



Total Contacts with HelpDesk Solution

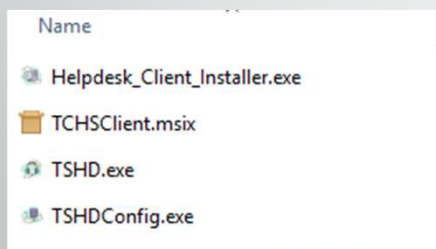
Version 7

Contact Manager Configuration

Once you have installed the host files and completed the host configuration, now is time to configure the software.

Browse to \Program Files (x86)\HelpDesk\server\client_files

Here you will find the TSHDConfig.exe



Total Contacts with HelpDesk Solution 2026 Configuration

Administrative Login



Please enter your HelpDesk login information below:

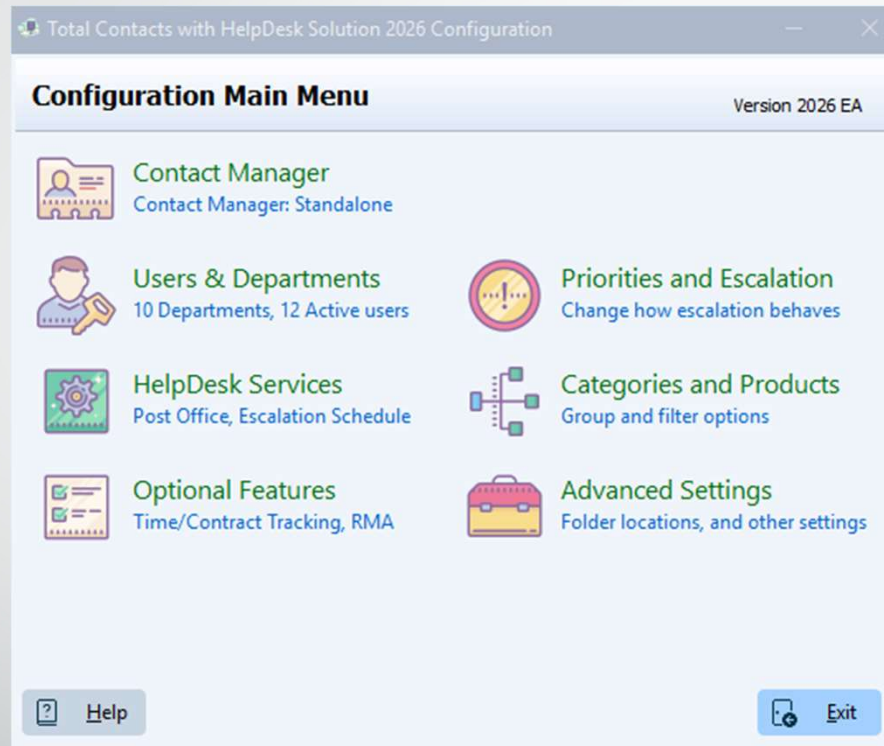
User Id:

Password:

Configuration Program Version 7.2026.0.4237
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 Help  Cancel  Ok

First time login user Id ADMIN with no password



Start with Contact Manager menu option



Select 1st option, Launch Contact Manager

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Contact Manager Selection

☒ Stand Alone

☐ ACT! PREM or WEB v18.2 +
Requires ACT! Connect
Requires ACT! Subscription

☐ 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  Save

Stand Alone will be selected by default – click Save



Select 2nd option, Contact Manager Field Mapping

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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

By default, the common contact fields will be prefilled

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Contact Manager Additional Field Mappings

The telephone, fax and e-mail fields are all optional field mappings which can be assigned.

Telephone Number:

Phone Extension:

Fax Number:

E-mail Address:

The contact notepad, if mapped will allow the user to display any contact notes from within an open inquiry. For this field to operate properly, only a memo field should be mapped.

