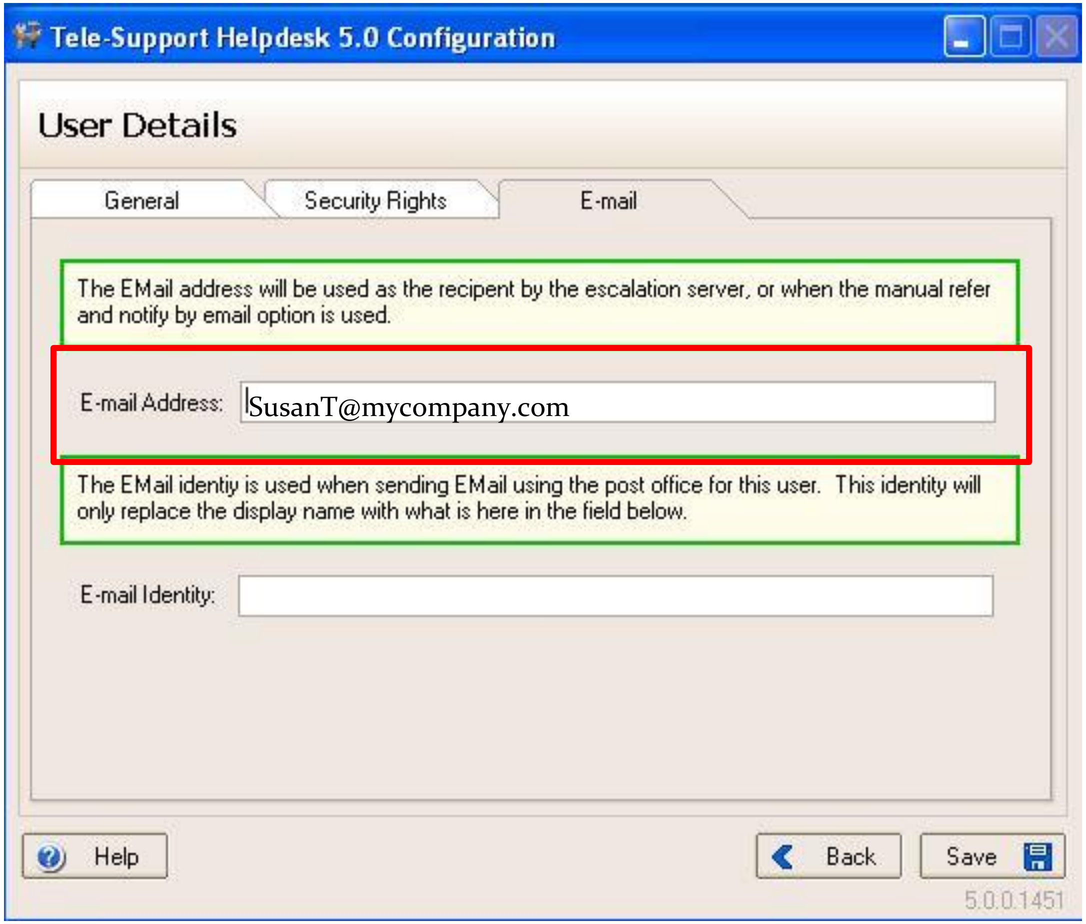


Every User requires one or more Security Rights. Expand tree next to topic to see specific rights available. For "Supervisor" User(s) recommend 'check all'.

