HelpDesk Viewer for ACT!

Installation of "HelpDesk viewer for ACT!"

There are really two features here that can be installed. They are:

1. **HelpDesk Viewer for ACT!** - To be used by ACT! users. It does not require that Tele-Support HelpDesk be installed on this workstation. It does require that you configure the feature. (HelpDesk.dll located in the \server\installers folder)
2. **Find Contact** - Requires that HelpDesk be installed on this workstation and is used to easily find a customer record in ACT! and then auto link a new HelpDesk inquiry to the current ACT! record. (TSHDANRC.exe located in the \server\installers folder)

You need to put the HelpDesk.dll file in the ACT! "plug-in" folder on your <u>local workstation</u>. The folder might look something like this:
C:\Program Files\ACT\ACT for Windows\Plugins. **This MUST be done on every workstation where you want to use this feature.**

Next, create a directory on your local drive as follows: C:\TSHD This will hold the helpdesk local configuration for this feature "helpdesk.ini".

"Auto Lookup" feature. This is optional. You do not have to install this. To use the additional feature described above (pressing the "find contact" button and auto linking the Act! contact to the HelpDesk contact), place the file, TSHDANRC.exe into the folder
C:\program files\common files\resourcedynamics\hdconnect . **This must be done on every workstation where you want this "find contact" button to work**.

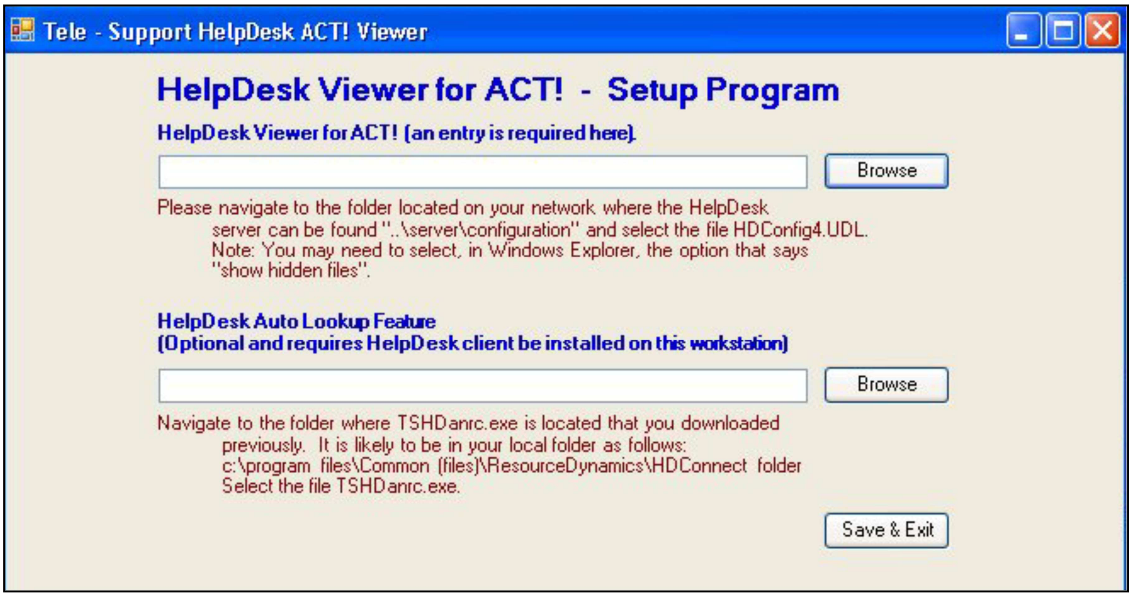
Configuration – (required on each workstation)

You must configure this option on every workstation where you wish it to appear.

First, close and reopen your ACT! program on the workstation. This will prompt the plug-in to ask you several questions. **The first question is required**.

The second one is only required if you want to use the "find contact" feature built into the plug-in. To use the "find contact" feature, Tele-Support HelpDesk must be installed on the same workstation for the "find contact" button to work.

You will first see the following prompt:



Step One (for the HelpDesk viewer)
Navigate to the HelpDesk "\Server\Configuration" folder. Set file type to "all files", then select "**HDConfig4.UDL**".

Note: Some systems treat this file as a 'hidden' file and you will not see it. If you cannot find this file, open Windows Explorer, select 'Tools', 'Folder Options', 'View', then select under 'hidden files and folders', "show hidden files". You can switch it back after this installation.

Step Two (to install the optional "auto lookup" feature. Requires HelpDesk client installed on workstation).
Navigate to the folder where TSHDanrc.exe is located that you downloaded in the earlier step. Select the file TSHDanrc.exe.

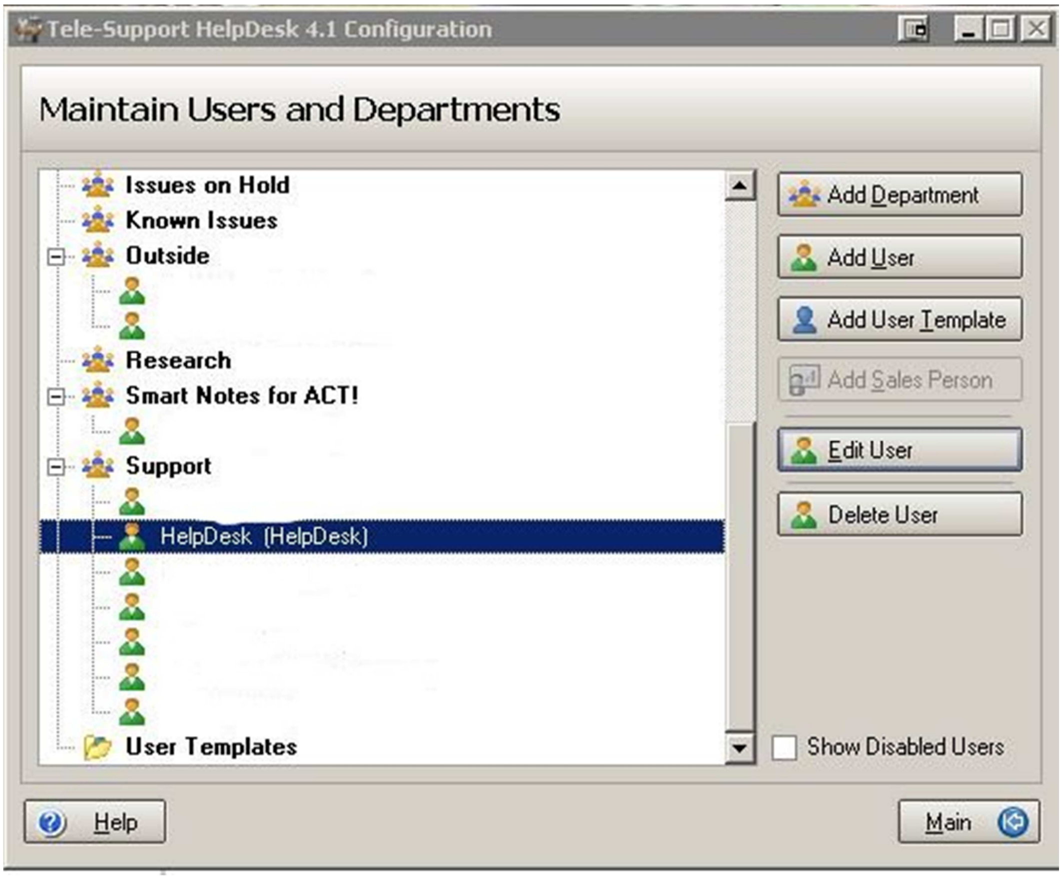
Select "Save & Exit" If you need to reconfigure the above screen, merely click on the "setup" button on the tab form from inside ACT! on the "HelpDesk" tab.

Configuring for HelpDesk

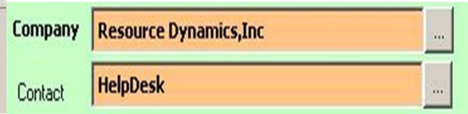
There are several things that you need to do in HelpDesk so that the Help Desk tab will be active in ACT!

First, you must add any ACT! users that you want to view the HelpDesk tab directly into HelpDesk. You must add users in a certain way that allows this feature to work. To do that, go to HelpDesk configuration, Users and Departments.

Once in the User and Departments Section you can either add a new user or Edit an existing user to allow that user to see the tab. Select Either Add User or Edit User



When assigning the full name to the HelpDesk user that will need to see the HelpDesk tab with in ACT! The User Full name in the HelpDesk Record must match that of the contact name of the User's record in ACT!



(HelpDesk User Record) (ACT! Contact Record)

In the above illustration you can see that the Full name in HelpDesk matches exactly to the Contact Record name in ACT!

To ensure you are using the correct name you can either use the Lookup my record in ACT method if you are signed in as the desired user in ACT! Or you can search for the record the normal way through ACT!

In HelpDesk configuration, you can make the user “inactive” so it they don’t show up in HelpDesk, such as in refer or where you list users.

You must also grant the user in HelpDesk’s permissions the right to use this feature. The HelpDesk user rights screen is as follows: