

FrontSupportWeb & FrontSupport

Version 3.0

User Guide

FrontZone Corporation

<http://www.frontzone.com>

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Chapter 1 FrontSupportWeb & FrontSupport Overview

FrontSupportWeb

FrontSupportWeb is a web based customer support software that enables your customer support personnel to store information for your customer support issues and tracks the issues from the time they are reported to the time they are resolved.

FrontSupportWeb runs within a web browser and offers similar functionality as FrontSupport.

In addition to storing and managing your customer support information, FrontSupportWeb integrates the customer support issues with the contact information in your ACT! or GoldMine contact database.

FrontSupport

FrontSupport is a windows based customer support software that enables your customer support personnel to store information for your customer support issues and tracks the issues from when they are reported to when they are resolved.

In addition to storing and managing your customer support information, FrontSupport integrates the customer support issues with the contact information in your ACT! or GoldMine contact database.

Using FrontSupportWeb & FrontSupport in your company

FrontSupportWeb and FrontSupport have been designed as a generic customer support tool that can be used company wide. Depending on the size and needs of your company, you can have only one database serving all the groups or you can have different databases for different groups. Here is how your company can use FrontSupportWeb and FrontSupport in different departments:

Customer Support Department

The customer support department of your company will use FrontSupportWeb and FrontSupport to keep track of all issues/problems that your customers report about your product or service. FrontSupport tracks the life of support issues from the day they are reported to the day they are resolved so that you keep your customers happy and they remain as your customers. Customer issues no longer slip through the cracks and so you don't lose your customers to your competition!

In addition to managing and tracking customer issues, FrontSupportWeb and FrontSupport integrates the customer support database with your ACT! or GoldMine customer database so that your customer support personnel can attach the support issues to ACT! or GoldMine contact record. No need to retype customer address and other contact details in the customer support database - reuse the customer information from your ACT! or GoldMine database.

Sales Department

Sales would use ACT! or GoldMine[®] to keep track of customer information. Since your ACT! or GoldMine[®] database is integrated with FrontSupport's customer support database, you can instantaneously verify how your company's support personnel are taking care of your customers.

Engineering & QA

If your company develops products, the engineering and QA departments will use FrontSupportWeb and FrontSupport to keep track of product defects and problems (bug tracking) during the product development. Since all this information remains in a centrally accessible database, product development coordination becomes easier and nothing will slip through the crack!

Marketing

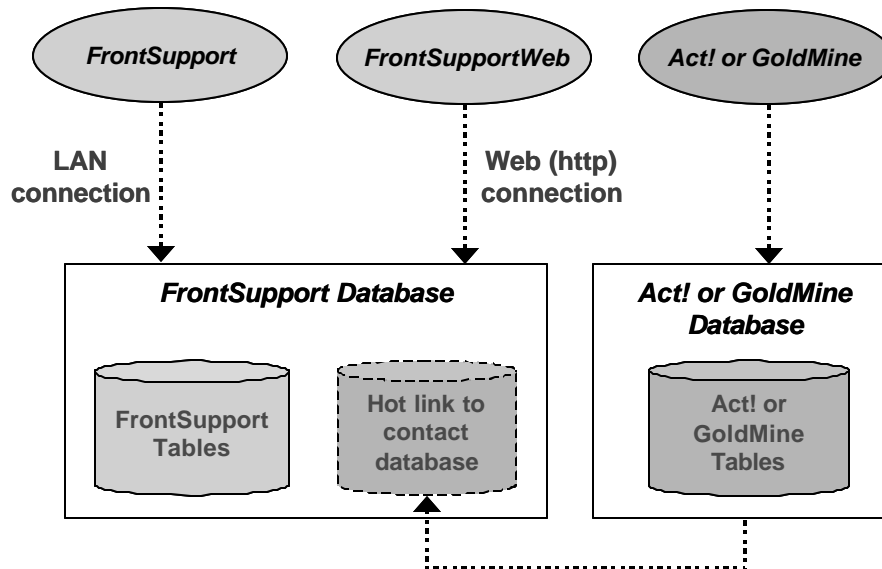
Marketing will use FrontSupportWeb and FrontSupport to categorize and analyze the nature of problems that your customers face and use this insight to improve your product or service. An improved product or service leads to increased profits!

Internal Helpdesk

Your internal helpdesk personnel will use FrontSupport to keep track of internal helpdesk issues until they are resolved. Eliminate employee frustration by using FrontSupport to track and manage the internal helpdesk requests.

Integration between FrontSupportWeb, FrontSupport and ACT! or GoldMine

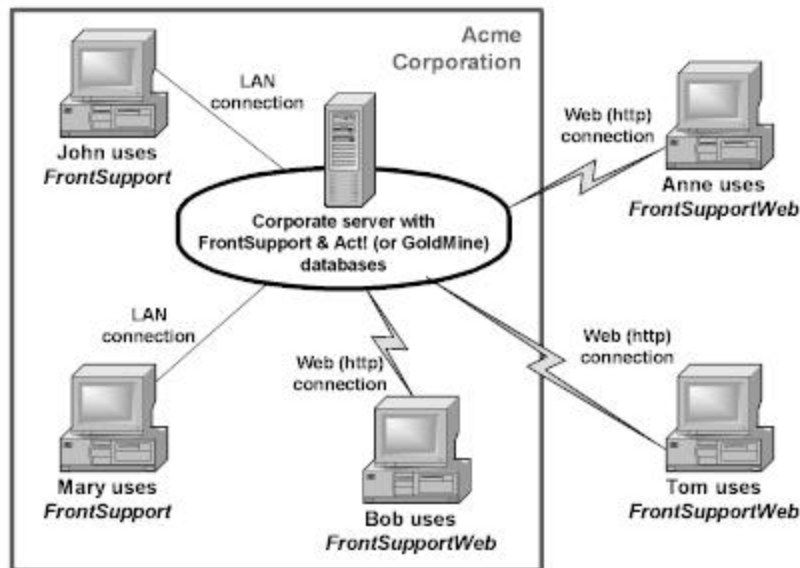
The figure below explains how FrontSupportWeb, FrontSupport and ACT! or GoldMine all fit in together.



FrontSupportWeb and FrontSupport integrate with ACT! 2000 or GoldMine® 4.0 (and upwards). FrontSupport uses MS Access while GoldMine® uses dBASE or SQL as its backend database. ACT! uses dBASE as its backend database. FrontSupportWeb and FrontSupport read and write to the same backend database. While FrontSupportWeb gives you a web-based interface, FrontSupport gives you the classic windows application interface. Because both products use the same database, any changes made via one interface are immediately available in the other interface.

Because the FrontSupport database integrates with your ACT! or GoldMine contact database, any changes made to your ACT! or GoldMine contact database are instantly visible in FrontSupportWeb and FrontSupport.

How a typical company uses FrontSupportWeb and FrontSupport



Here is a typical scenario in Acme Corporation that uses FrontSupportWeb and FrontSupport to service and support their customers.

- John and Mary work in customer support. They both are heavy users of the windows based FrontSupport. They to connect to the FrontSupport database that contains their customer support information.
- Bob is in Sales and he prefers to use the web based FrontSupportWeb to keep a tab on what's happening with his customers with regard to support.
- Anne works in customer support. Whenever she is on the field or at a customer site, she dials into the office and uses FrontSupportWeb to access the customer support database.
- Tom works in the regional office and he uses FrontSupportWeb to access the customer support database.

The combination of FrontSupportWeb and FrontSupport gives Acme Corporation a complete and an integrated customer care solution.

Chapter 2 Installing FrontSupportWeb & FrontSupport

System Requirements for FrontSupportWeb

FrontSupportWeb is a web application that needs to be installed only on the server along with the database and the web server. The end users just need a web browser. Here are the system requirements to install FrontSupportWeb on the server.

To install FrontSupport on the client PC's, here are the system requirements:

- PC with an Intel or compatible Pentium-class processor.
- Microsoft Windows NT 4.0, or Windows 2000 with Microsoft IIS web server 3.0 (or later) or Microsoft Personal Web Server. You can also use Microsoft Personal Web Server with Microsoft Windows 95/98 with Microsoft Personal Web Server.
- 20 MB disk space, 64MB RAM,
- FrontSupportWeb integrates with GoldMine 4.0 (both Standard & Enterprise Edition), GoldMine 5.0 and GoldMine FrontOffice 2000. FrontSupportWeb integrates with GoldMine's dBASE & SQL databases.
- FrontSupportWeb integrates with ACT! 2000 and above.
- FrontSupportWeb uses MS Access as the backend database.

System Requirements for FrontSupport

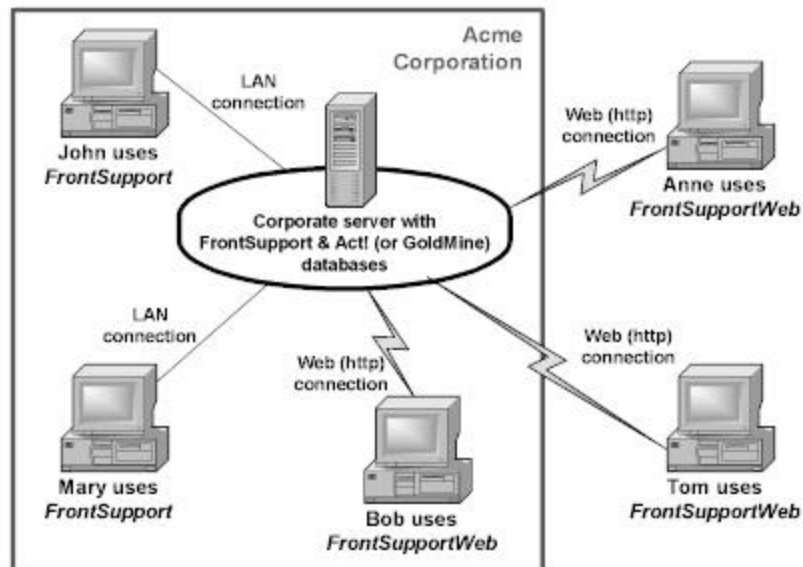
To install FrontSupport on the client PC's, here are the system requirements:

- 20 MB disk space, 32MB RAM, VGA Monitor

- FrontSupport integrates with GoldMine 4.0 (both Standard & Enterprise Edition), GoldMine 5.0 and GoldMine FrontOffice 2000. FrontSupport integrates with GoldMine's dBASE & SQL databases.
- FrontSupport uses MS Access as the backend database.

Installing FrontSupportWeb and FrontSupport

Lets say you have 5 people in your company. John and Mary will be using the windows based FrontSupport to track your company's customer service issues. You also have Rick, Bob and Patrick who will be using the web based FrontSupportWeb to track your company's customer service issues. Given below is a diagram that illustrates this scenario.



