

Evaluation Guide

knowledge

support

hardware

HELP!Desk

Customer Service / Technical Support Software for Windows

service

software

satisfaction

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Our high quality support is another valuable feature that sets us apart from our competitors. We invite you to contact us and try it out for yourself.

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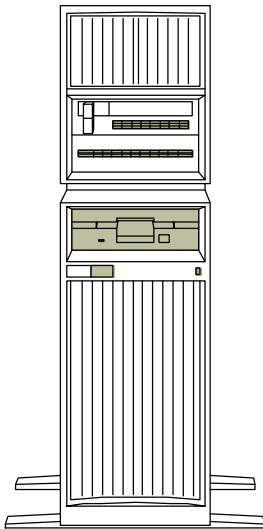
Installation and Setup

This section covers the physical installation of HELP!Desk on both the file server and individual workstations. Since HELP!Desk is most often used in a multiuser environment, installation on a LAN will be discussed first.

For Single-User (Local) Installation, please skip to page 7

Multiuser (Network) Installation

The diagram below shows the possible locations of all HELP!Desk files. For best performance, follow the “Recommended” file locations as indicated.



File Server

Required

- HELP!Desk Databases (HD*.DB*)
- Index Files (*.NTX, *.IA)
- Conversion Program (CONVERT.EXE, *.ATR)

Recommended

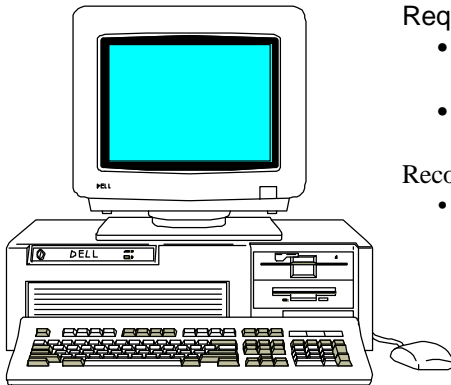
- Client Files (SETUP program and files for workstations)

Optional

- HELP!Desk Executables (HD*.EXE, HD*.PBD)

Optional - Not Recommended

- Runtime Files (*.DLL)
- ODBC Drivers



Each Workstation

Required

- Runtime Files (*.DLL) into \WINDOWS\SYSTEM or HELP!Desk executable directory (i.e. C:\HDWIN)
- ODBC Files into \WINDOWS\SYSTEM directory

Recommended for best performance

- HELP!Desk Executables (HD*.EXE, HD*.PBD)

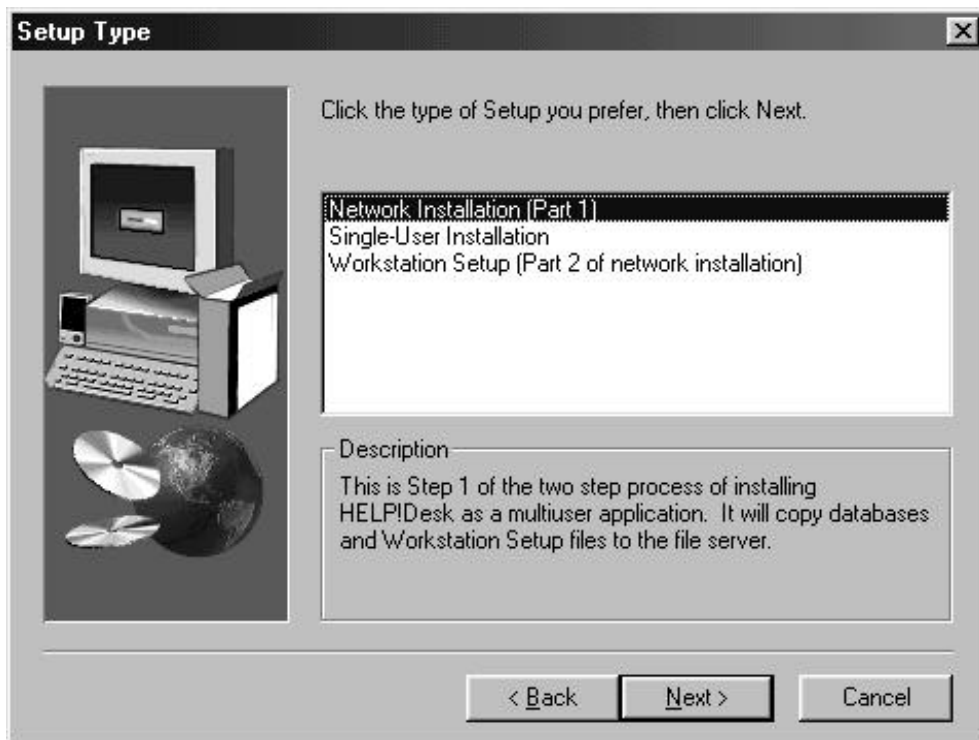
Installation Instructions

1. Insert the HELP!Desk CD into your CD-ROM drive.
2. The introduction program will start automatically.
3. Select “Install HELP!Desk”.
4. Follow the prompts which are explained below.

The SETUP Program

After SETUP initializes, you will be prompted with a welcome screen, the license agreement and a README file. This file contains the latest information on installing and running the software.

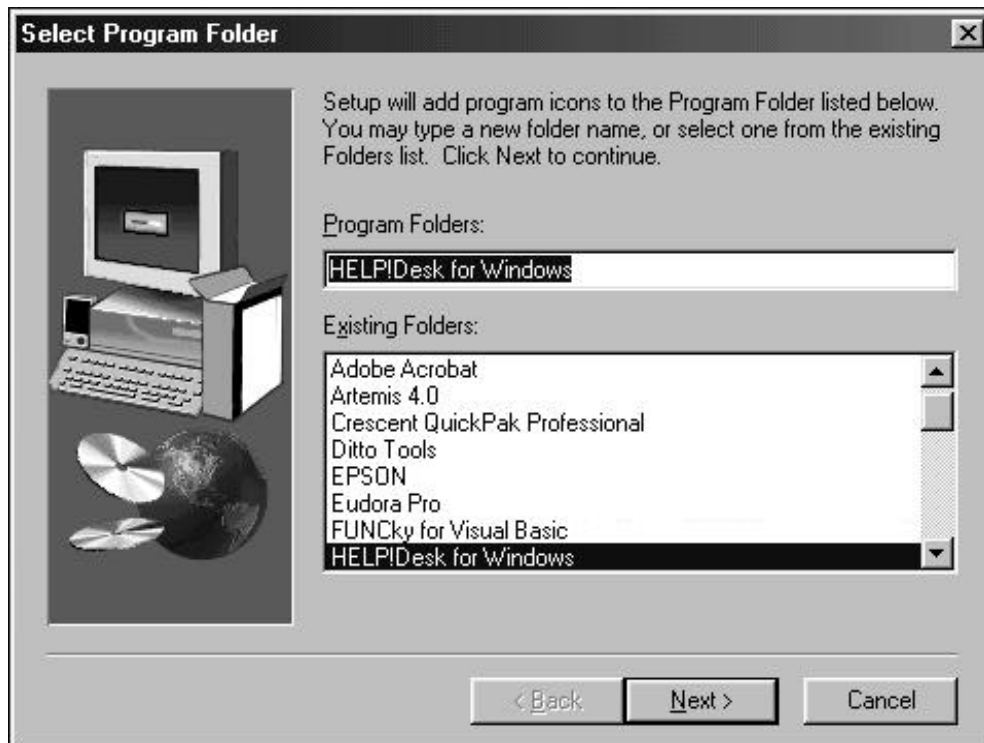
You will then be prompted to select the type of installation you want to perform. Select **Network Installation (Part 1)**.



