



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 Priorities and Escalation.



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.

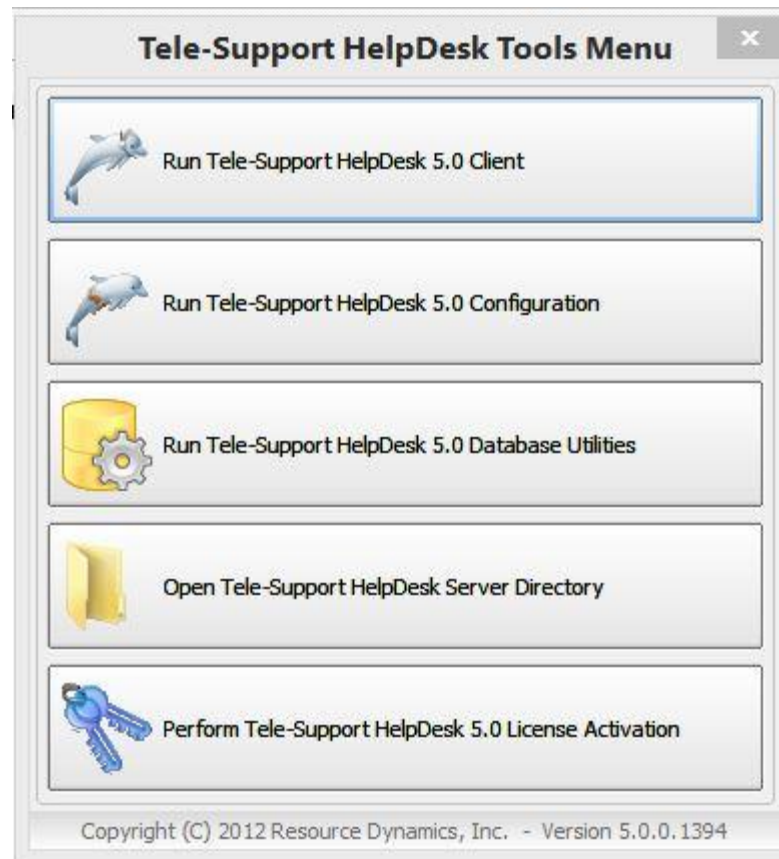
Once installed you will see a short-cut on your desktop called HDTools5. This is a quick access tool.



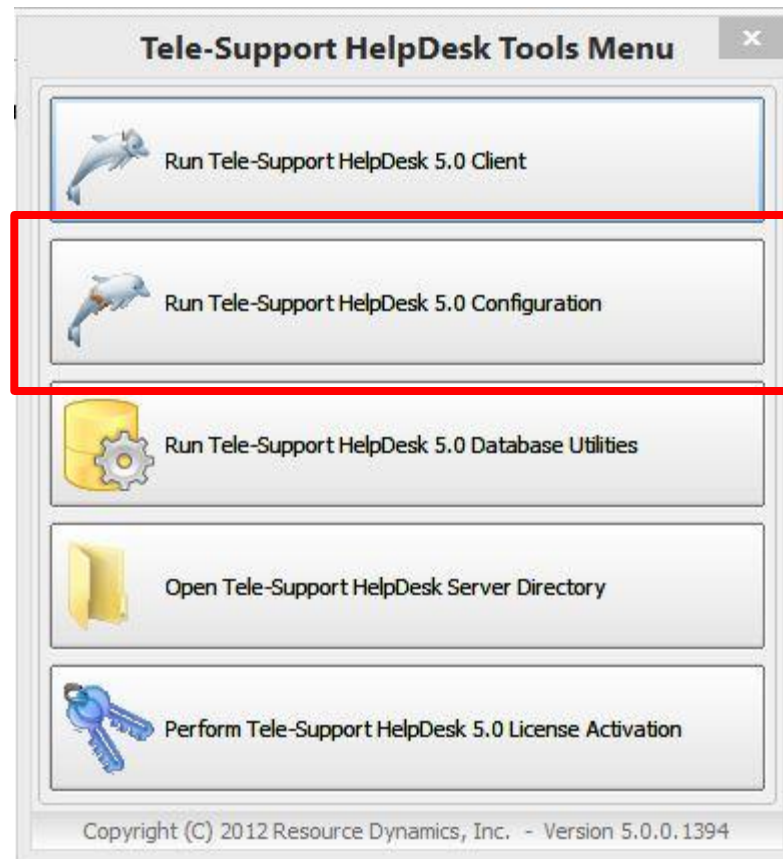
You can also access configuration from your main \server folder