All 5 PC's are connected on the LAN network. The ACT! or GoldMine contact database (dBASE or SQL) is located on the corporate server \\CORP. If you are integrating FrontSupport and FrontSupportWeb with GoldMine's SQL database, the SQL server does not need to be on CORP – it could be on some other server.

Given below are the broad steps to quickly install FrontSupportWeb & FrontSupport, setup the company wide FrontSupport database (that stores your company's customer support data) and to integrate it with your company's GoldMine contact database (dBASE or SQL). The following pages also explain the details involved at every step.

1. Plan the installation of FrontSupportWeb and FrontSupport.
2. Preparing your GoldMine's SQL database (only if you are going to integrate FrontSupportWeb and FrontSupport with GoldMine's SQL database. Skip this step if you are going to integrate FrontSupportWeb and FrontSupport with ACT! or GoldMine's dBASE database).
3. Setup the first FrontSupport user and the FrontSupport database.
4. Setup other FrontSupport users connecting them to the previously created database.
5. Setup and configure FrontSupportWeb

STEP 1: Plan the installation of FrontSupportWeb and FrontSupport

If you are going to install and use FrontSupportWeb in your company, here are a few things you must remember. If you are not going to install use FrontSupportWeb, you can skip this step:

- When setting up the FrontSupport's backend database (the MS Access database) in STEP 3, make sure that this database is on the same PC as your web server.
- If you are integrating FrontSupportWeb with the ACT! or GoldMine's dBASE contact database, it is important that GoldMine's dBASE files (CONTACT1.DBF, CONTSUPP.DBF etc.) or ACT!'s contact database files are on the same PC as the web server. However, if you are going to integrate with GoldMine's SQL database, the SQL database and the web server can be on different PC's.

STEP 2: Preparing the GoldMine's SQL database

If you are integrating FrontSupport or FrontSupportWeb with GoldMine's SQL database, you need to do the following. You can skip the following instructions if you are integrating with ACT! or GoldMine's dBASE database.

Before you start using the FrontSupport Setup Wizard, you need to setup your SQL server so that FrontSupport is able to read your GoldMine database. For this, you need to create a special login "fsuser" with no password (i.e. ""). FrontSupport uses this "fsuser" login with (with no password) to access you GoldMine SQL database.

Here are the steps:

- a. Go to the PC that hosts your SQL server with your GoldMine database and launch the "Enterprise Manager" from the SQL server program group.
- b. Under your server group, you will find the "Security" item. Click to open this "Security" item.
- c. Under the "Security" item, you will find the "Logins" item. Right click on this item and select the "
the "
the "
- d. New Login" menu. This will open up the dialog "SQL Server Login Properties – New Login".
- e. In the "Name" field, enter "fsuser".
- f. For authentication, select "SQL server authentication" and leave the "Password" field blank (i.e. no password).
- g. In the "Database" list, select your GoldMine database (your GoldMine database is probably named "goldmine"). Leave the "Language" as "<Default>".
- h. In this dialog, now click the "Database Access tab" that shows the list of all the databases in your SQL server. Find your GoldMine database in this list and check the "Permit" column for this database so that the "fsuser" has the permissions to read the selected GoldMine database.
- i. Press the OK button. The dialog should close and you should see the newly created user "fsuser".
- j. In the same dialog, towards the bottom of the dialog, you would see a "Database roles for...". In this list, select "public" (or any other suitable role) to setup the role for the "fsuser" login. You should use the "Properties..." button to make sure that the selected role (that "fsuser" belongs to) has SELECT permissions on ALL the GoldMine tables.

If you do not create the “fsuser” (with “” password), when you integrate the FrontSupport database with your GoldMine SQL database, you will see an error message “**Could not connect to your SQL server...**”.

STEP 3: Setting up the first FrontSupport user and the FrontSupport database.

The following instructions explain how to install FrontSupport on John’s PC, integrate it with your GoldMine database and setup the FrontSupport database on the corporate server \\CORP so that all the users in your network can access the FrontSupport database.

- a. Run SETUP.EXE (or FS\SETUP.EXE) from the FrontSupport installation CD to install FrontSupport.
- b. After installing, run FS.EXE to launch FrontSupport.
- c. Now you need to create a new FrontSupport database. In the login dialog, click the “Setup Wizard” button to start the FrontSupport Setup Wizard.
- d. In the dialog “FrontSupport Setup Wizard – Step 1 of 8”, choose the option “Setup FrontSupport database to integrate with ACT! or GoldMine”.
- e. In the dialog “FrontSupport Setup Wizard – Step 2 of 8”, choose one of the two options. If you choose the option “Integrate with ACT! database”, jump to “Step K”. If you choose the option “Integrate with GoldMine database”, continue with the below steps.
- f. **GoldMine Integration:** In the dialog “FrontSupport Setup Wizard – Step 4 of 8”, choose whether you want to integrate with GoldMine’s dBASE or SQL database.

- g. In the dialog “FrontSupport Setup Wizard – Step 5 of 8”, choose the directory and filename where you want to store your FrontSupport database. Give a path like \\CORP\DATA\FS\acmefbdb.mdb so that the FrontSupport database is stored on your corporate server \\CORP.

IMPORTANT: If you plan to install and use FrontSupportWeb, remember that acmefbdb.mdb file should be on the same PC as your web server on which you plan to install FrontSupportWeb.

- h. If you are integrating with GoldMine’s SQL database, in the dialog “FrontSupport Setup Wizard – Step 6 of 8”, enter your SQL server name and the GoldMine database name. If you don’t know these details, please consult your SQL administrator.
- i. If you are integrating with GoldMine’s dBASE database, in the dialog “FrontSupport Setup Wizard – Step 7 of 8”, give the pathnames for your GoldMine’s contact database files CONTACT1.DBF and USERS.DBF.

IMPORTANT: Use a UNC pathname \\CORP\DATA\GM\COMMON\contact1.dbf and \\CORP\DATA\GM\users.dbf so that these pathnames are valid on all PC’s on your network. If you use a pathname S:\GM\contact1.dbf, this pathname may NOT work from all PC’s unless a network drive S: is mapped to \\CORP\DATA.

IMPORTANT: If you plan to install FrontSupportWeb, please make sure that your ACT! contact database files or GoldMine contact files dBASE files (CONTACT1.DBF, CONTSUPP.DBF etc.) are on the same PC as the web server.

- j. Jump to “Step L”.
- k. **ACT! Integration:** In the dialog “FrontSupport Setup Wizard – Step 3 of 8”, enter the pathname of your ACT! contact database file.

- l. In the dialog “FrontSupport Setup Wizard – Step 5 of 8”, choose the directory and filename where you want to store your FrontSupport database. Give a path like \\CORP\DATA\FS\acmefsdm.mdb so that the FrontSupport database is stored on your corporate server \\CORP.

IMPORTANT: If you plan to install and use FrontSupportWeb, remember that acmefsdm.mdb file should be on the same PC as your web server on which you plan to install FrontSupportWeb.

- m. In the dialog “FrontSupport Setup Wizard – Step 8 of 8”, give a name, say “Acme FrontSupport Database”, to your FrontSupport database. The setup wizard uses this name to create a ODBC datasource that points to the FrontSupport database \\CORP\DATA\FS\acmefsdm.mdb. Now hit the “Finish” button to complete the setup process.
- n. The setup process is complete. In the login dialog, choose the same ODBC datasource name “Acme FrontSupport database”, enter your login name (or ‘ADMIN’), click the OK button to log into FrontSupport and start using the software.
- o. After you login, go to “File | Administration | Administrative Setup...”. In this dialog, in the "License Manager" tab, add the license key(s) that you received when you purchased FrontSupport. Without appropriate licenses, FrontSupport will run in trial mode."

STEP 4: Setup other FrontSupport users:

Use the following instructions to setup FrontSupport for Mary (and any other FrontSupport users you may have in your company).

- a. Run SETUP.EXE (or FS\SETUP.EXE) from the FrontSupport installation CD to install FrontSupport.
- b. After installing, run FS.EXE to launch FrontSupport.
- c. In the login dialog, click the “Setup Wizard” button to start the FrontSupport Setup Wizard.

- d. In the dialog “FrontSupport Setup Wizard – Step 1 of 8”, choose the option “Use an existing FrontSupport database”.
- e. In the dialog “FrontSupport Setup Wizard – Step 5 of 8”, choose the previously configured database \\CORP\DATA\FS\acmefsdm.mdb.
- f. In the dialog “FrontSupport Setup Wizard – Step 8 of 8”, enter the name “Acme FrontSupport Database”.
- g. The setup process is complete. In the login dialog, choose the ODBC datasource name “Acme FrontSupport database”, enter your login name, click the OK button and start using FrontSupport.

STEP 5: Installing and setting up the FrontSupportWeb on the CORP server

- a. Go to the computer CORP on which you would like to host your FrontSupportWeb application.
- b. If this PC doesn't have a Microsoft IIS web server installed, install the Microsoft IIS web server from your operating systems disks. If you don't have the Microsoft IIS web server, you can use the Microsoft Personal Web server (PWS) that comes with the Microsoft NT 4.0 option pack. PWS can be installed on Win 95, 98 and NT 4.0 operating systems. To install the NT 4.0 option pack, run NT40OPT\SETUP.EXE from the FrontSupportWeb installation CD (or you can download it for free from the Microsoft website). The installation program guides you through installing the web server. After installing the web server, make sure that your web server is running properly by opening “http://corp” using your web browser.
- c. Before you install FrontSupportWeb on the computer CORP, you must install FrontSupport and create an ODBC datasource that connects to an existing FrontSupport database. Use the instructions from STEP 4 to accomplish this. After you have installed FrontSupport using STEP 4 on this PC, run FrontSupport and make sure that you can open the database and see the issues and contacts within the FrontSupport database.
- d. Now install FrontSupportWeb by running FSWEB\SETUP.EXE from the FrontSupportWeb installation disk. The installation program guides you through installing FrontSupportWeb.

- e. Run the "Internet Service Manager" of your Microsoft IIS web server. If you are using Microsoft Personal Web server, you need to run "Personal Web Manager". Add a virtual directory, say "fsweb", and point it to the FrontSupportWeb installation directory. Make sure that you set "default.asp" as one of the default documents. Please consult your web administrator on how to setup a new virtual directory.
- f. When the web server runs the FrontSupportWeb application, it runs it on behalf of the user "IUSR_MACHINENAME" - i.e. if your PC name is CORP, the FrontSupportWeb runs on the behalf of the user "IUSR_CORP" (and NOT on behalf of "guest" who is currently logged into using FrontSupportWeb using the web browser). Because of this reason, you must make sure to setup the IUSR_MACHINENAME with all the necessary permissions. The easiest way to do this is to add the IUSR_MACHINENAME user to the "Administrators" group on your web server PC.
- g. Run "FrontSupportWeb Manager" FSWEBMGR.EXE from the installation directory of FrontSupportWeb. From the "ODBC datasources" list, select the datasource that you created in Step C above and press the OK button. Later when you use FrontSupportWeb through your web browser, you will be connecting to this database.
- h. This completes the setup and configuration of FrontSupportWeb. Now Anne, Bob and Tom (and anybody else) can use a web browser from any PC and open "http://myserver/fsweb" that takes them to FrontSupportWeb's login page. Enter your login id and start using FrontSupportWeb.

Now your users are ready to use FrontSupportWeb and FrontSupport to track with your customer support issues.

If you have any questions or if you need further help, please send us email at support@frontzone.com or refer to our website <http://www.frontzone.com>.

User Management

FrontSupport manages its users as groups e.g. users belong to groups like "Sales", "Customer Support", "Administrators", "Managers" etc. As an administrator, you will create such groups for your company. For each group, you will set the necessary permissions for creating the issues, modifying the issue data, deleting issues etc. After this, create the individual FrontSupport user accounts and make these users a part of one of the groups. Each user's privileges are based on the permissions you setup for the group.

To setup users, use the following steps:

- Log into FrontSupport as an administrator. You can login as an administrator by selecting the "Login as Administrator" checkbox in the login dialog.
- Select the "Users" tab in the Administrator dialog.
- You can create a new group using the "Add..." button for groups. In the "Group Properties" dialog, enter the group name and set the permissions (administrator login/create/modify/delete permissions) for this group.
- To create a new user, use the "Add..." button for users. In the "User Properties" dialog, enter the user login name, user name and the group that this person belongs to. This user will have the permissions and privileges that you have configured for the group that this person belongs to.
- After a user account has been created, users can change their own password using the "Tools | Change Password..." menu item.

Chapter 3 Using FrontSupportWeb

Starting FrontSupportWeb

To run FrontSupportWeb, start your internet browser and open “http://myserver/fsweb” where “myserver” is the server that hosts your FrontSupportWeb installation and “fsweb” is the virtual path where your application is installed. Your FrontSupportWeb administrator can tell you the exact path to access and use FrontSupportWeb.

In the login dialog, enter your GoldMine login id and press the OK button. Contact your FrontSupportWeb administrator for your login id.

FrontSupportWeb Workspace

Once you log into FrontSupportWeb, you see the main window with a blue tab “Issues” and an orange tab “Contacts”. The Issues tab shows all the customer support issues you have in your database. The “Contacts” tab shows all the contacts in the integrated ACT! or GoldMine contact database.

Working with Issues

When you are in the main window, clicking on the “Issues” tab shows you all the issues you have in your database.

- If there are more issues in your database than can be shown on one page, the issues span across multiple pages. You can use the page navigation buttons on the right side (below the blue strip) to traverse across pages. To directly go to a particular page, enter the page number and press the “Goto” button.
- Sort the issues on any field by clicking on the columns header of any column.
- Search within issues by typing a keyword in the “Search” edit box and press the “Go” button. Use the drop down list to select the column in which you would like to search the keyword. To see all the issues again, select “All Issues” from the drop down list on the right hand corner of the blue strip.
- Click on the Issue id of one an existing issue to open a window that shows all the details of that issue. You can change any of the fields in this window and press the “Save” button to save the changes you made.

- To create a new issue, click on the “New” button (in the blue bar). This opens an issue detail window. Enter all the details and press the “Save” button to create a new issue. A new issue id is automatically assigned to the newly created issue.
- To go to a particular issue based on the issue id, click on the “Goto” menu button (in the blue bar). This shows up a dialog window. Enter the Issue id and press the OK button. An Issue detail window shows the details of the issue id you entered.
- To delete an issue, check the checkbox next to an issue and press the “Delete” button in the blue menu bar underneath the “Issues” tab. This will delete the selected issue.
- Click on the “Filters” button to show all the filters in your FrontSupport database. Filters are predefined queries that have already been created for your use. Select one of the existing filters and press the OK button. The issue list window shows all the issues that satisfy the query condition in the selected filter. To add a new query or modify an existing query, use our desktop product FrontSupport. To see all the issues again, select “All Issues” from the drop down list on the right hand corner of the blue strip.

Working with Contacts

When you are in the main window, clicking on the “Contacts” tab shows you all the contacts you have in your integrated ACT! or GoldMine contact database.

- If there are more contacts in your database than can be shown on one page, the contacts span across multiple pages. You can use the page navigation buttons on the right side (below the blue strip) to traverse across pages. To directly go to a particular page, enter the page number and press the “Goto” button.
- Sort the contacts by clicking on the column header of any one of the columns. Click the column header to toggle the sorting order from ascending to descending or vice-versa.
- When integrating with GoldMine, you can switch between the Primary Contacts and Additional Contacts by selecting from the drop down list on the right hand corner of the orange strip.

- Search for a contact (by company name, contact name etc.) by typing in the “Search” edit box and pressing the “Go” button. Use the drop down list to select the column in which you would like to search. To see all the contacts again, select “All primary contacts” from the drop down list on the right hand corner of the orange strip.
- Click on the contact name to open the detail window of any contact. The detail window shows all the details of the selected contact. Click on the small yellow “driving directions” icon to see the map of the contact’s address in Yahoo Maps.
- In the contact detail window, the “Attached Issues” tab shows all the issues attached to a contact. To create a new issue for this contact, use the “New” button. To attach an existing issue to a contact, use the “Attach” button. To detach an issue, select one of the issues from the “Attached Issue list” and press the “Detach” button.

Options Tab

- Use the “Change Password” command to change your password.

Exiting FrontSupportWeb

To exit the FrontSupportWeb system, press the “Logout” on the top right corner of the screen.

Chapter 4 Using FrontSupport

Running FrontSupport

Run FrontSupport by double clicking on the “FrontSupport 3.0” icon (that points to FS.EXE) in the “FrontSupport” program group that gets installed during the installation.

IMPORTANT: Before you start using FrontSupport, you will have to setup and configure the FrontSupport database. For more details, refer to the Chapter 2 Installing and Configuring FrontSupport.

Login Dialog

When you run FrontSupport, you are presented with a login dialog.

ODBC Datasource FrontSupport uses ODBC (Open Database Connectivity) to connect to your backend customer support database. This listbox lists all the ODBC datasources that are available on your PC. Select the correct datasource that points to the database that you want to access. If you don't know which datasource you need to use, contact your FrontSupport administrator.

... Button Use this button to launch the "Manage FrontSupport Databases" dialog. For more details on this dialog, see the "Manage FrontSupport Databases" topic below.

User Name Enter the user name that you use to login.

You could also try using the login name “GUEST” – your administrator may have setup a guest account.

If you don't know your login user name, and the “GUEST” account doesn't work, contact your FrontSupport administrator.

Setup Wizard Click this button to launch FrontSupport Setup Wizard that will help you to setup and configure a FrontSupport database. For more details, refer to the section Installing and Configuring FrontSupport.

Tour FrontSupport Product Tour is a PowerPoint slide show that walks you through all the important features of FrontSupport. If you are new to using FrontSupport, you are strongly recommended to watch this 15-minute Product Tour slide show.

Manage FrontSupport Databases

This dialog shows all the FrontSupport databases you have configured. From the list if you select a FrontSupport database, it shows the database path as well as the details of the integrated GoldMine / ACT database.

Use the "**Delete**" button to just delete the selected ODBC datasource (but NOT the database itself).

Use the "**Repair**" button to repair and compact your FrontSupport database. Use this repair button to repair the database when you see any inexplicable errors.

Use the "**Relink**" button if you have moved your ACT / GoldMine databases. Sometimes you may have to physically move the GoldMine / ACT database from one directory to another. When you move the database files, you will need to use the "Relink" button to relink the FrontSupport database with the new location of the GoldMine / ACT database files.

FrontSupport's Work Area

When you run FrontSupport, the application workspace has the following:

Toolbar: The toolbar has different buttons for frequently used commands. Place your mouse cursor on the button to see a small tooltip window that will show you the function of that button.

Status Bar: The status bar shows the status of the application, help messages (when the mouse button is kept pressed on a toolbar button or when using menus) currently logged in user, current date and time.

Issue List Window: This window shows the list of all customer support/helpdesk issues that have been stored in your database. For more details on using this Issues list, refer to the section Using the Issue List Window.

Issue Detail Window: This window shows all the details of a particular issue whose Issue Id is shown in the window title bar and in the Issue Id field of the Issue Detail Window. For more details, refer to the section Using the Issue Detail Window.

Contact List Window: This window shows the list of all the contacts that are available in your database. For more details, refer to the section Using the Contact List Window.

Contact Detail Window: This window shows all the details (address, phone numbers, title etc.) of the selected contact. For more details, refer to the section Using the Issue Detail Window.

Chapter 5 Working with Issues

Overview

FrontSupport's primary functionality centers around adding, updating and managing the issues reported by your customers. This chapter provides a detailed description of the functionality in FrontSupport for managing issues.

What is an Issue?

When using FrontSupport, Issue can be anything that you need to track. For example, if you are in the business of selling software and one of your customer calls you (or emails you) saying that he cannot install the software, you will create a new Issue. This issue will contain all the details of the problem that he faces. You will then classify this issue as an installation problem and also attach the customer's contact record to this Issue so that you will know that this issue was reported by the customer whose contact record is attached. You will then use FrontSupport to track this issue until it is resolved.

Some companies refer to an Issue as Case, Ticket, Incident, etc.

In addition to tracking your customer support issues, you can use FrontSupport to track different items in different departments. For more details, refer to the section Using FrontSupport in Your Company.

Using the Issue List Window

The Issue list window shows a list of all customer issues. Each issue has information like its severity, reported date etc. These details of an issue are shown in different columns on the same row.

- To see the details of a particular issue, double-click on this issue with the mouse, or use the ENTER key after selecting the issue. This will open up an Issue detail window. For more details, refer to the section "Using the Issue Detail Window".
- Use the arrow (up and down), Page Up, and Page Down keys to traverse in this list. You can also use the scroll bar in the window to scroll the issue list. If you know the Issue id of the particular issue you are interested, you could also use the Record command (View Menu).