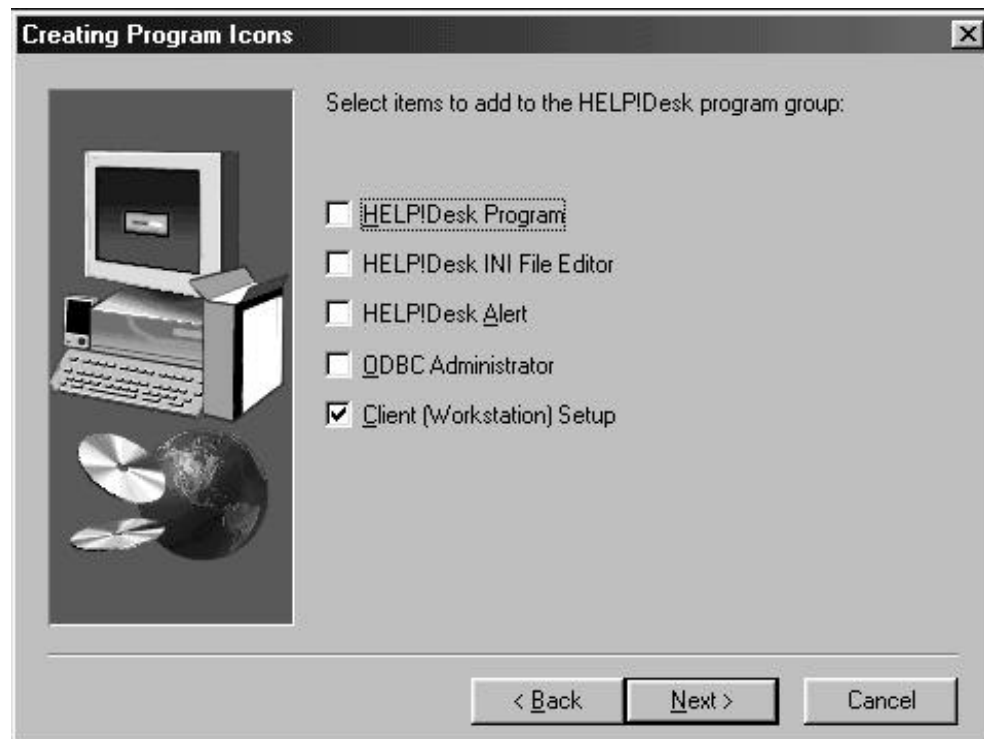
Next, enter your user information (name, company and serial number). You will then be prompted to select the components for installation. Accept the default components but be sure to **select a destination directory on your network**.



After the files are copied, you will be prompted to select a program folder.



Finally, you will be prompted to select icons to add to the HELP!Desk program group. Notice that this phase of setup only creates an icon for running the Client (Workstation) Setup.



This concludes part one of the network installation.

Part 2. Client (Workstation) Install

Once the installation to the server is completed, you need to run Client Setup from **each workstation** that will be accessing HELP!Desk. This routine will copy selected files to the local hard disk, create the ODBC connection to the databases and create (or update) the HELP!Desk program group.

Installation Instructions

Launch the Client Workstation Setup program using any of the following methods:

- C Double-click the **Client Workstation Setup** icon in the HELP!Desk for Windows group.
- C Use Windows Explorer to locate the HELP!Desk **CLIENT** directory on the network, then double-click on **SETUP.EXE**.
- C Load the HELP!Desk CD-ROM and choose **Install HELP!Desk** from the menu.



The SETUP Program

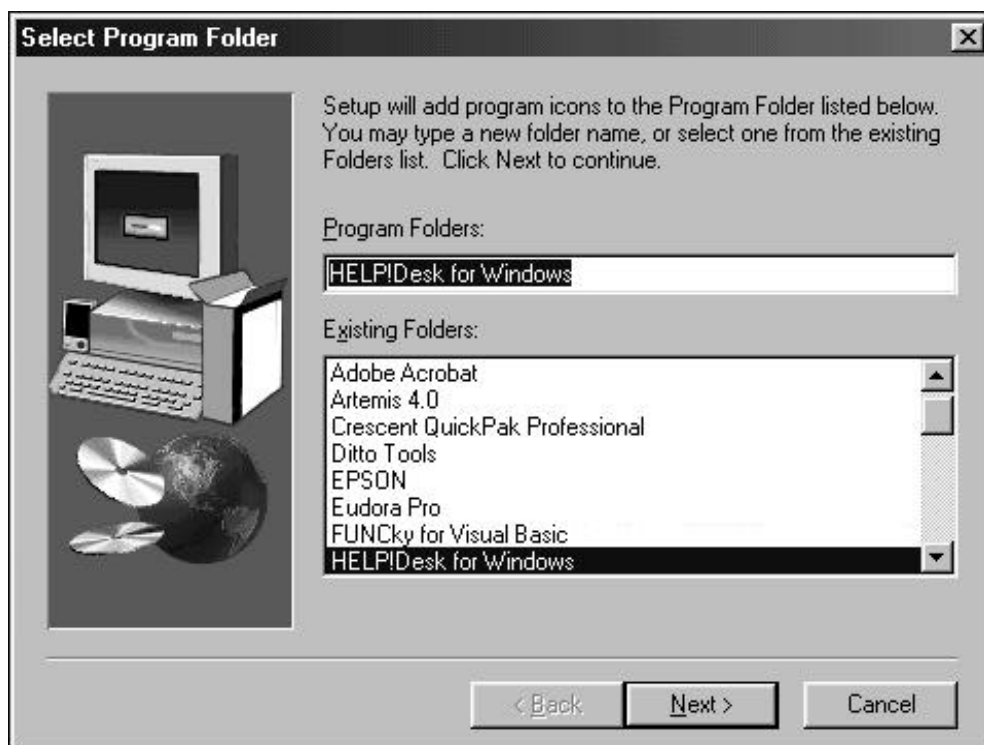
After SETUP initializes, a window will open showing the README file. This file contains the latest information on installing and running the software, and supersedes information found in the documentation.

If you are running SETUP from the HELP!Desk CD-ROM, you will be prompted to choose the Setup Type. Select **Workstation Setup (Part 2 of network installation)**.

You will then be prompted to select the modules you want to install. You should accept the components that have been checked. Change the destination folder if desired.



Next, you will be prompted to select the program folder. The default is *HELP!Desk for Windows*.

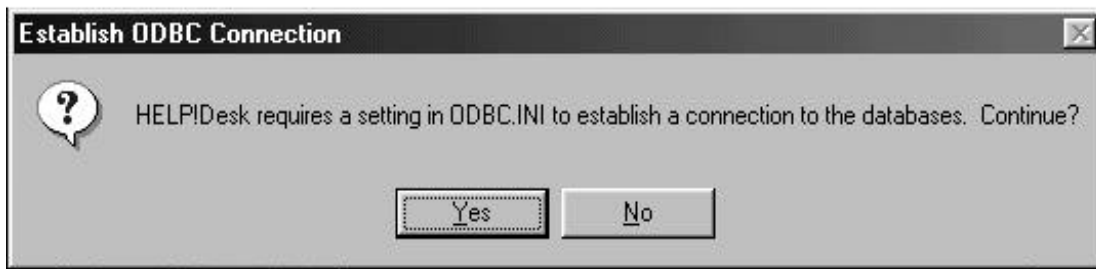


After the files are copied, you will be prompted with the following dialog box to create program icons:



