



RC Help Desk Users Manual



ITC Helpdesk Application Allows organizations to create and manage technical assignments from their desktops Organizations can: create technical assistants, create users, roles and groups, create, manage assignments, audit assignments, and integrate assignments with billing system and more.

For additional application help go to application web site at: www.rozierconsulting.com/rchelpdesk.html

System Requirements

- Windows XP/2000 operating system
- 50mb hard drive space
- 256k memory

Supported Applications

- Quick Books 5.x and above
- PDA with hot-syncs

Supported Databases

- Access, SQL Server, MySql and Oracle

Setup & Installation

Downloading application

Go to website: www.rozierconsulting.com

Click on products

Or go to web address: www.rcconsulting.com/RcHelpdesk.html

Click on download link

Install application

- Click on setup to install application
- Follow on screen instructions to install application

The configuration file: hdconfig.xml

- Hdconfig.xml is an xml file that specifies the different settings of the application. It has to be copied and pasted to the C: drive.

```
<?xml version="1.0" standalone="yes" ?>
```

```
<!-- USE THIS IF STAND-ALONE AND DATABASE IS MS ACCESS -->
```

```
<!-- DSN=mysqlDSN -->
```

```
<!-- FOR INTERNET BASED APP (WEBSERVICE) -->
```

```
<!-- DSN=mysqlDSN -->
```

```
- <configuration>
```

```
<!-- Webservice (TRUE/FALSE) -->
```

```
<setting name="webservice">TRUE</setting>
```

```
<!-- Database connection -->
```

```
<setting name="connectionstring">Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\HELPDESK.mdb</setting>
```

```
<!-- Quickbooks Setting -->
```

```
<!-- Quickbooks file,Account used for invoices -->
```

```
<setting name="quickbooks">C:\CISSEMY.QBW,SGBG</setting>
```

```
<!-- scanner configuration -->
```

```
<setting name="commSetting">9600,N,8,1</setting>
```

```
<!-- Serial Port Number -->
```

```
<setting name="commPort">1</setting>
```

```
<!-- Label Printer -->
```

```
<setting name="Printer" />
```

```
</configuration>
```

IF WEBSERVICE-TRUE THE APPLICATION CONNECT TO THE DATABASE OVER THE INTERNET REFERING THE DATABASE AND SERVER MENTIONED IN THE CONNECTIONSTRING TAG.IF WEBSERVICE-FALSE OR BLANK , THE APPLICATION LOOKS FOR THE DATABASE ON THE LOCAL HARD DRIVE OR NETWORK

SPECIFY WHICH DATABASE TO CONNECT ON WHICH SERVER OR HARD DRIVE

CONFIGURATION FOR THE SCANNER : BAUDE RATE,PARITY,.....

SPECIFIES WHICH COMM PORT THE SCANNER IS USING WHICH PRINTER THE APP IS USING TO PRINT .IF BLANK THE APP WILL USE ANY DEFAULT PRINTER

QUICKBOOKS SETTING: THE FIRST PARAMETER IS THE DATABASE FILE TO CONNECTION TO AND THE 2ND IS WHAT ACCOUNT TO USE.IF THE TAG IS BLANK THERE IS NO QB CONNECTION

Application Login

- Enter user id (CISSEMY) and password (2000) to enter system
- Note: delete default user id and password after creating new user accounts

Getting Started

- Start application by clicking on application icon from windows start menu or click on application icon located on windows desktop.
- Enter User id and Password. default User id: "CISSEMY" and Password: "2000"
- Select "Options/System Setup"
- Enter Business information and press enter to save.
- Enter Client information and press enter to save.
- Enter System users and press enter to save.
- Enter Manufacturer information and press enter to save.
- Enter Technician information and press enter to save.
- Enter Charge codes and press enter to save.
- Select "Import" to import client or manufacturer information. File must be comma delimited.

Create Billable and Non-Billable entries

- Select Job Entry tab
- Select client button to begin searching for a client
- Enter problem
- Enter model
- Enter serial number
- Enter Quantity
- Enter Description
- Select Dept: Type: Billable "B" or Un-billable "UB"
- Select Manufacturer
- Select Status: New, Dispatched, Enroute, Waiting Part or Completed
- Select Save to save entry – A requisition number will be created. You are now able to charge client for job.

Create proof of completion

- Under Proof of completion
- Enter Name
- Enter Date
- Enter Time
- Select Status: New, Dispatched, Enroute, Waiting Part or Completed

Charge Client

- Select Options/Charge
- Select charge Code
- Enter Amount
- Select Save to charge client
- Select Delete to delete charge

Preview Outstanding Jobs

- Select Outstanding Jobs Tab
- Select Client Name from dropdown list
- Select From Date
- Select To Date
- Select Find

Search for Outstanding Jobs

- Select Search tab
- Select Client Name from dropdown list
- Select From Date
- Select To Date
- Select Ok
- Outstanding jobs will be displayed
- Check job that you would like to dispatch
- Select Dispatch to dispatch checked job.

Preview Jobs Report

- Select Report tab
- Select Client Name from dropdown list
- Select From Date
- Select To Date
- Select Report

Obtaining Application Key

- Log on to website and select submit application key request.
- Enter company name
- Enter contact name
- Enter contact number
- Enter subject : "Helpdesk application key request"
- Enter message: "Helpdesk application key request"
- Select submit to submit email
Once RC consulting receives your application payment, RC consulting will send you an application key.
- Select Help/Register
- Enter emailed registration number to activate application
- Select Register to register application

Print Invoice

- Select Options/Invoice
- Select Invoice Generation Tab
 - Select Client Name
 - Enter Date
 - Select Ok to preview invoice
- Select Invoice printing
 - Enter invoice number
 - Press enter to print invoice
- Select Search invoice
 - Select Client name
 - Enter From date
 - Enter To date
 - Press Ok to search for an invoice

3Connecting – Downloading to PDA

- Connect PDA to USB port
- Select File/Scan

To Add Invoice to QuickBooks

- Enter the invoice number in invoice number textbox and click OK
- Once the invoice is displayed click menu add invoice
- A copy of that invoice will be transferred to QuickBooks.
- To activate the QuickBooks function, you have to have QuickBooks installed on your pc.
- Edit "hdconfig.xml" file
- Specify QuickBooks file and account in:
 - `<setting name="quickbooks">C:\mydb.QBW,QBaccount</setting>`
 -

Internet based or Remote Helpdesk

- Internet based or Remote helpdesk allows you to access a centrally located database over the internet without use of any VPN from any location in the world.
- To activate Remote Desktop:
- Edit "hdconfig.xml" file
- Set setting node to TRUE
- Specifies the server and the database in the connection string node.