

TOTAL SUPPORT HELPDESK

UPGRADE GUIDE



Software Solution for All Your Customer Service Needs

From Sales to Support
From Inception to Resolution

Stand Alone CRM (Built-in Contact Manager)

or

Integrate with Act! Contact Manager

Revised February 24, 2021

This guide is designed for Administrators

System Requirements

- Full Operating System 32-bit or 64-bit (64-bit recommended)
- 8 GB RAM recommended minimum (workstations)
- 12 GB RAM recommended minimum (servers)
- 500 MB available disk space (server and workstations)
- 3 GHz minimum (4 GHz recommended)
- Server and Client's:
 - Server 2019 Standard or Data Center
 - Server 2016 Standard or Data Center
 - Server 2012 R2
 - *Windows 10 (non-home)

*when using Windows 10 operating system as your server, all USERS need to be ADMIN users and you need to disable the UAC (user account controls) for each user. Check your Microsoft EULA as to the number of .CAL licenses you have available for your version of Windows 10. You will need 1 .CAL license for each User to connect. You are responsible for verifying and complying to Microsoft's User License Agreement for Windows 10.

IMPORTANT: For multi-user access, we strongly recommend a SERVER O/S.

Total Support HelpDesk requires a full operating system to function correctly. However, if you are using iOS, Android or Chromebook, you can use GO-Global to web enable your company applications for mobile device access. Check out more details and pricing from our website:

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

CONTACT MANAGER COMPATIBILITY:

- Stand Alone CRM (built-in contact manager)
- Act! PREM version 18 and newer
- Act! Cloud version 22 (link coming)

ABOUT THIS GUIDE

This guide is designed for Users that are already on version 5.1.1.x or 2019.0.x

Please note EOL notice

Technical Support limited for Windows 10 build 19042 and newer and Server 2019 and newer. Newer updates to these o/s will cause incompatibility issues with the MDAC version needed for our software.

Version 2019.x EOL set for July 2021 – upgrades supported w/ active contract

Version 5.1.x EOL set for July 2021 – upgrades supported w/ active contract

NO LONGER SUPPORTED:

Version 5.0 EOL ended July 2017 – upgraded at user's own risk

Version 4.1 EOL ended February 2013 – no upgrades available

Version 4.0 EOL ended February 2010 – no upgrades available

Version 3.x EOL ended April 2008 – no upgrades available

Version 2.x EOL ended Sept 2005 -no upgrades available

Version 1.x EOL ended June 2002 – no upgrades available

ABOUT THIS UPGRADE

This is a paid major upgrade. If you have an active care plan that includes all upgrades, you are eligible to get the upgrade for free during your contract period.

With the upgrade, we will provide you with an installation code and activation instructions via a private Email. Please be sure that our domain is on your white/approved recipient list.

This upgrade will convert your existing HelpDesk Access or SQL database to the new SQLite database format. Total Support HelpDesk version 6 (2021.x) will not include a database conversion to SQL.

Before you begin the upgrade process, please complete a full compact/repair/maintenance on the database. If you are connecting to an external contact manager, please complete a repair/rebuild to the database configured with HelpDesk.

Make a SAFE full backup of your HelpDesk database.

IMPORTANT INFO

Total Support HelpDesk is a complete rewrite from the core. To avoid a timely learning curve for existing users, we did our best to keep some of the main screens and functionality. There are some areas that you will need to reconfigure / edit.

- Templates > will convert but the formatting and images will need to be edited. Also, a new feature includes templates that can be assigned to a user/department or opened for anyone to use.
- Hot Tips with images > some images will be distorted, which is caused by the file format; such as, .RTF which is no longer supported. You will need to remove and add new images.
- Custom Reports > if you have created custom reports, you will need to recreate them since the database association will be new and there are new table/fields names. Note, Standard Reports have not yet been added to the Pre-Release version
- MUST remap the Stand Alone contact fields and update any contact fields you have mapped to center views.
- Users who were unable to be identified as being a user in the application will have (Deleted) after their name. This are place holders for users and SHOULD NOT be removed. You can edit them and change the deleted to something else, but please do not delete them as this will cause access violations in your application.
- **CHANGE:** From the New Inquiry Search Screen, we no longer include the drop-down alternate contacts with the (HD). The alternate contacts currently associated with your inquiries are still in place. Moving forward, only the main contact will display. Once you have the open inquiry, you can change the contact, phone, email as needed to match your caller's information, this information will remain with the inquiry. In your contact manager, you can create a memo field that you can add your alternate contacts, allow the field to be edited and then map that field to the center view tab of the open inquiries, this way you have access to adding alternate contacts in real-time and have them available to copy/paste for future inquiries. This was changed based on a large number of requests to have the ability to maintenance the alternate contacts.

REMEMBER TO:

BACKUP your current HelpDesk5.mdb or HelpDesk/HelpDesk3.mdf to a safe location in the event you need to restore

REPAIR your database using MS ACCESS or SQL Utility to ensure the database is clean.

EXCLUSIVE access when running the upgrade. All users and add-on utilities (publishers and scheduler) must be closed. Clear all *.lck (locks) from your \server and \server\users folder.

RUN this upgrade on the machine containing the current version 5.1.x. or 2019.x database.

LET'S GET STARTED!