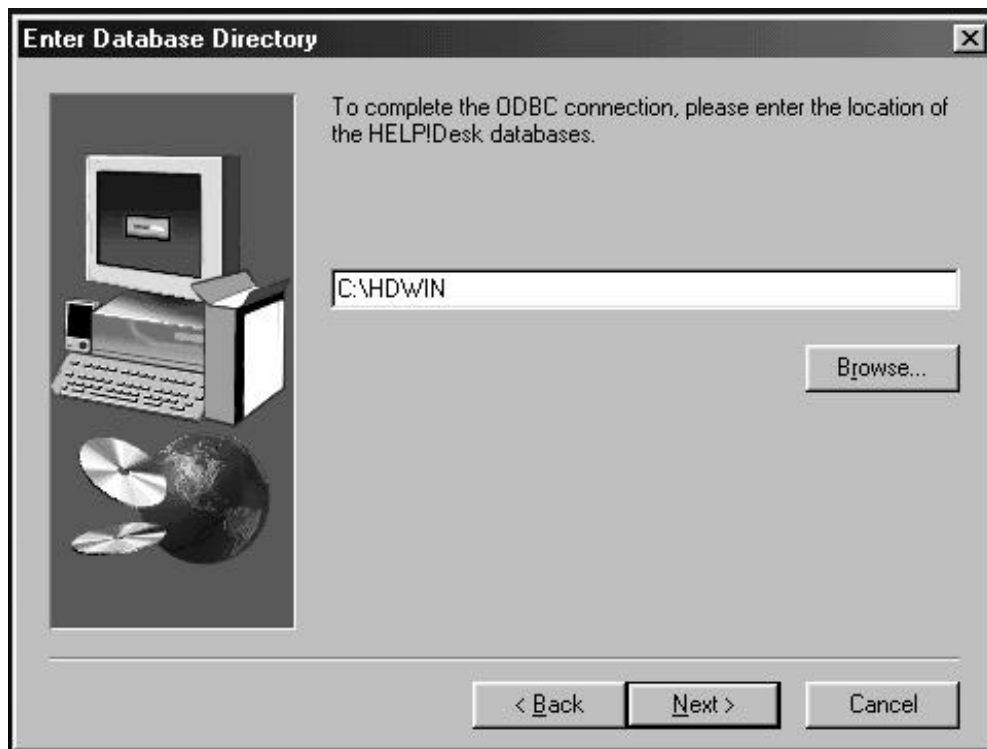
As the last step you have the opportunity to establish the ODBC connection to the HELP!Desk databases. The settings that are made by this process tell HELP!Desk where to find the databases and what methodology should be used to access them.

Unless there is a specific reason why you do not want SETUP to establish the connection, you should choose **Yes**.



To establish the connection, you must tell SETUP where on the file server the HELP!Desk databases are found.

Important If different workstations use different drive mappings to refer to the volume containing HELP!Desk, remember to adjust the ODBC connection accordingly.



Repeat Part 2 of the installation instructions for each workstation that will access HELP!Desk.

Congratulations! You are ready to launch HELP!Desk. Please turn to page 10 of this guide for instructions on using the program.

Single-User Installation

This section describes how to install HELP!Desk for use by a single user, on a single computer. This installation will require approximately 30 MB of disk space.

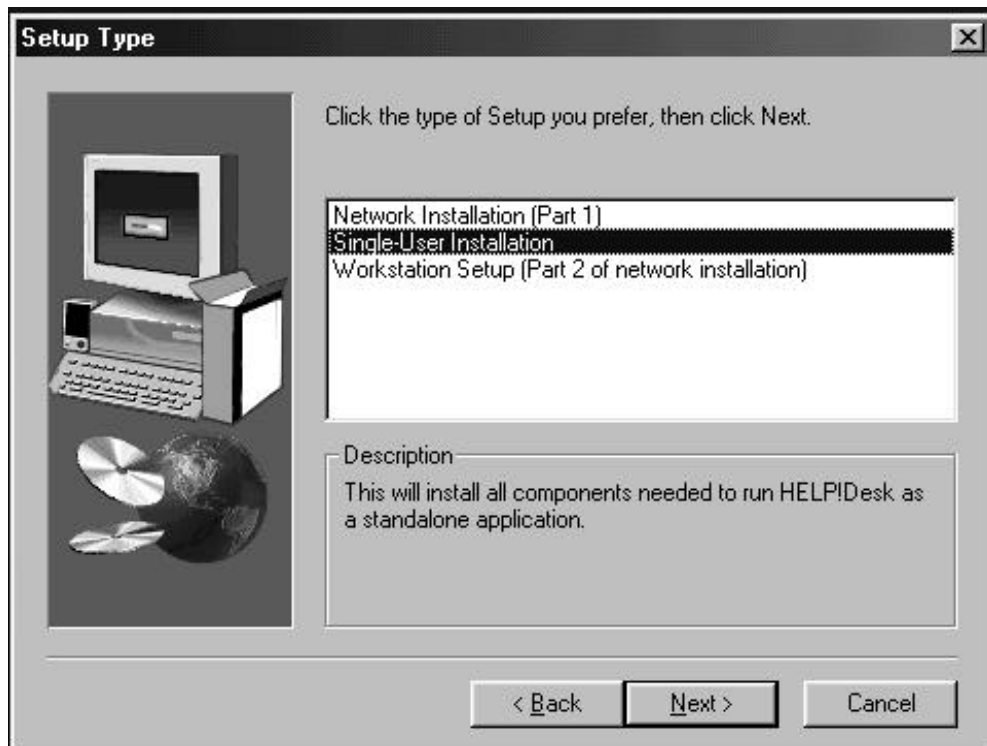
Installation Instructions

1. Insert the HELP!Desk CD-ROM into your computer.
2. The introduction program should start automatically.
3. Choose **Install HELP!Desk**.
4. Follow the prompts which are explained below.

The SETUP Program

After SETUP initializes, you will be prompted with a welcome screen, the license agreement and a README file. This file contains the latest information on installing and running the software.

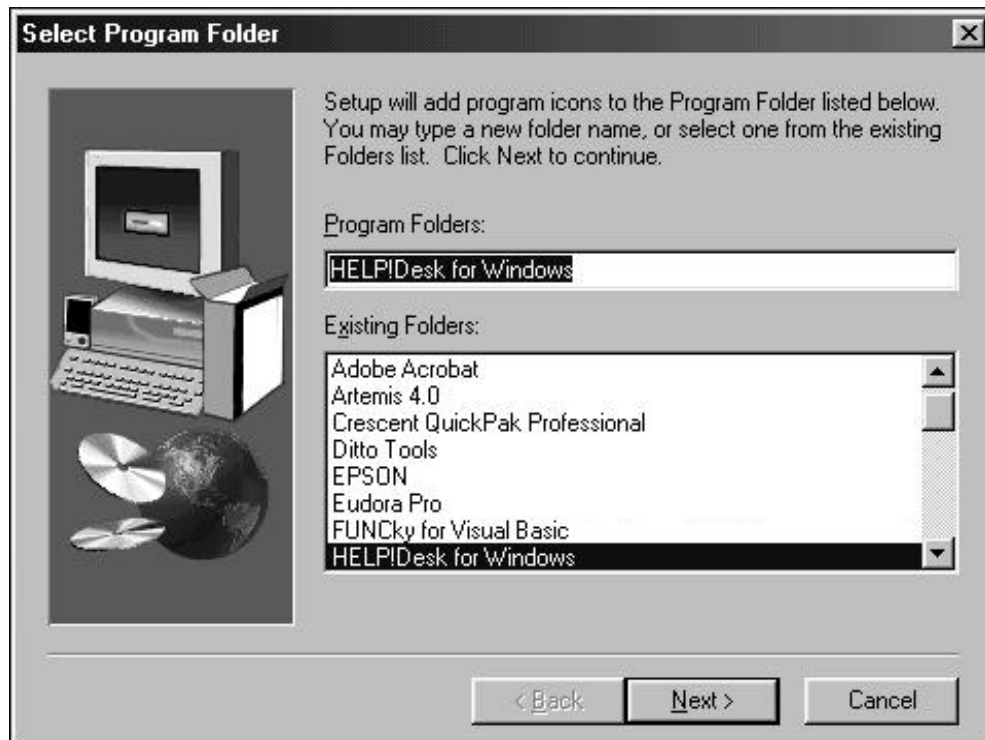
You will then be prompted to select the type of installation you want to perform. Select **Single-User Installation**.



Next, enter your user information (name, company and serial number). You will then be prompted to select the components for installation. Accept the default components and change the destination directory if desired.



Next, you will be prompted to select the program folder. The default is *HELP!Desk for Windows*.

