



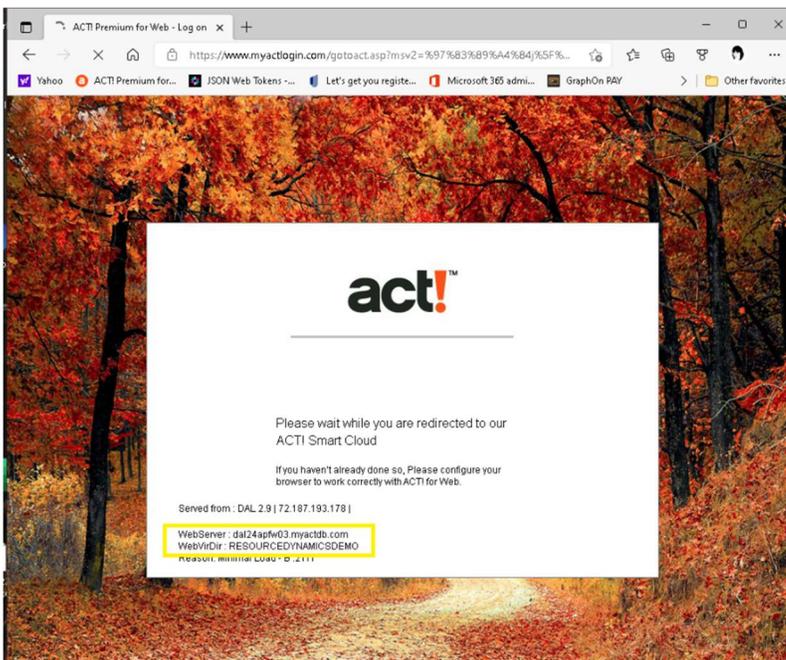
Hello, and welcome to our presentation on how to configure your Act! WEB hosted database to Total Support HelpDesk.

If you are using the web hosted database Act! version 22 or newer, and access your database through a browser using the act-web-api, you need to configure HelpDesk a little differently than you would when using the desktop version.

IMPORTANT: Before you can configure to Act! you must first install the HelpDesk CMLink add-on link. This link installer needs to be installed on your server and on each HelpDesk workstation. You should have received this in our email already. If not, please email CustomerService@Resource-Dynamics.com and let us know you need the Act! WEB Link.

You will need 3 key pieces of information to complete configuration:

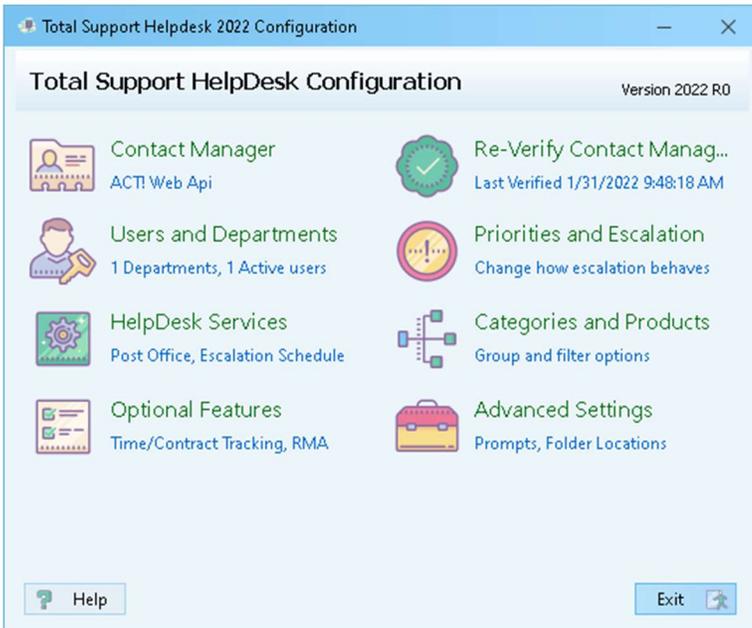
- 1) Web Server Address
- 2) Hosted Database Name
- 3) Must use an administrator logon for the database.



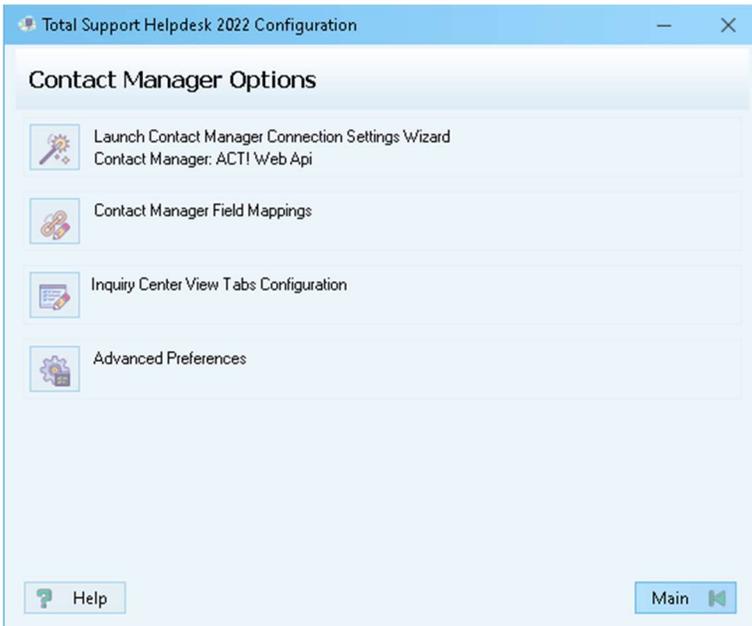
The webserver and database name can be obtained when you go to the web address myactlogin.com. Enter your admin username, or email for the database, and the password and click Log On.