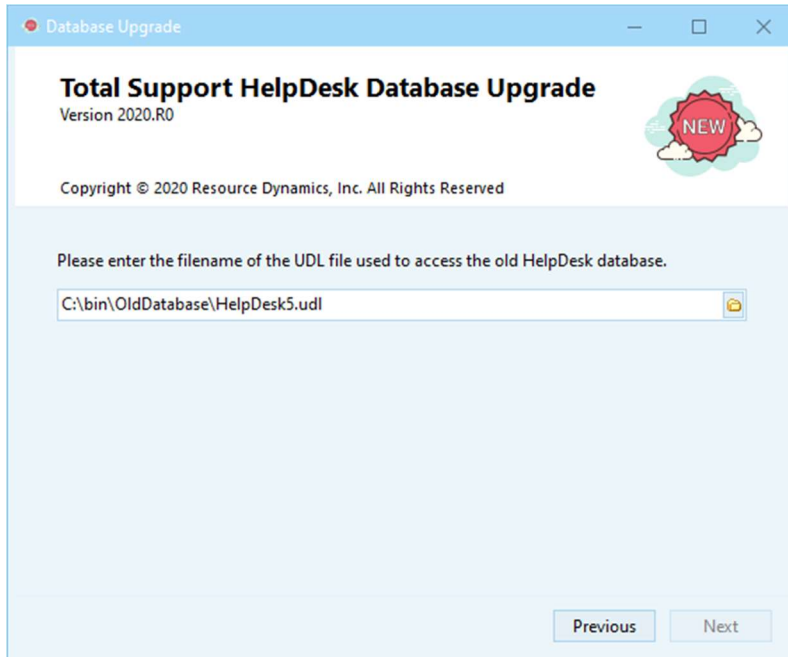
As an existing HelpDesk User for either Access or SQL database version 5.1/2019.0.0.x, you will run the upgrade executable TSHDDBUUpgrade.exe. The upgrade is wizard driven, just follow the prompts.

You must be on the server to upgrade and have exclusive access. If you started the service during the install process, please stop it. If the service will not stop, you can run a command prompt as ADMIN user as follows:

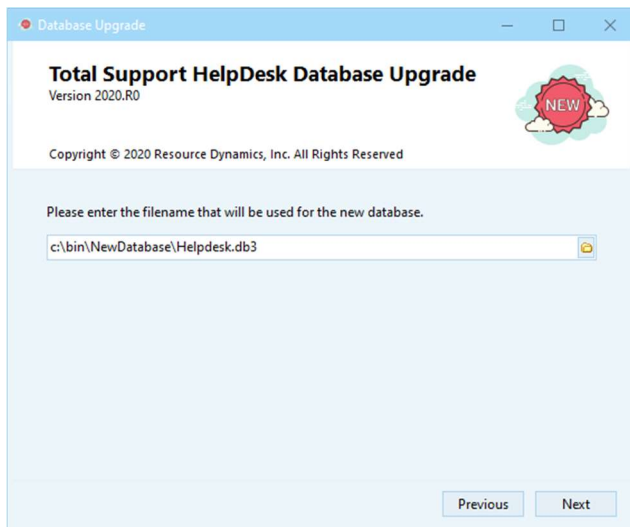
```
C:\>taskkill /im tshddb.exe /f
```

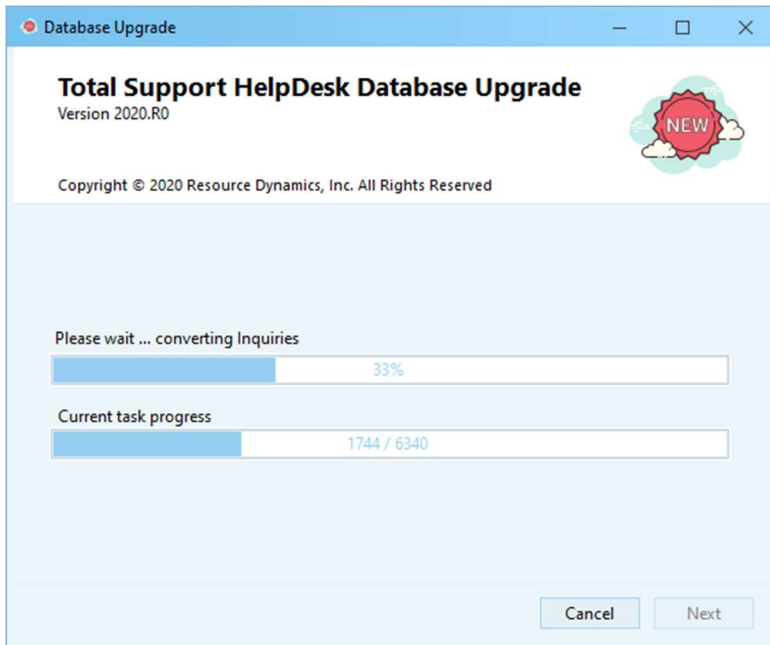
Now let's start your upgrade...

Browse to the main \HelpDesk\Utils folder. Select the TSHDDBUUpgrade.exe



The database is stored in C:\Users\Public\Documents\HelpDesk\Database. The default is TSHD.db3, but you can rename it if you like.





IMPORTANT: If someone has modified any fields and/or tables, the conversion process will attempt to correct and continue. However, if not, it will display the table and the field name in the old database that needs to be corrected. We have found through testing that it is usually the field size that people have changed. You will need to end task on the conversion process, correct the field(s) to the correct field size indicated in the message displayed and then start the conversion run again.

During our testing, we found 1 database with 25 field changes that we had to stop and correct the field and restart the conversion 25 times! This part is time consuming; so, if you are aware of changes, please give yourself additional time to run through the conversion process.

Once the database is completed you are ready to go. Please remember to remap your fields if your Stand-Alone contacts in both your contact manager layout and center view designer is applicable.

Enjoy your new Total Support HelpDesk and

Thank you for your patience during the development process.