

TOTAL SUPORT HELPDESK

Version 6

ADMIN & USERS GUIDE



Software Solution for All Your Customer Service Needs

From Sales to Support
From Inception to Resolution

Built-in Contact Manager

Revised September 10, 2025

This guide is designed for all levels of users

Resource Dynamics, Inc.

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

About This Guide:

This guide is designed for use by the Administrator and Users for Total Support HelpDesk. Use this guide **AFTER** you have completed your installation and server configuration. There are separate instructions for your installation process.

This Guide will provide instructions and recommendations on how to best utilize our software. If you are an existing user from a previous version, you will see some familiar screens. We kept as many screens the same as not to completely disrupt existing users from breaking their pattern and easing the learning curve.

This guide also includes CONFIGURATION instructions for the Administrator. You **MUST** complete the basic configuration to get started. Basic configuration required to get started is to configure your contact manager as either Stand Alone or with Act! and configure your Users and Departments. The rest of the configuration can be done as needed to fit your needs.

Almost every feature is optional; so, depending on how you configure (enable) features, will determine what you see when you logon. Some features require additional configuration, please do not enable features until you are ready to complete configuration. If you enable a feature and don't complete the configuration, this **WILL** cause issues.

You will find some features don't require a lot of instructions; they are pretty self-explanatory. The user interface was designed to allow Users less time learning, and more time working and being productive. Many of the features are intuitive.

YouTube videos that detail each feature can be found on our YouTube Channel. Visit our home page: <https://www.resource-dynamics.com/> to access our YouTube Channel. Along the way, we will also create individual PDF presentations that can be accessed from our Resource Links section on our website.

Total Support HelpDesk is SQLite database format. Optional if you wish to download the SQLiteStudio (3.3.3 or newer) if you wish to open the database for maintenance and/or create your own custom reports.

Fully supports English keyboard and English Characters. Foreign keyboards and characters may work, but not supported.

Requirement:

Server files can be installed on the following Operating Systems:

Windows Server 2022 and newer Standard or DataCenter

*Windows Server 2019 Standard or DataCenter

*Windows Server 2016 Standard or DataCenter w/ sp2 or later

Windows 11 **non-home**

AWS (Amazon Web Server)

Google Cloud Instance

We would suggest using a certificate and enabling HTTPS

(see <https://blog.boxofbolts.com/ssl/windows/owin/guide/2015/06/29/https-self-hosted-windows/>) as it would encrypt the traffic over the wire and improve security.

Client files can be installed and launched on the following Operating Systems:

Windows Server 2019 Standard or DataCenter

Windows Server 2016 Standard or DataCenter w/ sp2 or later

Windows 11 (home, pro, enterprise)

Windows 10 current build (home, pro, enterprise)

*Server 2019 and older, Windows 10 and older, are no longer supported by Microsoft. However, you may still be able to install and run; but, you do so at your own risk.

If you have clients that need access from other devices, such as Chromebook, iOS, Android, Chromebook, MAC, or Ubuntu, we have an add-on product called GO-Global. This will give you the ability to web-enable your software (and not just HelpDesk!). If your client is on a PC with full windows o/s, you can connect remotely using a static IP address configured and pointed to the server.

Resources:

All operating systems (recommend to be 64-bit).
8 GM MB minimum
500 GB hard drive disk space (recommend an SSD)
Processor Speed 3 GHz minimum (recommend 4 GHz)

SECURITY:

Please be sure that all Users can fully access on the host server:

c:\users\public\public documents\helpdesk

Recommend to turn off PRIVATE network firewalls for best performance and stability. Once Microsoft deems the product to be “trustworthy”, then you can enable private firewalls if needed. The more you use the software, the more Microsoft will identify the .exe as trustworthy.

TIPS:

SERVICE: HelpDesk Database Application Server runs as a service. This is set to ‘automatic’ and should not be changed. You can access the service quickly by going to the main \server folder and launching the TSHDServerMonitor.exe. You can start and stop the services here. Or you can go directly into SERVICES to start and stop.

BACKUPS: When making a backup of your main HelpDesk directory, please be sure to include the sub-folders (server and utils). Also, MOST important, is to backup C:\Users\Public\Documents\HelpDesk. Your database, logs, and storage items are located here.

MAINTENANCE: Setup a regular routine to maintenance your database. This can be done by accessing the HDDBTools.exe located in the \utils folder. Or optionally you can maintenance through SQLiteStudio.

ACCESS VIOLATION: Sometimes a bump in the network can cause random access violations. To quickly address this issue, run the TSHDDBFIX.exe located in the \utils folder. Requires exclusive access.

CONFIGURATION: When making changes in configuration, it is strongly recommended that you have all Users exist HelpDesk, make your changes, stop and restart the services to ensure everything is updated. And always good practice to make a backup of the database before you make changes!

ANTI-VIRUS: Depending on which anti-virus software you use we would recommend that you add exceptions for HelpDesk to ensure best performance. In most cases you can provide the file or folder path for our exceptions list. Please remember to also include the path C:\Users\Public\Documents\HelpDesk. You may also want to adjust when to scan, example some a/v software scan when executing, when opening, when writing. You may want to limit this to when opening. If you leave all 3 scan options, please make note that this may cause a delay in the application.

SCHEDULER: Please be sure that all the computers on the network have the same clock time. Different clock times will affect the scheduled task for Helpdesk, this includes Email and Priority Escalation.

Total Support HelpDesk does not support Opensource Software solutions. There are many drawbacks to using open source and trying to integrate. While you are more than welcome to configuration to an opensource solution, we cannot guarantee success. **Total Support HelpDesk may not support all Email accounts.**

Getting Started: Software Configuration with built-in Contact Manager

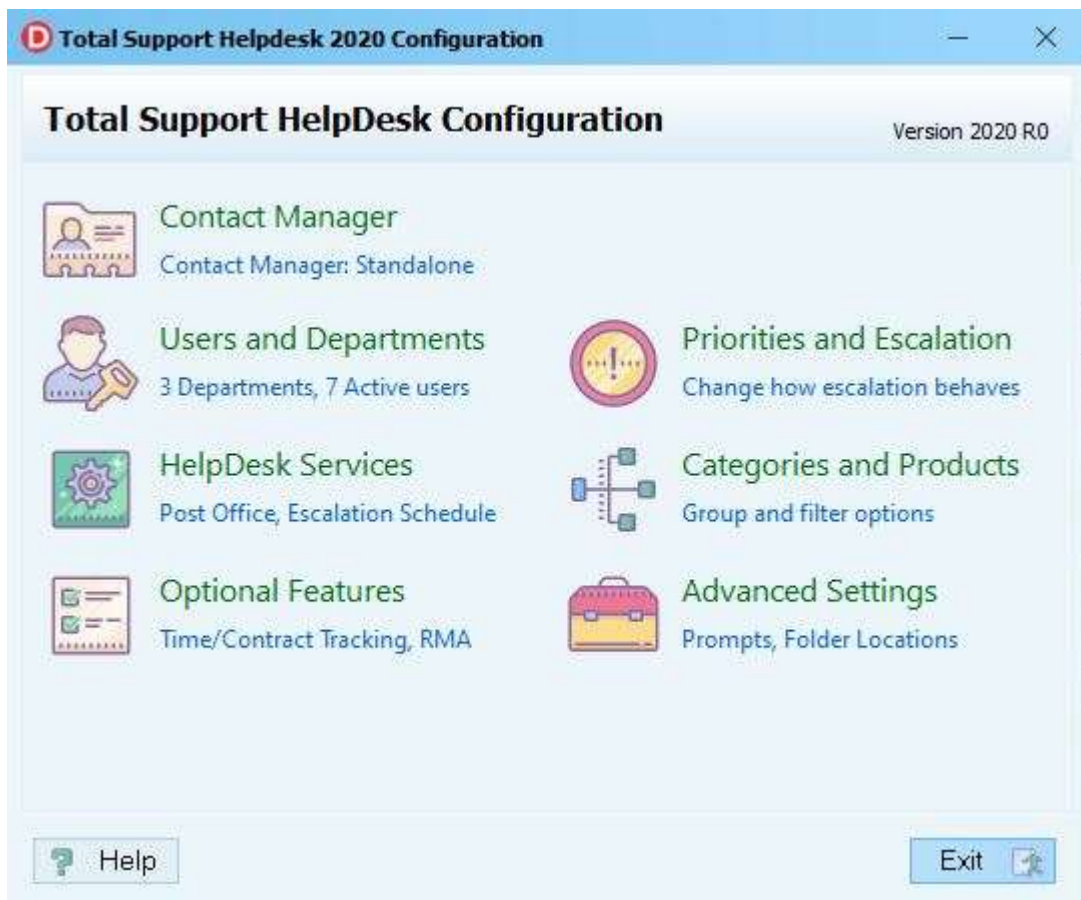
IMPORTANT: When making changes in configuration, these are global changes. You must stop and restart the HelpDesk Services for changes to take effect. Strongly recommend that all users exist HelpDesk before you stop the services so they do not get hung-up in the app.

TIP: When making changes to the Contact Manager section, it is recommended that you rebuild the database afterwards to ensure the fields and indexes are updated. Go to the HelpDesk Services and stop the service, this can be done by running the TSHDServerMonitor.exe located in the main \server folder. Then go to the UTIL folder and run the TSHDDBFIX.exe. Once that is completed, restart the services by running the TSHDServerMonitor.exe again.

Browse to your \Server\Client_Files. Launch TSHDConfig.exe file. Administrative Login screen will display. First time logon is ADMIN with no password, click OK.

This is the main Configuration menu. You can also access this menu from inside the client from the OPTIONS menu. Only the ADMIN and USERS with 'supervisor' rights will be able to access configuration for security reasons.

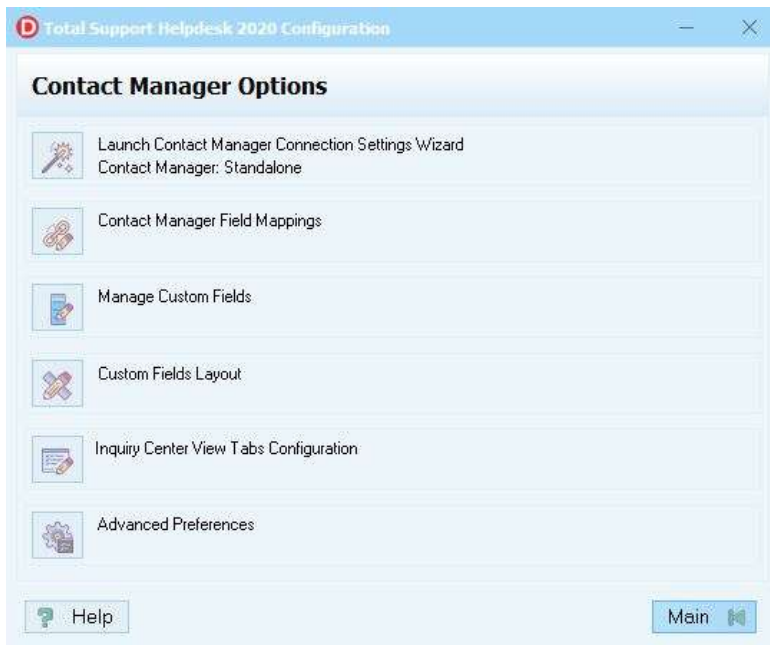
TIP: If you plan to keep the ADMIN user, please add a password to protect so non-admin/supervisor users cannot logon.



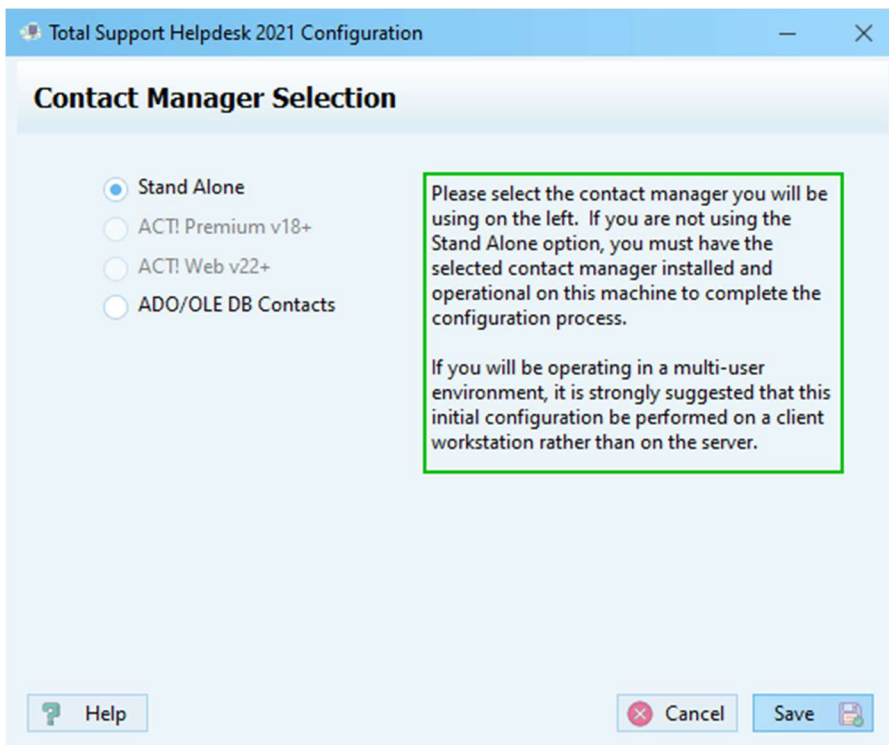
Contact Manager Configuration

First things first, you MUST configure your contact manager. Click on the Contact Manager button (top left). This will open a sub-menu

Contact Manager Options



Click on the top menu option, Launch Contact Manager Connection Settings. This will open another menu to select either Stand Alone, Act! Prem, Act! Web, or ADO/OLE DB Contacts



If Stand Alone, click the SAVE button. Since the contact manager is built-in, there is no further connection settings needed.

Act! and ADO are available as an add-on and limited on support. Contact our office for more details.

Contact Manager Field Mappings

For Stand Alone Only

This section you will map the basic contact manager fields. By default, they should already be filled in. If you configured your HelpDesk to Act! these fields must be from the CONTACTS_TABLES only. DO NOT map fields from the COMPANY_TABLE.

3rd Screen are optional fields that you can use to help when you are doing a new inquiry search. Field 1 and 2 will be searchable from the new inquiry search. Fields 3 through 7 will be viewable only on the results grid.

Contact Manager General Field Mappings

Please specify the appropriate contact field for each of the fields below. You must assign at least the Contact Name and Company Name before you can continue.

Company Name:	Contacts.COMPANY_NAME
Contact Name:	Contacts.CONTACT_NAME
Address Line 1:	Contacts.ADDRESS1
Address Line 2:	Contacts.ADDRESS2
City:	Contacts.CITY
State/Province:	Contacts.STATE
Zip/Postal Code:	Contacts.POSTALCODE
Country:	Contacts.COUNTRY

Help Cancel Next

If you are configured as Stand Alone, you will have additional options.