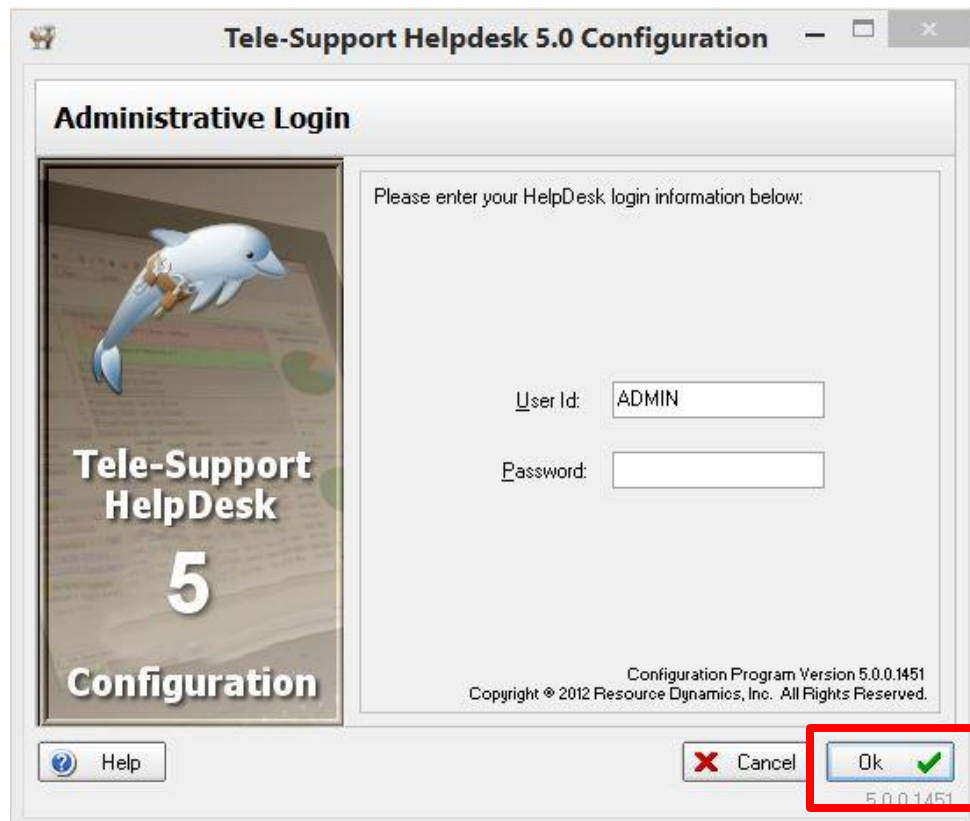
When you open the HDTools5 you will see these menu options.....



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



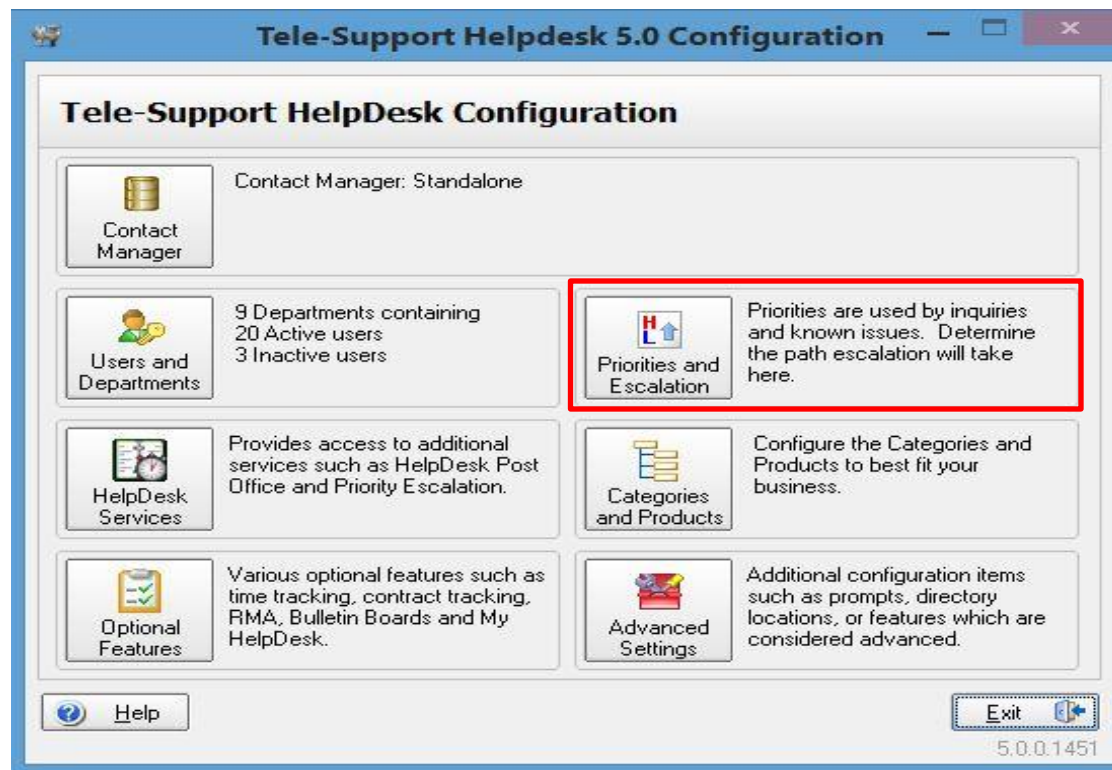
Only Users with Supervisor rights will have access to Configuration. We include one User ID: ADMIN no password. Click OK.