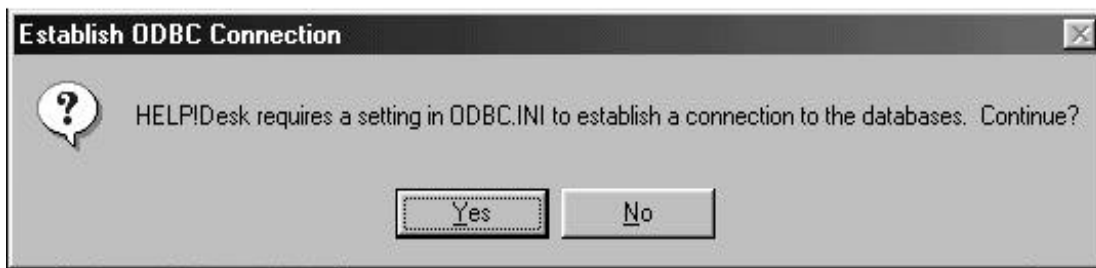


After the files are copied, you will be prompted with the following dialog box to create program icons:



As the last step you have the opportunity to establish the ODBC connection to the HELP!Desk databases. The settings that are made by this process tell HELP!Desk where to find the databases and what methodology should be used to access them.

Unless there is a specific reason why you do not want SETUP to establish the connection, you should choose **Yes**.



This completes the installation. Please turn to the following page to launch HELP!Desk.

Directory Defaults

The default location for each module is listed in the table below.

Module	Default Directory
Programs	\HDWIN directory on the drive Windows is installed upon.
Databases	The directory chosen for the programs.
Runtime DLLs	The directory chosen for the programs.
ODBC	\WINDOWS\SYSTEM.

Starting HELP!Desk

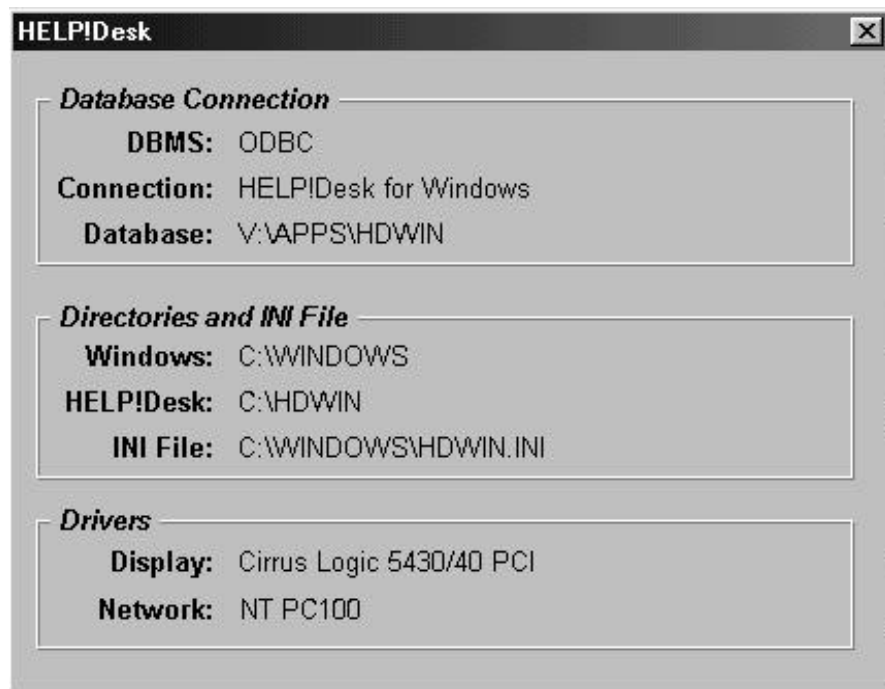
To launch the program, click Start, Programs, HELP!Desk for Windows, HELP!Desk. When the program begins, you will be prompted with the log-in window:



Enter your log-in name and password. Until you have added users to the security database (see page 19), use the default log-in: Enter **HD** for **both** the **log-in name** and **password**.

Troubleshooting Tip

Press Alt-H at the log-in window to display program configuration information.



The most common log-in problem reported by HELP!Desk users involves an incorrect ODBC setting of the database directory. If you experience an error when logging in, verify that the database directory reported in this window is actually the directory where the HELP!Desk data resides. On network drives, be especially certain that the drive letter has been properly mapped at the workstation.

If you need to adjust the directory setting, close HELP!Desk and run **ODBC Administrator** from the HELP!Desk for Windows folder. Double-click the "HELP!Desk for Windows" data source and make the necessary adjustments to the directory setting.

An Introduction to HELP!Desk

The remainder of this guide will take you through the most commonly used functions of HELP!Desk, such as logging calls, entering clients and maintaining inventory.

The HELP!Desk Program Group



Client Workstation Setup - This program was used to copy the HELP!Desk files from the server to the local machine.

HELP!Desk - The main program.

HELP!Desk Alert - This program runs in the background and alerts you whenever you have a tickler due. Ticklers can be created manually or generated automatically whenever a call is assigned or reassigned. You would typically add a shortcut to the Alert program to your Startup folder.

HELP!Desk INI File Editor - This program provides a convenient mechanism for making changes to the HELP!Desk INI File (HDWIN.INI).

HELP!Desk Convert - This program will convert HELP!Desk Version 2 (DOS Version) data to the HELP!Desk 3 format.

ODBC Administrator - This program is used to make changes to the ODBC connection, which tells HELP!Desk where the databases reside.

Starting HELP!Desk

When you start the HELP!Desk program, you will be prompted to enter a username and password. Until you create your own usernames, log in with the username **HD**, press <Tab>, and enter the password **HD**.

Administrative Duties

HELP!Desk offers extensive features for security, configuration and customization. To change the field labels and menu text, choose **File, Preferences, Screen Design**. Maximize the window for more convenient editing. You will see two columns of categorized options which allow you to change screen text from the default settings to terminology that better suits your environment.

File, Preferences, Program Defaults allows you to customize many aspects of the program's behavior.

User accounts are created by choosing **Utilities, Security**. This is where you add users, set passwords and grant program access rights. Please note that in our terminology "users" refers to the people who use the HELP!Desk software, while "clients" refers to the customers being supported.

Many fields utilize drop-down pick lists to ensure fast and accurate data entry. You can pre-fill the pick lists by choosing **Utilities, Table Maintenance, Field Tables**, or add to the tables on-the-fly through the normal data entry process. The **Field Validation** setting in Security allows or prevents on-the-fly additions to tables on a per-user basis.

These administrative tasks can be completed at any time. So if you're ready, let's jump in to HELP!Desk and see what it can do...

Entering a New Call

To log a new call, choose one of the following methods:

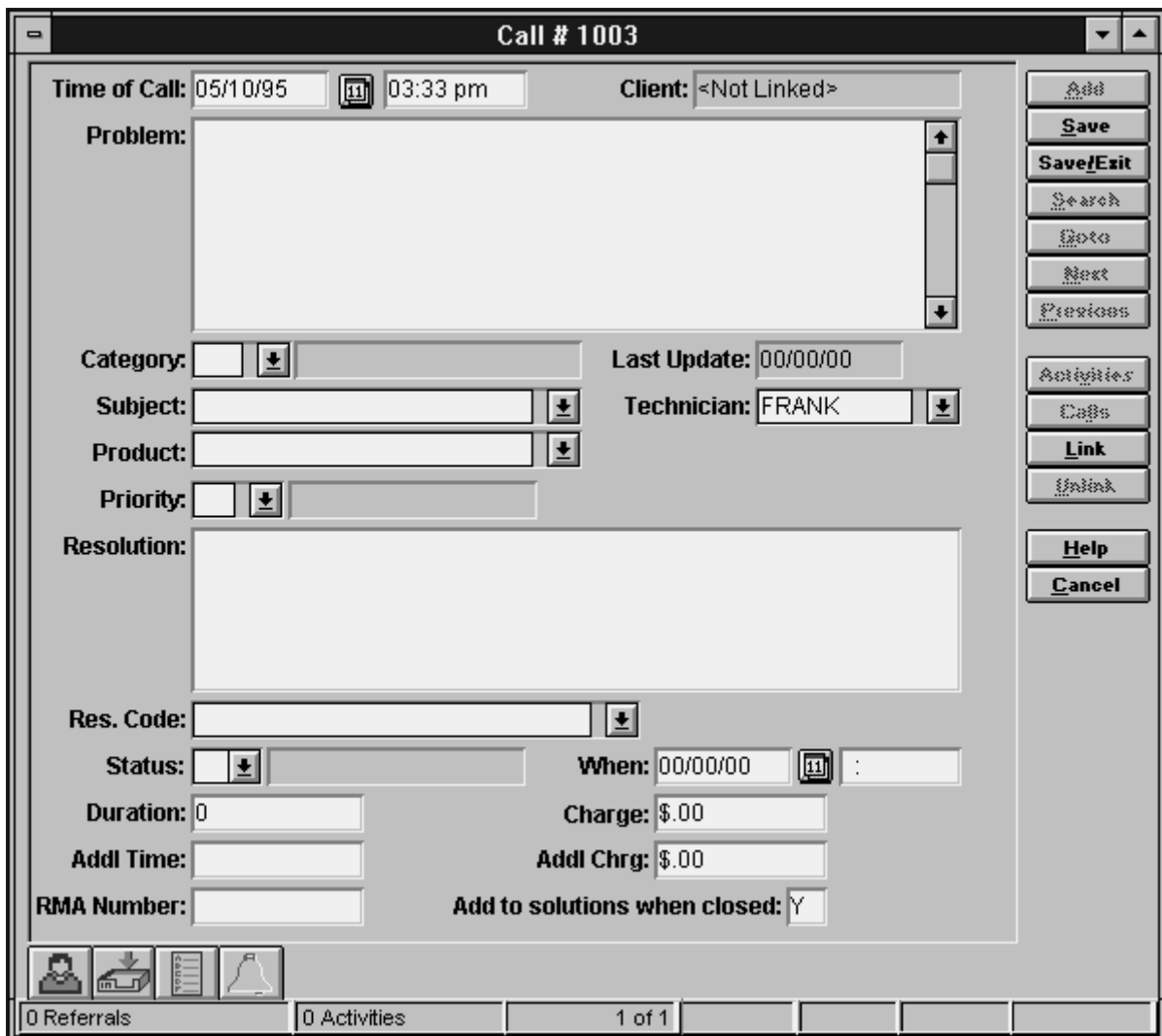
From the Menu: **Call, Add** or press **Ctrl+A**

From the Tool Bar: Click 

From the Client Profile: Click 

If either the Client or Client Profile Window is open, the new call will be automatically linked to the displayed client. If not, the call will be initially "<not linked>" but can be linked to a client later.

When a call is added, a unique call number (sometimes referred to as work order number) will be assigned and displayed in the title of the window. Some companies will give this number to the customer so they can refer to the problem if they call again. Other companies feel this approach is too impersonal, and prefer to deal with the customer strictly by name. With HELP!Desk, the choice is yours.



Call Window Buttons - Add/Edit Mode

Default Button Label	Description
Save	Saves the call with any changes you made.
Save/Exit	Saves the call then closes (or minimizes) the Call window.

Link	Links the call to a client. The Client Search window will open allowing you to find the desired client.
Help	Opens the Help window.
Cancel	Cancels editing and discards any changes you made.

Call Window Field Descriptions

Default Field Label	Description
Time of Call	The date and time of the call. These two fields are pre-filled with the system date and time. The calendar button allows you to select a date using your mouse.
Client	If the call is linked to a client, the client's name is displayed here. When adding a call, the call is automatically linked if the client or profile window is open. An unlinked call is indicated by the message "<not linked>".
Problem	Up to 64,000 characters of text describing the problem.
Category	The problem category. A drop-down table exists for this field to validate the data.
Last Update	This date is maintained automatically by HELP!Desk. It is updated each time the call is modified.
Subject	The subject of the call. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Product	The product that the client is having a problem with. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Technician	<p>The technician who is responsible for the call. This default for this field is the name of the current HELP!Desk user. A drop-down table exists for this field to validate the data and ensure consistent data entry.</p> <p>Changing the technician name to someone other than yourself can signal HELP!Desk to notify the other technician of the new or reassigned call. Settings in your HDWIN.INI file enable or disable this feature, and also set the method of notification. We provide a program, the HELP!Desk INI File Editor, to make changing the settings more convenient. The settings you will want to make are AutoMessage=On, and AutoMessageMethod=Tickler, NetMessage and/or Email.</p> <p>Remember, the receiving technician must be running HELP!Desk Alert to be notified by a tickler.</p>
Priority	The priority of the call. The initial value of this field is taken from the client's priority field. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Resolution	Up to 64,000 characters of text describing the resolution of the call. If you don't choose to use the Activities feature for tracking individual steps taken to resolve a call, you can enter each step in this field. We recommend inserting a blank line and adding a date/time stamp (F9) before adding a new step.

Res. Code	The resolution code is used to categorize the way in which each problem was resolved. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Status	The current status of the call. Some entries in this field will pre-fill the "When" date and time, and also generate network messages, ticklers and/or email. A drop-down table exists for this field to validate the data and ensure consistent data entry.
When	This is the action date/time for the "Status" field. It is used to indicate when a call was closed or when follow-up or other activity should occur.
Duration	<p>The time taken to resolve the call. This is the actual time spent working on the problem, not the elapsed time between when a call was opened and when it was closed. The duration is always displayed in minutes, but can be entered in days, hours and/or minutes. For example, 1 day, 2 hours and 35 minutes would be entered as 1D2H35M. The program default Number of work hours in day is used to convert the "day" entry into hours.</p> <p>Duration is accumulated automatically as long as the call remains in edit mode.</p>
Charge	The charge can be entered manually or computed automatically. If computed, it's value is determined by the duration , the client's minimum charge per call , and the program default billing rate , billing increment , minimum charge per call and minimum charge per activity .
Addl Time	Any additional time that needs to be tracked, such as time charged by an outside repair firm or consultant.
Addl Charge	Any additional charges that need to be applied against this call, such as a repair bill from a service company.
RMA Number	A Return Materials Authorization Number that can be assigned if the client needs to return merchandise.
Add to Solutions when closed	If "Y" is entered here, this call will be marked for inclusion into the Solutions database. Only calls that have been added to the Solutions database can be found when performing a key word search in the Solutions module.

Note: When a call comes in, you may want to make a practice of retrieving the Client Profile of the person who is calling. This way you have the opportunity to familiarize yourself with the clients' previous calls and configuration before you address the new call. Also, if the client is not on file, you will know that you need to obtain additional information so the client may be added and the call can be properly linked.

Printing Work Orders

To print the current call in Work Order format, choose **File, Print** or click the printer icon on the toolbar. Options under **File, Preferences, Program Defaults** allow you to choose some of the information that will appear on the printout.

Retrieving an Existing Call

An existing call can be retrieved into the Call window by any of the following methods:

From the Menu:

Call, Find

This option allows you to search for a call by one of eight fields as shown below.

Call, Goto

This option allows you to retrieve a call by call number (work order number).

From the Client window:



Click the **Calls** button to open a selection window of calls for the current client. Select one of the calls to load it into the Call window.

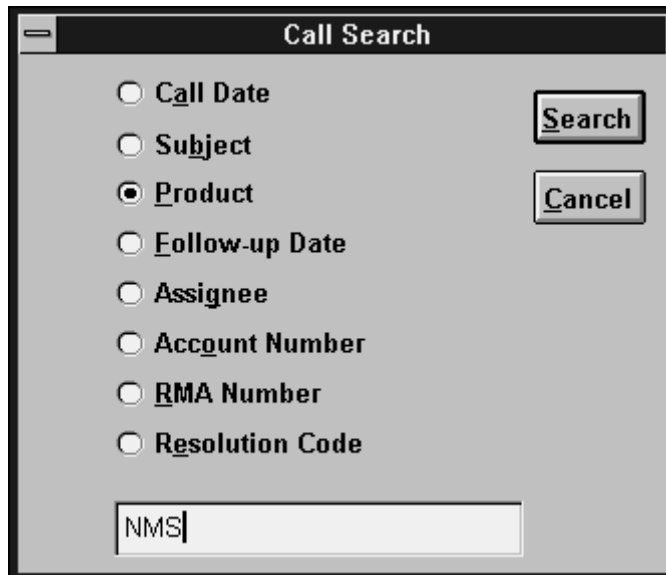
From the Client Profile window:



Click the **View Calls** button to open a selection window of calls for the current client. Select one of the calls to load it into the Call window.

Using the Call, Find menu option

You have a choice of eight fields to search on, as indicated in the **call search** window below.

A dialog box titled "Call Search" with a list of eight radio buttons: "Call Date", "Subject", "Product" (selected), "Follow-up Date", "Assignee", "Account Number", "RMA Number", and "Resolution Code". To the right of the list are "Search" and "Cancel" buttons. At the bottom is a text input field containing "NMS".

Click the radio button or field label of the field you wish to search by, enter your search criteria, then click **Search**. If more than one match is found, the Call Selection window will open.

Call Search - 2 found

Product	Call Date	Subject
NMS	11/24/93	Printing
NMS	02/18/94	Printing

OK

Cancel

Client: Call #: 518

Problem

About NMS 3.02

He said he could not print any reports from the system and he kept getting "Printer Not Ready" box. On the Computer System Information screen, showed "Printer: Not

Resolution

<02/18/94 15:39 FRANK> Called him back at the prescribed time, but he was gone. He'll be back on Tuesday 02/22/94.

<02/28/94 09:10 FRANK> They recently had a new network installed (with a new

From this window you would select the desired call and click **OK**. Note that a successful search changes the retrieval set of calls. From the call window, **Next** and **Previous** will move you through the calls that were displayed in the window above.

Using the Call, Goto menu option

This option allows you to quickly retrieve a single call by call number (also called work order number). Simply enter the number of the desired call and click **OK**.

Goto Call

Enter Call:

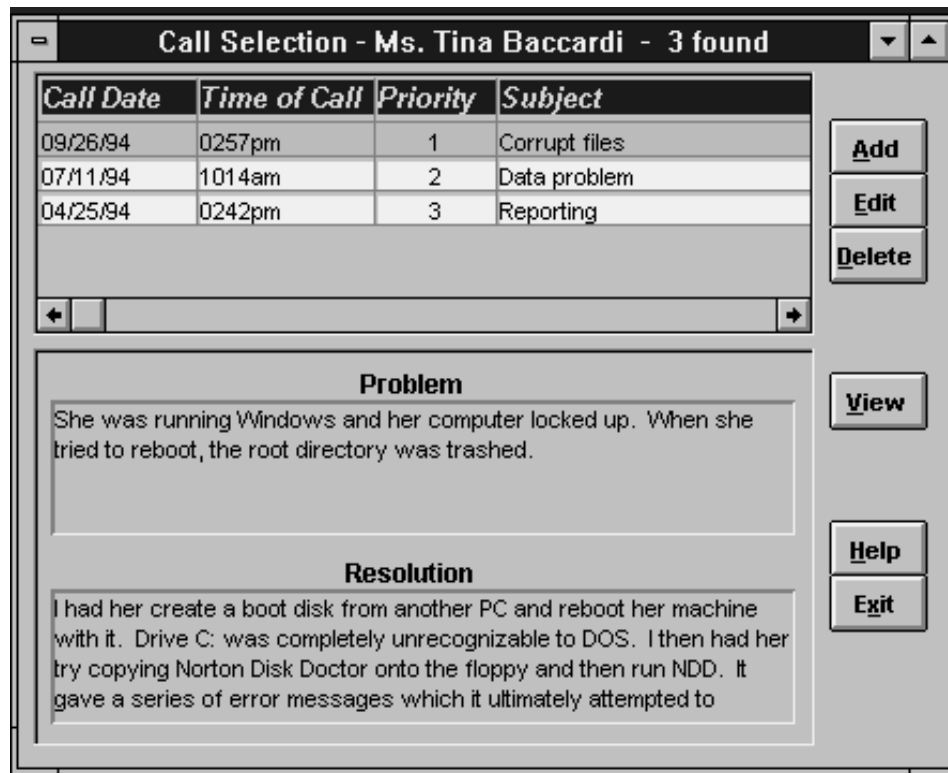
OK

Cancel

If the call is found, it will be displayed in the call window.

Using the  or  buttons

Both of these buttons will display a selection window of all calls linked to the current client.



Within this window you can scroll through all calls that have been logged to the client. The horizontal scroll bar allows you to see additional information for each call. The problem and resolution text for the currently highlighted call can be found in the lower portion of the window.

The **Edit** and **View** buttons open the call window in edit and view modes, respectively. The **Add** button opens the call window and allows you to enter a new call.

Click **Delete** to delete the currently selected call.

Adding an Activity

Accessed from the Call window by clicking **Activities**.

The Activities module allows you to independently track every step taken in the resolution of a call. While you are not required to use activities with your call logging, doing so provides an opportunity for better management of technical staff and more accurate tracking of each technicians' workload.

The Activities Window displays a list of all activities for the current call. The highlighted activity is shown in its entirety in the lower portion of the window. This is also where data entry takes place when an activity is added or edited.

To add a new activity, simply click the **Add** button.

Activities for Call #15020318

Start Date	Start Time	Activity	Technician	Priority
04/26/95	03:24 pm	Returned call	FRANK	1

Add
Edit
Delete
Reassign
Help
Exit

Start Date: 04/26/95 **Start Time:** 03:24 pm
End Date: 04/26/95 **End Time:** 03:25 pm
Duration: 1 **Charge:** \$0.00 ☐ **Auto Compute**
Activity: Returned call **Technician:** FRANK **Priority:** 1
Status: F **Date:** 04/26/95 04:00 pm ☒ **Tickle**
Detail: Left message on voice mail

Activities Window Field Descriptions

Default Field Label	Description
Start Date	The starting date of the activity. It is automatically set to the system date and cannot be changed.
Start Time	The time the activity was created. It is set to the current system time and cannot be changed.
End Date and End Time	These fields are used to indicate when the activity was completed. If the fields are left blank, they will be set to the system date and time when you click the Save button.
Duration	The time spent performing the activity. If left blank, the elapsed time of the activity will be stored here.
Charge	The charge to the client for this activity.
Auto Compute	If checked, the charge will be computed automatically based on the duration , billing rate , billing increment and minimum charge per activity .
Activity	A brief description or purpose of the activity.

Technician	The name of the technician who performed the activity.
Priority	The priority of the call. Changes made here are reflected back in the call window.
Status	The status of the call as of the completion of this activity. The call window is updated with this status.
Date	The date and time related to the status, such as when the call was closed or when a follow-up call should be made.
Tickle	If checked, a tickler will be generated for the technician named in the activity, with an event date and time corresponding to the status date above.
Detail	Up to 64,000 characters of text describing in detail the action that was taken in performing this activity.

Activities Window Button Descriptions - Add/Edit Mode

Default Button Label	Description
Help	Opens the Help window.
Save	Saves the current changes.
Save/Exit	Saves the changes and closes the Activities window.
Cancel	Cancels editing without saving the changes.

Reassigning a Call

Accessed from the Activities window, which is accessed from the Call window by clicking

Activities.

A call can be reassigned simply by editing the call and changing the name in the “Technician” field. The drawback to this method is that no audit trail exists and you will not necessarily know which other technician(s) have worked on the call. You will also be unable to track time between the assignment of a call and its acceptance by the technician.

Having said that, there is obviously a better way to reassign a call in HELP!Desk. That way is to use the **Reassign** button on the Activities window. Clicking this button opens a dialog box that will be used to create the reassign activity.

Activities for Call #15020318

Start Date	Start Time	Activity	Technician	Priority
04/26/95	03:24 pm	Returned call	FRANK	1

Buttons: Add, Edit, Delete, Reassign, Help, Exit

Start Date: 04/26/95 Start Time: 03:24 pm
End Date: 04/26/95 End Time: 03:25 pm
Duration: 1 Charge: \$0.00 ☐ Auto Compute
Activity: Returned call Technician: FRANK Priority: 1
Status: F Date: 04/26/95 04:00 pm ☒ Tickle
Detail: Left message on voice mail

The Reassign Call dialog box is pictured and explained below.

Reassign Call to...

Technician:
Priority: 1 Mission Critical
Status: F FOLLOW-UP
When: 00/00/00 :
Tickle: ☐
Buttons: OK, Cancel

Reassign Call Window - Field Descriptions

Default Field Label	Description
Activity	A brief description or purpose of the activity.
Technician	The technician you are reassigning the call to.
Priority	The priority of the call. Changes made here are reflected back in the call window.

Status	The status of the call as of the completion of this activity. The call window is updated with this status.
When	The date and time related to the status, such as when the follow-up call should be made. When reassigning a call, you would typically enter the current date and time.
Tickle	If checked, a tickler will be generated for the technician named in the activity, with an event date and time corresponding to the status date above. You should always generate a tickler when reassigning a call.

Retrieving a Client

Accessed from the Client menu (**Find** or **Profile**) and the button bar,  or ,

When responding to a client's query, you will often find it useful to retrieve the **Client Profile** which shows basic customer information (name, company or department, phone number, service contract, etc.), a summary of the customer's calls, and their hardware and software. The call information is particularly useful as it allows you to quickly scan both the nature and volume of the client's past calls, as well as their resolution or current status.

The **Client** window allows you to view or edit all client information, but requires you to click additional buttons to see the call history or inventory.

Whether you choose **Find** or **Profile**, the retrieval steps are the same. You will be presented with the Client Search window.



The Client Search window is a dialog box with a title bar that says "Client Search". It contains five radio buttons for selecting the search criteria: "Last Name" (selected), "Company", "Extension", "Phone", and "Search Key". To the right of these buttons are two buttons: "Search" and "Cancel". Below the radio buttons is a text entry box.

You can retrieve a client by any of the five methods listed in the window. Click the radio button next to the field you wish to search for, enter your search criteria in the entry box, then click **Search**.

If no match is found, a message will be displayed indicating same, and you will be returned to the client search window.

If multiple matches are found, the **Select Client** window will open.



The Select Client - 6 found window is a dialog box with a title bar that says "Select Client - 6 found". It contains a table with four columns: Name, Company, City, and State. The table lists six clients. Below the table is a large empty area. At the bottom of the window are three buttons: "Add", "OK", and "Cancel".

Name	Company	City	State
Baccardi, Ms. Tina	NuWave Surfwear	Wildwood	NJ
Bacchus, Ms. Lorraine	Acme Laser Cannons	Lansing	MI
Backner, Mr. Bill	Plutonium Engineering	Portland	OR
Baclawski, Mr. Victor	Minisoft Corporation	Redmond	WA
Bacon, Mr. Kevin W.	Lambda Chi Alpha Fraternity	Indianapolis	IN
Bacrett, Ms. Lisa	University of Pittsburgh	Pittsburgh	PA

The buttons on this window work as follows:

Add	Opens the client window and adds a new client record.
OK	Selects the currently highlighted client and opens either the client window or the profile window
Cancel	Closes the select client window and returns to client search .

Other functions such as **Link** and generating a report for a single client will also open the Client Search window. In such instances, the match will not be displayed in the client or profile window, but rather will be used simply as a response to program prompts (such as the client to link to).

Adding a Client

Accessed from the Client menu (**Add**) and the Select Client window.

While you are not required to link calls or inventory to individual clients, you will probably want to in almost all circumstances. If your customers pay for support or service contracts, you will definitely want to add them to the system.

Add is used to add a new client record. When this option is selected, the **Client Window** will open, allowing you to add the new client information.

The screenshot shows the 'Adding Client' window with the following fields and controls:

- Name:** <last name> <first name>
- Client Type:** [dropdown]
- Title:** [text box]
- Emp #:** [text box]
- Company:** [text box]
- Phone #:** [text box] **Ext:** [text box]
- Dept:** [dropdown] **Group:** [dropdown]
- Acct #:** [dropdown]
- Asset Tag:** [text box]
- Loc Code:** [dropdown]
- Invc Code:** [dropdown]
- Priority:** [dropdown]
- Service Contract / SLA:**
 - Contract:** [dropdown]
 - Contr. Exp:** 00/00/00 [calendar icon] ☐ Date ☐ Minutes
 - Min Charge:** [text box] .00
- Address:** [text box]
- Address 2:** [text box]
- City:** [text box]
- State:** [text box] **Zip Code:** [text box]
- Country:** [text box]
- Bldg:** [dropdown] **Zone:** [text box]
- Floor:** [text box] **Office:** [text box]

Buttons on the right: Add, Save, Save/Exit, Next, Previous, Notes, E-mail, Page #s, Calls, Config., Hardware, Software, Help, Cancel.

Status bar: 1 of 1

Field Descriptions

Default Field Label	Description
Name	Client's last name followed by first name.
Client Type	The client type. Valid entries are I for internal clients , E for external clients . This field affects how information is displayed and reported, so it must be filled with "I" or "E".
Title	Job title.
Emp #	Employee number. This is an informational field and not used for searches.

Company	Company or organization name.
Phone #, Ext	Primary telephone number and extension
Dept	Department. This field has an associated table for data validation.
Group	Group. This field has an associated table for data validation.
Acct #	Account number. This field can be used to sort and filter reports, so it is important to make an entry in this field. The drop-down list contains table entries for validating data.
Asset Tag	The value in this field is used as a default for the asset tag of all hardware entered for this client. This field can also be used to search for a client.
Loc Code	Location code. This field has an associated table for data validation.
Inv. Code	Type of invoice the client receives. This field has an associated table to data validation.
Priority	The value of this field is used as a default priority for all calls entered for this client. This field has an associated table for data validation.
Contract	The type of support contract this client maintains. This field has an associated table for data validation.
Contr. Exp	When the contract expires. If the Date radio button is selected, then enter the date the contract expires. If Minutes is selected, then enter the number of support minutes remaining before the contract expires. This number will be decremented appropriately for each call logged to this client.
Min Charge	The minimum charge that will be computed for each call logged to this client.
Address and Address 2	Mailing address (two lines).
City	City.
State	State or Province.
Zip Code	Zip or Postal Code.
Country	Country.
Bldg	Building. This field has an associated table for data validation.
Zone	Zone (for internal addressing).
Floor	Floor.
Office	Office room number.

Button Descriptions - Add / Edit Mode

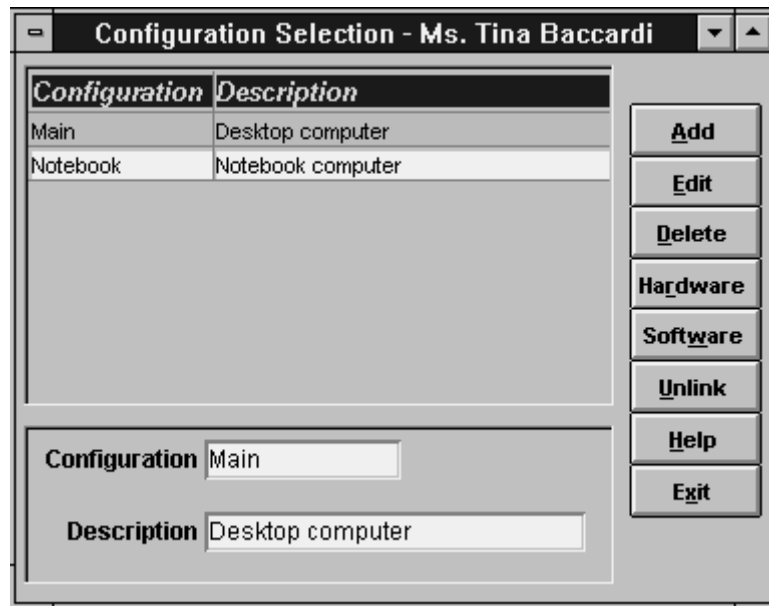
Default Button Label	Description
<u>S</u> ave	Saves the current client record. The client window remains open.
Save <u>E</u> xit	Saves the client information and closes (or minimizes) the client window.
<u>H</u> elp	Opens the Help window.
<u>C</u> ancel	Cancels the current add / edit.

Adding Inventory to a Client

This option can be accessed from several places, but the most common methods are from the Client or Client Profile windows by choosing the **Configurations** button.