- **Manage Custom Fields.** Here you will create your own contact manager fields. Names must be unique

Manage Standalone Contact Manager Custom Fields

Prompt	Field Name	Field Type	Field Size
Add Ons	AddOns	Memo	N/A
Alt Email	altemail	Character	50
Alt Email 2	altemail2	Character	50
App Version	appversion	Character	25
Auto Renewal	autorenewal	YesNo	N/A
Bank Details	bankdetails	Memo	N/A
Billing	billing	Character	50
CC#	ccnum	Character	75
CCExpires	ccexpire	Date	N/A
CM	cm	Character	25
connotes	ConNotes	Memo	N/A
Create Date	createdate	Date	N/A
CSID	csidnum	Character	5
customer notes	customernote	Memo	N/A
DiscountRate	DiscountRate	Character	5

Add Edit Delete Help Menu

- Custom Field Layout. Here you can add as many tabs as needed and then add your custom fields to the tabs. These tabs and fields will be the core to your CONTACTS database.

Standalone contact manager custom field layout designer

Environment Info GENERAL Contract Tracking NOTES Billing and Renewal

CM Plan Type InqBillabl SN# SQL

App Ver Prod ID Product

Host Nam ACTIVE Total Seats

Host ID Server Path

Server OS Reseller is

Reseller Ema


OK Cancel Help

Here is the area you have 100% customization control when running Stand Alone. Create as many custom fields as desired, and create as many tabs and layout the design anyway that works best for you and your team.

TIP: please extend your field a little bit longer than desired to allow room for the pick list box and *** box that will appear at the end of the field. Space the fields so they do not overlap each other.

Inquiry Center View Tab Configuration

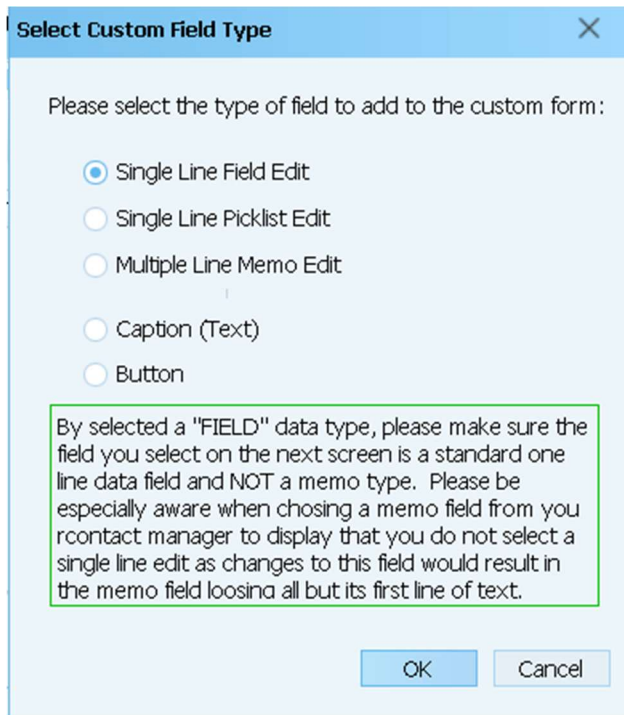
This section you will design your center view for the OPEN INQUIRY screen. This is different than the 'custom field layout'; which, is for the built-in contact manager when configured as Stand Alone. Here you can add as many custom tabs as desired or select a pre-designed tab. You can also add fields specific to the inquiry and/or add contact manager fields.



The dialog box titled "New Inquiry Tab Type Selection" has a close button (X) in the top right corner. It contains the instruction "Please select the type of tab you wish to add:". There are two radio button options: "Existing System / Pre-Designed Tab" (which is selected) and "New Custom Tab". Below the first option is a list box containing the following items: "Standard View 1", "Standard View 2", "Standard View 3", "Inquiry Intake Forms", "Inquiry RMA", "Standard Inquiry Status Publisher Fields", and "Inquiry Tasks". To the right of the "New Custom Tab" option is the text "* Not available in lite edition". At the bottom of the dialog are "OK" and "Cancel" buttons.

Standard View Tabs gives you a tab with 2 columns and 14 fields. The fields sized are fixed. You can change the Tab Caption, field type, and field source. If you select New Custom Tab, you will be prompted to provide a caption for the tab.

Once the tab is added to the view, you can now add items to the tab. Start by selecting the tab and then click the 'add item' button, then click on the grid to open the field box. Here you will select what type of field you are going to add.

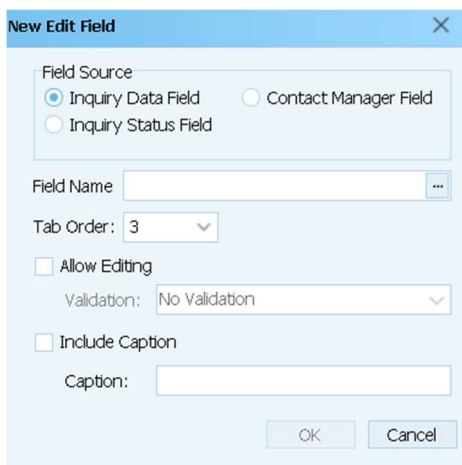


The dialog box is titled "Select Custom Field Type" with a close button (X) in the top right corner. It contains a message: "Please select the type of field to add to the custom form:". Below this message are five radio button options: "Single Line Field Edit" (selected), "Single Line Picklist Edit", "Multiple Line Memo Edit", "Caption (Text)", and "Button". A green-bordered text box contains a warning: "By selected a 'FIELD' data type, please make sure the field you select on the next screen is a standard one line data field and NOT a memo type. Please be especially aware when choosing a memo field from your contact manager to display that you do not select a single line edit as changes to this field would result in the memo field losing all but its first line of text." At the bottom are "OK" and "Cancel" buttons.

Field types are as follows:

- Single Line Field Edit > these are standard data fields, usually one line in length.
- Single Line Picklist Edit > this is the same as single line, but with the ability for you to select a pick list as the field.
- Multiple Line Memo Edit > this is a multi-line memo field.
- Caption (text) > this is text that you want to use on the form; either, associated with a field or just to use as a caption.
- Buttons > there are two types of buttons that will 'date/user/time' stamp a memo notepad of your choice; and, also a button that can launch a program of your choice and pass parameters to that program.

Select what type of field or action you would like to add. For example, let us start with Single Line Edit field.



The dialog box is titled "New Edit Field" with a close button (X) in the top right corner. It contains a "Field Source" section with three radio button options: "Inquiry Data Field" (selected), "Contact Manager Field", and "Inquiry Status Field". Below this is a "Field Name" text box with a dropdown arrow. Then is a "Tab Order" dropdown menu showing "3". There are two checkboxes: "Allow Editing" (unchecked) and "Include Caption" (unchecked). Below "Include Caption" is a "Caption" text box. At the bottom are "OK" and "Cancel" buttons.

In the above screen, you will need to select which 'source' your data will be coming from:

- Inquiry Data Field > we provide 24 extra fields you can use. 10 Date, 10 Text, and 4 Memo. You can caption the fields as you desire. Please DO NOT change the field name. DO NOT use the same field more than once, as this will cause issues.
- Inquiry Status Field > we provide 7 extra fields you can use. 6 Text, and 1 Memo. Originally created to support our add-on Inquiry Status Publisher, but even without the add-on, you can utilize these fields the same.
- Contact Manager Field > this list will come from your contact manager with available fields you can use.

Tab Order: This will auto fill based on fields already added. You can change the tab order of your fields for faster access. Example: fields that you map from your contact manager may be read-only; make them a higher tab order.

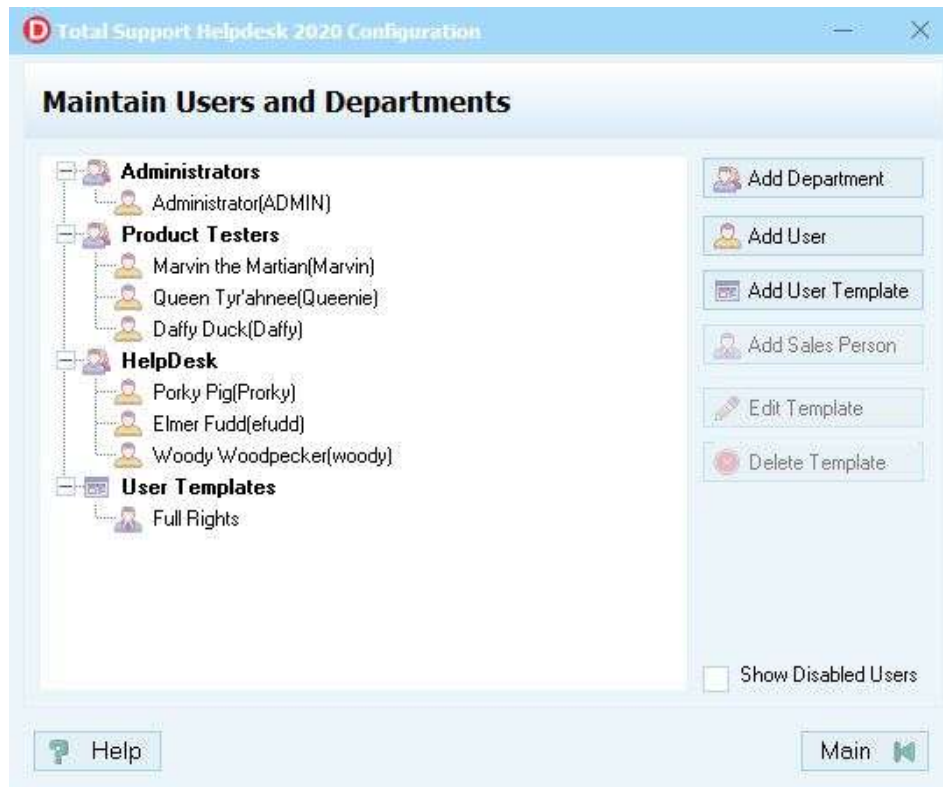
TIP: When using the Single Line Pick List option, the Field Name and the Picklist Name need to be the same.

TIP: You can right click on the field to change the tab order

Advanced Preferences

Enable Inquiry Relinking Option: This ONLY enables the feature. You still must give this right to each user through the Users/Departments section > security rights.

Users and Departments Configuration



Must add your Departments first. Click on **Add Department**. Create a unique 8 character Department ID. Add a Department name, and if applicable, add a department Email (example: Support@mycompany.com)

TIP: If you have multiple users with the same role (security rights), we recommend creating a User Template.

Click on **Add User Template**, create a template name (example: Group A Users). Click on the Access Rights tab and enable the rights you want to give Group A Users. Save your settings and return to the main menu.

Now let's add users....

Add Users Configuration

Total Support Helpdesk 2020 Configuration

User Details

General | Security Rights | E-mail | E-Mail Accounts

User Id: Marvin Full Name: Marvin the Martian ☐ Supervisor [Change Password](#)

Profile

Department: Product Testers
Title:
Extension:

Contact Manager Connection

Contact Manager User Id:
Contact Manager Password:
[Test Contact Manager Connection](#)

☒ Active User

[Help](#) [Back](#) [Save](#)

Adding users is a very important part of configuration. Once added, their User ID becomes part of the database linked to inquiries, hot tips and known issues.

- Create a unique 8-character User ID
- Full Name for the User. **IMPORTANT:** if configured with Act! you must use the Users Full Name on their contact record in Act!
- If you want this user to have supervisor rights in their department, check the box for Supervisor. More than a normal user, there are places where additional security is required and that is granted to the supervisor.
- Required to add passwords for your users, click on Change Password, then add new password.
- Profile: All users must be linked to a department. Title and Extension are internal use only.

Active User by default will be enabled. If your User is no longer employed or part of HelpDesk, you can disable them by unchecking this box.

IMPORTANT if you delete a User that has any inquiries, hot tips or known issues linked to their ID, you will need to first change ownership of these items. Use the Change Ownership button, select ownership method and then select the user to become the new owner of the items.

Contact Manager Connection can be ignored. This is in place for older installations using external contact managers.

Security Rights

Here is the area you select which rights your User can have within the HelpDesk application. If you created a User Template, all you need to do is select the template in the dropdown box.

Supervisor = mostly a normal user, but can operate in their department with certain override abilities, such as override expired contracts, and can edit Users within their department.

Superuser = have full access everywhere! You should limit who you receive this right.

Lock Manager, only available to Superusers, this allows one to see what records are locked by the system and break them if needed. This would help where an error left a lock behind. Locks are automatically cleared when the service is restarted.

E-Mail Tab:

This is the USERS email that will be used for internal use only between HelpDesk users. The Email identity is used through the Email system.

E-Mail Accounts Tab:

Here you need to select which email account this User has access to using, and which is the default. If you have multiple out-bound emails configured, check mark the ones this user can send emails from.

Client Install

At this point, you can now install a client and start using HelpDesk with the basic features. This giving you time to read and understand how the rest of the features work.

There are two ways you can install a client.

Recommended way:

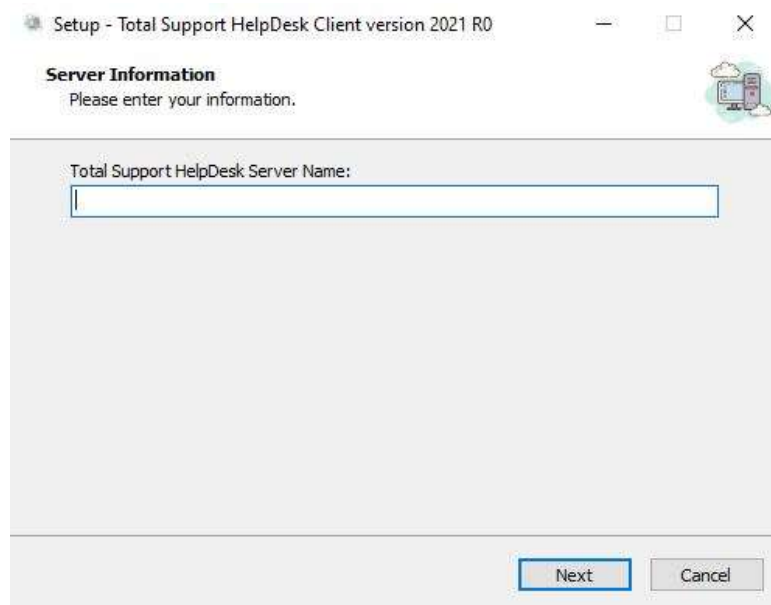
From any client, open explorer and enter `//servername/installhelpdesk` . This is the screen that will display. Click on the green button to download the client installer.

*If your Administrator enabled the alternate port for Act! Connect users, then you need to add `:8080` after the servername (`//servername:8080/installhelpdesk/`)



The 2nd method to install clients, is to push out the client installer located on the server in the `\client` folder. By default, would be `C:\program files (x86)\HelpDesk\Server\Client`. Since shares are no longer required on the server folder, you would need to place the installer into a global location for clients to access.

Next, you will be prompted to enter just your Server name where you install the main files. USERS must have access to the computer you are installing HelpDesk server files.



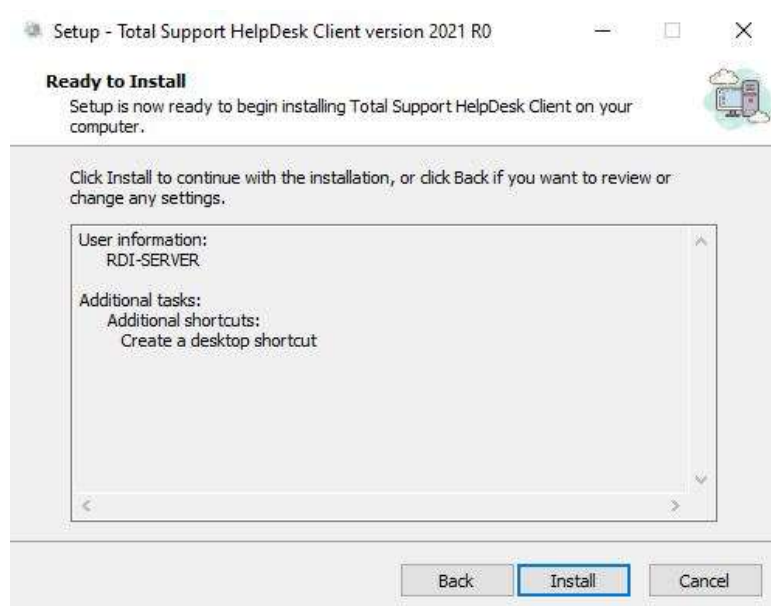
Setup - Total Support HelpDesk Client version 2021 R0

Server Information
Please enter your information.

Total Support HelpDesk Server Name:

Next Cancel

<Next>



Setup - Total Support HelpDesk Client version 2021 R0

Ready to Install
Setup is now ready to begin installing Total Support HelpDesk Client on your computer.

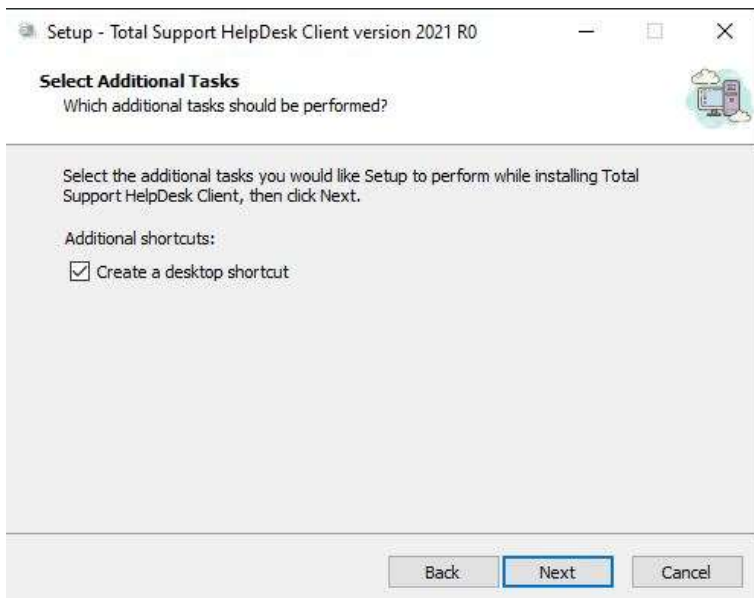
Click Install to continue with the installation, or click Back if you want to review or change any settings.

User information:
RDI-SERVER

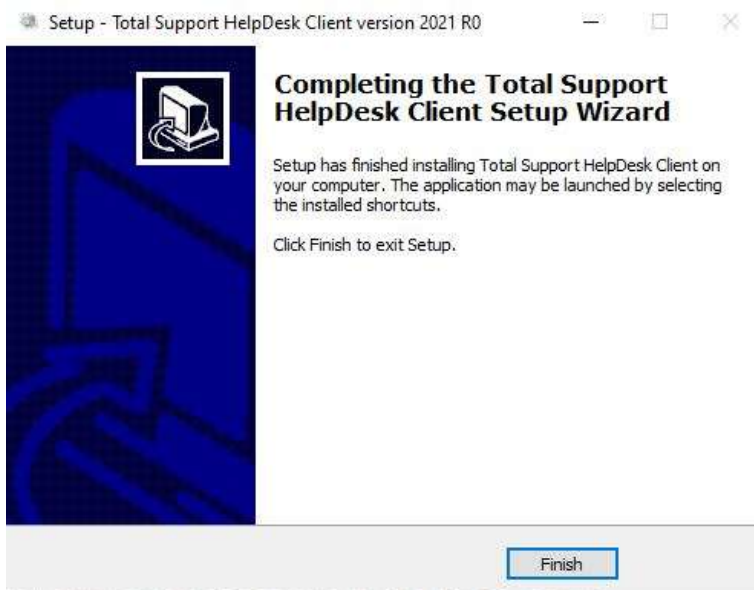
Additional tasks:
Additional shortcuts:
Create a desktop shortcut

Back Install Cancel

<Install>



<Next>



<Finish>

You can also locate the client install in \Server\Client_Files folder on the server.

You will notice that the TSHDConfig.exe is also located in the Client_Files folder. This is because clients will be able to launch configuration locally and does not require you to share the folder across your network. ONLY users that you have given Supervisor rights and/or Superuser rights, will be able to launch the configuration locally.

NOTE: Changes made in configuration are global; Users will not see changes until they exit their client and log back in.

When you need to update your client, repeat these steps.

Congrats! You are done with the basic configuration!

To get the most out of your software, please continue to see details and instructions on more features.

Priorities and Escalation Configuration

Description	Escalate After	Order
Critical	Never	10
High	2 Days	25
Medium	2 Days	31
Low	Never	50

By default, we have already included 4 main priorities. You can add new priorities, edit existing or delete priorities.

IMPORTANT You cannot delete a priority that is linked. You can edit the priority and it will change automatically on any linked item.

TIP: Spend some time thinking of how you will utilize priorities. Example: if you are configured as a Stand Alone and track sales and other non-support inquiries, you may want to create specific priorities for specific items.

Example:

Tech (for your technical support team)

Eval (someone that is evaluating your product)

Sales (inquiry for your sales team)

Licensing (inquiry for your licensing team)

Known Issues (known problem with your product)

Research (inquiry needs to be researched further)

DEV (inquiry for your development team)

HOLD (inquiry on hold)

Adding a Priority Configuration

Total Support Helpdesk 2020 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 * Not available in lite edition

☐ Enable E-mail Notification * Not available in lite edition

Help Back Save

Adding a new priority.

- Choose a unique priority name
- Sort Order (this is a numeric sort order and lowest displayed first)
- Select your colors. NOTE: colors will vary depending on Users display settings
- Enable Escalation if you wish to have this priority escalated. NOTE: You will also need to enable 'automatic priority escalation' setting. The Priority will start the clock once you click the 'save' or 'ok' button on the inquiry.
- Enable Email notification if you wish to notify Users when this inquiry escalates. NOTE: You will need to enable out-bound email and have valid email addresses

Default Priority Configuration

A default priority will be used when a new inquiry is created. This value can be set either as a constant, or by using a function written in Pascal scripting.

Scripting Engine

IMPORTANT we do not support your script. We do not provide working scripts. You are 100% responsible for making it work correctly. If you are not familiar with scripts, please do NOT enable this option. If your script does not function correctly, you need to remove it.

The scripting engine is provided as an option to give you a more powerful tool to create expressions that will use a situation inside your contact manager and return the results back to helpdesk.

Expressions are written in Pascal script. For more information go to:

<http://www.functionx.com/objectpascal/index.htm>

These general functions are also available in addition to the standard Object pascal syntax:

```
function CMFieldAsBoolean(Fieldname:String;bDefault:boolean):Boolean
function CMFieldAsFloat(Fieldname:String;bDefault:Double):Double
function CMFieldAsDateTime(Fieldname:String;bDefault:TDateTime):TDateTime
function CMFieldAsInteger(Fieldname:String;bDefault:Integer):integer
function CMFieldAsString(Fieldname:String;bDefault:String):String
```

HelpDesk has two places where you may use scripting:

- Default Billing Flag
- Default Priority

For the default priority, a function must be created that returns the name of the **priority to use**. Let's consider the following *example* using the priorities Low, Medium, High and Critical. We want to automatically set the priority High for anyone with the contact manager field VIP set to True. Everyone else should get a Low priority. This function then looks like the following:

```
function getpriority : string;
begin
if CMFieldAsBoolean('VIP',False) then
Result := 'High'
else
Result := 'Low';
end;
```

HELPPDESK SERVICES

Total Support Helpdesk 2021 Configuration

HelpDesk Services Selection

Automatic Priority Escalation

☐ Enable Automatic Priority Escalation * Not available in lite edition Configure

Automatic priority escalation will adjust an inquiry's priority from one level to another after a specific amount of time has passed since the inquiry's last priority assignment. Additionally, notifications by e-mail (requires a valid SMTP account) can be generated on these escalation events.

SMTP E-mail Processing "Post Office"

☒ Enable POP3/SMTP Inbound/Outbound E-mail Processing Configure

Inbound/Outbound E-mail processing will allow the complete management of a single E-mail account for use by HelpDesk. Generally the account used for this is support@yourdomain.com or helpdesk@yourdomain.com. The system will periodically poll the e-mail box using SMTP and will load all messages into a common inbox for processing by Total Support HelpDesk users.

Advanced Scheduling

☐ Do not schedule jobs on holidays Set Holidays

Help Cancel Save

With our Email feature, we can support INBOUND: POP3, IMAP, and Gmail and with OUBOUND: SMTP, Google SMTP, and Microsoft SMTP.

Total Support Helpdesk 2021 Configuration

Inbound E-mail Processing

Please enter the frequency you would like to check for new e-mail (no less than 5 minutes), and the account information you would like to have HelpDesk manage for you. If you choose to leave messages on the server, they will not be deleted by HelpDesk. Once you are complete, it is highly suggested that you test your account by pressing the test settings button.

Check e-mail account for new messages every minutes.

Inbound E-mail Type: ☐ POP3 ☒ IMAP ☐ GMAIL

IMAP Server Settings (Inbound)

Server Address:

Username:

Password:

IMAP Folder:

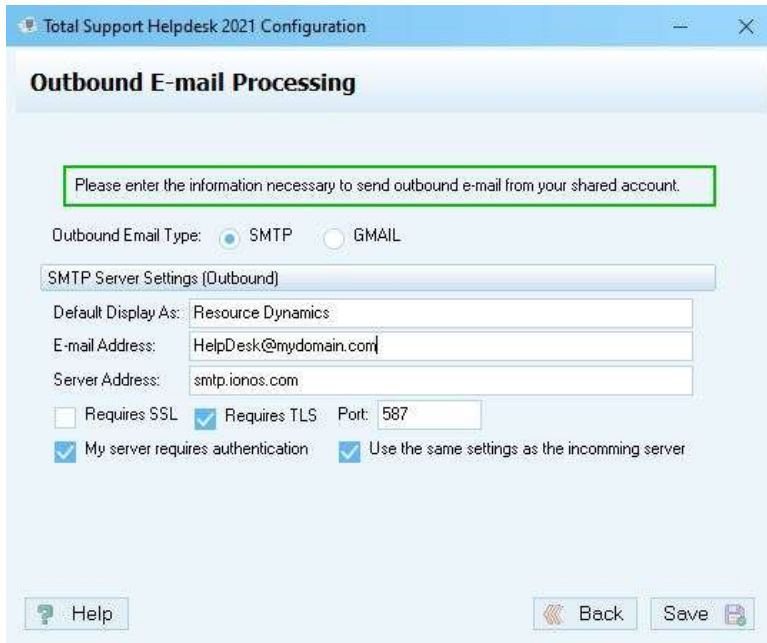
☐ Leave Messages On Server ☒ Use SSL/TLS Port:

Test Settings

Help Cancel Next

You can configure a single in-bound email. Please check with your email provider for SSL/TLS port #.

If you wish to collect any other in-bound accounts, you will need to set them up on your email provider end as a 'forward' or 'copy' to your main in-bound account.



Total Support Helpdesk 2021 Configuration

Outbound E-mail Processing

Please enter the information necessary to send outbound e-mail from your shared account.

Outbound Email Type: ☒ SMTP ☐ GMAIL

SMTP Server Settings (Outbound)

Default Display As: Resource Dynamics

E-mail Address: HelpDesk@mydomain.com

Server Address: smtp.ionos.com

☐ Requires SSL ☒ Requires TLS Port: 587

☒ My server requires authentication ☒ Use the same settings as the incoming server

Help Back Save

(Screen may vary)

For out-bound email, please check with your email provider for SSL/TLS port number and if your providers server requires authentication. **Google now requires you to setup an app password**. When you select the app, you need to select other and type 'HelpDesk'. That way it's clear when you are looking at the security notices.

TIP: You will have the option to configure additional out-bound email accounts. You first need to enable the option in Advanced Options.

IMPORTANT: With Email security every changing, we cannot guarantee every Email Provider can be supported. We use the common security settings set by Microsoft and Google.

IMPORTANT: If you are using a different Email account for Inbound and Outbound, then you need to enable the multi-SMTP feature located in the Configuration > Advance Settings. This will separate the two accounts and not share authentication.

Outbound E-mail Processing

Please enter the information necessary to send outbound e-mail from your shared account.

Outbound Email Type: ☒ SMTP ☐ GMAIL

SMTP Server Settings (Outbound)

Default Display As: Resource Dynamics

E-mail Address: HelpDesk@mydomain.com

Server Address: smtp.ionos.com

☐ Requires SSL ☒ Requires TLS Port: 587

☒ My server requires authentication ☒ Use the same settings as the incoming server

? Help

« Back

Save »

Scheduled Task:

Once you have completed the configuration of your Email and other features, you launch the scheduler from a client workstation. Click on Options > Scheduler > and then select the task you wish to schedule. Each needs to be marked **'active'**. To select the time range, click in the starting time and hold your left mouse button and drag across the area you wish to select, then click on the **'+schedule'** button. Then you need to set how often the schedule runs per hour. Do you want to send email and/or check Email once per hour, send every 5 minutes, 10 minutes, etc. Once you have your setting, click on [OK]. Repeat steps for other tasks you wish to schedule.