The processing screen for the logon will display the webserver address and database name at the bottom of the screen. Once you have these 3 key pieces, you will be ready to configure your database to HelpDesk.

Launch the Configuration utility. This is located on the server in the \server\client files folder; or, if you installed a client already, will also be located in the client folder. TSHDConfig.exe. no password. Click on the Contact Manager option >



Launch Contact Manager Connection Settings Wizard >



Select ACT! Web API v22+

Total Support Helpdesk 2022 Configuration

Contact Manager Selection

Stand Alone

ACT! Premium v18+

ACT! Web API v22+

ADO/OLE DB Contacts

Please select the contact manager you will be using on the left. If you are not using the Stand Alone option, you must have the selected contact manager installed and operational on this machine to complete the configuration process.

If you will be operating in a multi-user environment, it is strongly suggested that this initial configuration be performed on a client workstation rather than on the server.

Help Cancel Next

<next>

Enter your Web Server address, Database Name, and Act! User logon.

Total Support Helpdesk 2022 Configuration

act.web.api Link Configuration

Use the Act! Connect option within Act! to retrieve the web server field and paste it below.

Web Server: https://xxxxxxxxx\myactdb.com/act.web.api

From within ACT!, use the help/about dialog and press the database information button. Enter the current value of from the database setting Database Name below.

Database Name: MYWEBHOSTEDDATABASE

Please enter the ACT! username and password of an administrator in the database below. This information is used for configuration or if a HelpDesk user does not have a separately specified contact manager login on their user record.

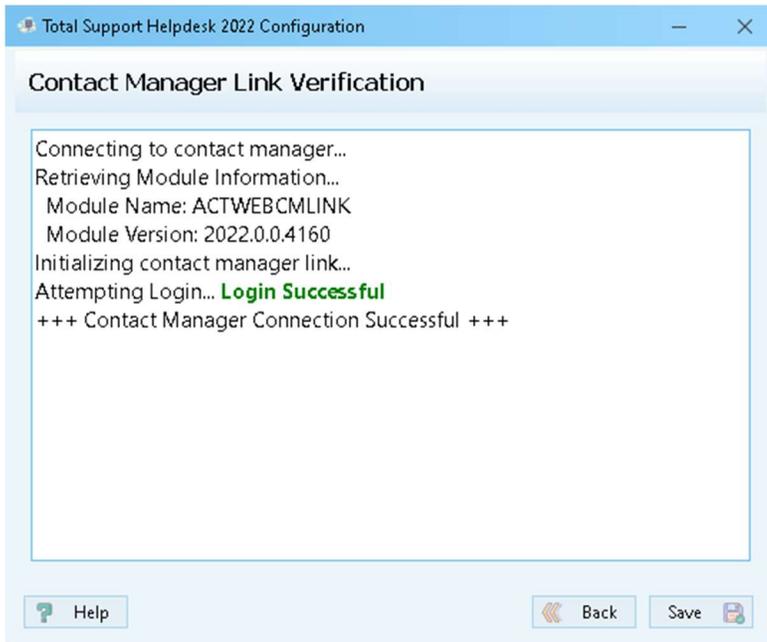
User Name: myname@mydomain.com

Password: ●●●●●●●●

Help Back Next

<next>

If you have configured correctly, you will see the following verification screen.



<save> if successful.

If the connection fails, go back and verify the web server, database name and logon information. Total Support HelpDesk uses the Act! Connect add-on to communicate with your Act! Database. Be sure you have the Act! Connect installed. Act! Connect is an add-on available from the Act! website. <act.com>. TIP: You may have to uninstall and reinstall the Act! Connect to refresh the connection.

Next, you will want to verify the contact manager fields. The Contact Manager Fields should already be mapped. But you should just verify to confirm. The fields are to the 'contact level'. There are 3 screens, continue through the wizard. The last screen are 7 additional contact manager fields you can map as User Defined. These fields are optional and used to help narrow down your search results by using unique fields.

For Inquiry Center View Tab Configuration, you can access our online YouTube video that will walk you through this process in about 5 minutes.

Depending on your contact manager, you may not have any options for advanced preferences.



Please visit our website and YouTube Channel for more information and videos:

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