



Implementation of Features – Considerations Checklist

Guide 3, Amendment 4
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Should you have any questions regarding any steps in this guide, please speak with the NetHelpDesk support team. nethelpdesk.com/contact

Welcome to NetHelpDesk

NetHelpDesk, like any new software, will seem a bit daunting at first. We're here to simplify the process of migrating to NHD for you, and once you get started, you'll see just how simple it is.

Have a good think about your current needs, maybe with your team in a brain-storming session.

- 🌀 What works well?
- 🌀 What is annoying and time consuming?
- 🌀 What would be a really great feature to have?

Like never before, you truly have the opportunity here to shape your very own help desk software. We don't think in a limited way, and neither should you! Go for it. What will make your life easier?

Tell us, and we're sure that we'll have functionality for it already. If not, we can add it in for you, usually free of charge! If it's quite bespoke, we offer inexpensive rates in many currencies. If you don't tell us, or ask us, you'll never know!

So many of our competitors have promised things that they fail to deliver. We're not the same, so please talk to us about any concerns you may have at any time.

The following guide is meant to be a lead into some of the features of NHD. It's by no means exhaustive, as we are adding new features all the time. We look forward to discussing your requirements with you.

We have left ample space at the bottom of each section for you to scribble your notes down.

If one of the NetHelpDesk team is assisting with your installation, helping you during the trial, or visiting your company on site, and assisting with your set-up, you and your team may wish to consider the following:

CHECKLIST MARKERS


To be utilised straight away.	✓
To be utilised later on.	L
Require further clarification.	C


- SPACE BELOW FOR YOUR NOTES -


Select a feature to configure.


Main Configuration


Favourites

 Organisation













































 Agents

 Email

 Users

 Tickets

All Features Show Active Features Only

 Actions <input type="checkbox"/>	 Active Directory <input type="checkbox"/>	 Advanced Settings <input type="checkbox"/>	 Agents <input type="checkbox"/>
 Asset Management <input type="checkbox"/>	 Auto-Assign Rules <input type="checkbox"/>	 Billing <input type="checkbox"/>	 Calendar and Appointments <input type="checkbox"/>
 Call Management <input type="checkbox"/>	 Categorisation <input type="checkbox"/>	 Change Management <input type="checkbox"/>	 Closure Procedures <input type="checkbox"/>
 Contracts <input type="checkbox"/>	 Custom Objects <input type="checkbox"/>	 Customer Management <input type="checkbox"/>	 Database Imports <input type="checkbox"/>
 Email <input type="checkbox"/>	 Integrations <input type="checkbox"/>	 Items and Stock Control <input type="checkbox"/>	 Knowledge Base <input type="checkbox"/>
 Live Chat <input type="checkbox"/>	 Multi-Tenancy <input type="checkbox"/>	 Notifications <input type="checkbox"/>	 Organisation <input type="checkbox"/>
 Problem Management <input type="checkbox"/>	 Project Management <input type="checkbox"/>	 Qualifications <input type="checkbox"/>	 Reporting <input type="checkbox"/>
 Sales <input type="checkbox"/>	 Screen Labels <input type="checkbox"/>	 Sections <input type="checkbox"/>	 Self-Service Password Reset <input type="checkbox"/>
 Self-Service Portal <input type="checkbox"/>	 Services <input type="checkbox"/>	 SLAs <input type="checkbox"/>	 Status <input type="checkbox"/>
 Suppliers <input type="checkbox"/>	 Surveys <input type="checkbox"/>	 Ticket Scheduling <input type="checkbox"/>	 Ticket Templates <input type="checkbox"/>
 Tickets <input type="checkbox"/>	 Time Management <input type="checkbox"/>	 Users <input type="checkbox"/>	 Workflows <input type="checkbox"/>

NetHelpDesk Main Configuration 10.92.01

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Configuration Checklist

Organisations and Multitenancy

Allow more than one company to be “tenants” in the same database.

Database Imports and Migration of Data

One-click data migration from competitor products, and existing data migration.

Populating your Area/Customers, Sites and Users Data

Adding a tree view structure to organise your tickets based on who you support.

Integrations

Before setting up NHD, let us know of any third-party software you wish to integrate with, or import from.

Customer Management

Customisable data fields at the site level, to keep quick access data.

Active Directory

Utilise your Active Directories to populate users and Agents.

Sections

Split your Agent logins into teams or departments.

Agents

Your team members who need to access NHD to provide support to users.