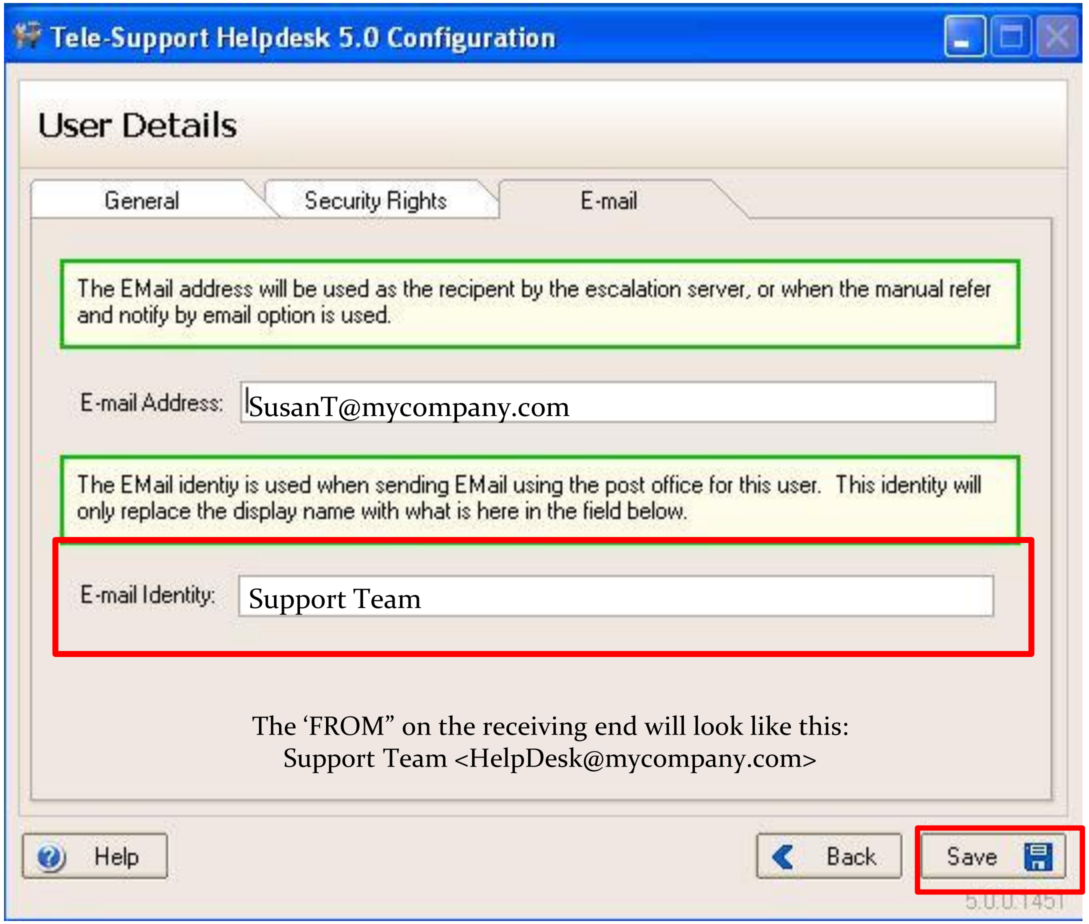


Custom Rights means you select each right as needed. If your User(s) have all rights, use the 'Check All" button

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.