HelpDesk Tasks include:

- Inbound Email
- Outbound Email
- Inquiry Priority Escalation
- Back up Database
- Publish Hot Tips (add-on)
- Publish Inquiries (add-on)

ScheduleSimpleProperties

Name: Publish Inquiry Status (Requires License)

Daily Schedule | Last Run Results

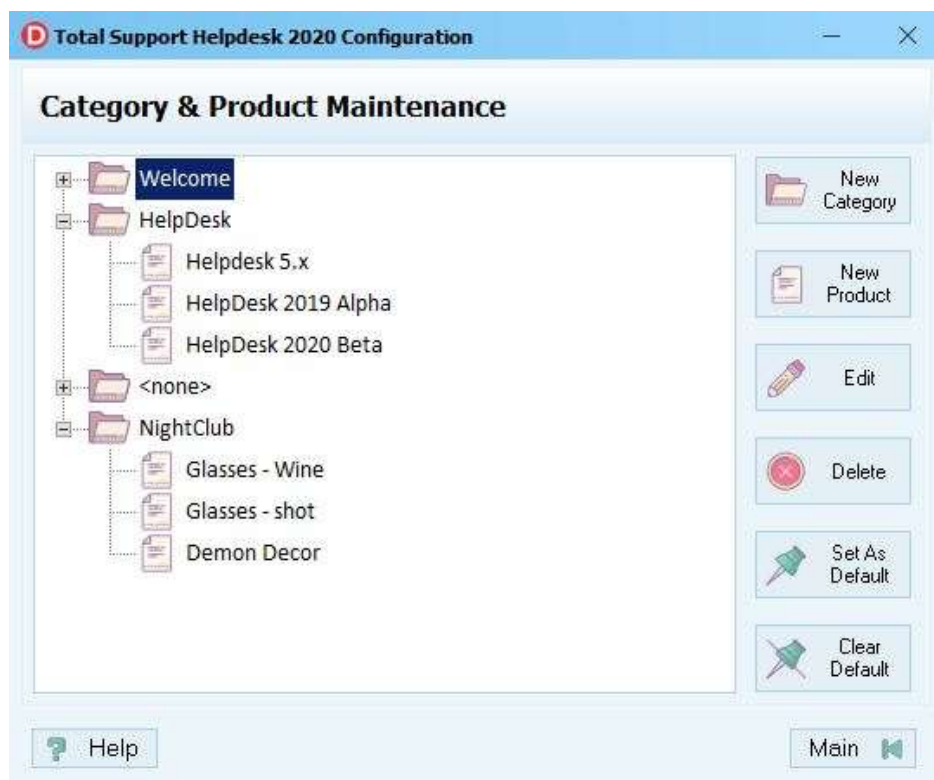
☒ Active

	12a	1a	2a	3a	4a	5a	6a	7a	8a	9a	10a	11a	12p	1p	2p	3p	4p	5p	6p	7p	8p	9p	10p	11p
SUN																								
MON																								
TUE																								
WED																								
THR																								
FRI																								
SAT																								

Frequency per hour: Once

OK Cancel

Categories and Products Configuration



Within HelpDesk, you can build a separate database of Categories and Products; which, you can also re-label in configuration > advanced settings.

Here you will add/edit/delete items. You can also set a default Category and default Product within that category.

You cannot delete a category or product that is linked in the system. You first need to select an alternate category and product you want to reassign. Do this by selecting the Category and Product, and set them both as the defaults. Then go back to the product you want to delete; when you click on the delete button, you will get a warning message about the reassignment.

Optional Features Configuration

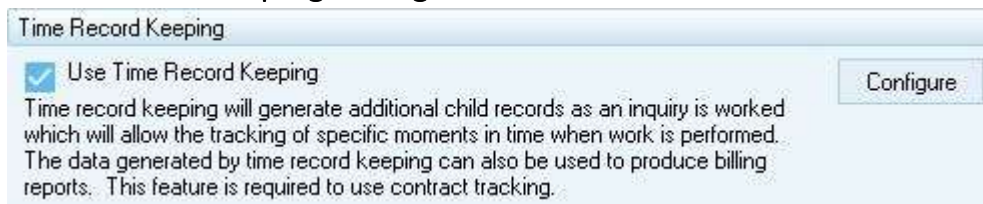
These are optional features that you can enable/configure if you wish to use them.

IMPORTANT DO NOT enable any feature unless you can complete the additional configuration associated with it. If you enable and do not complete the configuration, you **will** cause issues in the software.

NOTE: Some features will be automatically locked if you are licensed for the HelpDesk PRO version.

Each feature provides a description. The [configure] button to the right indicates there are additional configuration settings required for this feature to function.

Time Record Keeping Configuration



TIP: If you are going to use contract tracking, you must enable and configure this feature.

TIP: Even if you do not “bill” for your time, keeping time will allow you to analyze who, what, and when your company is spending time performing customer service.

Full time Record allows for the entry of all information into the time record, including billing notes and billing time.

Just the Action Prompt creates a time record and allows you to include an “Action Code”, but does not offer the full billing screen.

If you are using the full billing screen, you can also choose to determine minimums and increments. When HelpDesk logs an inquiry, it calculates both a ‘Logged’ time and a ‘Bill’ time.

Minimum billable time is the amount to charge for each time log entry. Example: you have a minimum set of 5 minutes. You have an inquiry open for 3 minutes, it will automatically bill 5 minutes, not 3 minutes.

Billed time is used for rounding. Example: you want to bill in increments of 15 minutes. You have an inquiry open for 8 minutes, it will automatically round up and bill for 15 minutes.

IMPORTANT Billing Time Logging cannot be -0-. Must have a numeric value of 1 at the lowest. Time Log billing is tracked in minutes.

Advanced Settings allow you to modify billing prompts and options to help to control how manual changes to inquiry time log entries are handled.

Default Action Prompt is the value that will appear as a default on the time record. This value should also appear on the list box that you can build during time log entry. You can also leave blank.

Billable Status if checked, all new inquiries will have as a ‘default’ the BILLABLE status turned on. If User has the proper security rights, they can uncheck the billable box from the open inquiry (to the right side of the Priority field).

Use function to determine billable status. Like Priority, you can create a Pascal script here. The Billing status is slightly different then the Priority script. This one will return a Boolean (true/false) from your contact manager field when the result is true, then indicates the billing flag to be enabled.

Time & Material Record Keeping Configuration

Advanced Time and Materials Record Keeping

☐ Use Advanced Time and Materials Feature





Configure

Advanced time and materials allows you to compute a cost for the time spent working on an inquiry, or for items used while working on the inquiry. This system includes the ability to generate an export file which can be imported into another accounting package.



This feature allows you the ability to attach and add cost information to an inquiry record. You can add costs based on 'TIME' at a selective rate, or you can add costs based on 'FIXED COSTS' at a rate per unit. This feature DOES NOT track inventory levels.

You can also use a detailed report that can be given to the accounting department or generate an export file that can import into another accounting package, such as EXCEL. We have included 2 reports for this feature, or you can create your own custom report using your own report designer. All custom reports are created and executed outside of our software. We do not troubleshoot custom reports.

Time & Materials Advanced Configuration

 Add Rate  Edit Rate  Delete Rate  Print Rates

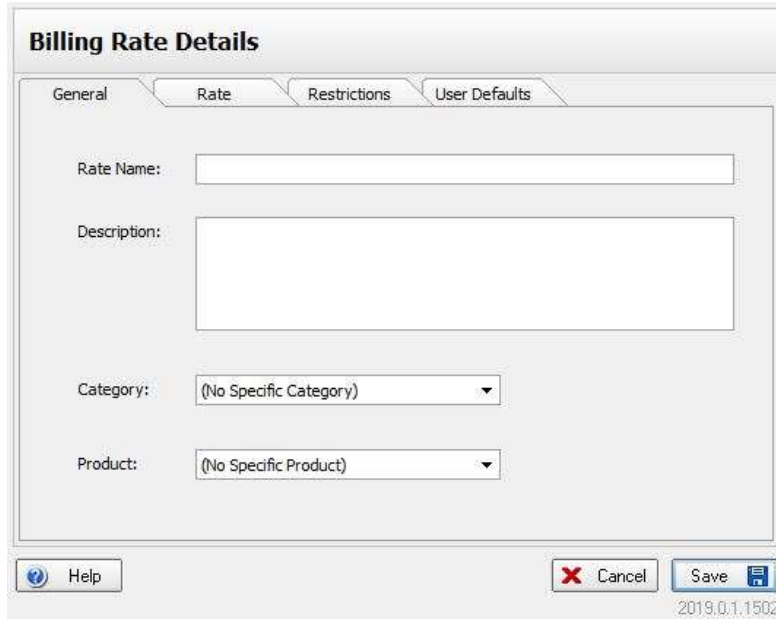
Name	Default Rate	Rate Type	Accounting Code
Database Conversion	\$850.00	UNIT	Convert
default	\$0.00	TIME	PROG
HELP	\$140.00	TIME	HELP
Rebuild	\$150.00	UNIT	PROG
Support	\$140.00	TIME	TS1
Training	\$140.00	TIME	HELP

 Help  Back

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The rate table is the heart of this feature. We added some examples of various kinds of rates you might use in your own operation.

When adding your own rate, the following Billing Rate Details screen will display:



'General' tab

- Rate Name is where you will enter a text description of the kind of rate you are creating. Since you will most likely view the list in alphabetic order, you should give some thought about the beginning characters so you can group similar items together.
- Description is a more detailed understanding of what the rate is about.
- Category will have a drop-down pick list based off your Categories that you have already created. The 'source location' box will display so you can select from Contact Manager Fields, User Defined Fields, Inquiry Fields, or Inquiry Status Fields. You can also leave this box as (no specific category).
- Products will have a drop-down pick list based off your Products that you have already created. The 'source location' box will display so you can select from Contact Manager Fields, User Defined Fields, Inquiry Fields, or Inquiry Status Fields. You can also leave this box as (no specific product).

TIP: You may wish to add special categories and products just for this section. *Example:* Category TIME or TMB, and then add various products.

'Rate' tab

- **Rate based on** option will give you different configuration options based on what you select.
 - Time (per hour) is based on a 'per hour' basis. It will use the time you assign.
 - Material (per unit) is a non-time- based entry which allows you to enter the 'units' which will be multiplied by the rate.
 - Mapped Field-Time (per hour) is like Time per hour, except the rate comes from the contact manager field in the inquiry record.
 - Mapped Field-Materials (per unit) is like Material per unit, except the rate comes from the mapped field in the contact manager or inquiry record.
- **Rate** is the dollar amount to bill based on your selection above, either time or units.
- **Accounting Code-** if you will be exporting your data or running the report to use with your accounting system. You can use accounting codes to match your accounting system. This field is NOT used

anywhere in HelpDesk. It is only used in this feature. The billing records are stored as part of the Time Logs.

'Restrictions' tab

Here you have several choices that are unique to your rate:

- No Restrictions means anyone may select and use this rate
- Only allow Supervisors to use this rate, which means only Users that have a 'supervisor' setting will be able to select this rate.
- Only allow users in the following department to use this rate. Select from the drop-down list.
- Only allow the following users to use this rate. Select from the drop-down list.

'User Defaults' Tab

- Here you will find a list of all your Users that have been created. You can set a rate for one or more users as their default rate.
- Note: A user cannot be **set as a default** in multiple rates.
- Some will use Time and Material Billing for Contract Tracking if you have various types of contracts per contact instead of using the built-in Contract Tracking Feature, which tracks one contract per contact record. And some will use both. You can make the decision on what best fits your needs.

Contract Tracking Configuration

One of our most popular features is Contract Tracking. Here you will choose the type of contract you will be using. If you have clients that have different contract types, then you will select Dynamic Tracking.

IMPORTANT Contract tracking tracks a single contract per contact record. There are future plans for a multi-tracking contract.

TIP: If you have a contract and have clients that also purchase additional time and/or materials outside of their contract, you may want to utilize Advance Time and Materials Billing feature.

Contract tracking is a method that you can use to block the creation of, or the work on an inquiry based on information that is obtained from within the contact manager. Total Support HelpDesk supports 4 different types of contracts: Fixed time tracking will allow unlimited access between two dates. Purchased minute tracking will only allow a contact specific amount of time to elapse on any number of issues. Purchased incident tracking will allow unlimited access to only a specific number of created inquiries. Finally, dynamic tracking will enable any one of the previous three methods to be used on a contact by contact basis.

Please choose one of the following contract tracking modes

- ☐ Fixed Time Tracking
- ☐ Fixed Time Tracking (Billing Rate)
- ☐ Purchased Minute Tracking
- ☐ Purchased Incident Tracking
- ☒ Dynamic Tracking

Help Cancel Next <next>

Fixed Time Tracking = requires a start and end date

Fixed Time Tracking (Billing Rate) = requires a start and end date and will incorporate Advanced Time and Billing Materials feature.

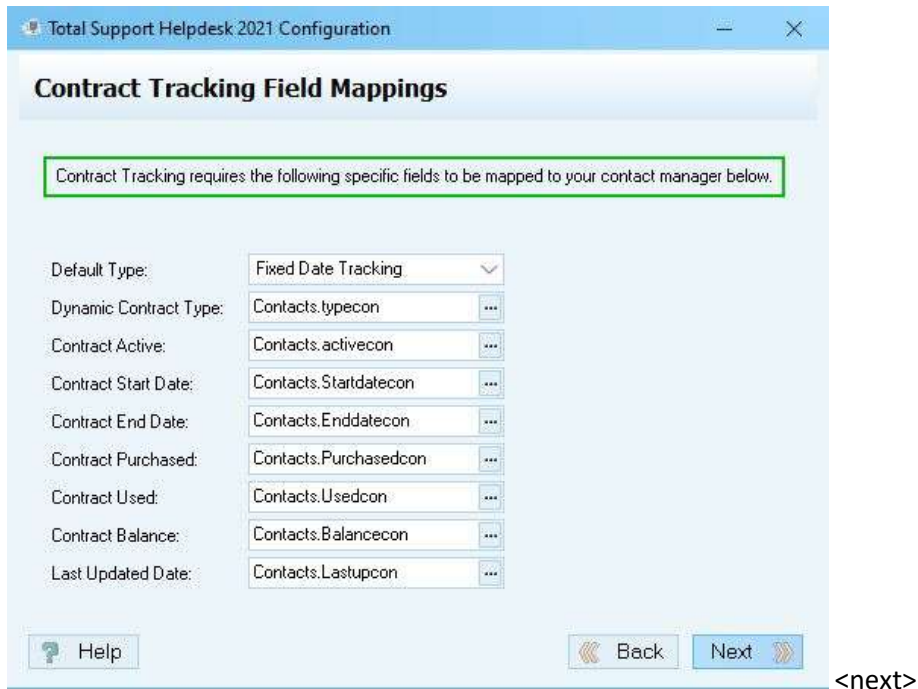
Purchased Minutes Tracking = requires a start and end date along with minutes purchased.

Purchased Incident Tracking = requires a start and end date along with the number of incidents purchased.

Dynamic Tracking = requires all the fields.

The actual contract tracking data will be stored in your contact manager (Stand Alone or Act!).

Depending on which method you selected, will determine the next screen.



Contract Tracking requires the following specific fields to be mapped to your contact manager below.

Default Type:	Fixed Date Tracking
Dynamic Contract Type:	Contacts.typecon
Contract Active:	Contacts.activecon
Contract Start Date:	Contacts.Startdatecon
Contract End Date:	Contacts.Enddatecon
Contract Purchased:	Contacts.Purchasedcon
Contract Used:	Contacts.Usedcon
Contract Balance:	Contacts.Balancecon
Last Updated Date:	Contacts.Lastupcon

Help Back Next <next>

Here is where you will map your contract tracking fields from your contact manager.

