Easy Help Desk

User guide

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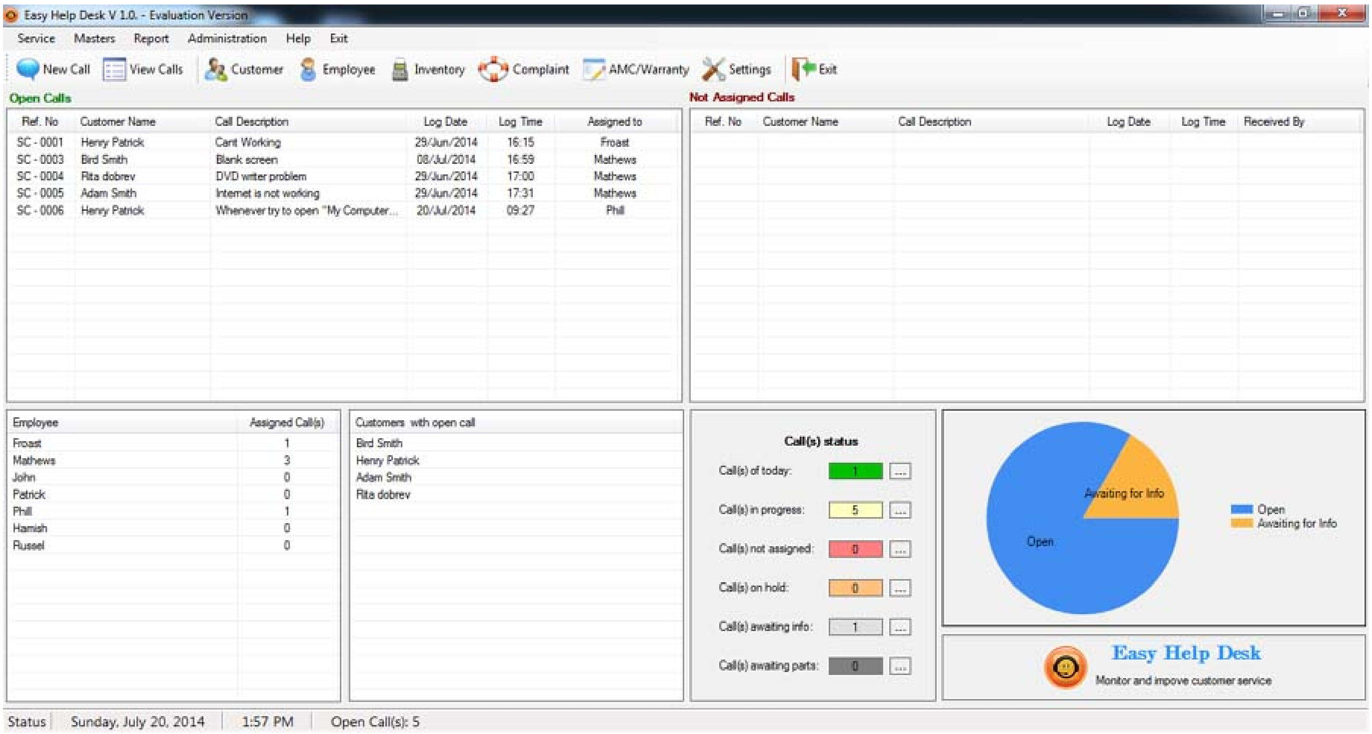
Easy Help Desk



Easy Help Desk is designed to make customer service and technical support as efficient as possible. It enables a support staff to streamline the support process. It also permits history of prior service, inventory, and other useful information to be displayed while working with a caller. The main features of the Easy Help Desk are described below.

Features

User Friendly Interface

Quick implementation

Outstanding Tracking Ability

Assign Priorities

Support Contract

Full text searching

History one click away

Problem Management

Dashboard and Analytics

Notification

Detailed reports to improve service performance

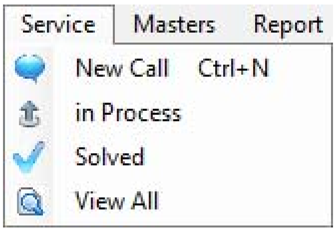
System requirements

Easy Help Desk **Minimal System Requirements**

- Microsoft Windows XP/Vista/Windows 7/ Windows 8
- True Color Display
- 500 MHz processor
- 256 MB RAM
- 100 MB free hard drive space

Menu Reference

Service Menu



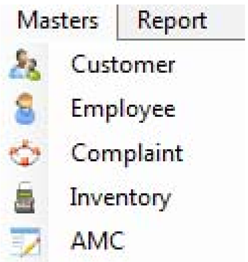
New Call is used to add a new call.

In Process is used to view previously entered calls.

Solved is used to view all solved calls.

View All shows a selection window for all open and solved calls

Master Menu



Customer is used to to add, edit, modify a new customer record.

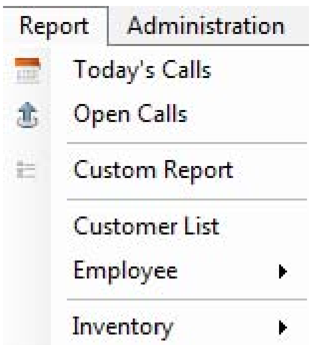
Employee is used to to add, edit, modify a new employee record.

Complaint to access troubleshooting knowledge base, where you can search, add, edit solutions.

Inventory is used to access Products or services.

AMC is used to add, edit, modify contracts (i.e. AMC, Warranty etc.)

Report Menu



Today's Calls Allows you to view and print today's call.

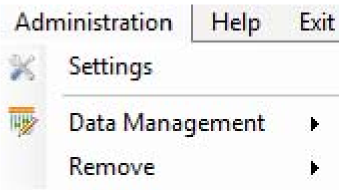
Open Calls shows all open calls.

Custom Report allows to see reports on any critieria, i.e. between dates, employee, customer, call status etc.

Inventory shows product/service list with total count of open, solved calls

AMC shows all contract information i.e. AMC/Warranty, or any other types of contract.

Administration Menu



Settings This menu shows settings window to customize different global settings.

Data Management This will open sub menu,

Scan & Repair Data : is used to check the integrity of database and repair it.

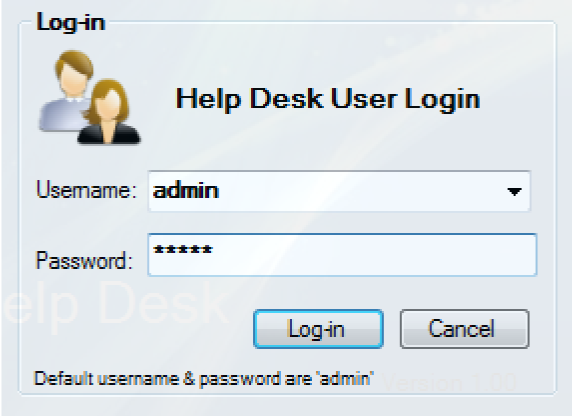
Backup : Takes backup in zip format to specified location.

Restore : Restore data from previously taken backup.