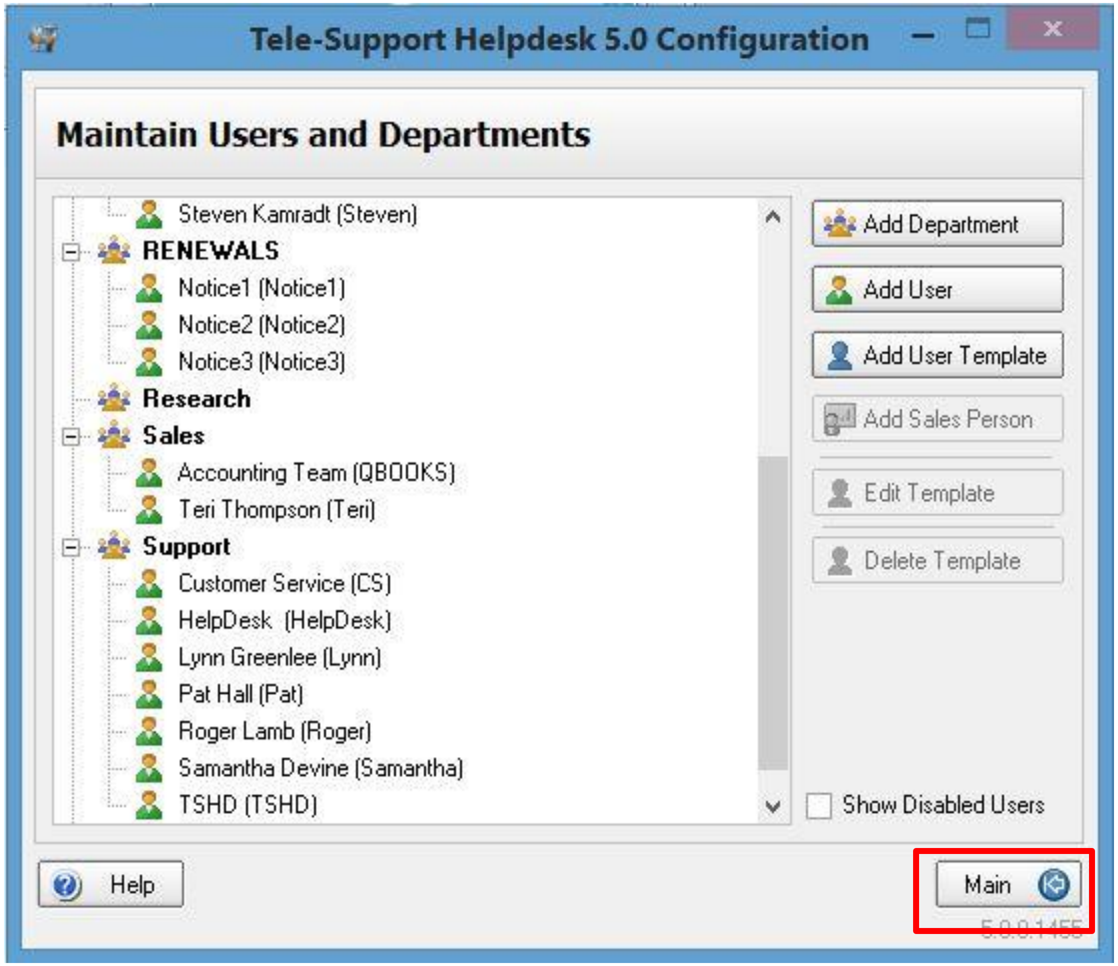


When using the built in Post Office (Email feature) This replaces the display name only, not the email address.

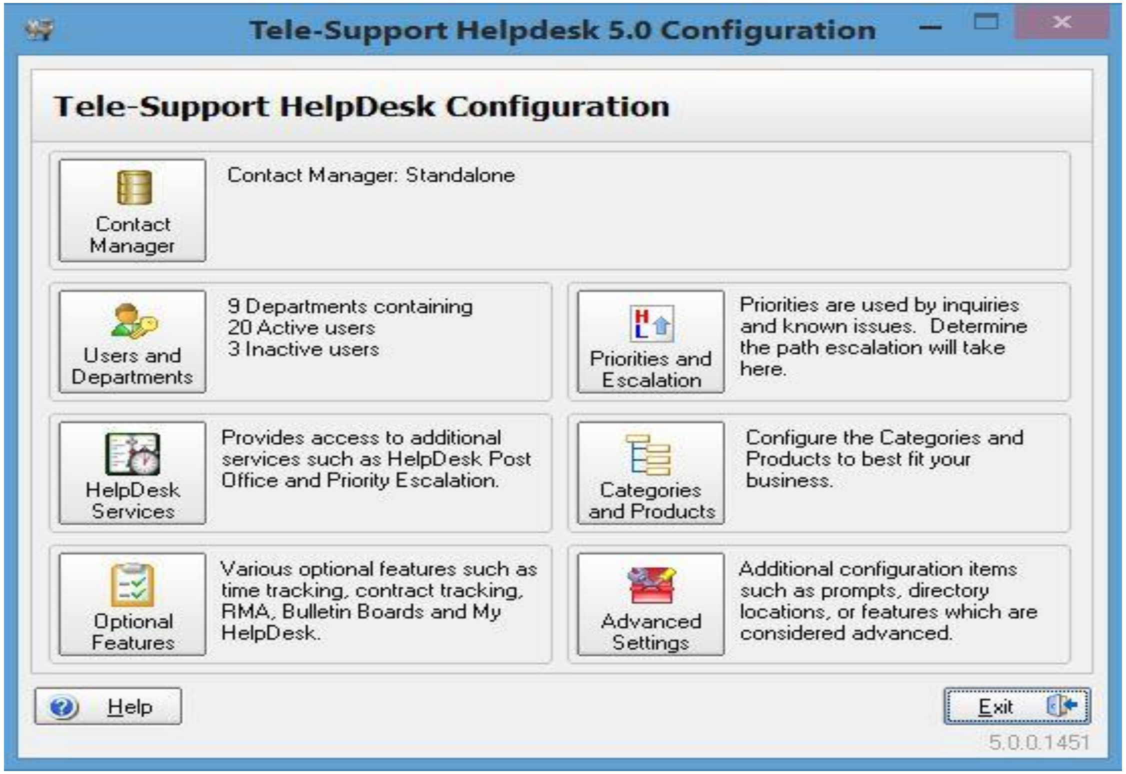


Click SAVE when you are done with User Details.

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.



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