Act! Users, if you have your contract tracking on the Company level, you will need to enable 'company' level field mapping in the Contact Manager Configuration > advance options.

Stand Alone Users, we have already included the fields, you should not have to map any fields.

In your contact manager, please be sure that valid data exist in each of these fields.

There are two exceptions to be aware of,

- 1) The 'Last Updated Date' field will automatically be updated by our software each time an inquiry is opened by a user.
- 2) The 'Contract Used' and 'Contract Balance' field, must have starting values that are mathematical correct. Once the balance is set, our software will then automatically calculate used and balance.

Total Support Helpdesk 2021 Configuration

Contract Tracking warning notification

For all methods of contract tracking, a warning can be displayed when the number of remaining items, or remaining contract time before expiration is reached. Once a contract has expired, either by used units or by expired time, only a supervisor account will be able to open an inquiry for editing.

Display warning when there is ... *

less than days before the contract expires.

less than purchased minutes remaining.

less than purchased incidents remaining.

* Set the value to 0 to disable the warning all together.

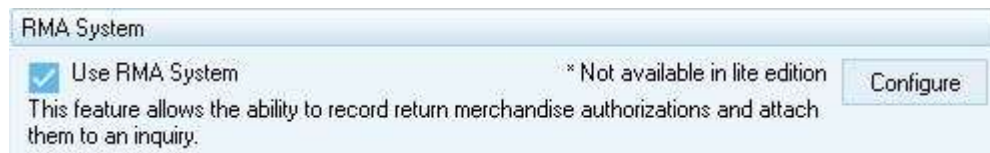
[? Help](#) [Back](#) [Save](#)

The last screen for contract tracking is the settings for 'warning'. Depending on contract type you selected, you can fill when the notification will display.

When a user opens or creates a new inquiry, and the contract is within the warning period, a message will display on the screen for the user. This is great especially if the client is on the phone, the user can mention as a reminder their contract will expire soon.

Once a contract is expired, only a supervisor within the same department or a Super-User (ADMIN) can override an expired contract and continue with the inquiry.

Returns (RMA System) Configuration

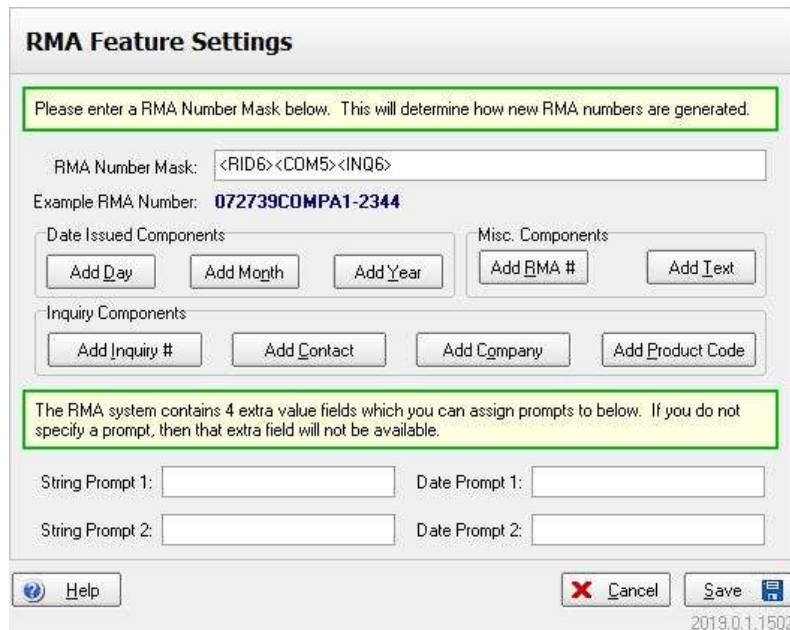


RMA System

☒ Use RMA System * Not available in lite edition [Configure](#)

This feature allows the ability to record return merchandise authorizations and attach them to an inquiry.

This is a very simple tracking system.



RMA Feature Settings

Please enter a RMA Number Mask below. This will determine how new RMA numbers are generated.

RMA Number Mask:

Example RMA Number: **072739COMPA1-2344**

Date Issued Components: [Add Day](#) [Add Month](#) [Add Year](#)

Misc. Components: [Add RMA #](#) [Add Text](#)

Inquiry Components: [Add Inquiry #](#) [Add Contact](#) [Add Company](#) [Add Product Code](#)

The RMA system contains 4 extra value fields which you can assign prompts to below. If you do not specify a prompt, then that extra field will not be available.

String Prompt 1: Date Prompt 1:

String Prompt 2: Date Prompt 2:

[Help](#) [Cancel](#) [Save](#)

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HelpDesk will use a unique numbers table to issue the RMA number. You can include additional information to be part of the RMA # by creating a mask. By clicking on the buttons, this will fill in the RMA Number Mask field.

In the screen shot above, we created the mask by clicking on the [Add RMA#] [Add Company] and [Add Inquiry #].

With the RMA, there are 4 extra fields you can use: Two are string fields and two are date fields. *Example:* you may want to include a due date for the merchandise to be returned. So, in Date Prompt 1, type in a prompt DUE DATE. And maybe you want to include a reason. So, in String Prompt 1, type in a prompt RMA REASON. These fields will now be available to the User when they create an RMA.

My HelpDesk Dashboard Configuration

My HelpDesk

☒ Use MyHelpDesk
This feature will display a tab containing statistical data about the system, and optional lists of recently accessed records.

Configure

Task Configuration

Tasks Feature

☒ Use the Tasks Feature
This feature will enable the ability to assign and view tasks which might also be attached to an open inquiry.

* Not available in lite edition

Advanced Settings Configuration

Inquiry Queue Refresh Rate

Current Inquiry Queue Refresh Rate

Automatically refresh the current inquiry queue every seconds.

TIP: set no lower than 60 seconds to avoid the refresh from looping.

Inquiry Prompts Captions

Inquiry Prompts (Displayed on the open inquiry window)

Company:

Category:


Status:

Product:


Here you can change the prompts to these fields that are on the inquiry record.

Inquiry Flag Captions


Inquiry Flag Prompts

Flag 1 


Flag 1 (Red)

Flag 2 


Flag 2 (Yellow)

Flag 3 


Flag 3 (Green)

Flag 4 


Flag 4 (Cyan)

Flag 5 

Flag 5 (Blue)

Flag 6 

Flag 6 (Grey)

Flag 7 

Flag 7 (White)

Here you can assign a meaning to the flag color. Example: Red Flag means HOLD.

Intake Forms Feature

Intake Forms Advanced Feature

☐ Use Inquiry Intake Forms.

You will design these inside HelpDesk from the Options menu.

Known Issues Tab Captions

Known Issue Tab Captions	
Issue Notes:	<input type="text" value="Issue Notes"/>
Technical Notes:	<input type="text" value="Technical Notes"/>
Resolution Notes:	<input type="text" value="Resolution Notes"/>
Release Notes:	<input type="text" value="Release Notes"/>

To design your forms, launch HelpDesk > Options menu > Intake Forms Manager to create form and > Intake Questions Library to create your list of questions to add to your form.

Automatic Email Search

Automatic E-mail Search	
<input type="checkbox"/>	Turn off automatic E-mail searching on new inbound E-mail messages.

By default, the new inquiry search will use the domain to locate the customer

Sticky Notes Feature

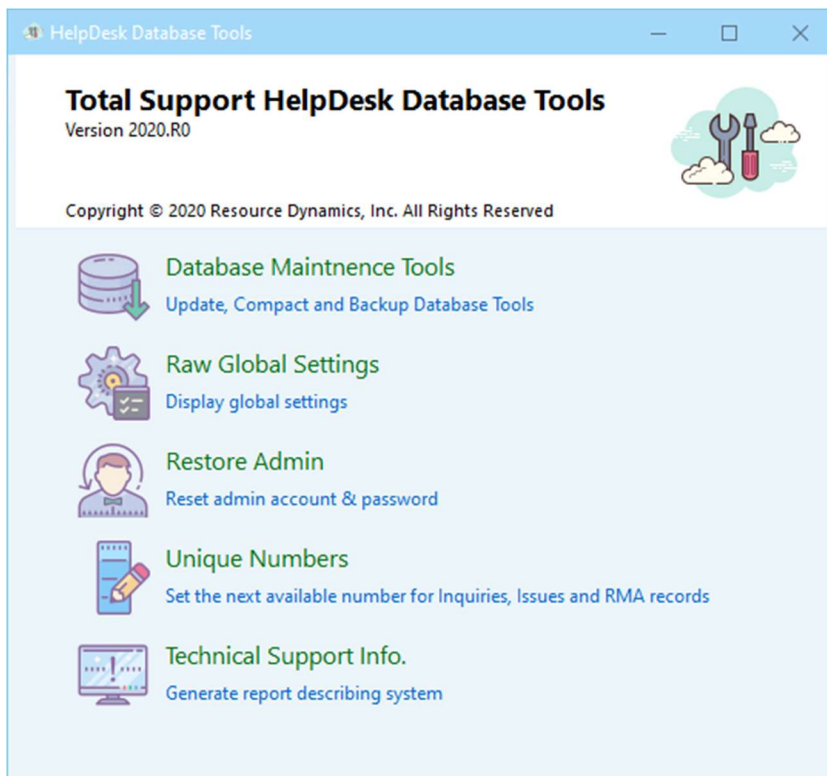
Sticky Notes Advanced Feature	
<input checked="" type="checkbox"/>	Use Inquiry Sticky Notes.
<input checked="" type="checkbox"/>	Require supervisor rights to change sticky note default settings.

Timeline Analysis

Timeline Analysis	
<input type="checkbox"/>	Create Timeline System Timelog Entries
<input checked="" type="checkbox"/>	Show System Events as default

Congratulations! You are done with configuration. At any-time, you can change your configuration. Please be sure that you have a safe backup of your database and have exclusive access before you make any changes.

Database Tools



Located in the main HELPDESK directory, in the UTILS folder. Only the Admin user or a user with supervisor rights will be able to logon to these options and must have exclusive access. All users must log out of the application and you must stop the HelpDesk Services.

Database Maintenance Tools: You will have 3 options:

Compact database > this keeps the database clean and should be done at least once a month.

Backup database > this should be done often, nightly is recommend.

Apply Patch > These files will be developed by us to do things like update statistics or add/remove fields.

Raw Global Settings: Exactly what it reads. These are raw settings to everything in your database. There may be times that you need to make a manual change in a field that cannot be reached by the program. PLEASE DO NOT make any changes here unless you are specifically guided to do so by an authorized HelpDesk Support Team Member with Resource Dynamics. Making unauthorized changes may cause ripple effects that will be unsupported.

Restore Admin: If you are locked out of your HelpDesk application because you forgot your password, you will need to contact us by email: customerservice@resource-dynamics.com or phone: 727-504-1908, and we can confirm your identity. To identify yourself, you will need the register user's name and email address on the account.

Unique Numbers: Here you can set your starting numbers for inquiries, Known Issues and Returns (RMA) records. These number by default auto increase when a new record is created. Once a number has been issued, it CANNOT be used again. NEVER change the number backwards; you can only change the number to the next highest number.

Technical Support Information: If you are having issues, this report can help our Support Team to better see your HelpDesk environment and troubleshoot.

Getting Started with Client Logon:



This is the main logon screen. Your administrator should have provided you with your User ID and Password.

Enter your logon information and click the 'OK' button.

If you are configured with Act! a second logon to your local Act! will happen behind the scene. If you get the message "ACT user name and/or password is incorrect", then please consult with your administrator. The contact manager user ID and password are incorrect and must be fixed by the administrator in the HelpDesk Configuration setup. If you receive an error "fatal configuration error, unable to logon to the contact manager", have your administrator also check that the contact manager is properly configured to the ACT! .PAD file, which should be a UNC path ([\\server\act\myact.pad](#) for example)

Act! Web client coming soon...

Top Menu Items

From the top menu options, you will have quick access to different features depending on your security rights that have been configured.

FILE:

- Search HelpDesk Contacts, Open Inquiries, Finished Inquiries, Known Issues, and Hot Tips all at one time. Browse through the results. Searches string value and key words. Includes an option to open your results.
- New Inquiry opens the new inquiry search screen
- GoTo Inquiry takes you directly to the inquiry using the unique inquiry #
- New Known Issue opens the new known issue screen editor
- GoTo Known Issue takes you directly to the known issue using the unique id #
- New Hot Tip opens the hot tip screen editor
- GoTo Hot Tip takes you directly to the hot tip using the unique tip name
- New Task allows you to create a new task
- GoTo Task takes you to your task using the task #
- View Calendar allows you to view your calendar, your departments or all calendars for all users
- New Email Message

Launch: (requires My HelpDesk to be enabled)

- Edit My Launch Pad
- Edit My Links

Reports:

- These are our standard built-in reports

Options:

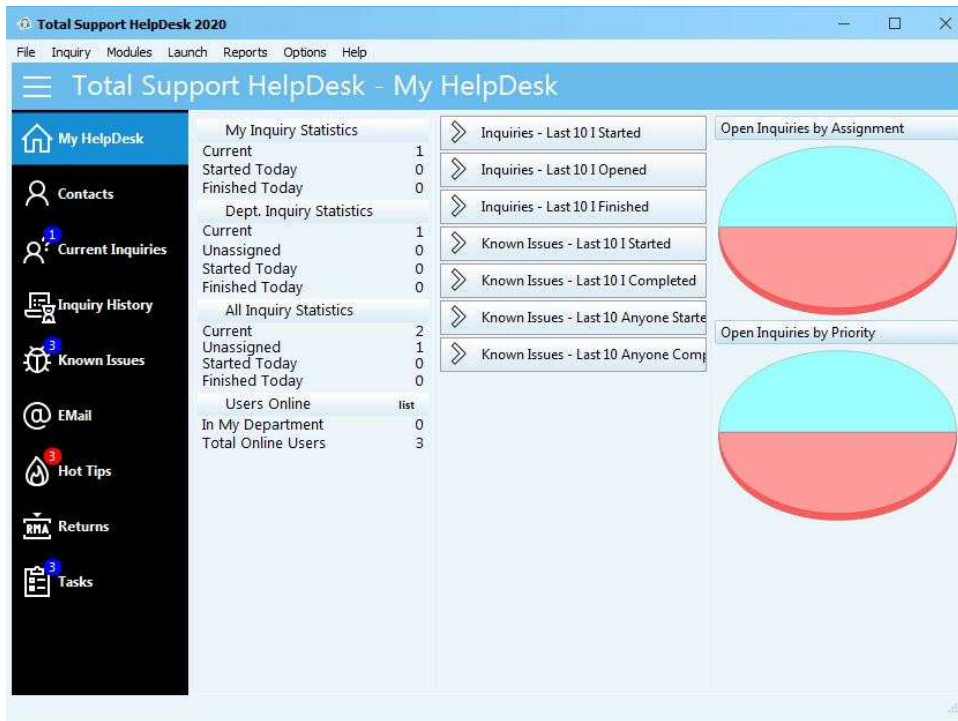
- Configuration Utility launches configuration
- Lock Manager used to clear locks in the system
- Intake Forms Manager
- Intake Question Library
- Template Manager for Emails and Signatures
- Scheduler turns on/off different task. Such as Email, Escalation, Database Backup, & Publishers

Help:

- About

My HelpDesk:

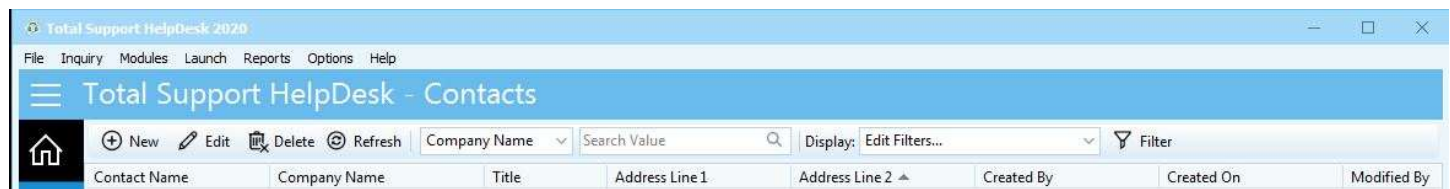
Optional feature enabled by your ADMIN through configuration



Once you have logged into HelpDesk, and depending on your security rights and configuration, you may not have this view.

This view is My HelpDesk and is a quick view of your **personal** HelpDesk. Besides personal statistics, you can also get a quick view of Known Issues and Hot Tips added into the system, along with a graph view for all inquiries.

Contacts:



If you are configured as a Stand Alone, you can manage and access your contacts all in one place. If you are configured with Act! you will not see this queue. You will manage your contacts directly in Act!

If this is the first time accessing the Contacts database, we recommend you create a company record so you can set the pick list field settings making it easier when adding new contacts. These are global settings and recommended to be done by an Admin User.

Menu buttons allow you to manage your contacts by clicking the (+) for adding new contacts. The pencil is to edit the highlighted contact record. The trash can with an [x] is to delete the highlighted contact (**WARNING!** This deletion is forever and cannot be redone. You WILL need to add a new contact at this point.). The looping arrows is to refresh the view of the Contacts part of the menu.

The drop-down list of fields to search are based on the columns that are displayed in the grid and allows you to enter a search value.

The 'Display' field, by default is set to All Contacts; however, you can further define your display by creating display filters. Example: you have a chain of hotels and you want to find a specific contact that works at the hotel. Create a filter for Hotel Name = X and then your 'search value' will search within the display.

TIP: Each filter has an 'owner', if you want to share your filter, use the 'change ownership' option from the edit view. This is a great way to create specific filters for specific Users and Departments.

Optionally, you can also use a Filter. This works in tandem with the Display by creating a specific filter. Example: you have a filter for all Hotels with email that starts with A.

Results: Filter will return results for hotels where email starts with A. Within that filter, you can set a Display filter to narrow down and the actual Search Value finds your results.

TIP: Most will find using the Display Filter fits their needs and returns their results as needed.

TIP for Stand Alone: When sending a **Bulk Email from contacts**, depending on the # of records, the system will return a 'not responding' message on the top window screen and also display an hour glass. The system is working in the background DO NOT end task, please let the system complete the process and once it is completed it will return back to the normal window.

Contact Editor:

The screenshot shows a software window titled "Edit Contact". It contains several input fields for contact information. The "Contact Details" section includes fields for First name (Roger), Last name (Rabbit), Title (empty), Contact (Roger Rabbit), Company (Acme Unlimited, Ltd.), Address 1 (123 Main Street), Address 2 (empty), City (El Paso), State (TX), Zip (79950), Country (USA), Phone (555-1212), Ext. (empty), Fax (555-1213), and Email (test1@mail.local). Below these fields are tabs for "Contact Notes", "Inquiries", "Links", "Contract Tracking", and "Contact Fields". The "Contact Notes" tab is active, showing a note added by the Administrator on 4/20/2020 at 2:03 AM, which says "Please make sure that Roger gets any tests ordered by Jessica." At the bottom of the window, there are buttons for "Delete", "Send Email", "Ok", and "Cancel", along with a status bar showing "Contact Created: 1/29/2020 8:12 PM by Administrator" and "Contact Modified: 1/29/2020 8:12 PM by Administrator".

You will notice at the end of some of the fields is an ellipse button (...). This button allows you to pick items from a pre-configured list. These fields may have already been pre-configured by your Administrator.

The 'TABS' will display the default views, which are: Contact Notes, Inquiries, Links, and Contract Tracking (if enabled). You may see additional tabs and fields that have been customized by your Administrator. In our screen shot, we created a tab called contact fields and then customized our own contact fields to store data.

Contract Tracking setup in your contact manager: If you have enabled Contract Tracking, you now need to fill in the contact manager fields with valid data. By default, the contract type field is 'No Contract'. You will be able to select a contract type based on how your system was configured. Fill in the fields that display and remember to check the box for 'Contract Active'. ALL contracts must have a valid Start date/End date.

Once you have updated the fields for contract tracking, you should not need to adjust the Used, Balance or Last Update fields. As you work on inquiries, the timer will automatically update these fields. If you add to the PURCHASED, it should automatically re-calculate the balance.

Any changes to a contact record, you must save the changes by clicking the (OK) button. If you click (Cancel) all changes will be reverted to the last saved record.

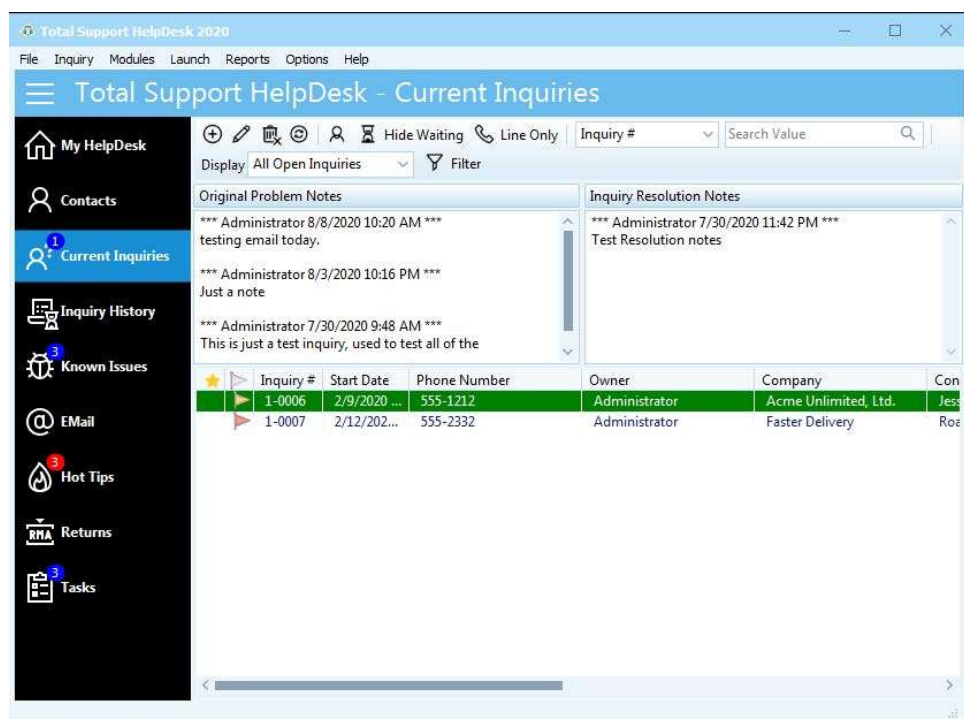
If you have Email services setup, you will be able to Send Email directly from a contact record. Sending an email will automatically add a copy of that email to the LINKS tab for future reference.

From the Contact Notes, you can view/add notes that are connected to this selected contact. Right below the Contact Notes 'Tab' is a + Add Note button. You must click this button in order to type in an additional note; if not, you will be unable to type anything.

From the Inquiries tab, you can view/open/reopen/create inquiries.

TIP: You can rearrange the tabs in any order you wish. This is done through configuration. Maybe you want to see the Inquiries Tab first. It's a simple select and move left or right to rearrange the tabs.

Inquiries:



Here you will find your inquiries. Depending on your security rights, you can change view to Your Department or All Inquiries that are owned by other users and departments.

When you select an inquiry, you will notice on the top section that 2 note fields display. The note field on the left contains the original notes, and the one on the right are the resolution notes. This gives you the ability to read the notes without opening the inquiry. You can also 'right click' on an inquiry, which will present additional options that can be performed on an individual inquiry. (Note: If certain items are grayed out, your administrator removed these security rights from you).

New Inquiry:

Company	Contact	Contact Title	City	State	Zip	Pr
Acme Unlimited, Ltd.	Roger Rabbit		El Paso	TX	79950	5
Acme Unlimited, Ltd.	Jessica Rabbit		El Paso	TX	79950	5

Enter your search value, method, and field to search. Once it finds your value, you can select from the results grid. Once you select a contact, their basic contact information from the contact manager will display in the top right 'Contact Information' fields. This is to verify that this is the contact you want to select.

Searching Email field with 'begins with' uses the wildcard name %@domain%, so for example rog@ac would find roger@acme.com

Along the top of the screen, once you select your contact from the grid, you may have additional tabs appear:

Current Inquiries will display all current open inquiries linked to this company record.

Finished Inquiries will display all finished/closed inquiries linked to this company record.

Contract Tracking (if enabled) will display their contract details.

You can open or reopen an inquiry without creating a new one if the description/problem is the same. This eliminates duplicate inquiries for the same issue. Plus, you can reference back to any previous notes. When you reopen an inquiry, the last user that owned the inquiry will reopen with the same owner. If you want to take ownership, refer the inquiry to yourself or to another user or department.

If the person you are working with is not the main contact person, you can change this information on the OPEN inquiry screen.

TIP: Create a custom memo field in your contact manager that includes your alternate contacts & emails, then map this contact manager field to the Inquiry Center View so when you have your inquiry open, you can quickly copy/paste or even add new contacts to the memo field for future use.

Field to search will default to COMPANY when you first login. If you change the field to search, that will then be the default field during your helpdesk session. Example, you switched the field to search to Email your next search will default to the Email field. You switched to contact your next search will default to contact. Etc.

Open Inquiry:

Regardless if you got to this screen from the New Inquiry Search, opened from the queue, opened from the desktop viewer, or opened from the Contact Record, this is the **OPEN INQUIRY EDITOR**.

Top menu from left to right:

Save Inquiry: This allows you to save this inquiry.

Close Inquiry: This allows you to close the inquiry. This places the inquiry into the current inquiries queue.

Finish Inquiry: This allows you to complete/finish the inquiry and moves it to the history archive file.

Search: This allows you to create a global string search in the system. Searching at one time in Contacts, Open Inquiries, Finished Inquires, Known Issues, and Hot Tips.

Hot Tips: This allows you to search your Hot Tips database using key words. You can use the LINK button to link the hot tip to the inquiry and/or you can use the ATTACH button to attach the hot tip to the inquiry email.

Known Issues: This allows you to search your Known Issues database using a string value.

Email: This allows you to email the contact from the open inquiry. **IMPORTANT** please SAVE changes before you Email so the fields (email address and description) will auto-fill.

Print: This allows you to print a hard copy of the inquiry record. **IMPORTANT** please SAVE changes before you print so the fields will display correctly on your report.

Set Schedule: This allows you to set a Schedule for Call-Back or Wait time.

Refer Inquiry: This allows you to refer the inquiry to another User or Department. You can see who's online by the green or red dot to the left side of the emoji.

Timer: Depending on your security rights, you can pause/start the timer.

Reset Timer: You can reset the timer back to 0 and start over.

Copy: This allows you to copy inquiry to clip board.

View Category/Product: Here you can add new categories and products instantly.

RMA: Here you can add a new ticket for return item(s).

Inquiry Contact Fields: The contact details are coming from your contact manager (Stand Alone or Act!). Here you can change the information specific for this inquiry. Example: Perhaps Jessica Rabbit did not call, but it was Roger Rabbit; so, you would simply change the contact field name, and any other applicable fields, such as the phone # and email address. Once this information is changed, Roger now becomes linked to Acme Unlimited, LTD. and this inquiry.

You will also fill in the category, product, description, status, due date, priority, and line fields, if applicable. Depending on your configuration, some fields may have already been setup to auto-fill.

On the far top right, you will see timer information. Timing is the core to HelpDesk. Time Opened is from the creation of the inquiry (start) to the resolution (finish). Time Worked is the amount of time that the inquiry has been opened and the timer is running. Time Opened and Time Worked may not be the same. The inquiry could have set idle for several hours before someone opened it. Or the billable time has been altered. Billable by default is disabled. This field can be configured to auto-enable based on specific criteria; or, you can enable manually if special billing is required. Check with your Administrator about if, or when, to use this field. Workflow is an optional configured feature that will send Emails based on the status of the inquiry that will auto-send an Email (such as a New Inquiry Confirmation Email to your customer, or a Finished Inquiry with a Survey).

The center view tabs will vary depending on how your administrator has configured your software. There are system tabs that will automatically display since they are core pieces to the software:

- **Links:** Here you will find any manually drag/drop items from outside of HelpDesk. Example: A Spreadsheet, PDF, Images, or other document type. Emails that are received and sent from this inquiry will also be found here.
- **Time logs:** These are logs created by the timer running in the bottom right corner. If the timer is stopped and/or you override the billing screen, no log will be created. TIP: Administrators can enable Timeline Analysis that can include system events. Example: if a time log is deleted, it will be reported to the Administrator of who and when the item was deleted.

The center right side buttons give you quick access to resources within your software to help resolve an issue.

Hot Tips will search and display your pre-configured hot tips that match key words based on the description you have entered. Can't find any matches? You can always change your key words and search again. If you find a matching Hot Tip or more, you can tag them so you can email them off to your client, if desired. You may have the option to suggest a Hot Tip as well. Example: Your client called with a tip about your software and/or work around. Your Administrator will then review your Hot Tip and make the decision if they want to create a Hot Tip.

Known Issues will search and display any matches. The search is a string value of the description, reading from left to right. You can also create a Known Issue, if needed. You also have the option to LINK an inquiry to an existing Known Issues or when you create a new Known Issue.

Search: This allows you to create a global string search in the system. Searching at one time in Contacts, Open Inquiries, Finished Inquiries, Known Issues, and Hot Tips.

Email: send an electronic mail message via HelpDesk.

Print: This gives you the option to print the inquiry record for hard copy, if needed.

Launch: This is a global feature. You can configure to launch external or internal items. Example: you can configure to launch a web site or EXCEL spreadsheet.

Note Fields: You have Original Problem Notes, Resolution Notes and if you are Stand Alone, you also have an option to add Contact Notes that will appear back in the contact manager.

Expand Notes: This allows you to open the note fields to view more content instead of scrolling through.

Bottom action buttons:

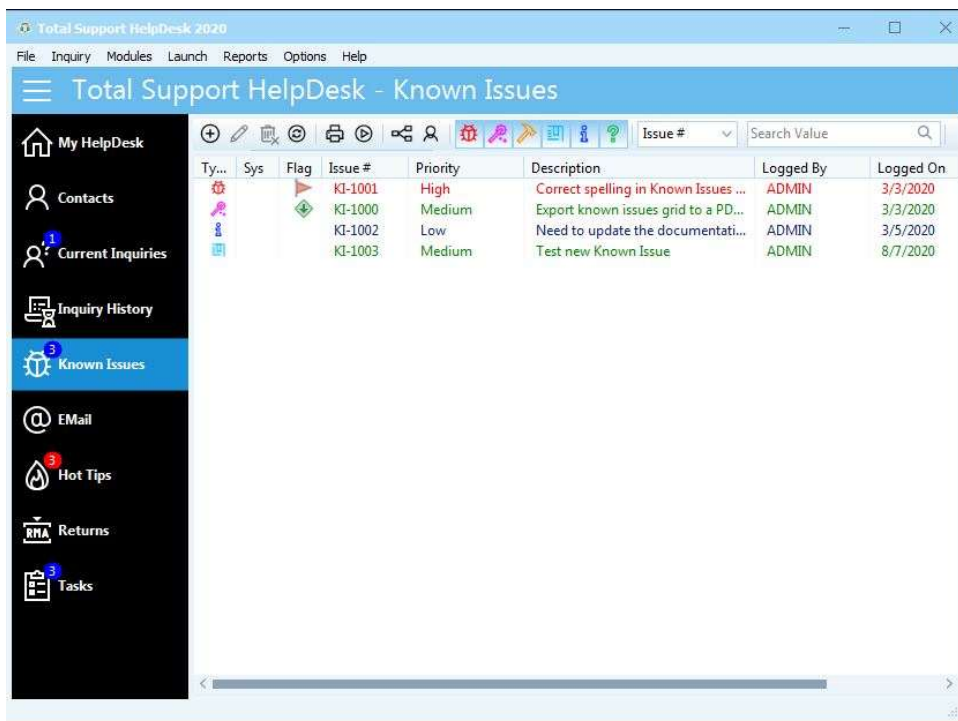
OK: This will save/commit all changes for this inquiry to the database and save to the current inquiries queue.

Cancel: This will cancel everything back to the last saved state of this inquiry.

Refer: This allows you to refer an inquiry to another department or user; they become the new owner of the inquiry.

Finish: This completes the inquiry and moves it to the finish/archive table. Finished inquiries can always be opened as read-only or reopened to work on again.

Known Issues:



Known Issues is a separate database of information you can store, track, and link to inquiries. Many Users, including us, have found multiple ways to use this extra database. We have incorporated some options to work outside the box.

Originally this was created to keep track of your bugs and issues that needed attention by your R&D Team. With the ability to link an inquiry to a Known Issue and once resolved, you can alert our customer(s).

Known Issues may not always be a bug. We have included multiple Issue Types:

- **Bug / Defect** for product issues that need to be fixed
- **Wish** for items that you and/or your clients would like to see added to your product(s)
- **Enhancements** to features already in place to make them function better
- **Documentation** to be created and/or corrected. Such as product use, sales or support procedures
- **Information** to share with others or use this type/icon specific for INTERNAL use
- **Other/Unknown** when nothing else fits the bill

To add a new Known Issue, click on the plus icon. This will open a new screen and assign a unique KI#.

You can group your views to create a tree view for quick view of your KI's. Added bonus feature, when you create a group, you can select a group, right-click and mass-change the Status, Priority, & Owner of all the KI's in that group.

Known Issues Editor:

The screenshot shows a software window titled "Known Issue KI-1001". At the top, there are icons for Save, Print, and Attach File. Below this is the "Issue Details" section with several fields: "Issue Type" is set to "Bug / Defect" (with a red bug icon), "Category" is "HelpDesk", "Product" is "HelpDesk 2019 Alpha", and "Flag" is "Orange" (with an orange triangle icon). The "Description" field contains the text: "Correct spelling in Known Issues dialog 'Kown' should be 'Known'". Below the description are "Status" (set to "Ready") and "Priority" (set to "High"). The "Created By" field is "Administrator" and "Created On" is "3/3/2020 10:18:12 PM". The "Owner" field is also "Administrator". To the right of these fields is the "Completion Details" section with "Estimated Effort" (0.5), "Estimated Completion Date", "Actual Completion Date", and "Completed By" (all empty). Further right is the "Version Details" section with "Reported In" and "Fixed In" (both empty). Below the issue details is a tabbed interface with "Issue Notes" selected. The "Add Note" button is visible. The notes area contains two entries: one from "Administrator 4/20/2020 10:08 PM" stating "Added a new note." and another from "Administrator 3/3/2020 10:18 PM" stating "Test note". At the bottom right of the window are "OK" and "Cancel" buttons.

Select your Issue Type. Every Known Issue is linked to a Category and Product. Your Administrator may have created a N/A category and product for issues that are not specific to product bugs. Flag (optional) provides a visual level of importance to the issue.

Description Field is where you can either free type anything you want, or you can also create a new Known Issue from an open inquiry and auto-fill the description. This makes searching much easier and could avoid duplicate issues being created.

Status field is a pick list that you can create.

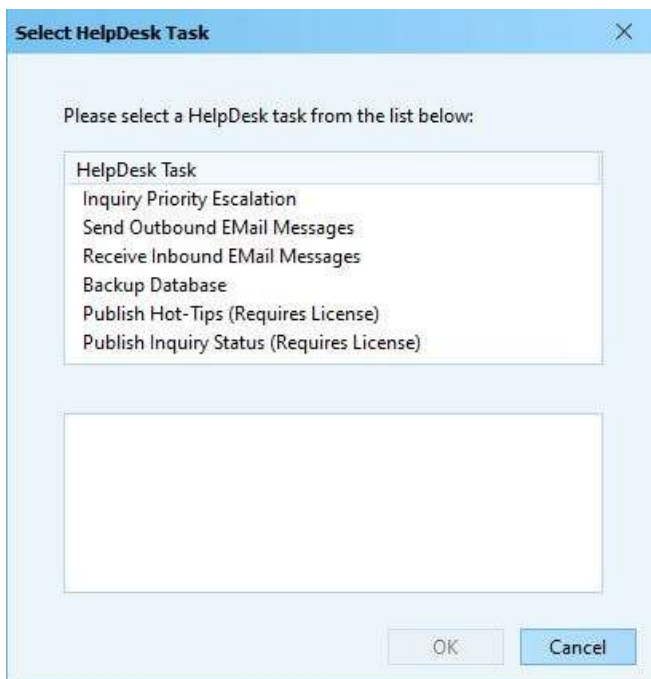
Priority is a pick list that you can only select from. Your administrator has already created your system priorities.

Owner is a pick list that you can only select from and list available Users and Departments. By default, this will be the User that creates the issue; but, if you need to refer this to another User or Department, this is where you change ownership.

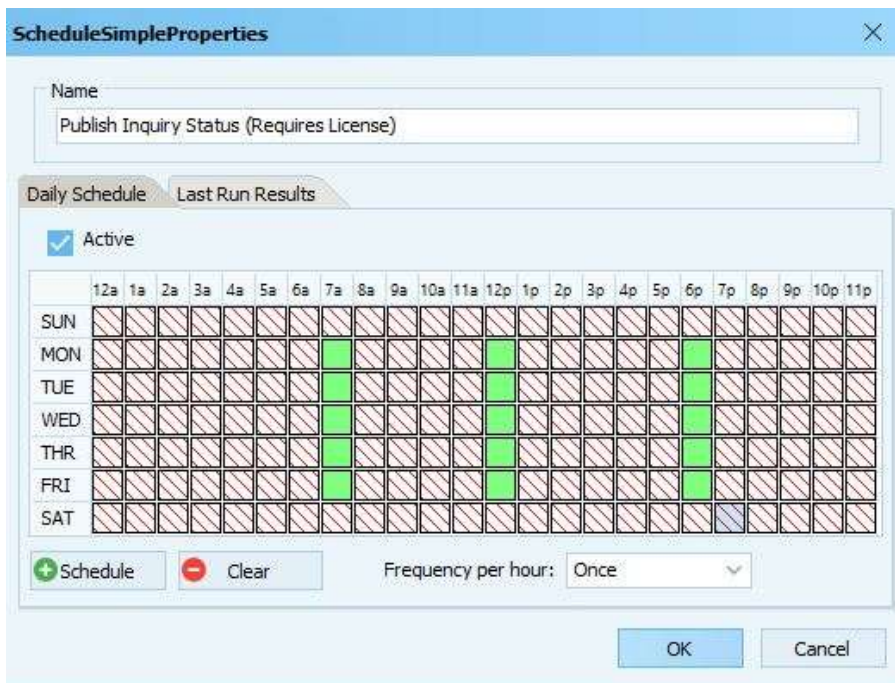
Completion Details was created for developers who need to estimate their efforts (time) to complete the issue. This helps provide a timeline that you can share with your client's when a bug should be resolved.

Email Task:

To configure your IN-Bound and OUT-Bound Emails, logon to your HelpDesk client as a user with Supervisor/Admin rights, click on Options menu > Scheduler. Here you will configure Email accounts; along with, any other advance schedules you would like to include.



Select your task to display the settings options



TIP: Be sure to check box ACTIVE

Once you have completed your settings, you will see your scheduled tasks here:

Total Support HelpDesk 2020

File Inquiry Modules Launch Reports **Options** Help

Total Support HelpDesk - My HelpDesk

Scheduled Helpdesk Tasks

+ Add Edit Remove Refresh Config

Scheduled Task	Next Run	Last Run	Run Count
<input checked="" type="checkbox"/> Receive Inbound EMail Messa...	9/9/2020 10:17...	9/9/2020 10:12...	615
<input checked="" type="checkbox"/> Send Outbound EMail Messa...	9/9/2020 10:17...	9/9/2020 10:12...	117

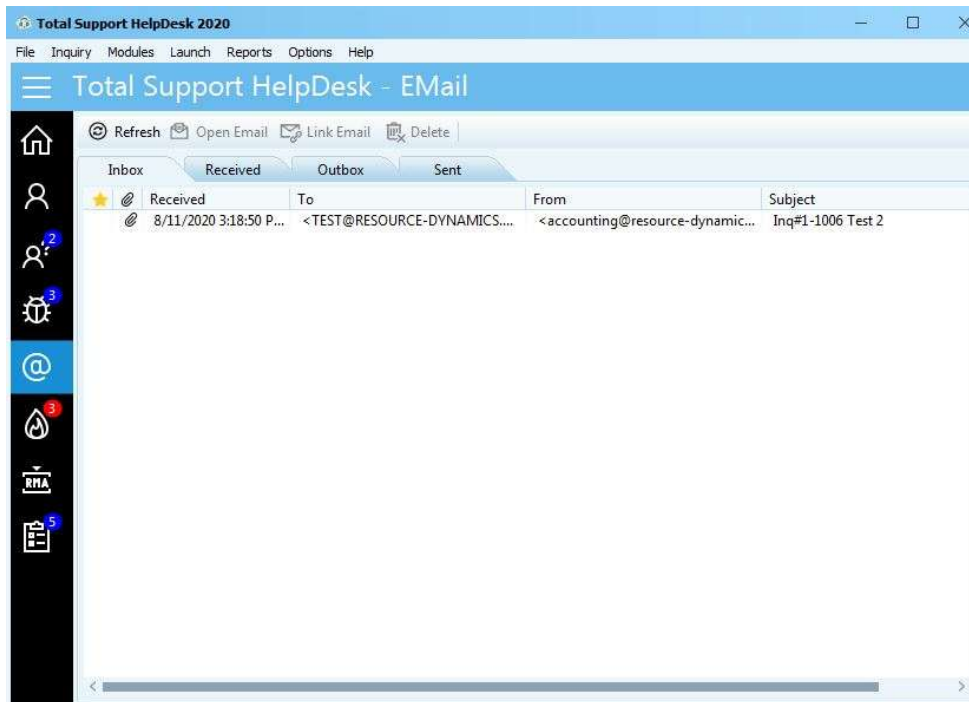
You can disable a task from running by unchecking the box. To enable the task, simply check the box.

NOTE: checking or unchecking the box does not make the task active. It just stops the task from running on its schedule time. To disable a task, select the task and EDIT.

To configure your task, select the task and double click to open the properties. Make sure the task is ACTIVE and then use your mouse to select from the day/time grid when you want the task to run and click the SCHEDULE button. This will turn the selected area green. Now select the frequency per hour. Click OK to save your settings.

NOTE: When sending email, it will send based on your scheduled task. So, you may see emails in the OUTBOX tab. These will clear once the scheduled task runs.

Email Queue:



Inbox: New Emails that have not yet been linked to an inquiry.

Processed: Copy of the original emails that have been processed and linked to an inquiry or contact if Stand Alone.

Outbox: These are pending Emails to be sent. This would normally always be empty.

Sent: These are Emails that have been sent either direct from a contact, or from an inquiry.

Refresh button refreshes the email queue manually, if needed.

Open Email will open the selected email.

Link Email will link the selected email to an inquiry.

Deleted will delete this email with NO recovery. You will receive a prompt to confirm.

NOTE: All Emails and Links are stored in the default STORAGE folder. Please **DO NOT** delete or move this folder from the default location it was installed.

OPEN INQUIRY from EMAIL QUEUE

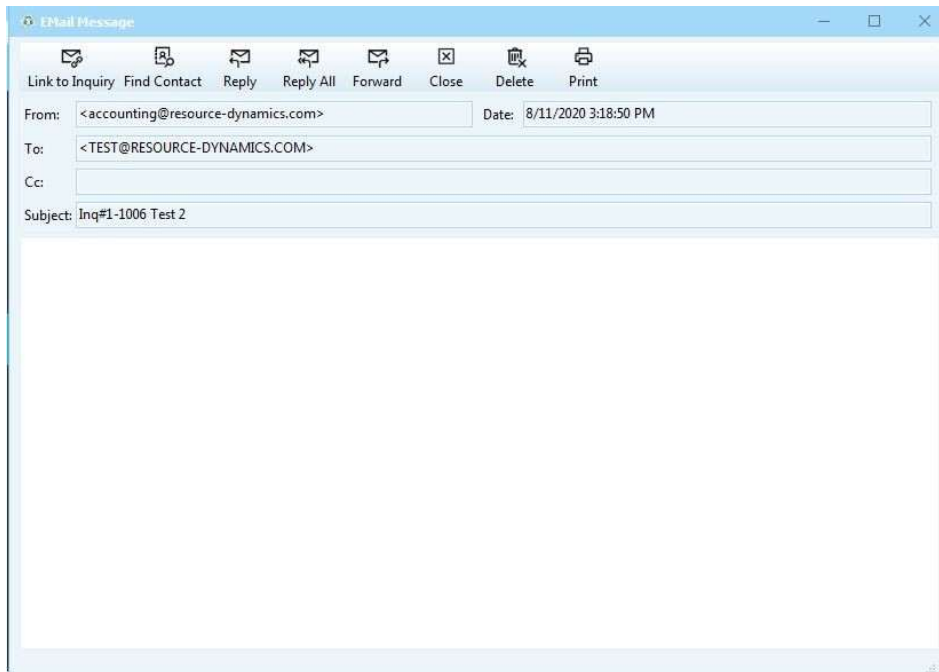
Once you create, open, or reopen an inquiry from the Email queue, you **MUST** link the email message to the inquiry if you wish to access the email at a later time. Before you commit the inquiry (Ok, Refer, Finish), click on the Link Email Message button.