- By default the list is arranged in the ascending order of issue Id. You can sort the list based on any column by clicking on its column header. For more details, refer to the section “Sorting the Issue List”.
- Search for a particular issue using the Issue Search toolbar. For more details, refer to the section Searching for an Issue.
- You can selectively show or hide different columns using the Options command (Tools Menu).
- The column width of a column can be increased or decreased by dragging the splitter (the line between 2 columns) between the column headers.
- Select multiple issues using the SHIFT and CONTROL keys in conjunction with the arrow keys (or mouse selection). Multiple issue selection is similar to selecting multiple files in Windows Explorer.
- Select an Issue and click the right mouse button to show a floating popup menu that contains some commonly used commands.
- Grid lines separate each row and column in this list view. Use the Draw Grid Lines command (View menu) to show or hide these grid lines. You can also turn ON/OFF the grid using the Options command (Tools Menu).
- Issue information can be emailed or saved to an external file using the Send Mail command (File Menu) or Save As command (File Menu) command.

The main Issue List window remains open through out the session and it cannot be closed.

Sorting the Issue List

By default the issue list is sorted in the ascending order of issues id's. To sort the issue list based on some other column, click on the column heading of that column. Clicking the same heading twice will toggle the sort order (i.e. ascending to descending and vice-a-versa). A small arrow in the column header provides a visual feedback of the sort order.

Searching for an Issue

Often times you would want to locate a particular issue based on a keyword or a phrase you remember. You can do this using the Issue Search toolbar in the issue list window.

- Go to the Issue List window. In the Issue Search toolbar, a drop down list contains the columns within which you can search for the keyword you are looking for. Select "Title", "Description", "Notes" or "Resolution" in this list. Select "All 4 Columns" so that you can search for the keyword or the phrase in all these columns.
- The Issue Search toolbar also contains an edit box where you can type the name of the contact you are looking for. In this edit box, type the keyword or phrase. Hit the "Find" button and the next issue record that contains the matching text will get highlighted.
- To find the next matching issue record, hit the "Find Next" button and the next matching issue (if available) will get highlighted.
- To show all the matching issue records in a separate window, click the "Find All" window. This will bring up a new window that will show all the issues containing the given word.

Using the Issue Detail Window

To open an Issue detail window, do the following:

- Select an issue from the issue list window. The selected issue is highlighted.
- Select the Open command (File Menu).
- The details of the selected issue appear in the Issue detail window.

The detail window shows all the details of the selected issue.

Status	Choose from one of the predefined values to set the status of this issue.
Assigned To	Assign this issue to one of the persons from the predefined user list.
Priority	Set the priority of the issue by choosing from the list of predefined priorities.
Severity	Set the severity of the issue by choosing from the list of predefined severity's.
Product	Select a product from the list to indicate that this issue pertains to the selected product.
Category	Categorize the issue using one of the categories from the list.

Type	Set the issue type by choosing from the list of predefined types.
Opened By	Shows the name of the person who opened the current issue.
Opened Date	The current issue was opened on this date.
Modified By	Shows the name of the person who last modified the current issue.
Modified Date	Shows the date on which the issue was last modified.
Issue Closed	Indicates if the issue is closed or not.
Closed By	Shows the name of the person who closed the issue.
Closed Date	Shows the date on which the issue was closed.
Target Date	Shows the date by which the issue needs to be addressed.
Target Time	Shows the time on the Target Date by which time the issue needs to be addressed.
Description	Use the description window to describe the issue/problem in detail.
Attached Contacts	Shows the list of contacts that are related to this issue. For more details, refer to the sections Attaching Issues and Contacts to each other and Detaching Issues and Contacts from each other.
Notes	Use the notes window to make any notes for this issue. For example, while working on this issue, you may make notes on the progress of this issue.
Time & Billing	Use the "Time & Billing" window to keep track of the time and effort spent on an issue so that the customer can be invoiced accordingly. For more details, refer to the topic "Time & Billing Management".
Resolution	Use the Resolution window to describe the resolution for this issue.

Navigating the Issues

The toolbar in the Issue detail window can be used to navigate the issues. The toolbar has 4 buttons – first record, previous record, next record and the last record. Use these buttons to traverse across the records. The first and the previous record buttons are disabled when the issue detail view shows the first record. Similarly the last and the next record buttons are disabled when the issue detail view shows the last record. All the four buttons are disabled as soon as the information in the detail view is changed. The buttons are enabled only after saving the information.

Adding New Issues

To create a new issue, do the following:

- Select the New Issue command (File Menu) to add a new issue. This will open up an issue detail window.
- For detailed information about different fields, refer to the section Using the Issue Detail Window.
- Some fields are initialized with default issue information. You can configure these defaults using the **Issues** tab in the Options command (Tools Menu).
- Once you have entered all the fields select the Save command (File Menu). This will add a new issue to the database. The newly added issue is assigned an issue id and added to the main list window.

The **Attached Contacts** tab in the issue detail window is disabled when adding a new issue. It is enabled once you save the issue. If the Smart Issue Insert feature is turned ON, a contact record may automatically get attached to this newly created issue. For more details, refer to the section Smart Issue Insert.

When you create a new issue and attach it to a contact, FrontSupport can update the GoldMine® contact's "History" tab or ACT!'s "Notes/History" tab so that you can check the status of all the issues for this contact from within ACT! or GoldMine®.

Modifying Issue Information

- Open an issue as described in the section "Using the Issue Detail Window".
- Modify the issue information by modifying different fields in the Issue detail window.
- After modifying, select the Save command (File Menu) to save the modified issue information.

Time & Billing Management

When working on certain issues, your company may want to keep track of the time spent on that issue so that the customer can be invoiced for your time and effort. The "Time & Billing" window in the Issue detail window allows you to keep track of such time and billing information.

- From the main issue list window, click open the details of any issue.
- In the Issue detail window, click on the "Time & Billing" tab to show all the time and billing entries.
- A billable entry has a green dollar sign bitmap. A non-billable entry has a green dollar sign with a cross across it.
- With the mouse, right click in this window and select the "New Time & Billing" command.
- This opens up the "Time & Billing" dialog.
- In this dialog enter the hours and minutes that you spent working on an issue. You can enter the hourly rate so that your customer can be invoiced at that rate. The total amount will be automatically calculated. You can mark an entry as billable or non-billable. Select the appropriate "Action" item to indicate what the time was spent upon. In the "Notes" field you can enter other details.
- Press the OK button to save the details that you just entered.

Note: To modify the entries you see in the "Action" list, change the entries in the "Time & Billing Actions" tab in the administrator dialog.

For every issue, you can create such multiple time and billing entries to keep track of work done at different times by different people.

Deleting Issues

To delete issues, do the following:

- Select one or more issues from any issue list window.
- Select Delete Record command (Edit Menu) to delete the selected issues. Alternatively you can Click the delete icon or press the DEL key to delete the selected issues.

- A dialog box may come up asking for confirmation before the issue is deleted. Click on Yes.

The issue gets deleted. Please note that the deleted issue information cannot be recovered.

Printing Issue Information

To print an Issue list

To print just a list of issues that are listed in the issue list window, do the following:

- Select the Issue list window that contains the issue list that you would like to print.
- Select Print command (File Menu) or use the CTRL+P shortcut key for printing. This will bring the print dialog box. Press OK to continue printing.
- You can select Print Preview command (File Menu) to first preview the printer output.

When printing an issue list, only those columns that are visible in the window will be printed. The columns that are not visible in the window will not be printed. Also, the width of a column is proportional to the width of the column on the screen. Depending on how you want the printed output to look, you may have to show/hide some columns and resize the width of those columns.

To print Issue detail information

To print the details of an individual issue, do the following:

- Select the Issue detail window that contains the details of the issue that you would like to print.
- Select Print command (File Menu) or use the CTRL+P shortcut key for printing. This will bring the print dialog box. Press OK to continue printing.
- You can select Print Preview command (File Menu) to first preview the printer output.

EMailing Issue Information

Select any one issue from Issue list window and select the Send Mail command (File Menu). FrontSupport will format the details of the selected issue and send an email using your default MAPI tool. Outlook Express, Outlook and Netscape Messenger are few popular MAPI compliant tools.

Similarly, you can also send an email from the Issue Detail window.

Filtering or Querying Issues

As you use FrontSupport, the number of issues in your database grows and you need a way to select only the issues you would like to see. Typically, you would like to say “Show all the issues that are open and those that are assigned to me”. This Filters feature allows you to create such filters based on certain conditions so that you can see only a subset of all the issues in your database.

- Select the Filters command (Tools menu).
- A dialog comes up that shows all the existing filters that you can use immediately. Using the Add button, you can build your own filter.
- Press the OK button and a new issue window opens up. This window contains all the issues that satisfy the conditions of the filter that you selected.

Exporting Issue Information

You can export (i.e. save) the issue information to an external file (in plain text format) by selecting Save As command (File Menu). To export issue information, do the following:

- Select a single issue from Issue list view or open a detail view.
- Select Save As command (File Menu). This will open the file dialog box. You can choose the name of the file and location where you want to save the information about the selected issue.

This will save the issue information to an external file.

Smart Issue Insert

Often times when you are dealing with a customer, say John, on the phone (or email etc.), you would bring up the contact record for John. While John's contact record is active, you will want to create a new issue and attach it to John's contact record to indicate that the newly created issue belongs to John. Normally you will do this by creating an issue, saving it, dragging John's contact record and dropping it into the newly created issue's contact list.

Instead, you can use the FrontSupport's Smart Issue Insert feature. When John's contact record is active and you create a new issue and save it, John's contact record will be automatically attached to this newly created issue. This will save your the trouble of doing a drag-drop to attach the John's contact record to this newly created issue. Smart Issue Insert works by detecting if a contact record was active when a new issue is created. If so, the active contact's record will be automatically attached to the newly inserted issue.

- Open a contact detail view (John's record).
- Create a new issue and fill in the details for this issue.
- When you save the issue, the active contact record (John's record) is automatically attached to this newly created issue. You will be asked for confirmation before the contact is attached to the new issue. The attached contact record will appear in the **Attached Contacts** tab.

You can turn ON/OFF this Smart Issue Insert feature using the Tools | Options command | Issues tab . In this dialog, you can also turn ON the "Confirm before doing the Smart Issue Insert" so that you will be asked for a confirmation before the Smart Issue Insert automatically attaches the active contact record to the newly inserted issue.

When you attach an issue to a contact (or vice-a-versa), FrontSupport can update the GoldMine® contact's "History" tab so that you can check the status of all the issues for this contact from within GoldMine®.

Chapter 6 Working with Contacts

Overview

FrontSupport integrates with ACT! or GoldMine contact database so that you can see the contact information from within FrontSupport. This chapter explains the functionality in FrontSupport to view the Customer Contact information accessing it directly from your ACT! or GoldMine® database. This chapter also explains how you can attach contacts to issues and vice-a-versa.