Remove allows to remove all closed calls, all calls & remove everything from the database.

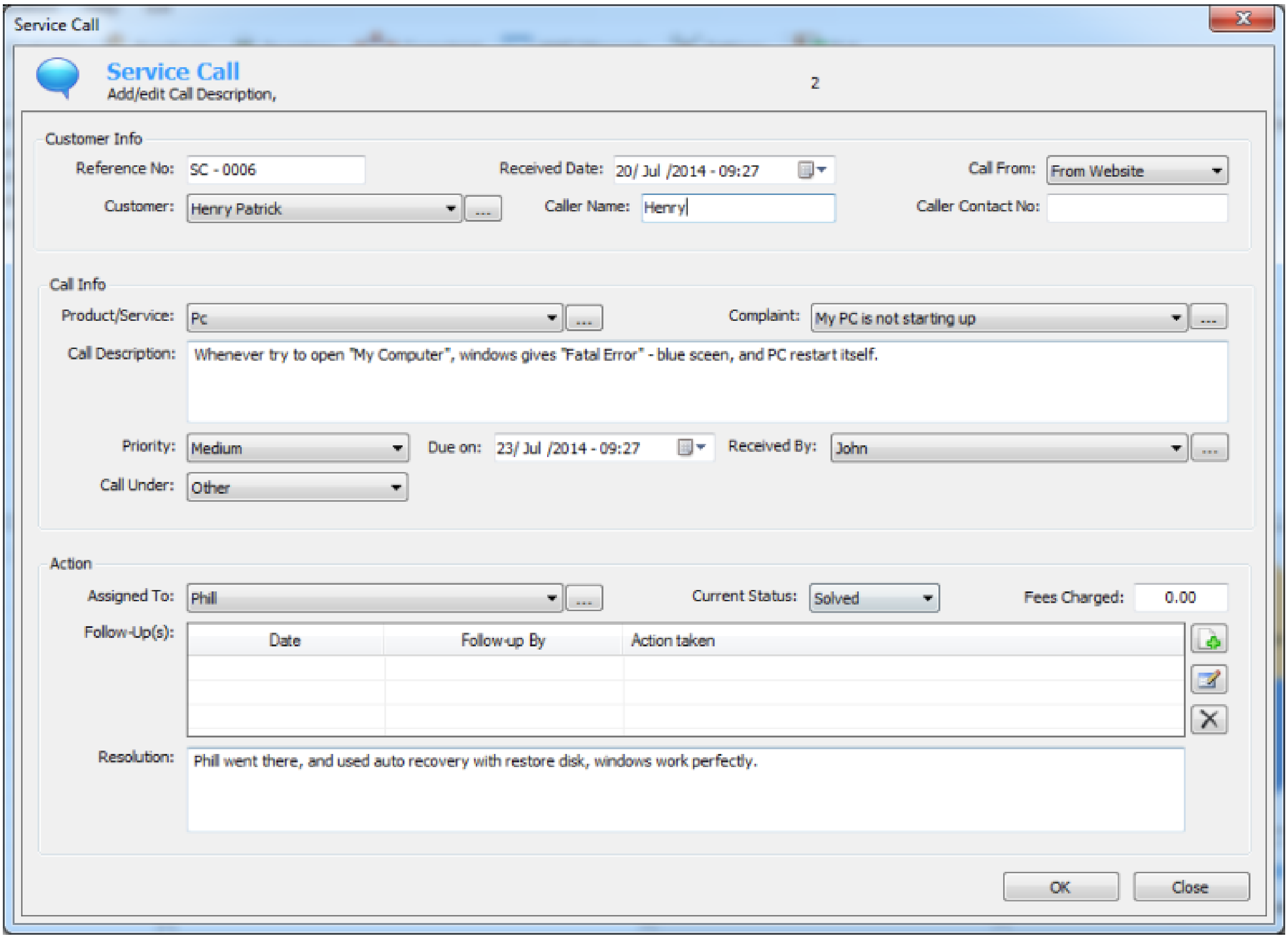
How To

Login



You will be prompted to enter log-in user name and password. Default user name and password are 'admin'. You can access login details at employee managment section later.

Add New Call



Accessed from "Service" menu "New Call" or first toolbar "New Call".

This form is used to add all call related information, as mentioned below:

It is devided in three section.

1. Customer Information. 2. Call Information. 3. Action information.

1. Customer information

Reference No: Unique identification number for the call, auto generated, (you can manually change it also.)

Receive Data: The date and time of the call, system defined, you can change it yourself.

Call From: Select from the list either it is existing customer, or from any other types of, (you can edit this list at settings.)

Customer: Select customer name from the list.

Caller Name: Add caller name if differ from the main client, i.e. clien't employee, re-presentative etc.)

Caller Contat No: Add caller contact no if differ from main client data.

2. Call Information

Product/Service: Select product or service from the list for which call was made. This is the product or the service that the customer is having a problem with.

Complaint: Select Complain/Problem type from the list(You can define problem and solution at Master Menu- Complain).

Call Description: Description of the problem.

Priority: The priority of the call, select it from the drop down list, you can manage them at Setting window.

Dues On: The day or time assigned to finish the call, it will be calculated based on Priorty settings, you can also edit it manually.

Received by: The employee who is receving the call most probably help desk application user, which is logged in.

Call Under: Select the relevant AMC or warranty or any other type of contract from the list, You can create contracts at Master Menu -> AMC.

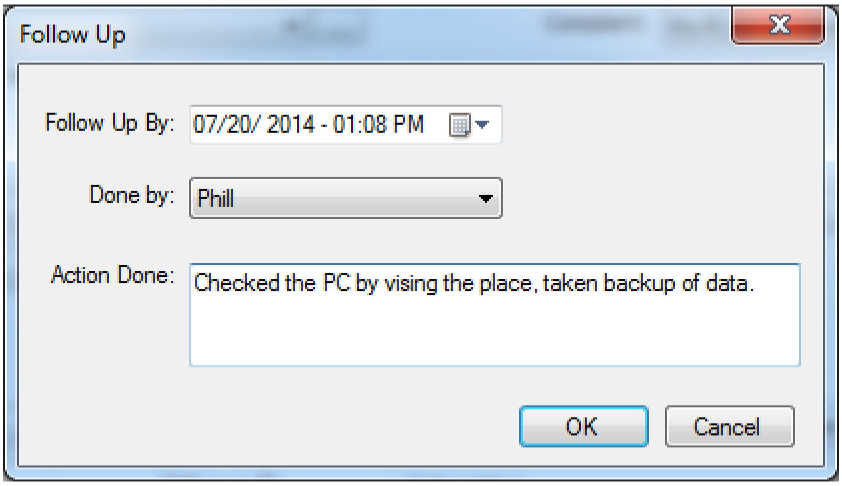
2. Action Information

Assigned to: The employee who is responsible to the call, i.e. the technician who will solve the problem.

Current Status: The current status of the call. i.e. open, awaiting info, solved etc.

Fees Charged: Add fess charged to the customer for the activity.