Email

Add as many mailboxes to pull emails in as tickets, reply from and use in features.

Email Templates and Groups

Customise how the emails sent out will look, and use multiple groups for different mailboxes.

Tickets

Add as many forms as you need, with system and customised data fields to use.

Custom Objects

Add any type of tab and field, record any type of data you could ever want. Endless possibilities.

Actions

Action buttons to record what you do on tickets, set defaults, add your own, use our suggestions and more.

Statuses

Set the statuses of your tickets, projects, or even your teams.

Categorisation

How will you categorise tickets for reporting purposes? Lots of options to choose from.

Agents Notifications

Let your teams know about tickets and activity when they are not in the product, via email, pop-ups and more.

Agent Web Portal and Smartphone Apps

Access your data on the move, plot Agents locations and vehicle tracking.

Agent Time and Timesheets Management

Record time throughout tickets, Agent timesheets and much more.

Agent Calendar and Appointments

Set appointments and tasks, 2-way syncing with your external calendar with alarms.

Service Level Agreements

Setup multiple groups of priorities, timings for response and resolution, change descriptions.

SLA Hold Reminders Procedure

Let us manage your tickets on hold, awaiting further feedback from your end-users, and close automatically.

Ticket Templates

Template standard tickets that come up time and again for efficiency.

Auto Ticket Scheduling

Create tickets automatically when you need them to appear for anything you may need to.

Auto Assign Rules

Route tickets to specific Sections and/or Agents based on predetermined criteria.

Qualification Matching

Route tickets through to Agents based on their official qualifications, or just skillsets.

Knowledge Base Articles

Add articles to share between your Agents, and publish articles to the self-service portal for users.

Approval Processing

Start approval processes manually or automatically to a variety of approvers or CABs.

Logging Tickets to Suppliers/Third Party Vendors

Use NHD as a repository of all your Supplier data and contracts, and log tickets to them to record comms.

Workflows of Actions

Restrict actions in tickets from beginning to end in customisable workflows for different tasks.

Notify and Telephone Call Management

Use Notify to pop-up when tasks or appointments are due, sync with customer data in calls, and more.

Project Management

Even if you're not interested in ITIL, track and record your project work in one tidy location.

Reporting

What will you report on, how will you report on it, who will you send it to and when.

ITIL Alignment

Becoming an ITIL aligned help desk isn't as difficult as it may sound. Our processes help you.

Incident Management

Every day issues, affecting minor things as they occur.

Problem Management

Escalate or link Incidents to Problems, for efficient resource management.

Change Management

Record, plan and justify changes of pretty much anything you need to for auditing purposes.

Service Management

Set service monitoring software to update NHD entries, and generate tickets only from issues.

Project Management

Set up and track projects as they develop, setting time and monetary budgets.

Supplier / Vendor Management

Manage your third-party contributors, log tickets to them, monitor their SLAs to you.

Self Service Web Portal for End-users

Allow your users to access and create tickets, read self-service articles all within your control.

Screen Labels

Change some of the key terminology in NHD features, including web, to better match your own terms.

Live Chat (BETA)*

Allow your end-users to interact with your agents via the self-service portal.

Social Media Integration

Create tickets and communicate with your users using your company social media accounts.

Closure Procedures

Go the extra mile when you're closing tickets with user confirmation options.

Single-click Feedback & Surveys

Add options in emails for ticket rating in one click, or link to more detailed online surveys.

Self Service Password Reset Tool*

Allow your domain users to reset their own passwords, rather than burden your support team.

Sales Leads and Revenue Opportunities Tracking

Track all communications and sales activity, from initial enquiry to retentive sales.

*Additional Cost for this Module.

Items and Stock Control

Bring all of your physical and service items into NHD for stock control, or quotation usage etc.

Quotations

Create quotations to send to your customers, using the items you've added in Items & Stock.

Sales Orders & Items Issued

Raise Sales Order records from quotations in one click, to bill customer for items ordered.

Purchase Orders

Raise POs for your Vendors or Suppliers for kit and services you buy in from them.

Asset Management

Anything of value can be recorded, tracked, analysed and monitored from one place.

Contracts

Setup and record customer contract documents, link assets, data recording and more.

Billing and Accounts

Use NHD's extensive billing engine, and integrate with your Accounts package of choice.

Services Management & Service Catalog

Treat emails from remote (RMM) software differently, and allow customers to choose service.

Report Layouts (for Print/Email Documents)

Change the layout and look of quotes, SOs, POs, Invoices and more using our designer.

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