Using the Contact List Window

Since FrontSupport integrates with ACT! or GoldMine®, you will be able to see ACT! or GoldMine's contact information in the contact list window. Each contact has details like company, title, phone number, address etc.

- To see the details of a particular contact, select it and double-click on this contact with the mouse, or use the ENTER key. This will open up a contact detail window. For more details on different fields in this contact detail window, refer to the section “Using the Contact Detail Window”.
- Use the arrow (up and down), Page Up, and Page Down keys to traverse in this list. You can also use the scroll bar in the window to scroll the contact list.
- You can sort the list based on any column by clicking on its column header. For more details, refer to the section Sorting the Contact List.
- Search for a particular contact using the Contact Search toolbar. For more details, refer to the section Searching for a Contact.
- You can selectively show or hide different columns using the Options command (Tools Menu).
- The column width of a column can be increased or decreased by dragging the splitter (the line between 2 columns) between the column headers.
- Select multiple contacts using the SHIFT and CONTROL keys in conjunction with the arrow keys (or mouse selection). Multiple contact selection is similar to selecting multiple files in Windows Explorer.
- Select a contact and click the right mouse button to show a floating popup menu that contains some commonly used commands.

- Grid lines separate each row and column in this list view. Use the Draw Grid Lines command (View menu) to show or hide these grid lines. You can also turn ON/OFF the grid using the Options command (Tools Menu).
- Email a contact using the Send Mail command (File Menu). For more details, refer to the section EMailing a Contact.

Sorting the Contact List

To sort the contact list based on a column, click on the column heading of that column. Clicking the same heading twice will toggle the sort order (i.e. ascending to descending and vice-versa). A small arrow in the column header provides a visual feedback of the sort order.

Searching for a Contact

Often times you know the name of a contact and you want to locate that person quickly. You can do this using the Contact Search toolbar in the contact list window.

- Go to the Contact List window. In the Contact Search toolbar, a drop down list contains the columns within which you can search for the contact you are looking for. Select "Name" or "Last Name" in this list.
- The Contact Search toolbar also contains an edit box where you can type the name of the contact you are looking for. In this edit box, start typing the name of the contact you are looking for.
- To find the next matching record, hit the "Find Next" button and the next matching contact (if available) will get highlighted.

Use the same procedure to search for a contact based on Company that person works for after you select the "Company" column in the drop down list.

Using the Contact Detail Window

- Select a contact from the contact list view.
- Select Open command (File Menu)
- The contact detail window opens up. This window shows the details such as phone numbers, address, company name etc.

- If you integrate FrontSupport with GoldMine database, the "Contact Details" tab shows all the GoldMine profile details such as "Email address", "Web site address", "Birthday" etc. When using GoldMine, you will notice the same entries in the "Details" (or the "Profiles") tab of the GoldMine contact window. This "Contact Details" tab is not available when integrated with ACT!.

Navigating the Contacts

The toolbar in the contact detail view can be used to navigate the contacts. The toolbar has 4 buttons – first record, previous record, next record and the last record. Use these buttons to traverse across the records. The first and the previous record buttons are disabled when the contact detail view shows the first record. Similarly the last and the next record buttons are disabled when the contact detail view shows the last record.

Printing Contact Information

To print a contact list

To print just a list of contacts that are listed in the contacts list window, do the following:

- Select the contact list window that contains the contact list that you would like to print.
- Select Print command (File Menu) or use the CTRL+P shortcut key for printing. This will bring the print dialog box. Press OK to continue printing.
- You can select Print Preview command (File Menu) to first preview the printer output.

When printing a contact list, only those columns that are visible in the window will be printed. The columns that are not visible in the window will not be printed. Also, the width of a column is proportional to the width of the column on the screen. Depending on how you want the printed output to look, you may have to show/hide some columns and resize the width of those columns.

To print contact detail information

To print the details of an individual contact, do the following:

- Select the contact detail window that contains the details of the contact that you would like to print.

- Select Print command (File Menu) or use the CTRL+P shortcut key for printing. This will bring the print dialog box. Press OK to continue printing.
- You can select Print Preview command (File Menu) to first preview the printer output.

E Mailing a Contact

Select any one contact from the contact list view and select Send Mail command (File Menu). FrontSupport will open your default email program to send a mail to the contact. The **To:** field of the email window will contain the email address of the contact if it is present. The default email program should be MAPI (Microsoft Messaging Application Programming) compliant. Outlook Express, Outlook and Netscape Messenger are few popular MAPI compliant tools.

Use the same procedure to send email from a contact detail window.

If there is no default MAPI compliant email program installed on your PC, you may get an error message.

Attaching Issues and Contacts to each other

FrontSupport supports integration with ACT! or GoldMine[®] by allowing contacts to be attached to issues (and vice-a-versa). Using this integration, you can use FrontSupport to keep track of which issues have been reported by a particular customer.

To attach a contact to an issue

- Open an issue detail view.
- Select one or more contacts from any other contact list view. Using the mouse, drag (click the left mouse button, hold the button down and move the mouse) the contacts onto the **Attached Contacts** tab in the issue detail view and drop (release the left mouse button that was kept pressed) the contacts.

The **Attached Contacts** tab will show the newly attached contact. Now if you open the contact detail view of the contact you just dragged, you will see the issues that are attached to this contact.

To attach an issue to a contact

- Open a contact detail view.

- Select one or more issues from any other issue list view. Using the mouse, drag (click the left mouse button, hold the button down and move the mouse) the issues onto the **Attached Issues** tab in the issue detail view and drop (release the left mouse button that was kept pressed) the contacts.
- You can also use the “Tools | Attach Issue...” menu item to attach an issue to a contact.

The **Attached Issues** tab will show the newly attached issue.

When you attach an issue to a contact (or vice-a-versa), FrontSupport can update the GoldMine® contact's “History” tab or ACT!'s “Notes/History” tab so that you can check the status of all the issues for this contact from within ACT! or GoldMine®.

Detaching Issues and Contacts from each other

To detach an issue from a contact

- Open a contact detail view.
- Select one or more issues from the issue list that appears in the **Attached Issues** tab.
- Select Detach Record command (Tools Menu).

Selected issue records will be detached from the contact they were attached to.

To detach a contact from an issue

- Open an issue detail view.
- Select one or more contacts from the contact list that appears in the **Attached Contacts** tab.
- Select Detach Record command (Tools Menu).

Selected contact records will be detached from the issue they were attached to.

Chapter 7 Using Menus

File Menu

New Issue command (File Menu)

Use this command to create a new issue.

Open command (File Menu)

Use this command to open the selected item from an Issue or a Contact list.

Close command (File Menu)

Use this command to close the currently active window.

NOTE: You cannot use this command to close the main Issue list window and the main Contact list window.

Save command (File Menu)

Use this command to save the contents of the currently active window.

Save As command (File Menu)

Use this command to save the contents of the currently active window to an external file.

If the selected item is an Issue, you can save the contents of this Issue to a text file (.TXT file) or export the Time & Billing information of this issue to a Intuit QuickBooks Pro invoice file (.IIF file).

Exporting Time & Billing information as a QuickBooks Pro Invoice

If the current item is an Issue, you can export the Time & Billing entries of this Issue as an Intuit QuickBooks Pro invoice file (.IIF). This file contains a invoice with the time & billing entries from the selected issue. For each time & billing entry, one line item is created in the invoice. If the time & billing entry is "non-billable", the amount for this line item will be zero.

To create an invoice in QuickBooks Pro using FrontSupport, here are the steps:

- Use the "File | Save As..." command to save the time & billing entries of this issue as an invoice .IIF file.

- In QuickBooks Pro, use the "File | Utilities | Import..." command to import the .IIF file you just created.
- In QuickBooks Pro, use the "Edit | Find..." command to bring up the "Find" window. In this "Find" window, select the "Account" filter and search for "FrontSupport" account. This will show you the invoice that you just imported. You can now double click the invoice to open it and see the details.
- In this Invoice detail window, you can change the "Customer:Job" field to select the customer for whom you need to raise the invoice. Also change the "Account" field to "Accounts Receivable" or some other suitable account.

Now you can create and print the invoice from within QuickBooks.

Export to MS Excel command (File Menu)

Use this command to save the contents of the current window to Microsoft Excel. When you use this command, FrontSupport will automatically launch MS Excel and export the contents of the current window to Excel. If you do not have Excel installed on your PC, you cannot use this feature.

Export to Outlook task command (File Menu)

Often times you would like to track your own issues (support issues assigned to you) on your task list so that you can set reminder to yourself. FrontSupport allows you to create a task entry in your Microsoft Outlook task list so that you can track your issues using MS Outlook.

- Open any issue in the database.
- Select "File | Export to MS Outlook | Export to Outlook Task" menu item.

FrontSupport will automatically create a Outlook task in your Outlook task list. In the Outlook task window you can set the "Start Time", "End Time" and other "Reminder" entries so that you can set reminders for yourself.

NOTE This feature works only when you have Microsoft Outlook installed on your PC.

Export to Outlook calendar command (File Menu)

Often times you would like to track your own issues (support issues assigned to you) on your calendar so that you can set reminder to yourself. FrontSupport allows you to create a calendar entry in your Microsoft Outlook calendar so that you can track your issues using MS Outlook.

- Open any issue in the database.
- Select "File | Export to Outlook" menu item.

FrontSupport will automatically create an Outlook appointment entry in your Outlook calendar. In the Outlook appointment window you can set the "Start Time", "End Time" and other "Reminder" entries so that you can set reminders for yourself.

Note: This feature works only when you have Microsoft Outlook installed on your PC.

Backup (File Menu)

Use this command to backup your FrontSupport database.

- Select "File | Administration | Backup" command.
- In the Backup dialog, choose the filename and location for your backup.
- Check the "Backup the database to a compressed file" checkbox so that the backup will be saved in the compressed ZIP format. You can use Winzip, Pkzip or other such programs to open your compressed ZIP file. Also, when you backup your database to a ZIP file, the ZIP file will also contain a "readme.txt" file that contains the date, time and other such information about the backup.
- Click the "Start" button to start the backup.

Run SQL Command (File Menu)

FrontSupport uses MS Access as the backend database. Sometimes, to do some administrative operations, you may directly want to use SQL commands. SQL commands are very useful to perform those tasks that you cannot do using the FrontSupport user interface.

- Select "File | Administration | Backup" command.

- In the Run SQL command dialog, enter the SQL command and click the 'Run' button.

Here are some examples of how you can use the SQL commands:

- To reassign all the issues of "JOHN" to "MIKE", use the SQL command:

```
update fs_issues set fs_issues.assignedto = "MIKE" where  
fs_issues.assignedto = "JOHN"
```

- To delete all the issues that were created before 16 Jan 2001, use the SQL command:

```
delete * from fs_issues where fs_issues.openeddate < #1/16/2001#
```

Administrative Setup (File Menu)

Use this command to perform various administrative operations on a FrontSupport database. For example, you can add different Issue "Types", setup users and their privileges etc. For more details, refer to the "Administrative Login" topic in "Chapter 8: Advanced Topics"

Print command (File Menu)

Use this command to print the contents of the currently active window. This command presents a Print dialog box, where you may specify the range of pages to be printed, the number of copies, the destination printer, and other printer setup options.

Print Preview command (File Menu)

Use this command to display the contents of the currently active window as it will appear when printed. When you choose this command, the main window will be replaced with a print preview window in which one or two pages will be displayed in their printed format. The print preview toolbar offers you options to view either one or two pages at a time; move back and forth through the document; zoom in and out of pages; and initiate a print job.

Print Setup command (File Menu)

Use this command to select a printer and a printer connection. This command presents a Print Setup dialog box, where you specify the printer and its connection.

Send Mail command (File Menu)

Use this command to email the contents of the active window (or the selected item). If your computer is configured with a MAPI compliant email tool, FrontSupport will use this email program to send the email. If no email program is configured on your computer, an error message is displayed.

Exit command (File Menu)

Use this command to end your FrontSupport session. You can also use the Close command on the application Control menu. FrontSupport prompts you to save any items with unsaved changes.

Edit Menu

Cut command (Edit Menu)

Use this command to remove the currently selected text data from the window and put it on the clipboard. This command is unavailable if there is no data currently selected.

Cutting data to the clipboard replaces the contents previously stored there.

Copy command (Edit Menu)

Use this command to copy selected data onto the clipboard. This command is unavailable if there is no data currently selected.

Copying data to the clipboard replaces the contents previously stored there.

Paste command (Edit Menu)

Use this command to insert a copy of the clipboard contents at the insertion point. This command is unavailable if the clipboard is empty.

Insert Timestamp (Edit Menu)

Use this command to insert a date-timestamp at the top of the Description, Notes and Resolution fields of an issue. That date-timestamp will let you record the date and time when you made the change to these fields.

Delete Record command (Edit Menu)

Use this command to delete the currently selected or currently active record. You can only delete Issues but not contacts.

Find command (Edit Menu)

Use this command to find a particular word/words. This command can be used only when you set the focus to the Description, Notes or Resolution windows in the Issue detail view.

Find Next command (Edit Menu)

Use this command to find the next occurrence of the previously specified word/words. This command can be used only when you set the focus to the Description, Notes or Resolution windows in the Issue detail view.

Replace command (Edit Menu)

Use this command to find a specified word/words and replace it with some other word. This command can be used only when you set the focus to the Description, Notes or Resolution windows in the Issue detail view in the Issue detail view.

Select All command (Edit Menu)

Use this command to select all items in the current list view. You could also use this command to select all the text in the Notes, Description and Resolution windows in the Issue detail view.

View Menu

Draw Grid Lines command (View menu)

Use this command to show or hide the grid lines in all the list (Issue or Contact) views.

Record

First Record command (View Menu)

Use this command to go to the first record in the list. You can also use button in the toolbar to go to the first record. This menu is available only when you are using an Issue detail or a Contact detail view.

Previous Record command (View Menu)

Use this command to go to the previous record in the list. You can also use button in the toolbar to go to the previous record. This menu is available only when you are using an Issue detail or a Contact detail window.

Next Record command (View Menu)

Use this command to go to the next record in the list. You can also use button in the toolbar to go to the next record. This menu is available only when you are using an Issue detail or a Contact detail window.

Last Record command (View Menu)

Use this command to go to the last record in the list. You can also use button in the toolbar to go to the last record. This menu is available only when you are using an Issue detail or a Contact detail window.

Record command (View Menu)

Use this command to go to a particular record in the list. Often times, when you know the Issue Id of the issue you would like to see, you could use this menu to directly jump to that issue instead of using the Issue list view to open the Issue you are interested.

When you use this menu item, a "Goto Issue" dialog comes up. Enter the Issue Id of the issue are you interested and press OK. The current issue detail window will load the Issue you requested.

This menu is available only when you are using an Issue detail window.

Tools Menu

Dial command (Tools menu)

FrontSupport can automatically dial a telephone number if you have a Windows compatible modem on your computer. You can start dialing by selecting the Tools | Dial command.

- When the "Phone dialer" dialog pops up, this dialog shows all the phone numbers of the currently active contact. If there was no active contact, the phone numbers list is empty. You can select one of the phone numbers from the list or type in the number that you want to dial.
- Click the "Dialing Properties" button to set properties for dialing.
- Use the "Line Properties" button to set the modem properties.
- The "Connect using Line" shows the list of available modems.
- Click the "Start Call" button to start dialing. Once the modem starts dialing, pick up the phone receiver and click the "Pick Up" button that closes the dialog. Click the "Cancel" button to disconnect the call.

Filters command (Tools Menu)

As you use FrontSupport, the number of issues in your database grows and you need a way to select only the issues you would like to see. Typically, you would like to say “Show all the issues that are open and those that are assigned to me”. This Filters command allows you to create such filters based on certain conditions so that you can see only a subset of all the issues in your database.

FrontSupport comes with a set of pre-configured filters that you can use immediately. Using these filters, you can build additional filters to select the issues that you would like to see.

When you select this command, the Filters dialog comes up.

Filters Dialog

This dialog shows the list of all available filters. Select the filter that you are interested and press OK. To build a new filter, click on the Add button. To modify an existing filter, select the filter that you would like to modify and press the Modify button. To delete an existing filter, select the filter that you would like to delete and press the Delete button. Use the Save As button to use an existing filter to create a new filter.

When you select a filter and press the OK button, a new issue list window is displayed that contains all the issues that are satisfied by the filter conditions that you selected. Now you can use this filtered issue list window to open the issues, sort the issues, print, search in these issues for keywords etc.

Filter Builder Dialog

In the previous Filters dialog when you press the Add or Modify button, the Filter Builder dialog is displayed that allows you to build a filter based on one or more conditions.

Filter Name

Shows the name of filter.

Notes

Use this field to store some details about the filter. You could use this field to describe instructions to the user of the filter.

Field

Shows the list of all Issue fields that you can use to build your filter conditions.

Operator

Shows the list of all operators that you can use to build your filter.

Value

Shows the values that you can use to build your filter. Depending the Field type you choose, the value type can change.

Insert Condition

This button will use the Field, Operator and Value fields to build and insert a condition into the filter expression field.

AND

If you have multiple conditions in your filter, use this button to insert an AND condition into your statement.

OR

If you have multiple conditions in your filter, use this button to insert an OR condition into your statement.

Verify Expression

Click this button to verify the filter expression you have built so far. If there is an error in the expression, you can verify this immediately.

Clear Expression

Clear the expression completely so that you can build your filter expression from scratch.

Expression

Shows all the conditions that you have used so far to build your filter. If you know how to build SQL statements, you can directly type (or paste) into this edit control.

Reports & Charts command (Tools menu)

Generating Reports

FrontSupport comes with a list of prebuilt reports that you can use out of the box. To generate and view a report, do the following:

- Select Tools | Reports & Charts command. Click on the “Reports” tab.
- Click and select one of the existing reports. For the “Report Type”, select “MS Snapshot”, “MS Word” or “MS Excel”. You are recommended to use the “MS Snapshot” type because this type offers better-formatted reports.
- You can generate a report based all the issues in your database, selected issues based on a filter or one particular issue based on an issue id. If you select the “Using the issue id’ choice, you will have to enter the issue id. If you select the “Using the filter” choice, select one of the filters listed in the drop down list – in this case, your report will be generated based on the issues selected by the filter. To generate a report based on all the issues you have in your database, use the choice “All issues”.
- Now click on the “View Report” button to launch the report in the format that you have selected.

By combining a pre-built report and the issues selected by a pre-defined filter, you can generate very powerful management reports with a click of the button.

Note: FrontSupport requires you to install MS Access on your PC to generate and view reports. Without MS Access, you cannot generate and view reports.

Modifying existing reports & Creating your own reports:

- To modify one of the existing reports or to create a new report, use MS Access to open your backend FrontSupport MS Access database (i.e. the .MDB database file).
- Within MS Access, use the “View | Database object | Reports” command to see all the reports in your database. Using MS Access, you can delete the existing reports, modify the format of the existing reports or add new reports. For more details on how to modify/create reports using MS Access, please refer to the MS Access documentation.

Tips on creating or modifying reports

- To create new reports or modify existing reports using MS Access, you need to have exclusive access to the FrontSupport MS Access database i.e. nobody else can be using the FrontSupport MS Access database. The best way to modify these reports would be to copy your FrontSupport database to another location. Now modify the existing reports or add new reports in this duplicate database. Once you have finished testing the report, you can copy this report into your original FrontSupport database and delete the duplicated the FrontSupport database. To copy the report from the duplicate database to the original database, open 2 separate instances of MS Access with the original and duplicate databases and drag-drop the new report from the duplicate database to the original database.
- To create a new report, we strongly recommend you to use one of the existing reports as a basis to create a new report. You can select a report and use the “File | Save As...” command to save an existing report as a new report that you can modify and customize.
- FrontSupport uses the “Filter” and “Filter ON” properties of a report when you generate a report based on just one issue or based on one of the filters. You are recommended to leave the “Filter” property empty and “Filter ON” property as “No”. For more details on these report properties, please refer to the MS Access documentation.

Generating Charts

FrontSupport can generate pie charts and bar charts for you based on the issue data you have in your database. You can use this feature to colorful management reports that show you the trends on what your customers are facing.

FrontSupport generates these charts in Microsoft Excel. Once the charts are generated in Excel, you can modify and format it to suit your needs. For example, once you generate a pie chart, you can convert this chart to a "3D Doughnut" or an "XY scatter" chart. Excel also allows you to format the colors, text and other such attributes.

- Select Tools | Reports & Charts command. Click on the “Charts” tab.

- Select one of the chart variables like "Assigned To", "Category". For example, you can select "Assigned To" to see how the customer issues are assigned to different customer support technicians in your company.
- Select either "Pie Chart" or "Bar Chart" as one of the chart types.
- Keep the option "Use of the below filters..." unchecked if you want to generate a chart based on all the issues in the database. If you want the chart to be based on selected issues, check the option "Use of the below filters..." and choose one of the filters that selects the issues that you want. You can use the "Tools | Filters" command to manage this list of filters.
- Click the "View chart in Microsoft Excel..." button to launch Microsoft Excel that shows the chart based on the items you selected.
- Once you have the chart created in Microsoft Excel, you can modify the chart types (using the "Chart | Chart Type menu"), colors, text etc. to format the chart to your needs.