Follow up(s): Here you can add any follow up action taking by the employee. It will open new form to enter follow up data.



Follow up by: The date and time when follow up action done.

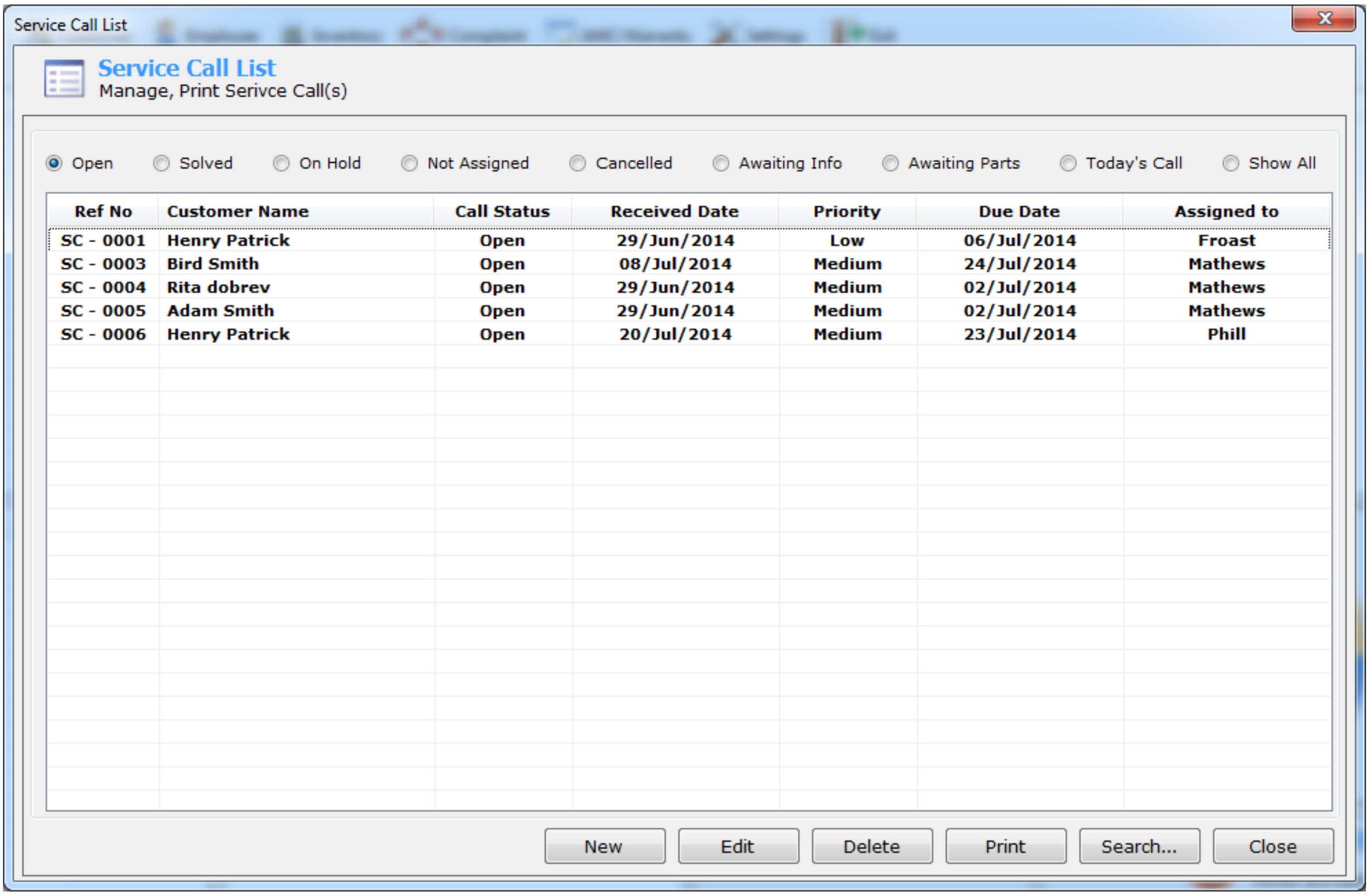
Done by: Employee name who did the follow up action.

Action done: A description of the follow up action taken.

You can add, edit, delete follow up action very easily here.

Resolution: The description in detail for the action that was taken to solve the problem.

View Call

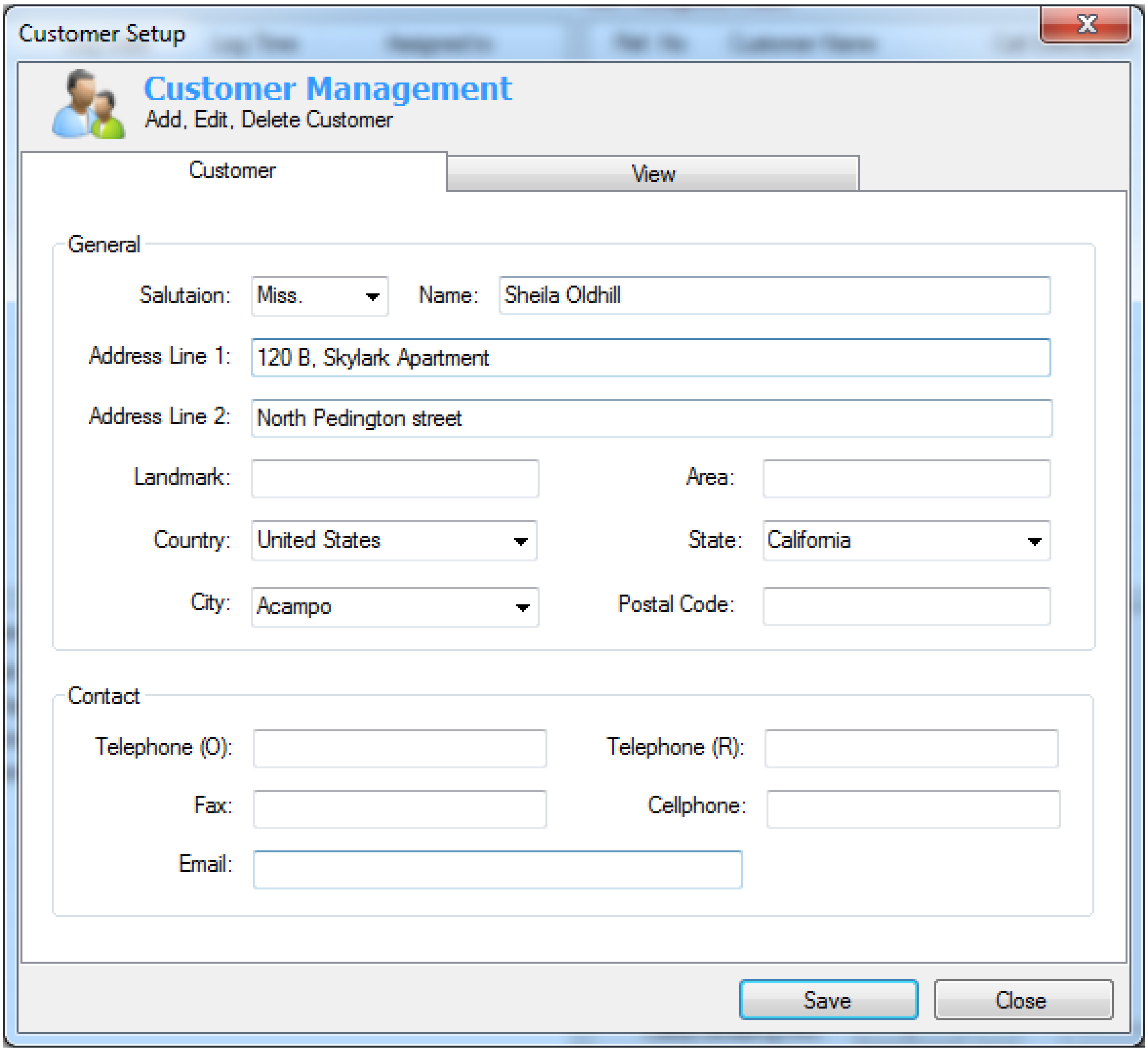


Accessible from Service menu -> View All and second tool button " View Calls"

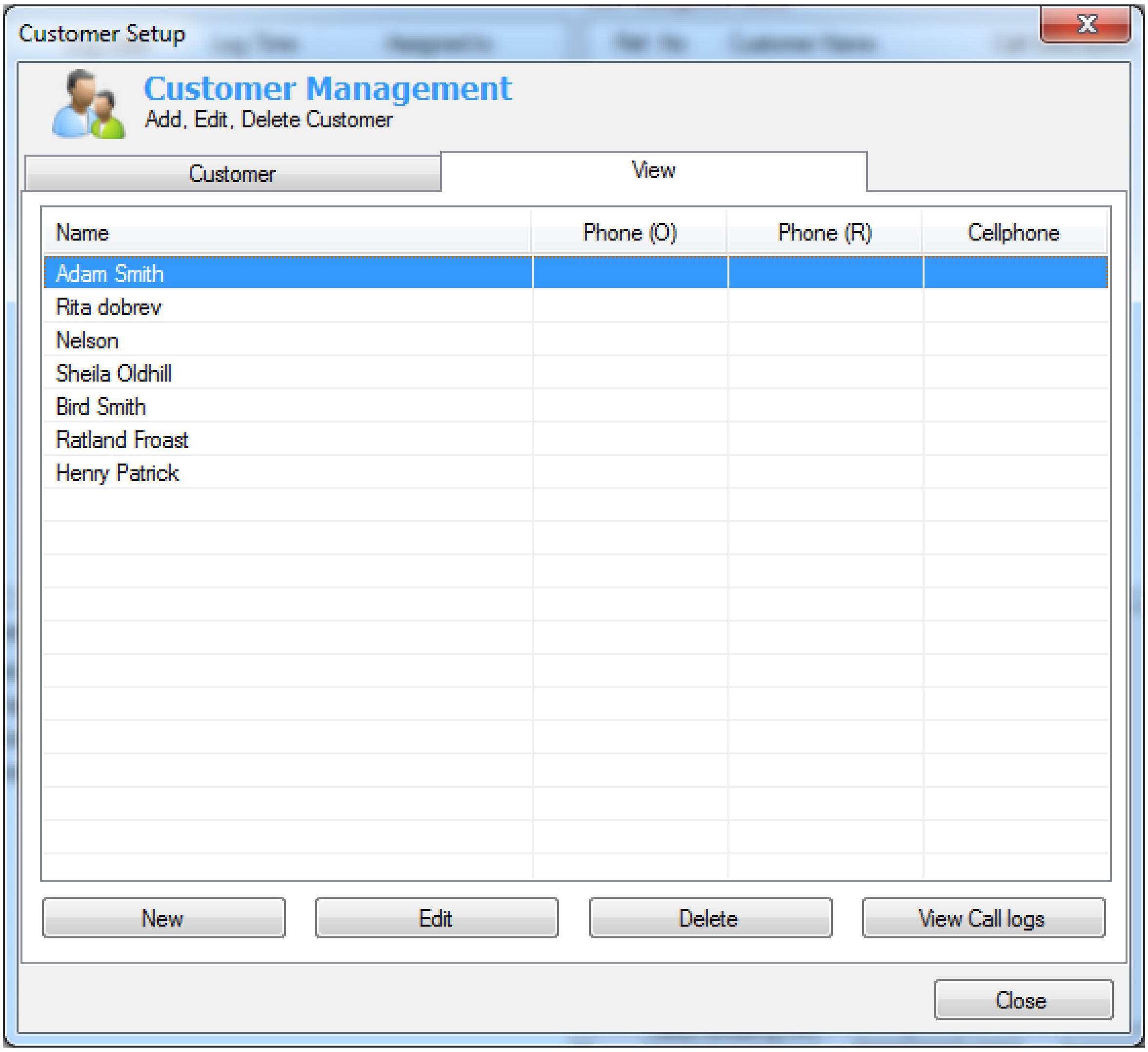
This will show all calls. it includes all the service requests that exist. By using one or more filters, however, you can restrict the list to what interests you. For instance, by clicking on the "Not assigned" option button, you can review different lists of service requests divided according to the status. To open any service request for editing or checking, double click on the row entry of that relevant request.

You can search also here based on your desired criteria.

Customer



Accesible from Master -> Customer Menu, Toolbar "Customer" button.



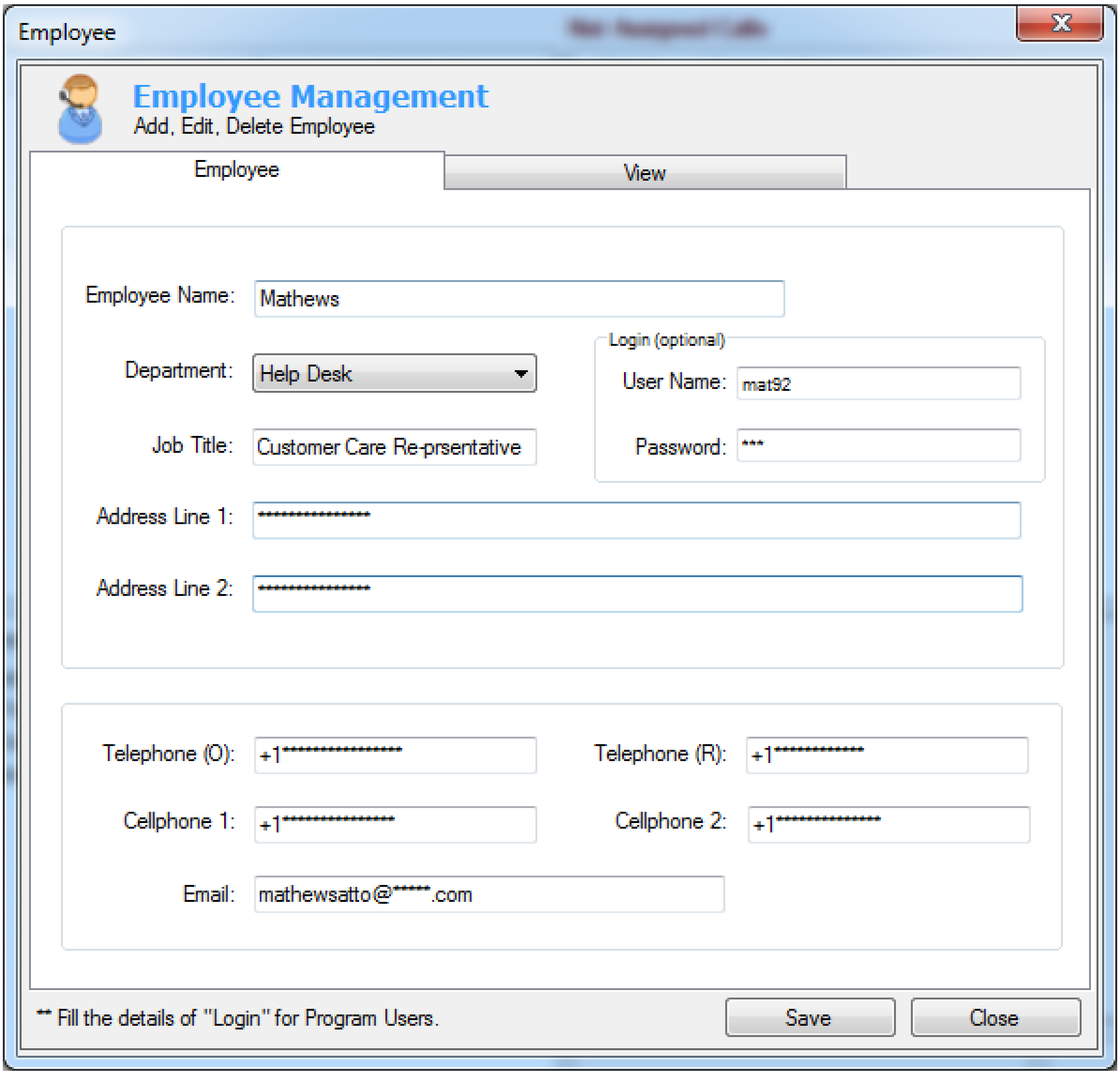
New: Add a new customer record.

Edit: Edit selected customer.

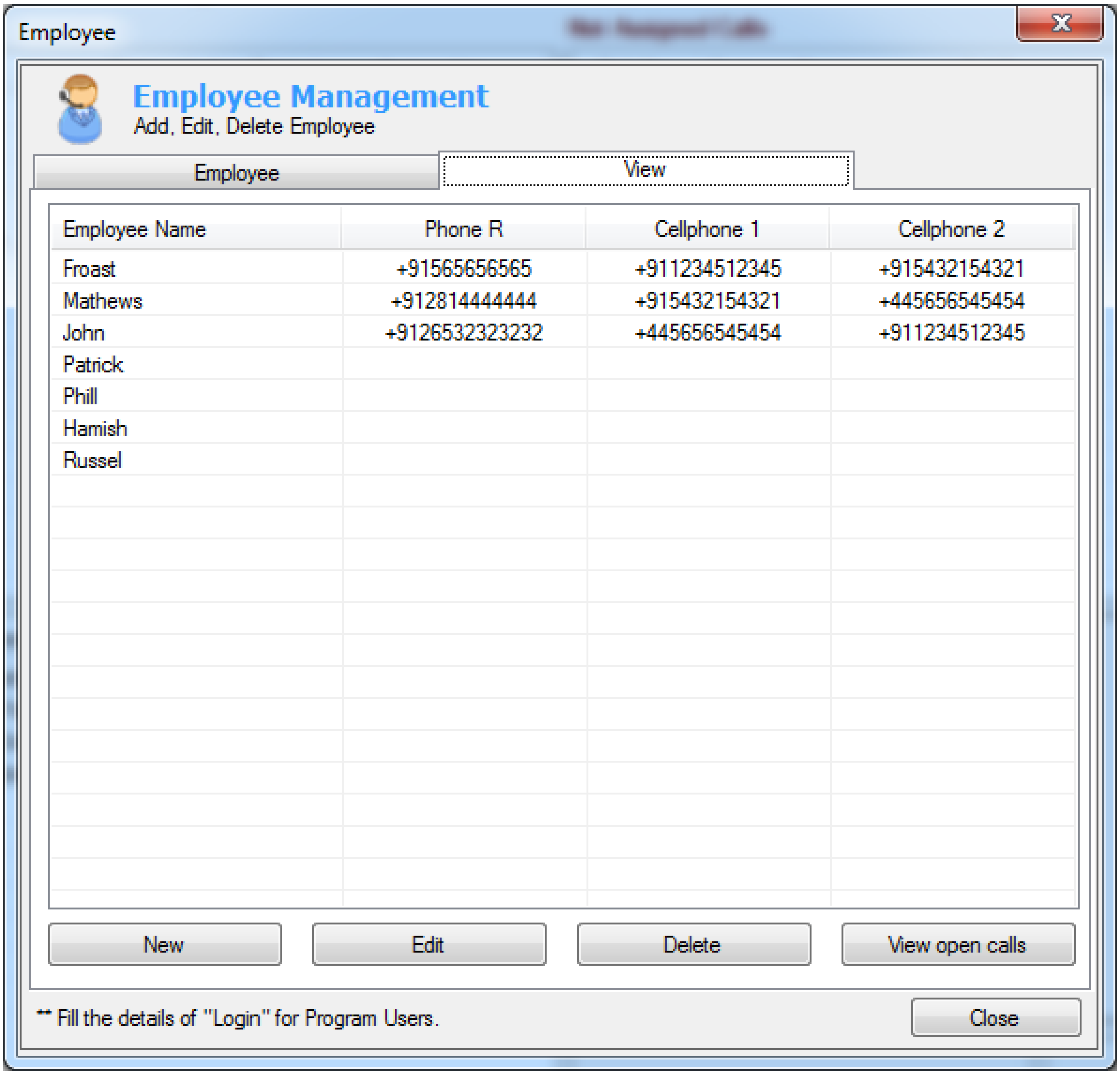
Delete: Delete selected customer only if there's no open calls or contract associated with.

View Call Logs: Shows all calls made by a selected customer.

Employee



Accessed from Master -> employee Menu, "Employee" toolbar button.



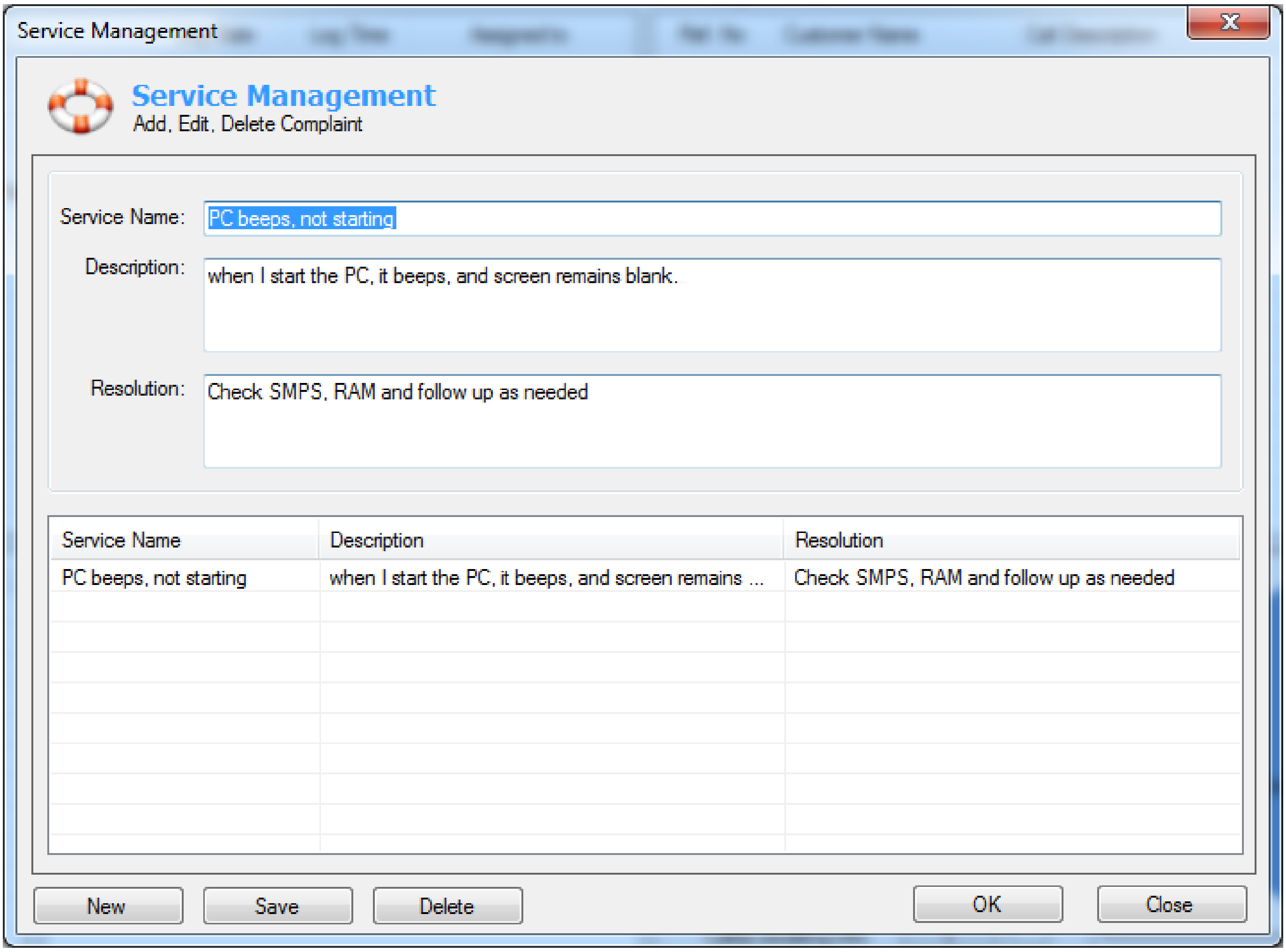
New: Add a new Employee record.

Edit: Edit selected Employee.

Delete: Delete selected employee only if there's no open calls associated with.

View Call Logs: Shows all calls handled by a selected employee .

Service



Accessed from Master ->Service menu, "Service" toolbar button.

Service Name: Short description of the problem or service.

Description: Detailed description of a problem or service

Resolution: Solution of the problem.

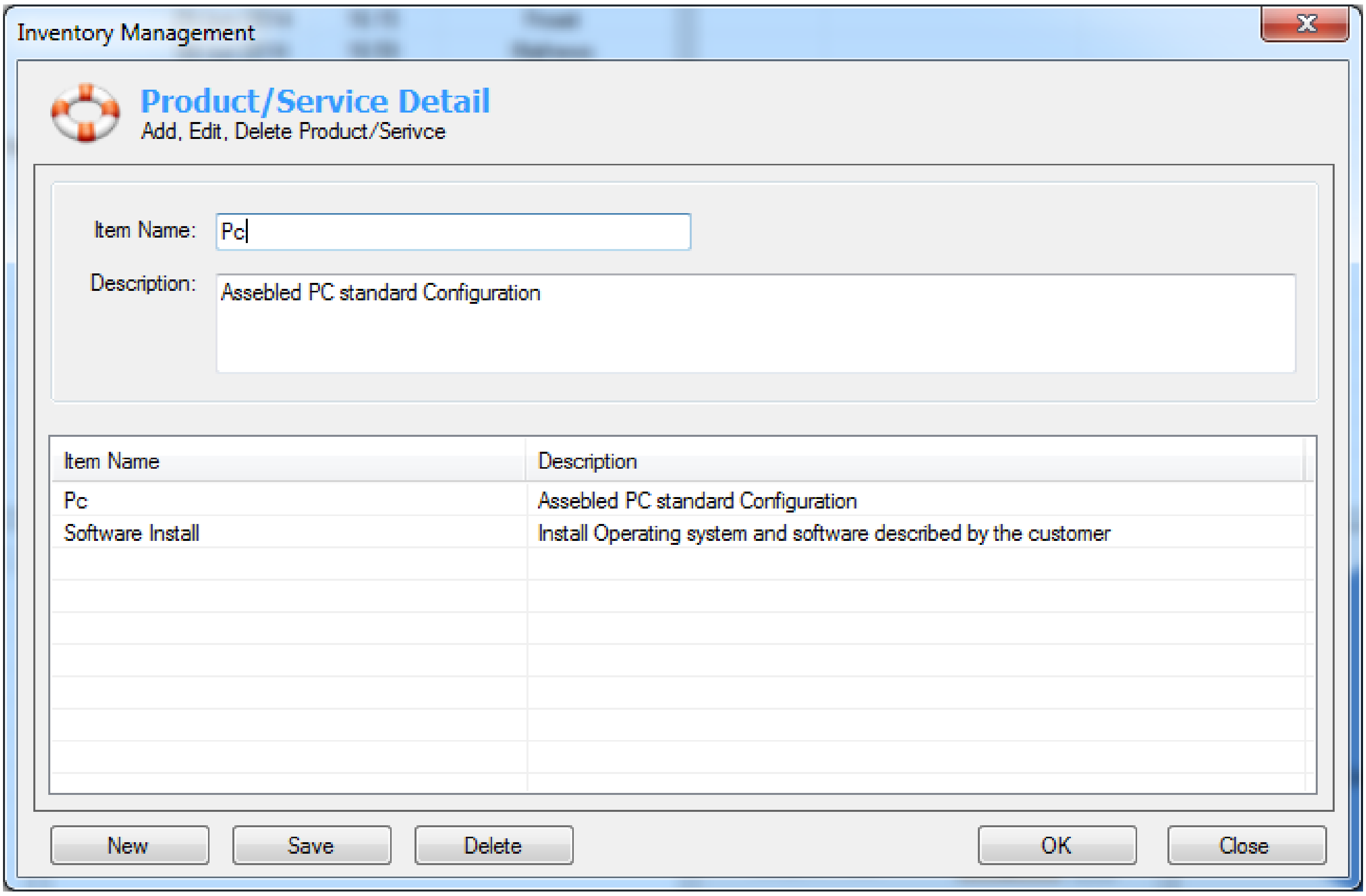
Button Description:

New: Add a new Service.