This button accesses a selection window of all configurations (hardware and software inventory) for the current client. Configurations are used to tie all of the hardware and software components of a computer system together. For example, your desktop PC consists of a CPU, monitor, keyboard, disk drives, memory, peripherals such as a CD-ROM drive, speakers, sound card, printer, network card and mouse, and numerous software packages. Each client may possess an unlimited number of configurations, with each configuration containing an unlimited number of hardware and software components.



The upper portion of the window lists this client's configurations. The lower portion is used to add or edit a configuration.



Click the Add button to enter a new configuration.



The Hardware and Software buttons will display selection windows of all hardware and software that is part of the highlighted configuration. Scroll bars allow you to view each item in the configuration. The full detail of the selected piece is shown in the lower portion of the window.

An example of the Configuration Hardware window is shown below. The Configuration Software window functions in a similar fashion.

Hardware for Configuration - Main - 9 found

Type	Brand	Model
COMPUTER	Gateway 2000	486DX2/66
KEYBOARD	Gateway 2000	14587
MOUSE	Microsoft	37967
SOUND CARD	Logitech	Soundman Wave
SPEAKERS	Labtec	CS-550

Configuration: Main Ms. Tina Baccardi
 Type: COMPUTER
 Brand: Gateway 2000
 Model: 486DX2/66
 Description: Tower PC with 16MB RAM, dual floppy
 Serial #: 398098F3984

Add Edit Delete
 House Unlink
 Help Exit

Description of Buttons



Click the Add button to enter a new piece of hardware for this configuration. Data entry takes place in the Hardware window, shown below.

Hardware Entry

Configuration: Main Ms. Tina Baccardi

Type:

Brand:

Model:

Description:

Serial #:

Asset Tag:

Shared?: ☐

Purch Date: 00/00/00 PO Number:

Price: 0 Vendor:

Warranty: Warranty Exp: 00/00/00

Service Code: Svc Expires: 00/00/00

Depreciate: ☐ Curr. Value: 0

Save
 Browse
 Help
 Cancel

Hardware Entry Field Descriptions

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Type	The type or category of hardware.
Brand	The brand or manufacturer.
Model	The model name or number.
Description	The description of the hardware.

Serial #	Serial number.
Asset Tag	The assigned asset tag of the hardware.
Shared	This field is used to identify equipment that is shared by several clients, such as a network printer. If the equipment is not shared, enter "N". If it is shared, enter "P" or "S" for primary or secondary, respectively. Each piece of shared equipment should be listed under each client who shares it. This field should be marked "S" for all but one client, who should be "P". In reports, the hardware will be listed under each client, but will only be added to totals if the Shared field is "N" or "P".
Purch Date	Purchase date.
PO #	Purchase order number.
Price	Purchase price.
Vendor	Company the hardware was purchased from. The drop-down for this field accesses the vendor table.
Warranty	<p>The length of the warranty period. Enter a number followed by "Y" (years), "M" (months) or "D" (days). For example, 1Y, 3M or 90D.</p> <p>If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date.</p>
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for servicing the equipment. The drop-down list accesses the Service Company table.
Svc Expires	The date the service contract on this equipment expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.
Depreciate	Check this box if the value of this equipment is depreciated over time.
Curr. Value	The current (depreciated) value of the equipment.



While entering data into the hardware window, you can click the **Browse** button to access the hardware table. The table can contain the basic descriptions of equipment that is widely used by your clients, thus speeding data entry.

The Hardware Table contains type, brand, model, price and warranty fields. Click **OK** to load the selected table entry into your hardware window.

The **Print** button prints a list of all entries in the table, while **Cancel** closes the table without updating your hardware window.



The **Edit** button loads the selected item into the Hardware Window and allows you to change the information. For a complete description of the fields, refer to the **Add** text above.



Click this button to delete the highlighted piece of hardware.



Click the **House** button to access house hardware. This enables you to move a piece of hardware from house inventory into the current configuration.

The top portion of the window contains a scrollable list of all hardware in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.



The **Unlink** button allows you to move the selected piece of hardware to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.



Click this button to access help.



Click this button to close the hardware selection window.

Adding a Tickler

Accessed from the button bar and the Utilities menu.

Ticklers are reminders that you can set for yourself or for another technician. If you are running the **HDALERT** program, you will be notified whenever one of your ticklers is due. While the ticklers are intended to notify you of follow-ups and new calls, they can be used as reminders for any task, including activities not related to HELP!Desk. For example, you can create a tickler to remind you of a meeting, an important birthday or anniversary, or when it's time to go home.

The screenshot shows a window titled "List of Ticklers - 3 found". At the top, there is a label "List of Ticklers For ..." followed by a drop-down menu showing "FRANK" and a downward arrow icon. Below this is a table with four columns: "Event Date", "Event Time", "Tech Name", and "Event Description". The table contains three rows of data. To the right of the table is a vertical stack of buttons: "Add", "Edit", "Delete", "Print", "Help", and "Exit". Below the table is a horizontal scroll bar. At the bottom of the window is a form with the following fields: "Technician" (a drop-down menu showing "FRANK"), "Event Date" (a date field showing "04/26/95"), "Event Time" (a time field showing "04:00 pm"), and "Event Description" (a text field containing "Call #15020318 Return call").

Event Date	Event Time	Tech Name	Event Description
04/26/95	04:00 pm	FRANK	Call #15020318 Return c
04/27/95	11:01 am	FRANK	Call John Simms about ha
04/26/95	04:00 pm	FRANK	Call# 15020318

The Tickler window shows a scrollable list of all ticklers assigned to the person named in the top drop-down. Ticklers are added and edited in the lower portion of the window. To create a tickler, click the **Add** button. Tickler fields are described below.

Tickler Window - Field Descriptions

Default Field Label	Description
List of Ticklers For...	This drop-down allows you choose whose ticklers will be listed. Unless you have "Tickle Supervisory" rights, you can only view your own ticklers.
Technician	The recipient of the tickler.
Event Date	The day the tickler is due.
Event Time	The time the tickler is due.
Event Description	The reason for the tickler.

The recipient of a tickler **must** be running **HDALERT** to receive notification.

Additional Features

This evaluation guide covers many of the basic features of HELP!Desk. We'd like to quickly point out some other features we think you'll find valuable. Also, we invite you to download the complete documentation for HELP!Desk from our web site, www.coastaltech.com.

Bulletin Boards allow technicians and other HELP!Desk users to easily share information. They can be used for displaying work schedules, technical tips, alerts that a server will be down for scheduled maintenance, etc. Bulletin boards can be accessed from the toolbar or the **Utilities** menu.

The **knowledgebase** stores previously solved problems to help all of your technicians solve even the most difficult questions quickly and easily. Diagrams and other graphics can be added also.

The **Open Calls List** allows technicians to quickly view all open calls assigned to them. New additions are color-coded until they are acknowledged by the technician.

With more than 60 pre-defined **reports**, you're sure to find the ones you need in HELP!Desk. How many calls were closed last week? What products are people having the most trouble with? How many laser printers are on the premises? How many calls were open for more than two days? Which clients call the most frequently? These questions and many more can be easily answered with HELP!Desk. Track response time, print mailing labels, compute support charges, be aware of expiring service contracts and warranties. It's all so easy.

The **Call Window** contains two buttons of special interest. **Referrals** are used to notify personnel that a call contains pertinent information, without reassigning the call. For example, if a customer finds a problem with an internally developed application, you may want to refer the call to programming or quality assurance, even if the Help Desk staff is responsible for providing the customer with a workaround or update.

Surveys allow each call to be rated by the client. This is a great way to quantify the success of your support center and individual staff members.

The **House Inventory** features allow you to keep a complete list of all unassigned or spare software and equipment in your inventory. You can easily move components or entire configurations from house inventory to a client and vice versa.

Multiple **Training Schedules** allow you to store and refer to course schedules by category, vendor, etc. If you use outside training vendors, you can copy course and schedule information from the vendors' web sites and paste into HELP!Desk. This makes it easy for technicians to recommend specific training to clients and choose courses from an approved list.

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Our technical support staff is available to answer your questions by phone (973 744-2900) or via email at support@coastaltech.com.

Thank you for evaluating HELP!Desk