Please note that you cannot use this feature if you don't have Microsoft Excel installed on your PC.

Analytic Reports

Many times you will want to analyze your support data while being able to change your parameters interactively and see the results of such analysis.

With FrontSupport you can create such interactive analytical reports based on the PivotTable reports in MS Excel. An Excel PivotTable report is an interactive table that you can use to quickly summarize large amounts of data. You can rotate its rows and columns to see different summaries of the source data, filter the data by displaying different pages, or display the details for areas of interest.

When to use a PivotTable report Use this Excel PivotTable report when you want to compare related totals, especially when you have a long list of figures to summarize and you want to compare several facts about each figure. Use PivotTable reports when you want Excel to do the sorting, subtotaling, and totaling for you. Because a PivotTable report is interactive, you can change the view of the data to see more details or calculate different summaries.

To create a interactive analytical report based on Excel's PivotTables, do the following:

- Select Tools | Reports & Charts command. Click on the “Analytic Reports” tab.
- Select one or more reports from the list.
- Keep the option "Use of the below filters..." unchecked if you want to generate a report based on all the issues in the database. If you want the chart to be based on selected issues, check the option "Use of the below filters..." and choose one of the filters that selects the issues that you want. You can use the "Tools | Filters" command to manage this list of filters.
- Click the "View Report..." button. This will launch MS Excel with the reports. In MS Excel spreadsheet that is launched, there are multiple worksheets. You can see the worksheet list towards the the bottom left corner of the Excel window.
- The "Source Data" worksheet contains the data that is used as a basis for the PivotTables. For each report, there will be one worksheet. For example, if you generate a report on the "Assigned To" field, you will see a worksheet with the "Assigned To" name.
- In each of the worksheet, you will see a PivotTable based on the fields that come from your FrontSupport data. You can use the field drop downs to filter the rows appropriately and immediately see the results. Because the results change instantly, you can easily change different values and view results to dynamically analyze your data.

TIP If you want to manually create a PivotTable based on other fields from your FrontSupport data, do the following:

- Go to the main issue list window in FrontSupport.

- Select the “File | Export to Excel...” command. This will launch Excel and load all the FrontSupport data in MS Excel.
- In Excel, select one of the data cells in this Excel sheet.
- In Excel, select the “Data | PivotTable and Pivot Chart Report”. In the dialog click the Finish button. This creates a worksheet with a blank pivot table.

Now drag and drop the fields from the PivotTable toolbar into the empty pivot table. This creates a PivotTable report.

Please note that you cannot use this feature if you don't have Microsoft Excel installed on your PC. For more details on PivotTables, please refer to the MS Excel documentation.

Find Issue command (Tools Menu)

Use this command to go to the Issue search toolbar in the main Issue List window so that you can search for issues that contain a particular keyword or a phrase.

If you need to search among issues based on multiple conditions, you can use Filters feature.

Find Contact command (Tools Menu)

Use this command to go to the Contact search toolbar in the main Contact List window so that you can search for contact using the contact name or company name.

Attach Issue command (Tools Menu)

Using this menu item, you can attach Issue records to Contact record. In the "Attach Issue" dialog, enter the Issue Id of the issue to be attached to the current contact. When you enter the Issue Id and press OK, this issue will be attached to the currently open contact.

Detach Record command (Tools Menu)

Using FrontSupport, you can attach Issue records to Contact records and vice-a-versa (i.e. Contact records can be attached to Issue records). Use this command to detach a record if it is attached to another record.

Refresh Issue Data (Tools Menu)

Use this command to re-read all the issue data from the database (i.e. refresh data from the database).

Refresh All Data (Tools Menu)

Use this command to re-read all the issue and contact data from the database (i.e. refresh data from the database).

Launch ACT! (Tools Menu)

Use this command to launch ACT! from within FrontSupport. Note that this command works only if ACT! is installed on your PC. If ACT! cannot be found on your PC, this command stays disabled.

Launch GoldMine (Tools Menu)

Use this command to launch GoldMine® from within FrontSupport. Note that this command works only if GoldMine® is installed on your PC. If GoldMine® cannot be found on your PC, this command stays disabled.

Activate ACT!/GM's Contact (Tools Menu)

Use this command when you want FrontSupport to show the same contact that you are currently viewing in ACT! or GoldMine. When you use this command, FrontSupport communicates with ACT! or GoldMine, finds out the currently active contact in ACT! or GoldMine and immediately loads the same contact in FrontSupport.

This command makes it easy to switch between FrontSupport and ACT! / GoldMine while viewing the same contact's data without having to search for that contact.

Activate Contact in ACT!/GM (Tools Menu)

Use this command from the contact detail window. When you use this command, FrontSupport communicates with ACT! or GoldMine to make the FrontSupport's current contact as the current contact in ACT! or GoldMine and automatically switches to ACT!/GoldMine.

This command makes it easy for you to switch to ACT! or GoldMine so that you can view the current contact's other details in the ACT! or GoldMine program.

Change Password command (Tools Menu)

FrontSupport users can change their passwords anytime using this menu item. When you select this menu item, a "User Properties" dialog appears. In this dialog you can set your new password. For more details about your permissions and privileges, consult your FrontSupportWeb administrator. For more details, refer to the User Management section of the manual.

Options command (Tools Menu)

Use the Options command to bring up the Options dialog that lets you configure the way you would like to use FrontSupport.

General Tab

Confirm while deleting records

Select this check box so that FrontSupport will prompt every time you delete a record.

Draw grid lines when displaying record list

Select this check box to draw grid lines in Issue list view and Contact list view. This check box does the same function as the Draw Grid Lines command (View menu).

Issues Tab

Columns

The columns list box shows all the available columns in the Issue list view. You can select the columns that you want to see by checking the corresponding column name.

Defaults use when inserting new issues

When you create new issues in FrontSupport, defaults are used for different fields. Here you can specify the defaults that will be used when creating new issues.

Smart Issue Insert

Enable Smart Issue Insert

Lets you enable or disable the smart issue insert feature. For more details on this feature, refer to the Smart Issue Insert section.

Confirm before doing a Smart Issue Insert

If you turn ON the Smart Issue Insert feature, you can select this checkbox so that you will be asked for a confirmation when this feature is being invoked. If you are not sure, select this checkbox and keep it ON.

Contacts Tab

Columns

The columns list box shows all the fields that are available in the Contacts list view. You can select the columns that you want to see by checking the corresponding column name.

Window Menu

Cascade command (Window Menu)

Use this command item to cascade all the open windows.

Tile Horizontally command (Window Menu)

Use this command item to arrange all the open windows one below another.

Tile Vertically command (Window Menu)

Use this command item to arrange all the open windows one next to another.

Arrange Icons command (Window Menu)

If you have any minimized (i.e. iconified) windows, Use this command item to arrange all the iconified windows one next to another at the bottom of the main window.

Help Menu

Tip of the Day command (Help Menu)

Use this command to see some useful tips for using FrontSupport.

Product Tour (Help Menu)

FrontSupport Product Tour is a PowerPoint slide show that walks you through all the important features of FrontSupport. If you are new to using FrontSupport, you are strongly recommended to watch this 15-minute Product Tour slide show.

When you select this command, the FrontSupport Product Tour dialog comes up.

- Click the “Start Tour” button to start the product tour.

- If you do not have Microsoft PowerPoint installed on your PC, click the “Download Viewer” button to launch your internet browser and download a FREE PowerPoint viewer from Microsoft website.

Help Topics command (Help Menu)

Use this command to open the online documentation for FrontSupport.

Net-Update command (Help Menu)

FrontZone Corporation periodically releases minor upgrades of FrontSupport. You can automatically download and install these minor upgrades free of charge by using the Net-Update command. Here are the steps to upgrade to a newer release:

- Make sure that you are connected to the internet through your LAN or ISP. If you are not sure, load your internet browser (e.g. Netscape, MS Internet Explorer etc.) and point it to <http://www.frontzone.com> and make sure that you can see the FrontZone website.
- Select the Net-Update command from the Help Menu that brings up the Net-Update dialog. This dialog shows the current version of FrontSupport you are running.
- Click the Check Update button to see which version of FrontSupport is available by Net-Update. This information is shown in the Net-Update Information area.
- Compare the version available to the version that you are running. If a later version is available, click the Net-Update button to start downloading the newer upgrade. If the FrontSupport program cannot connect to the FrontZone Net-Update server, you will see an error message.

Once the download is complete, a message box is displayed that lets you install the newer upgrade.

About command (Help Menu)

Use this command to display the copyright notice and version number of your copy of FrontSupport.

On the Web

FrontZone Home Page command (Help Menu)

Use this command to visit FrontZone Corporation web site at <http://www.frontzone.com>

Send Feedback command (Help menu)

Use this command to submit online feedback (i.e. suggestions, improvements, bugs etc.) on FrontZone's website.

ACT! Home Page command (Help Menu)

Use this command to visit ACT! web site at <http://www.act.com>

GoldMine Home Page command (Help Menu)

Use this command to visit GoldMine web site at <http://www.frontrange.com>

Chapter 8 Advanced Topics

Administrative Setup

The customer support/helpdesk Issues you store in FrontSupport contain fields for Product, Priority, Type, Status, Severity and Category. When you are creating a new Issue, for each of these fields, you can choose a value from a set of pre-configured values. To setup these pre-configured lists, you will use the Administrator Setup. In the Administrator dialog you can add/modify/delete values for each of the fields.

To launch this administration dialog, use the “File | Administration | Administrative Setup...” menu command.

The Administrator dialog contains multiple tabs. In all the following tabs, you can add/modify/delete the entries in the list. To add a new entry, click the **New** button and type the name of the new entry. To modify an existing entry, select the item from the list and click the **Modify** button. This will enable you to modify the selected entry. To delete an entry, select it in the list and click the **Delete** button.

General Tab

Update GoldMine Contact history for issues Check this box so that FrontSupport will update ACT! or GoldMine® contact’s “History” tab when an issue is attached to a contact.

Update with details Check this box so that FrontSupport will update the ACT! or GoldMine’s contact’s "History" tab with all details of an issue. If this checkbox is unchecked, a brief entry is added without any details.

The idea is that when an issue is created and attached to a GoldMine® contact, you may want an entry to be created in that contact’s “History” tab within GoldMine® or the "Notes/History" tab in ACT!. When this feature is enabled, you can open the “History” tab for this contact within GoldMine® or the "Notes/History" tab within ACT! and see all the issues created for this contact and see all the issues created for this contact.