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 Copyright © 2012 Resource Dynamics, Inc. All Rights Reserved." and the version number "5.0.0.1451" is also visible at the bottom right corner of the dialog's content area.



Now lets check out Priorities and Escalation. By default we include:
Low – Medium – High - Critical



Full details with instructions included in the HDAdmin5 – Chapter 6



Inquiries have PRIORITIES. Which you define based on your company needs. Here you can see various Priorities we use in our company. From Sales to Support to Development.

Tele-Support Helpdesk 5.0 Configuration

Maintain Priorities and Escalation

Priorities | Default Priorities

| Description | Escalate After | Order |
|-------------|----------------|-------|
| Tech | Never | 0 |
| Critical | Never | 0 |
| High | Never | 1 |
| Sales | Never | 1 |
| Medium | Never | 2 |
| Low | Never | 3 |
| Research | Never | 4 |
| DEV | Never | 5 |
| KI-Version5 | Never | 6 |
| KI-Version4 | Never | 8 |
| KI-Customer | Never | 9 |
| Closed | Never | 10 |
| Internal | Never | 20 |
| Wish | Never | 30 |
| Hold | Never | 31 |
| NewProject | Never | 40 |

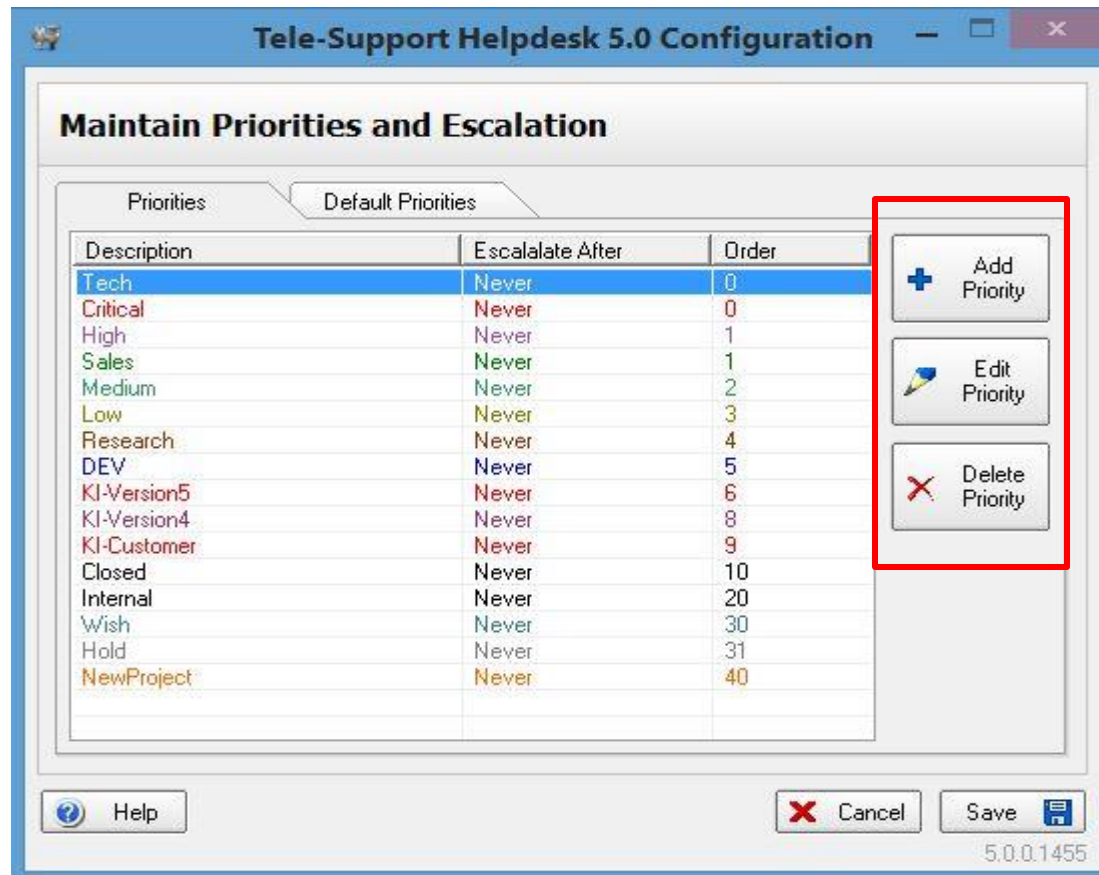
Buttons: + Add Priority, Edit Priority, Delete Priority

Buttons: Help, Cancel, Save

5.0.0.1455



Here you can ADD – EDIT – DELETE a priority.



You cannot delete any priority that is linked with an Inquiry or linked to a Known Issue.



The “Order” is a numeric high to low sort. So you can sort the queue (current and known issues) based on priority. You add your own order number. Numbers can be repeated for different Priorities.

Tele-Support Helpdesk 5.0 Configuration

Maintain Priorities and Escalation

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| Description | Escalate After | Order |
|-------------|----------------|-------|
| Tech | Never | 0 |
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| KI-Version5 | Never | 6 |
| KI-Version4 | Never | 8 |
| KI-Customer | Never | 9 |
| Closed | Never | 10 |
| Internal | Never | 20 |
| Wish | Never | 30 |
| Hold | Never | 31 |
| NewProject | Never | 40 |

Buttons: + Add Priority, Edit Priority, Delete Priority

Buttons: Help, Cancel, Save

Version: 5.0.0.1455



If you have configured your Priority to Escalate, the information would appear in this column.

The screenshot shows the 'Tele-Support Helpdesk 5.0 Configuration' window with the 'Maintain Priorities and Escalation' dialog open. The dialog has two tabs: 'Priorities' and 'Default Priorities'. The 'Default Priorities' tab is active, displaying a table with three columns: 'Description', 'Escalate After', and 'Order'. The 'Escalate After' column is highlighted with a red box, and all entries in this column are 'Never'. To the right of the table are three buttons: 'Add Priority', 'Edit Priority', and 'Delete Priority'. At the bottom of the dialog are 'Help', 'Cancel', and 'Save' buttons. The version number '5.0.0.1455' is displayed in the bottom right corner.

| Description | Escalate After | Order |
|-------------|----------------|-------|
| Tech | Never | 0 |
| Critical | Never | 0 |
| High | Never | 1 |
| Sales | Never | 1 |
| Medium | Never | 2 |
| Low | Never | 3 |
| Research | Never | 4 |
| DEV | Never | 5 |
| KI-Version5 | Never | 6 |
| KI-Version4 | Never | 8 |
| KI-Customer | Never | 9 |
| Closed | Never | 10 |
| Internal | Never | 20 |
| Wish | Never | 30 |
| Hold | Never | 31 |
| NewProject | Never | 40 |



Let's edit the HIGH Priority to Escalate.....

The screenshot shows the 'Tele-Support Helpdesk 5.0 Configuration' window with the 'Maintain Priorities and Escalation' dialog open. The dialog has two tabs: 'Priorities' and 'Default Priorities'. The 'Default Priorities' tab is active, displaying a table of priority levels. The 'High' priority row is highlighted with a red box. To the right of the table, the 'Edit Priority' button is also highlighted with a red box. The table contains the following data:

| Description | Escalate After | Order |
|-------------|----------------|-------|
| Tech | Never | 0 |
| Critical | Never | 0 |
| High | Never | 1 |
| Sales | Never | 1 |
| Medium | Never | 2 |
| Low | Never | 3 |
| Research | Never | 4 |
| DEV | Never | 5 |
| KI-Version5 | Never | 6 |
| KI-Version4 | Never | 8 |
| KI-Customer | Never | 9 |
| Closed | Never | 10 |
| Internal | Never | 20 |
| Wish | Never | 30 |
| Hold | Never | 31 |
| NewProject | Never | 40 |

Buttons visible in the dialog include 'Add Priority', 'Edit Priority', and 'Delete Priority'. At the bottom of the window, there are 'Help', 'Cancel', and 'Save' buttons, along with the version number '5.0.0.1455'.



To Escalate and/or Email Notify on Escalation, you need to check the boxes below...

You can change the color of your Priority and the Highlight color.

Tele-Support Helpdesk 5.0 Configuration

Priority Details

Priority Settings | Escalation Settings | Escalation E-mail Settings

Priority Name: Sort Order:

Normal Color
Text:
Background:

Highlight Color
Text:
Background:

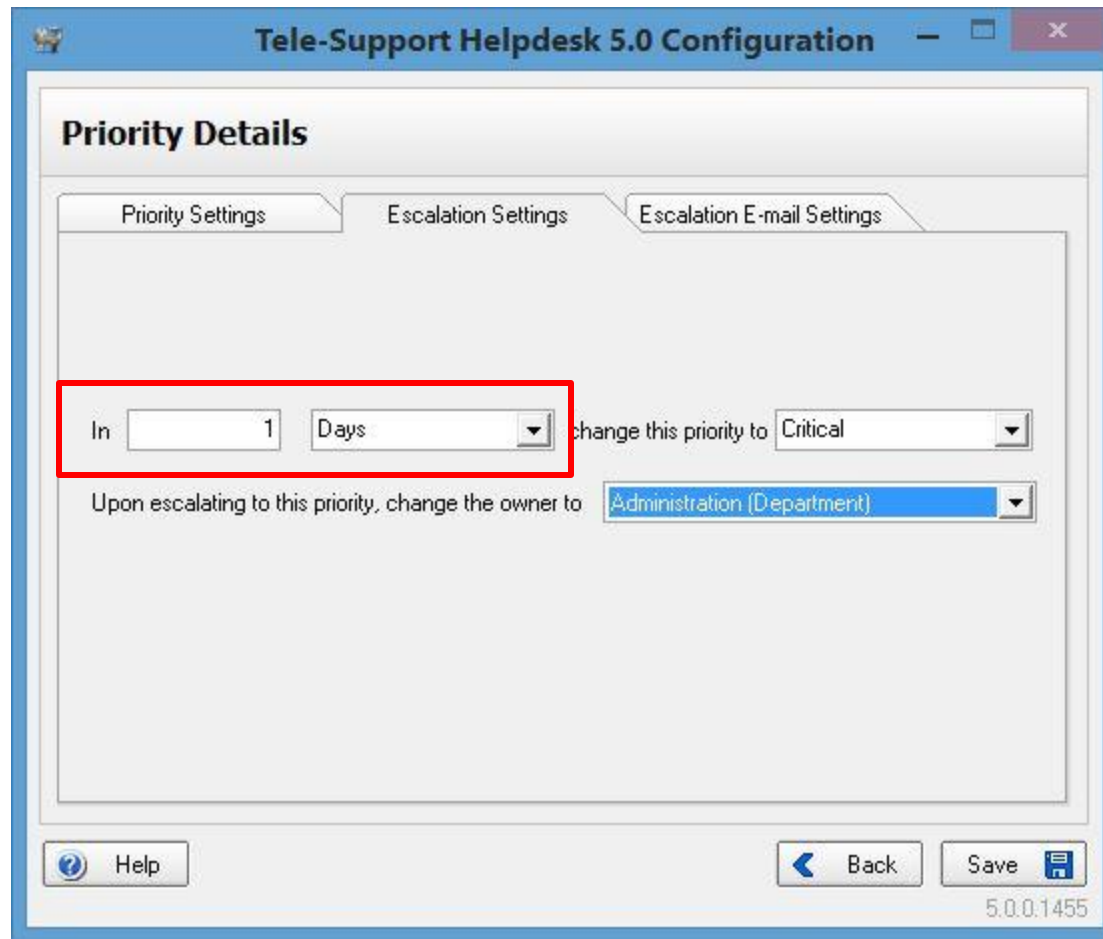
Enable Escalation for this Priority
 Enable E-mail Notification

Help Back Save

5.0.0.1455



Escalation Settings. You can set to Escalate in X – minutes; X-hours; X-days.



The screenshot shows the 'Tele-Support Helpdesk 5.0 Configuration' window. The 'Priority Details' section is active, with three tabs: 'Priority Settings', 'Escalation Settings', and 'Escalation E-mail Settings'. The 'Escalation Settings' tab is selected. A red box highlights the 'In' field, which contains the number '1', and the unit dropdown menu, which is set to 'Days'. To the right of this field is a dropdown menu labeled 'change this priority to' with 'Critical' selected. Below this is another dropdown menu labeled 'Upon escalating to this priority, change the owner to' with 'Administration (Department)' selected. At the bottom of the window, there are buttons for 'Help', 'Back', and 'Save', and the version number '5.0.0.1455' is displayed in the bottom right corner.



Change Priority upon Escalation...

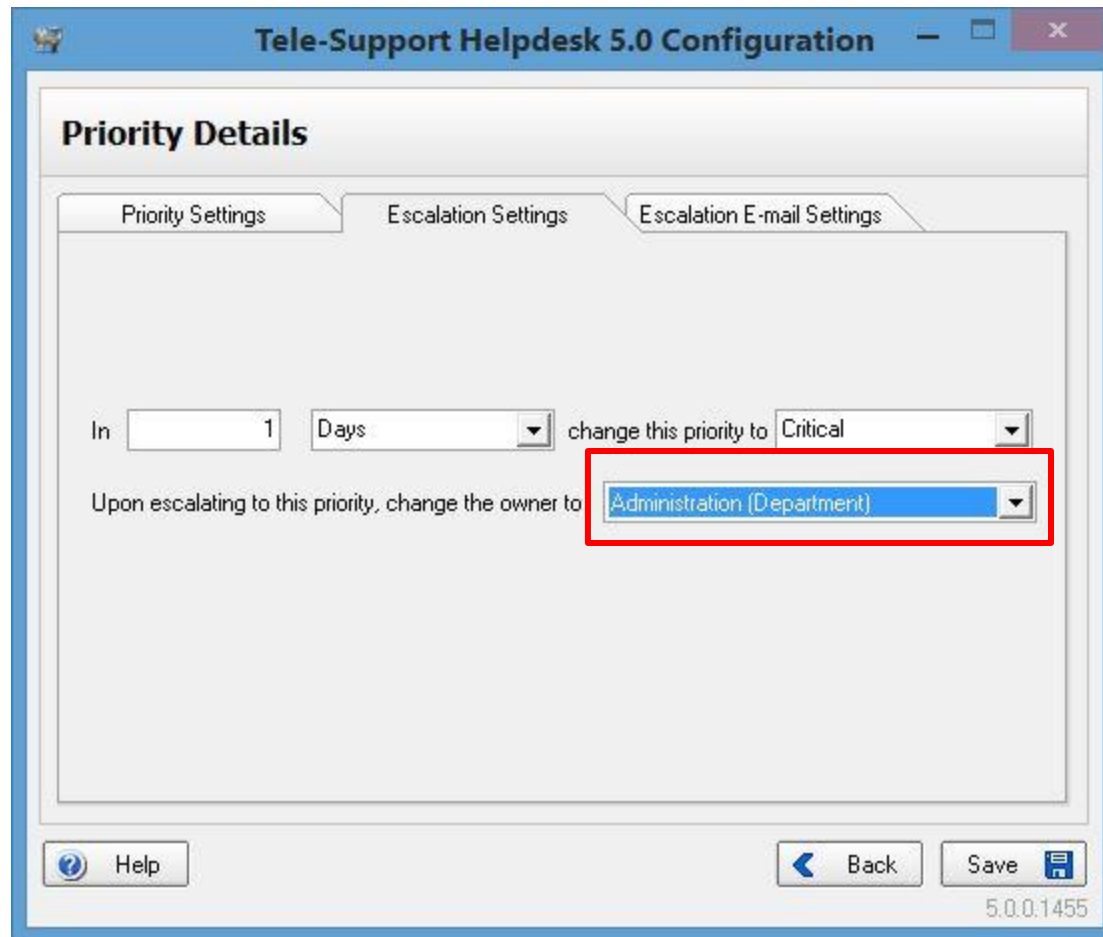
The screenshot shows a configuration window titled "Tele-Support Helpdesk 5.0 Configuration" with a sub-tab "Priority Details". The window has three tabs: "Priority Settings", "Escalation Settings", and "Escalation E-mail Settings". The "Priority Settings" tab is active. It contains a form with the following fields:

- "In" followed by a text input field containing "1" and a "Days" dropdown menu.
- "change this priority to" followed by a dropdown menu showing "Critical".
- "Upon escalating to this priority, change the owner to" followed by a dropdown menu showing "Administration (Department)".

A red rectangular box highlights the "change this priority to" dropdown menu. At the bottom of the window, there are "Help", "Back", and "Save" buttons, and the version number "5.0.0.1455" is displayed in the bottom right corner.



Change Owner upon Escalation or you can leave with current owner.
Changing ownership can be set to another User or Department.



The screenshot shows the 'Tele-Support Helpdesk 5.0 Configuration' window with the 'Priority Details' section active. The 'Priority Settings' tab is selected, showing a configuration for a priority level. The settings are: 'In 1 Days', 'change this priority to Critical', and 'Upon escalating to this priority, change the owner to Administration (Department)'. The 'Administration (Department)' dropdown is highlighted with a red box. At the bottom, there are 'Help', 'Back', and 'Save' buttons, and the version number '5.0.0.1455' is displayed.

Tele-Support Helpdesk 5.0 Configuration

Priority Details

Priority Settings Escalation Settings Escalation E-mail Settings

In Days change this priority to

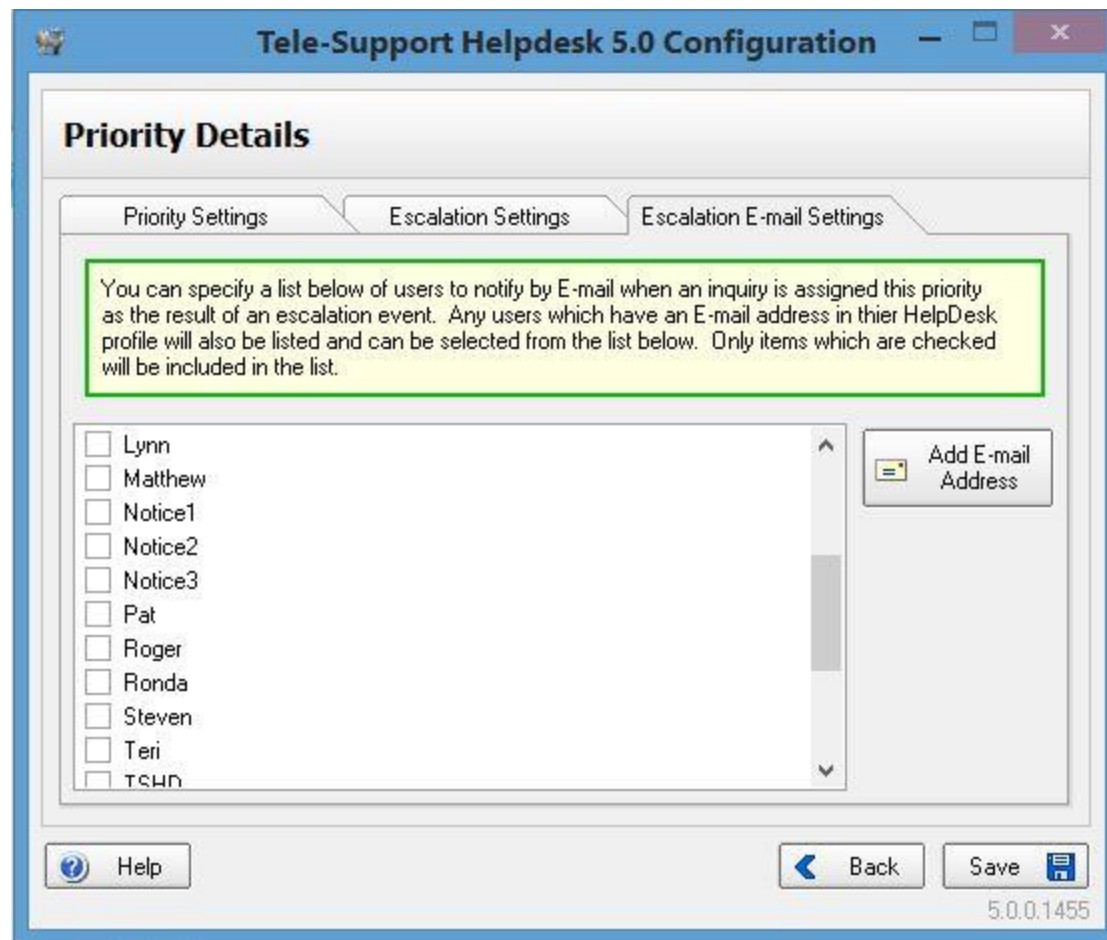
Upon escalating to this priority, change the owner to

