



TOTAL SUPPORT HELPDESK VERSION 6.2021 FEATURES

Total Support HelpDesk is packed full of features. More features than anyone would ever use. We are sure to have a few features that fit your needs!

ACT! CRM - If you have an existing Act! CRM, our application integrates and shares your existing contacts. You manage your contacts outside of our application.

ADVANCED TIME AND MATERIALS – This feature allows you to compute a cost for the time spent working on an inquiry, or for the items used while working on the inquiry and bill your client. We include standard reports that you can generate an export file; which, can be imported into your accounting package.

ALERTS – There are areas in the application that users need to have a heads-up that something needs their attention. From new emails received, new inquiry tickets referred to them, company alert notice, new task referred to them, new known issues and new hot tips that need their attention.

BULLETIN BOARD SYSTEM – Here you can customize multiple boards and post as many notes as desired. You can also configure your notes to notify users when a new post is made that needs their attention. Create boards for each department (Company for general post, Sales for just sales team, Support for just support team). You can select which users and/or departments have access to the boards and if they have rights to edit/delete post.

CENTER VIEW TAB DESIGNER – For the inquiry, you can create and sequence the tabs in any order you like. You also have the ability to add as many fields as possible from your contact manager and inquiry fields in any order on each tab.

CONTACTS – If you have configured the application as a **Stand Alone using the built in CRM**, then you have full customization to creating your own fields and layout.

CONTRACT TRACKING – Whether you are configured as a Stand Alone or with Act!, contract tracking gives you the ability to track contracts from your clients. You determine the type of contract (fixed date, incident based, time based), start and end date of the contract. You can also configure our application to provide a warning if the contract is close to being expired. Once a contract is expired, only a Supervisor will be able to override to allow a user to continue working on their inquiry.

CATEGORIES & PRODUCTS – You build this database to your company needs. One Category with many products linked.
Example: Category = Printers

-> Products for this category = HP ENVY5000
= EPSON 2500 E Series

EMAIL – We have a complete email system built into our application. From an email, you can create or link to an existing inquiry. If you are configured Stand Alone, you have the option to link the email to the contact instead of an inquiry. Inbound email supports POP3, IMAP, & Gmail. You can configure a single in-bound email. If you have multiple emails that you need to work with, setup a forward from your ESP end. Inbound email will be identified so you know who the email was sent to. You can also configure multiple out-bound emails in our application. Each department or user can use their own email or department email when sending out emails.

HELPDESK CALENDAR – Users can view their scheduled inquiries, task, known issues on a monthly calendar view. Users can only see their calendars, but Supervisors can see everyone’s calendar in their department and ADMIN users can see all calendars. Filter settings allow views for ‘due date’, ‘scheduled dates’, or ‘wait date’.

HOT TIPS DATABASE – Build your company’s knowledgebase in Hot Tips. Create Q&A’s, FAQ’s, Problems and Resolutions. Putting information at your user’s finger tips. Configure your Hot Tips to allow printing, publishing, and emailing. Hot Tips are accessible from the main Hot Tips queue or from the open inquiry.

IFORMS – We include an easy way to extract information from your web form that can easily ‘form fill’ into your new inquiry from an email. You just need to design your web form to include a specific format and fields that our application can read and extract.

INTAKE FORMS – With this optional feature, you can design your own intake forms. These are for internal use and the purpose is to give your users that ability to ask questions and get answers as part of the inquiry record that is critical to a particular type of problem or issue. You can develop as many forms and questions as desired. Usually, the questions are in general nature, such as Operating System, When did the problem start, can the problem be replicated, does this effect all users, etc. Besides the standard string field to free type, you can create pick list, yes/no, and even map contact manager fields into your form. This is a great feature, especially if you have multiple users working on the same inquiry and avoiding duplicate questions from being asked to your client.

KNOWN ISSUES DATABASE – Don’t spin your wheels researching and looking up known problems. Check the ‘bug’ database. This is a great place for developers to work from and keeps users informed along the way to the status of a bug. Expanding this database, you can also track other internal information, such as wish/Idea submitted by clients and/or users, enhancements, documentation, information, and other topics. Ability to link an inquiry to a Known Issue.

LAUNCH MENU – This is a great feature and is accessible from the main menu, open inquiry, and My HelpDesk dashboard. Build a menu of external applications to launch and/or web sites to access while in HelpDesk.

LINKS DATABASE – This allows you to link just about anything externally to an inquiry record or the contact record if running Stand Alone. You can browse to the item or simply drag/drop. We also use this database for inbound/outbound emails.

MY HELPDESK – This is the user’s dashboard for the application. Quick glance at their HelpDesk, including reminders, custom launch pad, their inquiries owned by them and their department.

PRIORITY & ESCALATION – We include basic priorities: LOW – MEDIUM – HIGH – CRITICAL. 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.

REALTIME 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. Using the LINE field, the user will know which line to pick up.

REPORTING - Built into HelpDesk are standard reports that are most common. Inquiry Analysis, Billing 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 designed 100% by you and executed outside of the HelpDesk application.

You can create a database scheme to help build your reports. The database is SQLite. Be sure to use a report designer that is compatible.

RMA RETURNS DATABASE - A basic database to hold information regarding product returns. You will easily record your RMA's, which are linked to inquiries. Configure your own RMA numbering mask. We also include 2 string fields and 2 date fields.

STICKY NOTES – Inquiry sticky notes are a great way to quickly see special messages regarding this inquiry.

TASK MANAGEMENT - Ability to add one or more tasks that can be free standing or linked to an inquiry. Assign task to other users. Great feature for when you need multiple users working on the same inquiry, just create task and link the task to the inquiry.

TEMPLATES/SIGNATURES – Design your own Email Templates. Create groups that help organize your templates. Users can set their own default template and signature. Set access rights to which templates users can use.

TIMELINE ANALYSIS - This feature is optional and 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 will 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.

TIME RECORD KEEPING – This will generate additional child records as an inquiry is worked, which allows tracking of specific moments in time when work is performed. The data generated by time record keeping can also be used to produce billing reports.

TRACKING – Tracking inquiries from inception to resolution. For every call or email you receive, and you create an inquiry, it will be tracked through the system.

WORKFLOW – This feature allows you to predefine actions that you want to take based on the occurrence of certain activities. There are four occurrences that will trigger a workflow action: New Inquiry Created, Inquiry Completed, Inquiry Reopened, and Inquiry Created and Completed in one-call. Example: when you complete an inquiry, you may want to trigger a survey email to go out to your client. Or send an email to the Sales Rep to let them know their client's issue has been resolved. Or a new inquiry created, send an email confirming their inquiry has been received and include their inquiry information, such as the inquiry number and/or user working on their inquiry. You can configure the emails to automatically go, or maybe not every inquiry needs a survey or confirmation. Then you can configure a prompt for the user to select yes/no to sending.

Add-Ons – To enhance client experience, we offer two add-on applications:

Hot Tips Publisher which allows you to select hot tips from your database and publish them to your website, or save to a file for a tech on the go who doesn't have internet access.

Inquiry Status Publisher which allows you to select a range of inquiries and publish them to your website.

For a free test drive of our Publishers and more details, please visit our Products page by going to:

<https://www.resource-dynamics.com/publisher.html>