The “History” tab is updated when an issue is attached to a contact (or vice-a-versa) by Smart Issue Insert or via drag-drop. Similarly, an entry is also created in the “History” tab when an open issue is “Closed” or when a “Closed” issue is opened.

IMPORTANT:

- When FrontSupport is integrated with ACT!, the ACT!'s "Notes/History" tab is updated only if you have ACT! installed on your PC. FrontSupport uses the ACT recommended OLE Automation technology to update your ACT! database. If you do not have ACT! installed on your PC, FrontSupport cannot update ACT!'s "History" database. Also make sure that the username & password that you use with FrontSupport is the same as the one you use with ACT!.
- When FrontSupport is integrated with GoldMine^â, the "History" tab is updated ONLY when GoldMine^â is running because FrontSupport uses DDE (Dynamic Data Exchange) to communicate with GoldMine^â to update the "History" tab. If GoldMine^â is not running on your desktop when you attach a contact to an issue, the "History" tab is NOT updated. Also, it is important that the database you integrated into FrontSupport should be the same one that is open in GoldMine^â.
- Even when this option is checked, FrontSupportWeb does not update the ACT! or GoldMine database when an issue is attached to a contact using the FrontSupportWeb interface.

Next Issue Id When issues are created in FrontSupport, each issue is given a unique issue id. Issue Id's are assigned continuously (i.e. 232, 233, 234 etc.). To change the starting issue id for the next issue, use the "Modify..." button.

Users & Groups Tab You can create new FrontSupport users and user groups using the controls in this tab. For more details on this topic, refer to the "User Management" topic in chapter 2.

Products Tab This tab shows the list of Products. Later when you create a new Issue (or modify an existing Issue) within FrontSupport, you will choose a product from this list to indicate that this Issue belongs to the chosen product. Update this list to contain all the products (or services) that your company supports.

License Manager Tab In this tab, add the license keys that you received when you purchase FrontSupport.

Creating Custom Reports

Often times, when you are using a database product like FrontSupport, you need to generate reports using the data that is stored in the database. Generating reports using the FrontSupport data is very easy because all the FrontSupport data is stored in the standard MS Access database. For more details on how you can create reports, refer to the documentation on the "Tools | Reports & Charts" command. In addition, you can use any other third party reporting tool depending on your need.

IMPORTANT: Before you start using any of the following methods to generate your customer reports, please read the section Introduction to FrontSupport Database Structure to understand the FrontSupport database schema. You will also have to read and understand the database schema of the ACT! or GoldMine[®] database since you may have to join the database tables of FrontSupport and ACT! or GoldMine[®].

Using MS Excel

Excel is a very powerful tool that you can use to create the reports that you are looking for. Excel is capable of importing data from a database by directly querying the database itself. Once you import the data into Excel, you can massage the data into any form to create your reports. In fact, Excel can use the very same ODBC source that you use when running FrontSupport.

To import FrontSupport data into your Excel spreadsheet, use the **'Data | Get External Data | Create New Query'** command from within Excel. For more details on importing database data and creating reports in Excel, refer to Excel's documentation.

NOTE: To import database data into Excel, you need to have the **"MS Query"** component installed on your computer. If you don't have MS Query installed on your computer, you can install it from your MS Office CD-ROM. You may have to drill down into the installation options to find and select this component.

Using Seagate Crystal Reports

Crystal Reports is a report generation software from Seagate Corporation that is designed to generate reports data from different data sources including databases. You can use Crystal Reports to access your FrontSupport database and generate reports from this data. For more details about Crystal Reports, checkout their website <http://www.seagatesoftware.com>

Database Structures

Introduction to FrontSupport Database Structure

FrontSupport uses MS Access as its backend database to store your customer support/helpdesk issues. This means that you can use MS Access itself or other third party tools to generate reports or do other things using the database directly. Before you do anything with the database directly, you need to understand the database schema (the tables, and fields inside the tables) of the FrontSupport database. The following sections explain the details of each table inside the FrontSupport database.

NOTE: Since FrontSupport integrates with ACT! and GoldMine® database, you will also have to understand the structure of their databases. Please refer to ACT! or GoldMine® documentation for more details on their database structures.

Database Integration between ACT! / GoldMine and FrontSupport

FrontSupport integrates with ACT! or GoldMine® by integrating the underlying databases of the two systems. The integration allows FrontSupport's Issues and ACT! or GoldMine's Contacts to be attached to each other. By attaching Issues to a Contact, you can identify which issues belong to which Contact.

FrontSupport – ACT! Integration: FrontSupport stores all your Issue data in FS_ISSUES table. Each Issue is uniquely identified by its id that is stored in the ISSUEID field of this table. On the other hand, ACT! stores all its Contact data in dBASE tables. Each contact record is uniquely identified by a record id that is stored in the UNIQUE_ID field .

To implement the integration, FrontSupport uses the table FS_ISSUES_CONTACTS that stores the ISSUEID and the UNIQUE_ID pair for every Issue that is attached to a Contact (or vice-versa). For example, if a ACT! contact is attached with 3 FrontSupport Issues, there will be 3 ISSUEID - UNIQUE_ID entries in the FS_ISSUES_CONTACTS table.

If you need to access the FrontSupport data using external tools to generate reports or for some other reason, because of the way FrontSupport/ ACT! tables are integrated, you may have to do one or more of the following table joins:

<u>Table 1</u>	<u>Table 2</u>	<u>Join using the field</u>
FS_ISSUES	FS_ISSUES_CONTACTS	ISSUEID
FS_ISSUES_CONTACTS	ACTDB	UNIQUE_ID

FrontSupport – GoldMine Integration: FrontSupport stores all your Issue data in FS_ISSUES table. Each Issue is uniquely identified by its Issue Id that is stored in the ISSUEID field of this table. On the other hand, GoldMine® stores all its Contact data in CONTACT1 and CONTSUPP tables. Each contact record is uniquely identified by a record id that is stored in the RECID field of CONTACT1 and CONTSUPP tables.

To implement the integration, FrontSupport uses the table FS_ISSUES_CONTACTS that stores the ISSUEID and the RECID pair for every Issue that is attached to a Contact (or vice-a-versa). For example, if a GoldMine® Contact is attached with 3 FrontSupport Issues, there will be 3 ISSUEID-RECID entries in the FS_ISSUES_CONTACTS table.

If you need to access the FrontSupport data using external tools to generate reports or for some other reason, because of how the FrontSupport/ GoldMine® tables are integrated, you may have to do one or more of the following table joins:

<u>Table 1</u>	<u>Table 2</u>	<u>Join using the field</u>
FS_ISSUES	FS_ISSUES_CONTACTS	ISSUEID
FS_ISSUES_CONTACTS	CONTACT1	RECID
FS_ISSUES_CONTACTS	CONTSUPP	RECID

Table: FS_ISSUES

Description: The FS_ISSUES table contains data for all issues that you have in your FrontSupport database.

<u>Field Name</u>	<u>Type</u>	<u>Size</u>	<u>Description</u>
ISSUEID	Number (Long)	4	Issue Id
TITLE	Text	255	Title / subject
DESCRIPTION	Memo	-	Description
PRODUCT	Text	64	Product name
CATEGORY	Text	64	Category to which the issues belongs
TYPE	Text	64	Issue type
STATUS	Text	64	Status of the issue
OPENEDBY	Text	64	Name of person who created the issue
ASSIGNEDTO	Text	64	Issue assigned to
MODIFIEDBY	Text	64	Name of the person who last modified the issue
PRIORITY	Text	64	Priority of the issue
SEVERITY	Text	64	Severity of the issue
NOTES	Memo	-	General notes for the issue
RESOLUTION	Memo	-	Details for the resolved issue
OPENEDDATE	Date/Time	8	Issue was opened on this data
MODIFIEDDATE	Date/Time	8	Issue was last modified on this date
CLOSEDBY	Text	128	Name of the person who closed the issue
CLOSEDDATE	Date/Time	8	Issue was closed on this date
CLOSED	Yes/No	1	Indicates if the issue is closed

Table: FS_FILTERS

Description: The FS_FILTERS table contains data for all the filters that you have in your FrontSupport database.

<u>Field Name</u>	<u>Type</u>	<u>Size</u>	<u>Description</u>
NAME	Text	255	Filter Name
NOTES	Text	255	Notes for the filter
EXPRESSION	Memo	-	Expression for the filter

Table: FS_GROUPS

Description: The FS_GROUPS table contains data for all the users groups that you have in your FrontSupport database.

<u>Field Name</u>	<u>Type</u>	<u>Size</u>	<u>Description</u>
GROUPNAME	Text	255	Name of the group
PERMISSIONS	Number (Long)	4	Permissions of this group
DESCRIPTION	Memo	-	Description

Table: FS_ISSUES_CONTACTS

Description: The FS_ISSUES_CONTACTS table contains data about which Issues belong to which Contact. This table is used in conjunction with GoldMine's CONTACT1 and CONTSUPP table.

<u>Name</u>	<u>Type</u>	<u>Size</u>	<u>Description</u>
ISSUEID	Number (Long)	4	ISSUEID field from the FS_ISSUES table
RECID	Text	15	RECID from GoldMine's CONTACT1 or CONTSUPP table.

Table: FS_STRINGS

Description: The FS_STRINGS table contains strings (lists) that are used in the FrontSupport database. When you log into FrontSupport database in Administrator mode, you can add/modify/delete lists for Product, Category, Type, Severity, Status and Priority. These lists are stored in this table.

<u>Name</u>	<u>Type</u>	<u>Size</u>	<u>Description</u>
NAME	Text	64	Name of the string
VALUE	Text	64	Value of the string

Table: FS_SYSTEM

Description: The FS_SYSTEM table contains data some system information.

IMPORTANT: Please do NOT modify any information in this table. Doing so may result in erroneous operation of the software.

<u>Name</u>	<u>Type</u>	<u>Size</u>	<u>Description</u>
VERSIONID	Number (Single)	4	Contains version id of the database
FLAGS	Number (Long)	4	Stores the various options from the "General" page of the Administrator dialog.
COMMENTS	Text	200	Some comments
NEXTISSUEID	Number (Long)	4	Id of the next Issue to be inserted
INITDATA	Memo	-	Reserved

Table: FS_USERS

Description: The FS_USERS table contains information about all FrontSupport users.

<u>Name</u>	<u>Type</u>	<u>Size</u>	<u>Description</u>
USERNAME	Number (Single)	50	Login name of the user
FULLNAME	Number (Long)	255	Full name of the user
GROUPNAME	Text	255	Name of the group to which this user belongs to
PASSWORD	Number (Long)	255	Stores the encrypted password
INITDATA	Memo	-	Reserved

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