Help Back Save

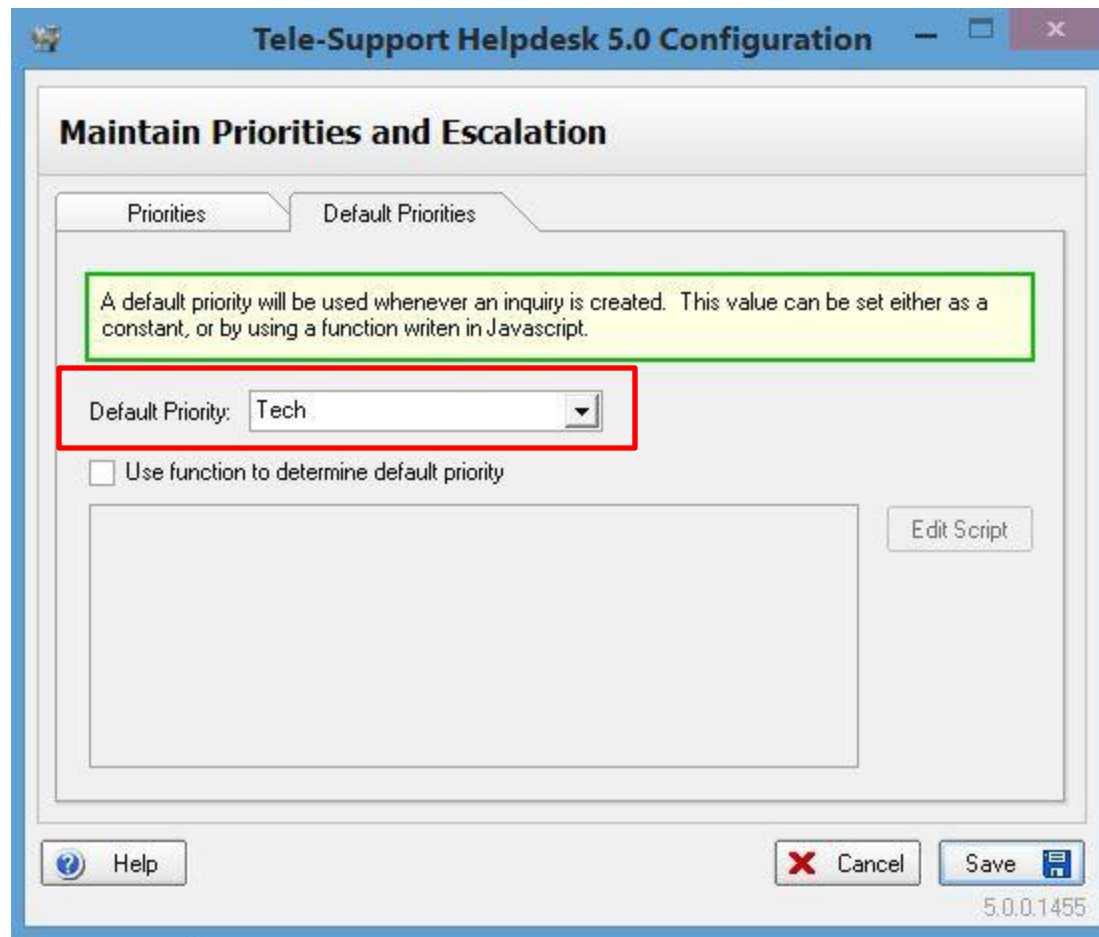
5.0.0.1455



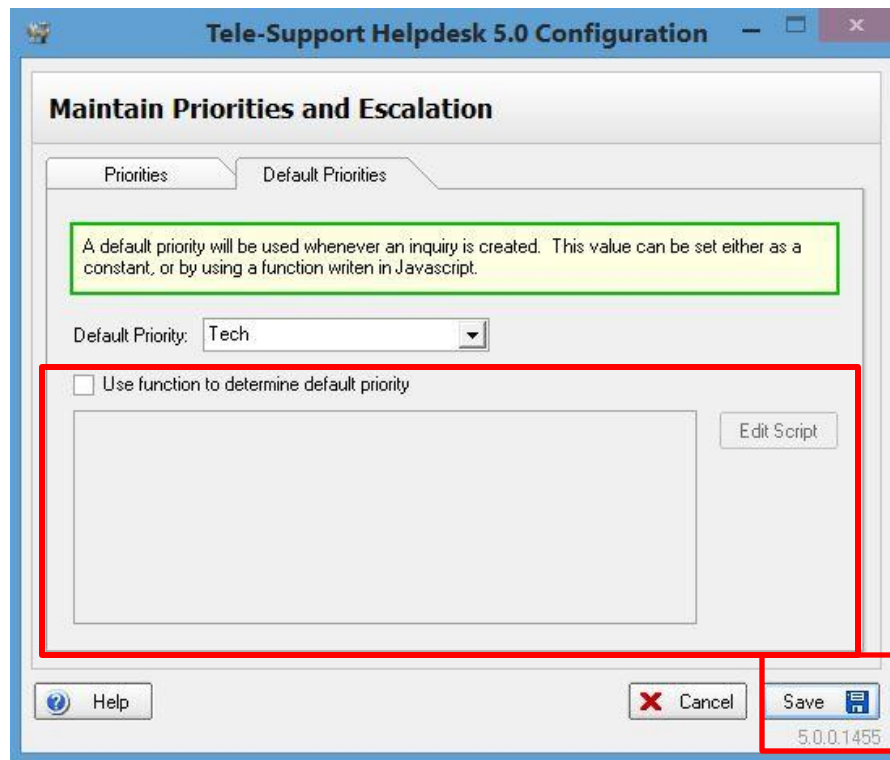
Upon Escalation you can also Email notify one or more Users. You can also add Email Address for non-HelpDesk Users.



Every Inquiry requires a Priority. You will set your default Priority here. Users will have the option to change the priority from the inquiry screen.



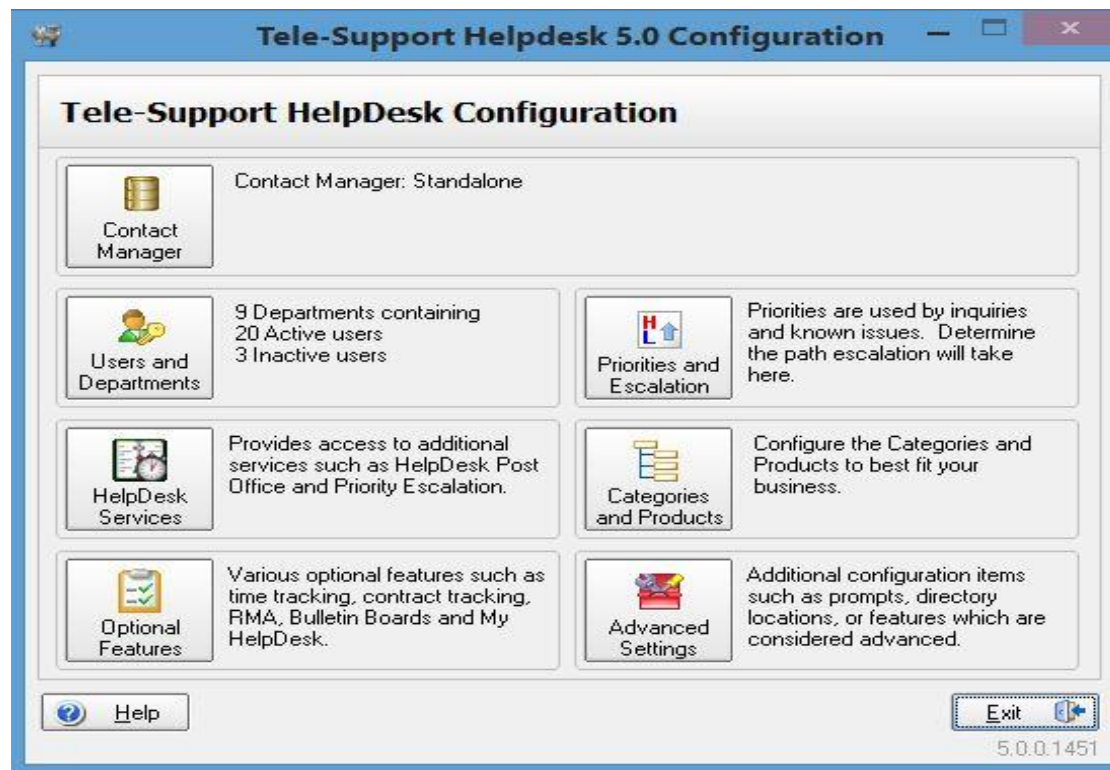
Create a script is an "Advanced" feature and YOU are responsible for how it functions. We provide a SAMPLE in the admin guide. If your script does not function correctly, you need to remove it. We do not provide technical support for custom scripting.



See Appendix B in the HDAdmin5.PDF guide for additional info.



See how easy it is to create Priorities. And having unique priorities can quickly sort for each team (Sales,Support, etc..)



Full details with instructions included in the HDAdmin5 – Chapter 6