Edit: Edit selected service.

Delete: Delete selected service only if there's no open calls associated with.

Inventory



Accessed from Master ->Inventory, "Inventory" toolbar button.

Item Name: Name of the product or the name of the service.

Description: Detailed description of the product or service.

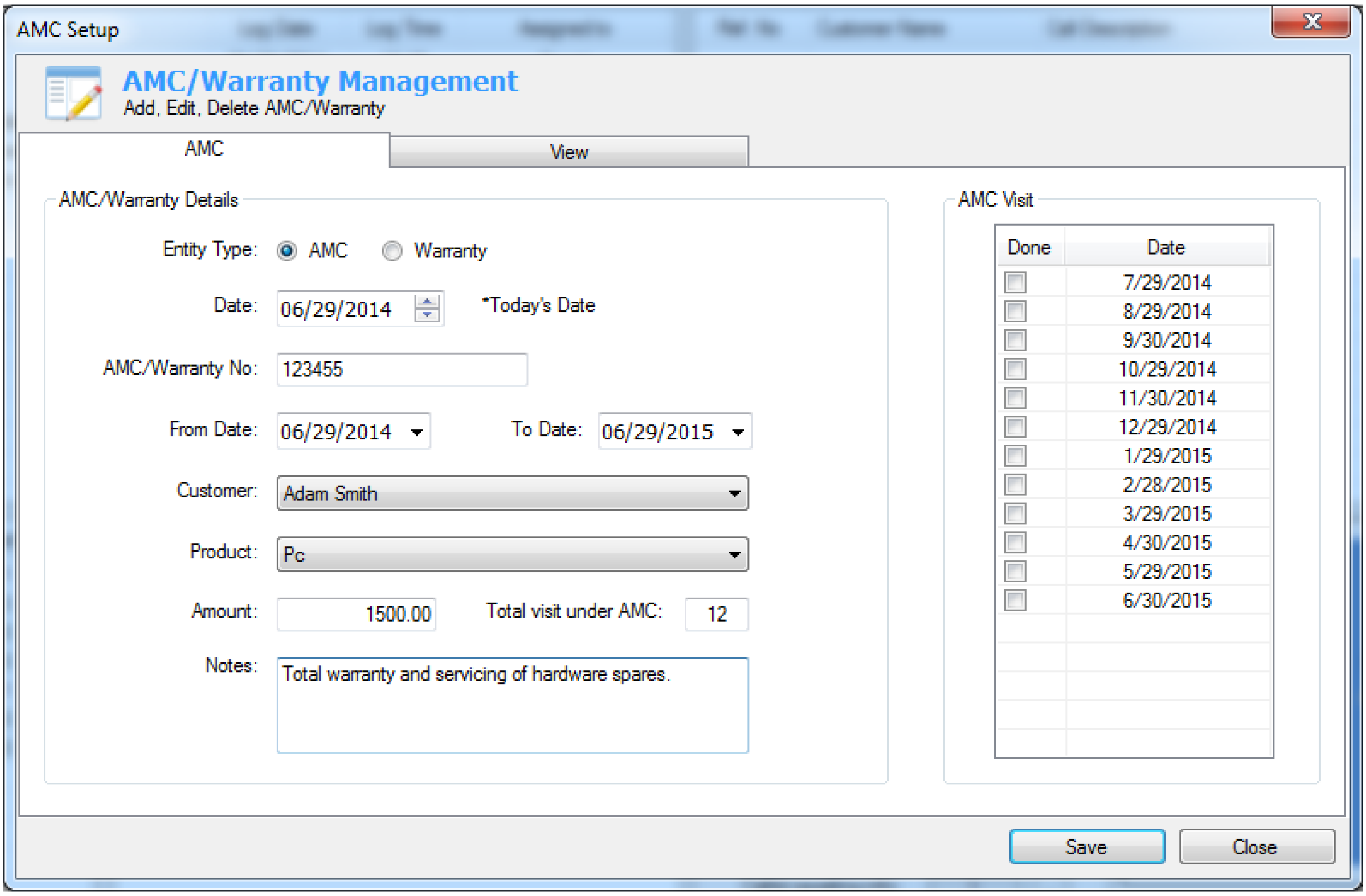
Button Description:

New: Add a new item.

Edit: Edit selected item.

Delete: Delete selected item only if there's no open calls associated with it.

Contracts-AMC/Warranty



Accessed from Master ->AMC/Warranty, "AMC/Warranty" toolbar button.

Entity Type: Select the contract type.

Date: Date on which contract being made.

AMC/Warranty No: Unique number for the contract.

From Date: Starting date from which contract being effective.

To Date: Ending date of the contract.