Contact Notepad:

 [Help](#) [<< Back](#) [Next >>](#)

Additional field mappings will also be prefilled

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Contact Manager User Defined Field Mappings

Total Support HelpDesk allows you to specify up to seven user defined fields that will be copied to a new inquiry and displayable on the main inquiry queue screen. For increased performance, we strongly recommend you index these mapped fields. Please consult your contact managers documentation for further information on how to create an indexed field.

	<u>Field Mapping</u>	<u>Field Caption</u>
Field 1:	Contacts.HostName ... 	Host Name
Field 2:	Contacts.HostName2 ... 	Host Name 2
Field 3:	... 	User 3
Field 4:	... 	User 4
Field 5:	... 	User 5
Field 6:	... 	User 6
Field 7:	... 	User 7

 Help  Back  Save

These fields are optional. They should stay blank until you create user defined fields in the next step



Select 3rd option, Manage Custom Fields
This is where you will create your custom fields

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Manage Standalone Contact Manager Custom Fields

Add

Edit

Delete

Prompt	Field Name	Field Type	Field Size
AltEmail	AltEmai	Character	75
AntiVirus	AntiVirus	Character	50
AppVerGG	AppVerGG	Character	25
AppVerHD	AppVerHD	Character	25
AutoPayNotes	AutoPayNotes	Memo	N/A
BillingNotes	BillingNotes	Memo	N/A
ConEndGG	ConEndGG	Date	N/A
ConEndHD	ConEndHD	Date	N/A
ConMONTH	ConMONTH	Character	5
ConStartGG	ConStartGG	Date	N/A
ConStartHD	ConStartHD	Date	N/A
ContactID	ContactID	Character	100
ContactINT	ContactINT	Character	100
CreateDate	CreateDate	Date	N/A
CRM	CRM	Character	35

Help

Menu

Click the Add button to start creating your fields

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New Standalone Contact Manager Custom Field

Prompt:

Field Name:

Field Type:

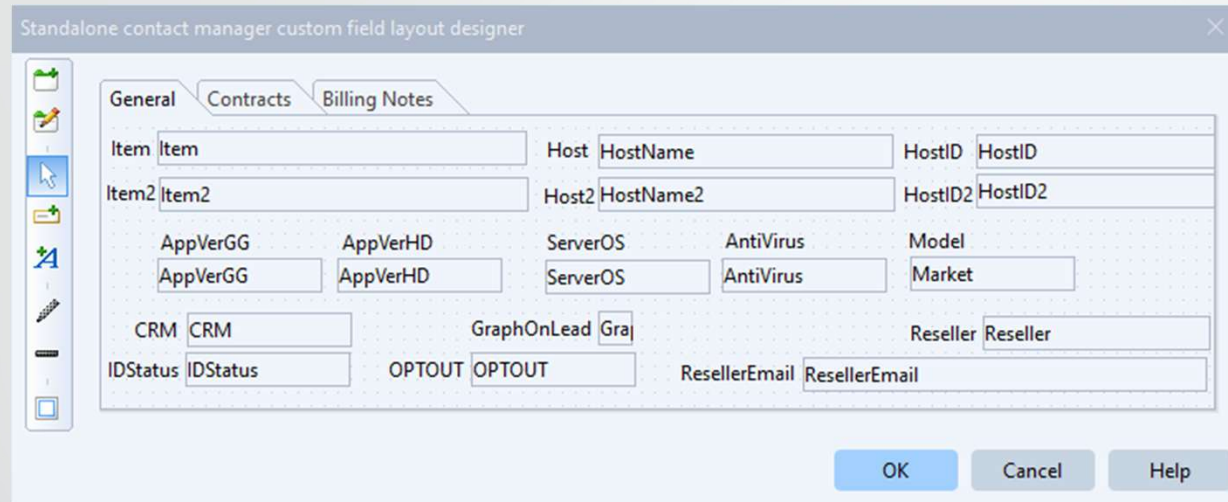
Field Size:

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

Fields must be unique and no spaces
Suggest prompt and field name the same



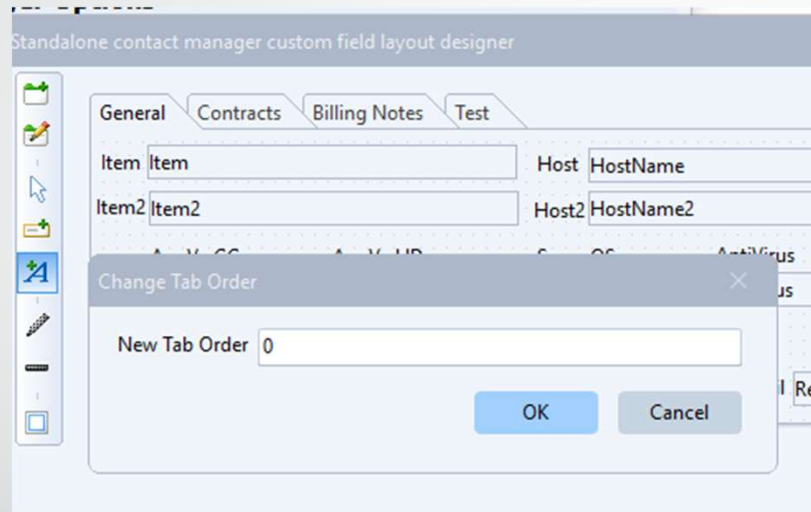
Select 4th option, Custom Field Layout



Using the left side menu, first option is to add a new tab. The tabs will be placed at the right of the system tabs.

4th menu item, is where you will select your contact manager fields and place on the tab. When you click this option, click on the tab and your available fields will display in a picklist. Select the field and click OK. It will drop onto the tab. You can grab the field and move it, you can resize it, you can change the 'prompt' if you like.

Other menu options, edit, move, delete, font change, and toggle.



You can set the Tab selection by right clicking on a field. Enter in numeric order as desired.

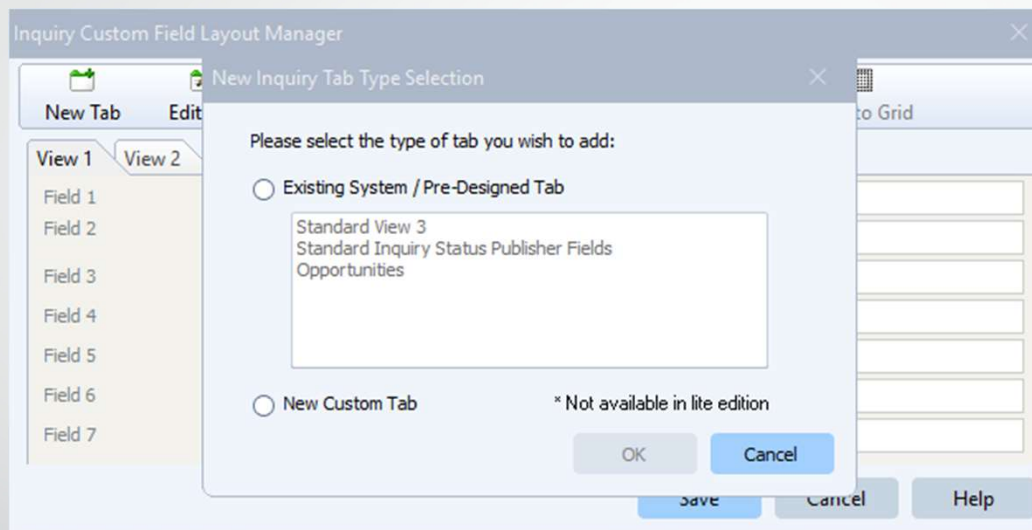


Select 5th option, Inquiry Center View Tab
Here you can map contact manager fields to the inquiry that can be set to read only or read and write.

The screenshot shows a software window titled "Inquiry Custom Field Layout Manager". It features a toolbar with icons for "New Tab", "Edit Tab", "Select Item", "Add Item", "Edit Item", "Delete Item", and "Snap to Grid". Below the toolbar is a tabbed interface with tabs labeled "View 1", "View 2", "Links", "Time Logs", "History", "Tasks", and "GG Codes". The "GG Codes" tab is currently selected. The main area of the window is divided into two columns. The left column contains labels "Field 1" through "Field 7". The right column contains labels "Field 8" through "Field 14". Each label is followed by an empty rectangular input field. At the bottom right of the window are three buttons: "Save", "Cancel", and "Help".

Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	Field 7	Field 8	Field 9	Field 10	Field 11	Field 12	Field 13	Field 14

By default, you will see the system tabs. If you are not going to use time for billing or task, you can remove them from the view. But we don't recommend removing links or history. Links is where all the emails and documents associated with the inquiry are attached.



Click on New Tab menu option. You can select from pre-designed tabs or create your own custom tab.

The screenshot shows a 'System Inquiry View Options' dialog box. The 'Tab Caption' is set to 'View 3'. Below it is a table with 6 columns: Field #, Prompt, Field Name, Table Name, Field Type, and Can Mo... The table has 14 rows, with row 1 selected. An 'Inquiry Center View Tab Field Properties' sub-dialog is open over the table. It contains two radio buttons: 'Use Contact Manager Field' (selected) and 'Use Additional Inquiry Field'. Below these are text boxes for 'Field Mapping:', 'Prompt:', and 'Allow Editing:' (with a checkbox). At the bottom is a 'Validate Field As:' dropdown menu set to 'String (no validation)'. 'OK' and 'Cancel' buttons are at the bottom right.

Field #	Prompt	Field Name	Table Name	Field Type	Can Mo...
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

Inquiry Center View Tab Field Properties

☒ Use Contact Manager Field ☐ Use Additional Inquiry Field

Field Mapping:

Prompt:

Allow Editing: ☐

Validate Field As: String (no validation)

OK Cancel

Selecting a pre-designed tab, you can change the tab caption. Then you have the option to use an existing contact manager field or additional inquiry fields.

The screenshot shows a 'System Inquiry View Options' dialog box. The 'Tab Caption' is 'View 3'. Below it is a table with columns: Field #, Prompt, Field Name, Table Name, Field Type, and Can Mo... The table has 14 rows, with row 1 selected. An 'Inquiry Center View Tab Field Properties' sub-dialog is open over the table. It contains two radio buttons: 'Use Contact Manager Field' (selected) and 'Use Additional Inquiry Field'. Below these are text boxes for 'Field Mapping:', 'Prompt:', and 'Allow Editing:'. At the bottom is a 'Validate Field As:' dropdown menu set to 'String (no validation)'. 'OK' and 'Cancel' buttons are at the bottom right.

Field #	Prompt	Field Name	Table Name	Field Type	Can Mo...
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

Inquiry Center View Tab Field Properties

☒ Use Contact Manager Field ☐ Use Additional Inquiry Field

Field Mapping:

Prompt:

Allow Editing: ☐

Validate Field As: String (no validation)

OK Cancel

Once you select your field, you can change the prompt.
We recommend you leave validation unchanged
Allow Editing, if anyone changes the data from an
inquiry, it will update in the contact manager

Inquiry Center View Tab Field Properties

☐ Use Contact Manager Field ☒ Use Additional Inquiry Field

Field Mapping:

Prompt:

Allow Editing:

Validate Field As:

User Defined Inquiry Fields

Field Prompt	Field Name	Table Name
User Date 1	USERFLD_D...	Inquiry
User Date 2	USERFLD_D...	Inquiry
User Date 3	USERFLD_D...	Inquiry
User Date 4	USERFLD_D...	Inquiry
User Date 5	USERFLD_D...	Inquiry
User Memo 1	USERFLD_M...	Inquiry
User Memo 2	USERFLD_M...	Inquiry
User Memo 3	USERFLD_M...	Inquiry
User Memo 4	USERFLD_M...	Inquiry
User Num 1	USERFLD_N...	Inquiry
User Num 2	USERFLD_N...	Inquiry
User Num 3	USERFLD_N...	Inquiry
User Num 4	USERFLD_N...	Inquiry

OK Cancel

We have included 5 date fields, 4 memo fields, 10 number fields.

System Inquiry View Options

Tab Caption: General

Field #	Prompt	Field Name	Table Name	Field Type	Can Mo...
1	Item	Item	Contacts		Yes
2	Item2	Item2	Contacts		Yes
3	AppVerGG	AppVerGG	Contacts		Yes
4	AppVerHD	AppVerHD	Contacts		Yes
5					
6					
7	CRM	CRM	Contacts		Yes
8	Reseller	Reseller	Contacts		Yes
9	ResellerEmail	ResellerEmail	Contacts		Yes
10					
11	HostName	HostName	Contacts		Yes
12	HostID	HostID	Contacts		Yes
13	HostName2	HostName2	Contacts		Yes
14	HostID2	HostID2	Contacts		Yes

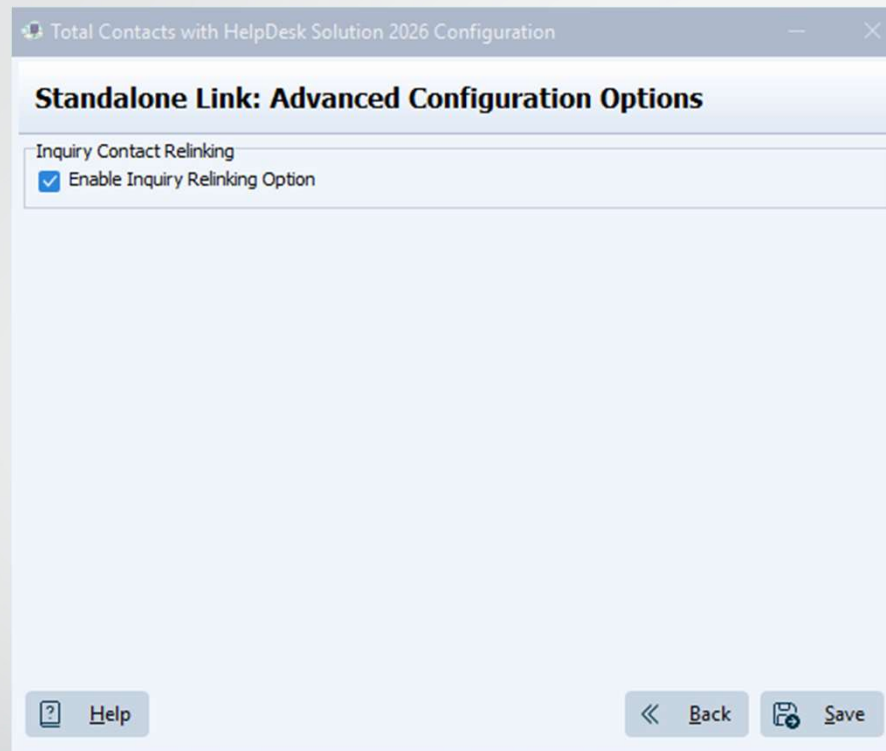
Edit Selected Field Clear Selected Field(s) Ok Cancel

Help Main

When using the pre-designed tabs, it will contain 2 columns and 14 fields (7 each column). Many users like this as it keeps everything nice and clean.



The option is Advance Preferences



Total Contacts with HelpDesk Solution 2026 Configuration

Standalone Link: Advanced Configuration Options

Inquiry Contact Relinking

☒ Enable Inquiry Relinking Option

 Help

 Back

 Save

Currently there is only one option, which is relinking. This is helpful if someone accidentally linked an inquiry to the wrong customer. You can relink the inquiry to the correct customer

Congratulations!!!
You just finished basic contact manager configuration



If you have any questions, please don't hesitate to
reach out to our team

customerservice@resource-dynamics.com

We are available Monday-Friday 8am-4pm EST
[Excluding scheduled holidays](#)