The screenshot shows the 'Inquiry 1-0008' window. At the top, there's a toolbar with various icons. Below it, the form is divided into several sections. The top section contains fields for 'Contact' (Bugs Bunny), 'Company' (Warner Brothers), 'Phone #', 'Extension', and 'Email' (test1@mail.local). To the right of these are dropdowns for 'Category' and 'Product' (both set to '<None>'), a 'Description' field (test), 'Status' (New), 'Priority' (Low), 'Due Date', and 'Line'. Further right are time tracking fields: 'Time Opened (d/h/m)' (0 d 0 h 5 m) and 'Time Worked (d/h/m)' (0 d 0 h 0 m). There are also checkboxes for 'Billable' and 'Workflow' (checked), and a 'Flag' dropdown. Below this is a tabbed interface with tabs for 'Test', 'View 2', 'View 3', 'Customer Status', 'Links', 'Timelogs', 'History', and 'test'. The 'test' tab is active, showing 'User Text 1', 'User Date 1', 'User Num 1', and 'User Memo 1' fields. To the right of these is a 'CONTACT_NAME' field with 'Bugs Bunny'. On the far right, there are buttons for 'Hot Tips', 'Known Issues', 'Search', 'Email', 'Print', and a 'Launch' dropdown. Below the tabs is a section for 'Original Problem Notes' with an 'Add Note' button and radio buttons for 'Resolution Notes' (selected) and 'Contact Notes'. A text area contains the note: '*** Administrator 3/21/2021 8:14 AM *** Just testing email linking'. At the bottom left, there are buttons for 'Expand Notes' and 'Link Email Message' (circled in red). At the bottom right, there are buttons for 'Ok', 'Cancel', 'Refer', and 'Finish'. A status bar at the very bottom shows 'OUTSIDE CONTRACT DATES' and a timer '00:00:10'.

Reasons why you may not want to link the email message:

- 1) The Email has multiple issues that need multiple Inquiries
- 2) The Email needs an inquiry and needs to be forwarded to outside rep/agent
- 3) The Email is a simple and does not require the original email attached

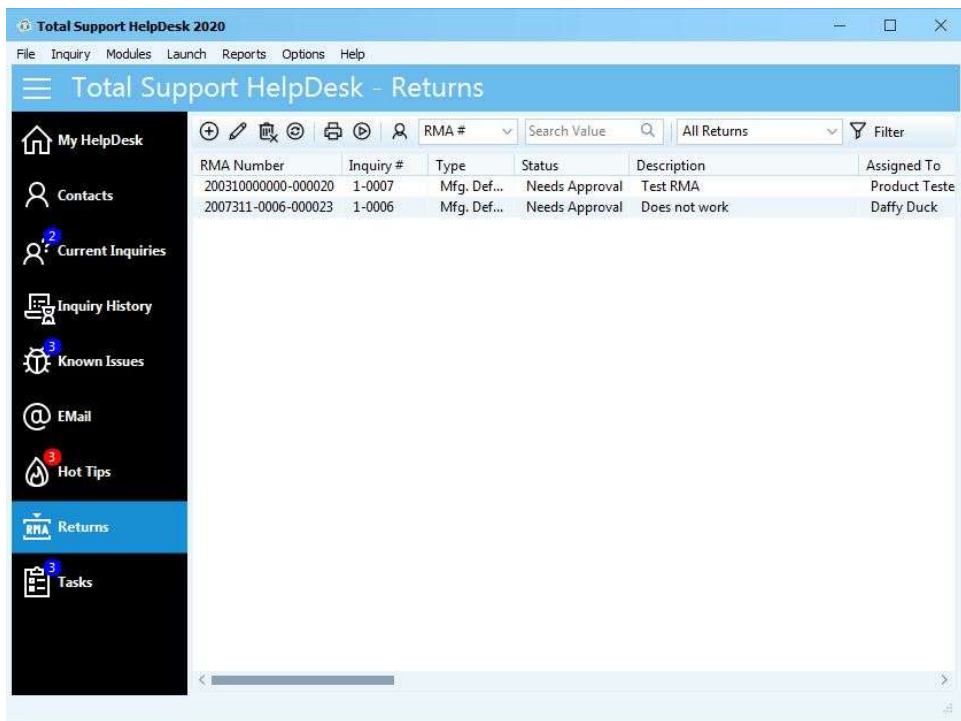
Open Email



Here is the open email. From here you can perform several different tasks:

- Link email to an inquiry. If inquiry number is present in the subject line, it will find that inquiry and prompt to link.
- Find Contact. This allows you to find the contact for this email by using the inquiry search (same as new inquiry).
- Reply. This allows you to reply directly from the Email queue without linking.
- Reply All. This allows you to reply to a group of recipients at one time direct from the Email queue without linking.
- Forward. This allows you to forward this email to someone else direct from the Email queue without linking.
- Close. This allows you to close the email and it will remain in the Inbox until it has been linked to an inquiry or deleted.
- Delete. This allows you to delete an email. **WARNING!!** This is a one-way unrecoverable delete. Once deleted it is gone.
- Print. This allows you to print the email.

Returns



This is an optional feature that allows you to track returns from your clients. Returns are also referenced as RMA's (Return Merchandise Authorization). Returns can be linked to inquiries. Besides viewing/adding returns from the main queue, you can also add/edit returns from the open inquiry.

Open

Return:

Edit RMA

General

RMA Number	2007311-0006-000023	Description	Does not work ...
RMA Type	Mfg. Defect ...	Customer	Jessica Rabbit
Status	Needs Approval ...	Company	Acme Unlimited, Ltd.
Inquiry #	1-0006	Category	Welcome ▾
Created By	Administrator	Product	Welcome ▾
Owner	Daffy Duck ...	Serial #	1234-5678
Authorized By	Administrator ...	Completed	<input type="checkbox"/>

Notes

RMA Notes

Daffy suggested that we take the item and inspect it in house. We need to send a packing crate since the first one was already recycled.

Shipping Notes

Shipping

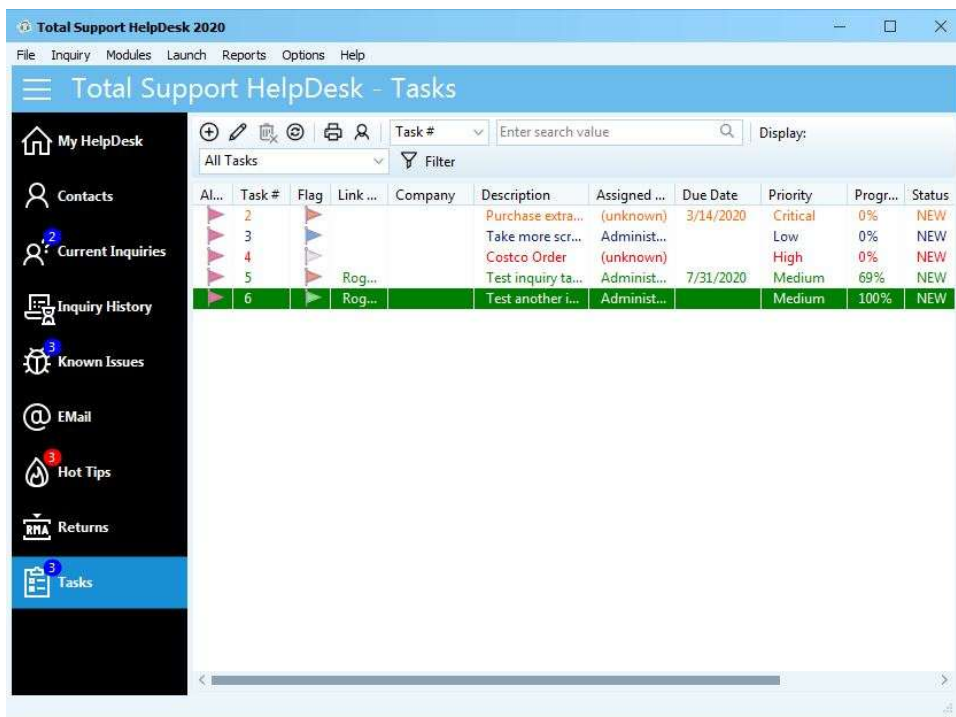
Date Received	▾	User 1 String	
Received By	...	User 2 String	
Date Shipped	▾	User 3 Date	▾
Shipped By	...	User 4 Date	▾

Print

OK

Cancel

Task



Al...	Task #	Flag	Link ...	Company	Description	Assigned ...	Due Date	Priority	Progr...	Status
	2				Purchase extra...	(unknown)	3/14/2020	Critical	0%	NEW
	3				Take more scr...	Administ...		Low	0%	NEW
	4				Costco Order	(unknown)		High	0%	NEW
	5		Rog...		Test inquiry ta...	Administ...	7/31/2020	Medium	69%	NEW
	6		Rog...		Test another i...	Administ...		Medium	100%	NEW

Tasks is an optional feature that allows you to track anything. You can create tasks for yourself, other users or departments. Tasks can be linked to inquiries or can be free standing. In this view, the tasks are not linked to anything. To link a Task to an inquiry, this is done from the OPEN INQUIRY screen.

Example: Create a task for a project you need to complete by a specific due date. Create a task for an inquiry you own and requires additional help from another department or user; this gives you the ability for multiple people to work on the same inquiry.

By default, All OPEN tasks will display for the logged in User. You can view completed tasks by clicking the 'clock' icon on the menu to the left of the TASK# box.

Open Task

Task

Save

Print

Subject: Purchase extra birdseed

Category: <none>

Priority: Critical

Status: NEW

Product: <none>

Due Date: 3/14/2020

Effort: Effort as total hours

Task Flag: Orange

Link To:

Owner: Elmer Fudd

Task Progress: 0%

Task Notes

Add Note

Edit Notes

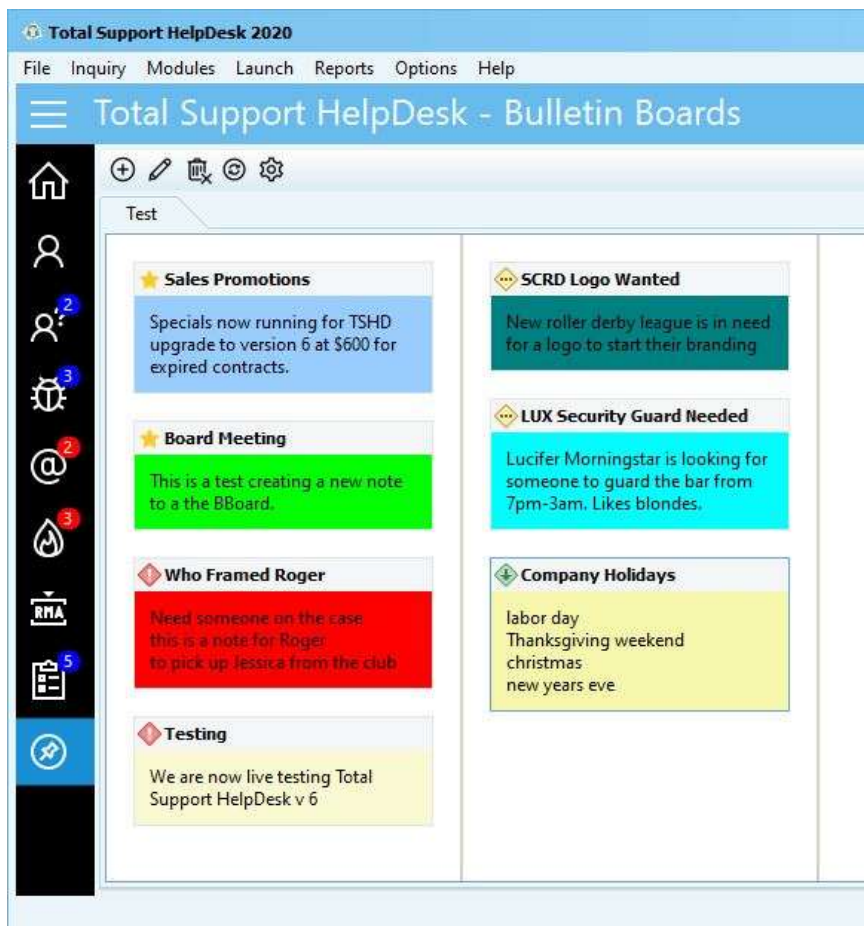
*** Administrator 3/8/2020 8:28 PM ***

Elmer, the next time you place a costco order, double the amount of bird seed on hand. We need ot get in front of the orders for Mr. Coyote who seems to be ordering quite a bit lately.

OK

Cancel

Bulletin Boards



Bulletin Boards is a general area to post notes. You can create notes to all users or specific users.

To ADD a new note, click on the plus sign. This will open the notes properties. Once you have completed setting the properties (title, color, priority, expiration date) click the OK button; this will place your note onto the view. Click on the text box and type your message. Although the text box is a single line, by adding a <return> will create a break in your message, if desired. Once you have completed entering your 'text', click anywhere on the white area of the view. This will post your note and open in full view. To 'edit' the note, simply double click in the text box.

The top pencil 'edit' will allow you to edit the post Board Post Properties (titles, color, priority, expiration date) that you have selected.

The top trash can 'delete' will allow you to delete the post you have selected.

Keep your notes organized by creating multiple tabs. Example: create a tab for notes specific for Company Events. A tab for your Support Team, Sales Team, etc.

If you set a post to expire, the note will change color. You can either edit the note and extend the expiration date or delete the note.

Templates & Signatures

From the OPTIONS menu, you can access the Template Manager. This is the place to create your Email Templates and User Signatures.

Before you can create a Template, you must create a Group in which the templates will be linked. Once you have your group, then you can add templates and signatures by selecting the group.

You can also assign templates to a specific User or Department. When a User is logged into their client, they will only see Templates/Signatures that are assigned to them, their department, or open (not assigned).

The Name of your Template must be unique (cannot duplicate template names).

Reports

Total Support HelpDesk has a few basic reports built-in. Over the past 20+ years, these are the most common reports used, which are: Inquiry Analysis, Billing, and Time Log. You can launch the reports from the REPORTS menu. Each report has parameters which include date range, there are 3 primary ways to pull the report.

<any status> will return the all inquiries created with the date range

<open> will return all inquiries which are still open during the date range. This would catch inquiries which were still opened years ago and never marked closed.

<Finished> will return all inquiries which were finished within the date range. This will NOT include inquiries that were re-opened.

Total Support HelpDesk is using SQLite database, so users can create/customize their own reports using any report designer of their choice, as long as it can connect to the database. We use Fast Reports. Your custom reports are executed outside of our application. Users are 100% responsible for the design and execution of their reports.