



We wanted to make a separate document for important information and tips for your users. While most of these are included in the guides, we want to be sure you didn't miss anything.

For customers that upgraded from version 5.1/2019:

- Any custom report you created you will need to recreate them and reconnect the new database.
- Hot Tips with images using .rtf type, will need to readd your images using a different image type.
- Templates/Signatures you will need to be created new.
- New security right. Supervisor will now have access to areas within their department. Superuser is a full user of the system and has access everywhere.
- Stand Alone configuration, you **must** remap your contact manager fields, including any contact manager fields you added to the center view designer and custom field layout designer.
- New Inquiry Search, viewing (HD) contacts from search results. The drop- down menu for added contacts will no longer be an option. A better solution is to have you manage your alternate contacts from your contact manager and then map that field to the inquiry view. If you are using Act! CRM, create a memo field in your contact manager and then map that field to the center view tab designer and allow editing. If you are using Stand Alone CRM, use the new Contact Notes memo field to add your alternate contacts. This field is already available from the open inquiry, resolution notes area, click on Contact Notes. From the memo fields you can add/edit alternate contacts and copy/paste into the open inquiry as needed.
- No longer a 'History' queue. You can create a filter for all inquiries closed.
- Email Queue no longer has a 'Deleted' tab. Once deleted it's gone with no recovery.
- Email Queue now includes a 'Processed' tab. Emails that are received and processed will be moved to this tab. You can set your range for 'Processed'. This is great for people that may call and ask 'Did you get my email', you can quickly look into the Processed tab and respond. This saving time from doing an inquiry search.
- Act! Users, the free plug-in that would add the 'helpdesk' tab is no longer available in the new version. A work around will be to use the Act! Scratchpad launched from the HelpDesk Open Inquiry, add notes that you can send back to Act! and appear in the NOTES tab on the contact record. Or add a memo field in Act! and map to Helpdesk

General Tips:

- Stand Alone display filters, if you are changing between filters, and go back to 'All Contacts' and it is not loading for some reason, clear the 'search value' field and click the magnify glass and this will reload the all contacts.
- We would strongly recommend you create a daily backup of the HelpDesk database. Since this is a new database format, it's best to be safe in case something happens.