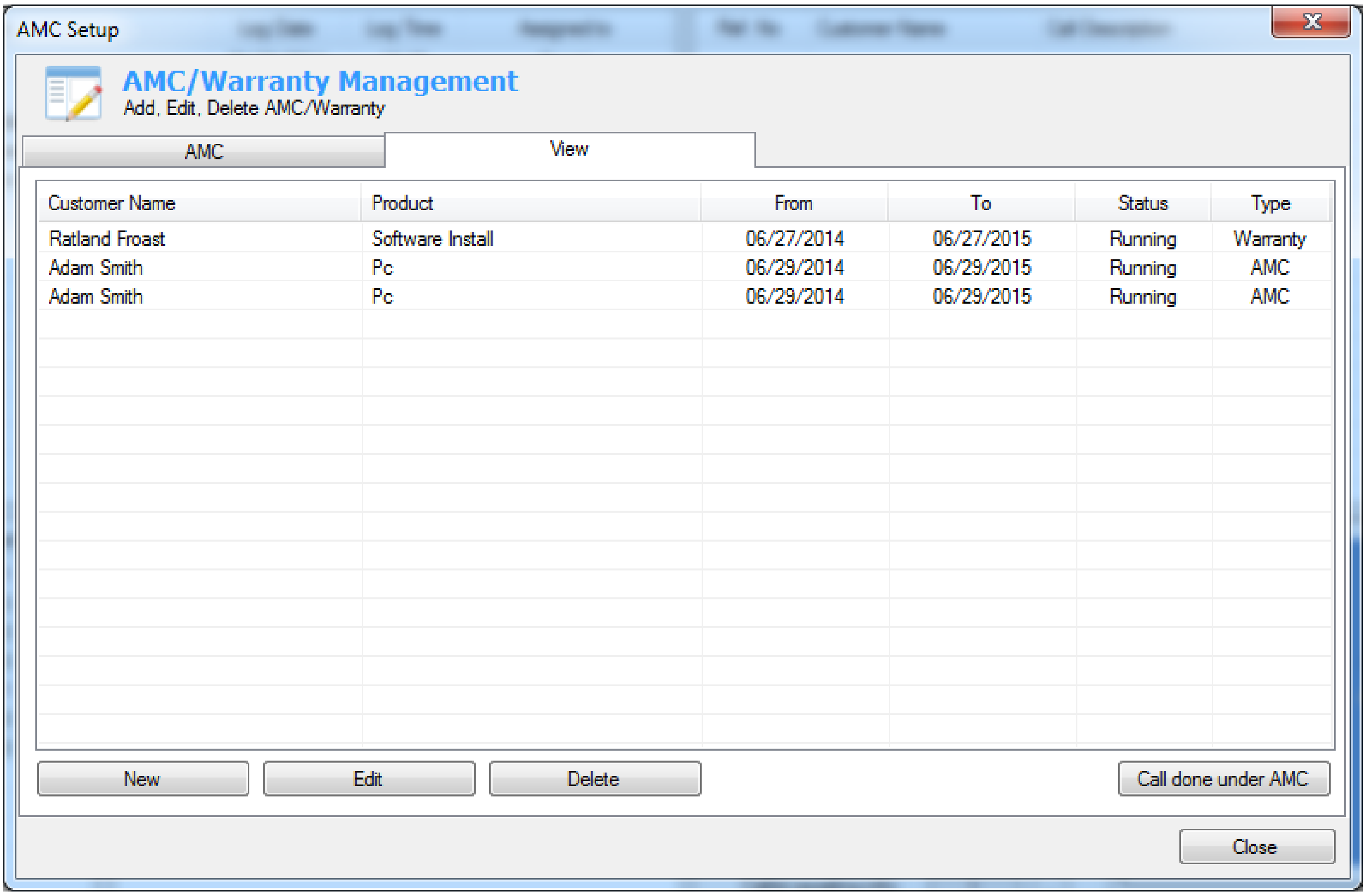
Customer: Select customer name from the list for whom contract is being made.

Product: Select the product coming under contract.

Amount: Enter amount of contract if applicable.

Total Visit: Under the contract total mandatory visit require to the customer.

Notes: Enter remakrs.

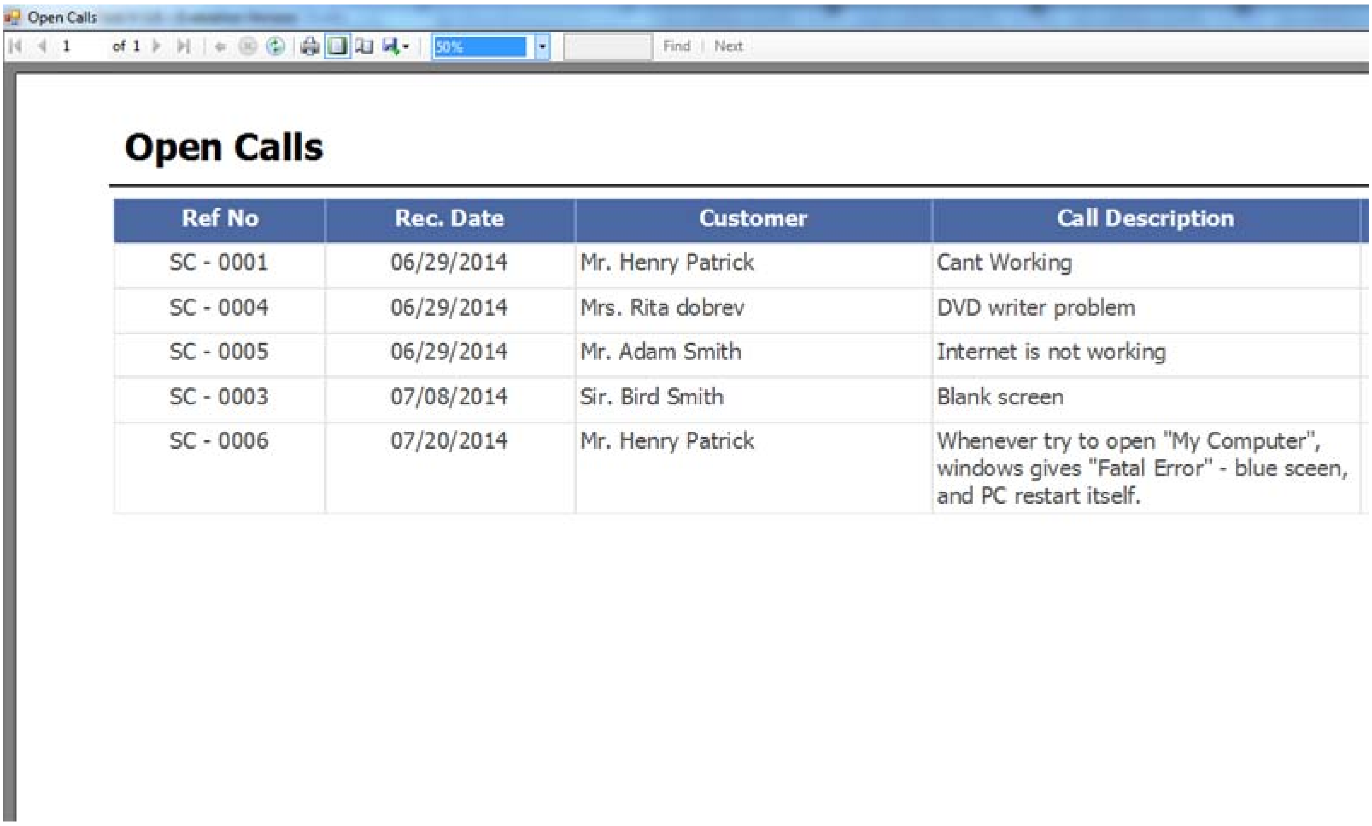


Button Description:

New: Add a new contract item.

Edit: Edit selected contract item.

Delete: Delete selected contract item.



Open Calls

Ref No	Rec. Date	Customer	Call Description
SC - 0001	06/29/2014	Mr. Henry Patrick	Cant Working
SC - 0004	06/29/2014	Mrs. Rita dobrev	DVD writer problem
SC - 0005	06/29/2014	Mr. Adam Smith	Internet is not working
SC - 0003	07/08/2014	Sir. Bird Smith	Blank screen
SC - 0006	07/20/2014	Mr. Henry Patrick	Whenever try to open "My Computer", windows gives "Fatal Error" - blue sceen, and PC restart itself.

When a report is generated, it is displayed on screen similar to the one shown above.

Description:

Navigation: Navigate between pages.

Stop: Stops the report from loading data.

Refresh: Refresh the data from the database.

Print: Print the report actually, you are previewing.

Print Layout: Shows the report same as being printed on paper.

Page Setup: Access the windows printer setup dialog box.

Export: Export the report to pre-defined format.

Zoom: Allows you to enlarge or reduce the report preview on screen.

Contacts & Credits

Support e-mail:
rayance.tech@gmail.com

Credits: