

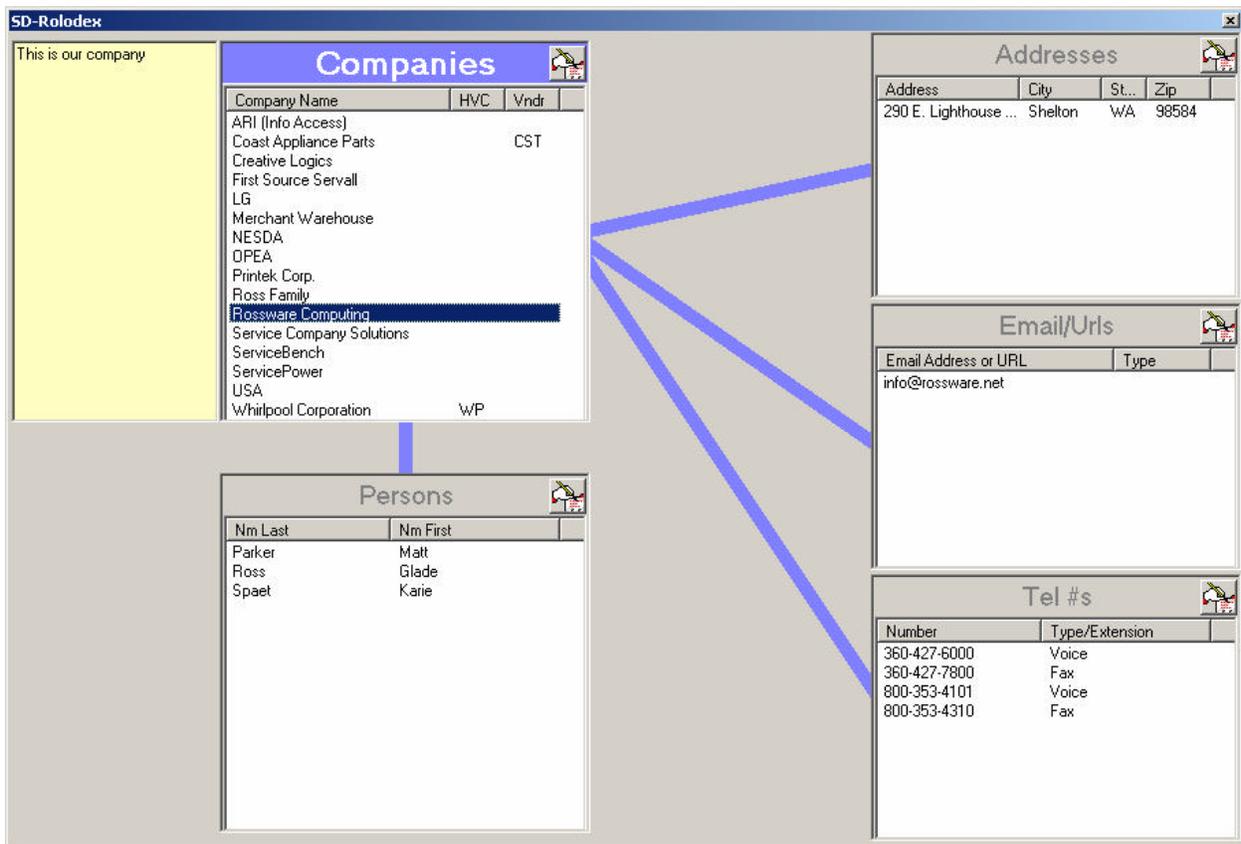
# ServiceDesk's Electronic Rolodex

## Chapter 1

### Background and General Description

The electronic Rolodex was added to ServiceDesk in February 2010. It may be accessed via *File Functions* in the MainMenu, or via the quickkey combo Shift-F3.

It's purpose is largely the same as with a standard mechanical Rolodex: to keep track of (and give you easy access to) companies, persons, addresses, emails and telephone numbers. Of course, it has many elements that make tracking management infinitely more powerful, as compared to its conventional counterpart.



As you can see, the main interface has five boxes, one for Companies, one for Persons, one for Addresses, one for Emails (and/or Urls) and, finally, one for Telephone numbers.

The general concept is that each person (as located in the Persons box) is attached to a Company (in the Company box). Each Address, Email or Telephone number may be attached to either a Person or Company (if you want to have Persons who are not attached to an actual Company, we suggest creating a faux Company called "Other Persons" or something similar).

Within any box, simply click on its AddNew button in its top-right corner (the button that sports a little AddNew icon).

You may note the system will not allow you to create anything but a Company-entry first (given that each other entry must be anchored, at least as one option, to a company). Once you have one or more Companies listed, with any Company selected you can then add listings to each of the other boxes (whether Persons, Addresses, Emails or TelNmbrs). Each such addition will attach to the Company selected. When in the Add mode, graphics change to help make it clear precisely what "parent" the new item will be attached to.

As an alternative, once one or more Persons are added in the Person's box, you can select any Person, then add (under that person's connection) as many addresses, Emails and TelNmbrs as might potentially be connected to that person. Again, during the Add process graphics change to help keep you in mind of what is connecting to what during the addition.

Please also note that when any Company or Person is selected, a large yellow note area appears to its left. You may enter any kind of miscellaneous notes in this section as you may wish — as applicable, of course, to the Company or Person selected.

## ***Chapter 2***

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### **Reviewing and Retrieving Your Data**

Once you have a reasonable quantity of entries in place, please note there are lots of handy tricks.

For example, each column of data in each of the boxes is headed with a labeling bar at its top. If you click on any such header-bar, it will instantly sort contents of the box on the column clicked. Click again and it will reverse sort. Thus, if you want to sort on Last Names in the Persons box, click on the "Nm Last" header. To reverse the sort, click again. To sort on First Names instead, click on that header, and so on.

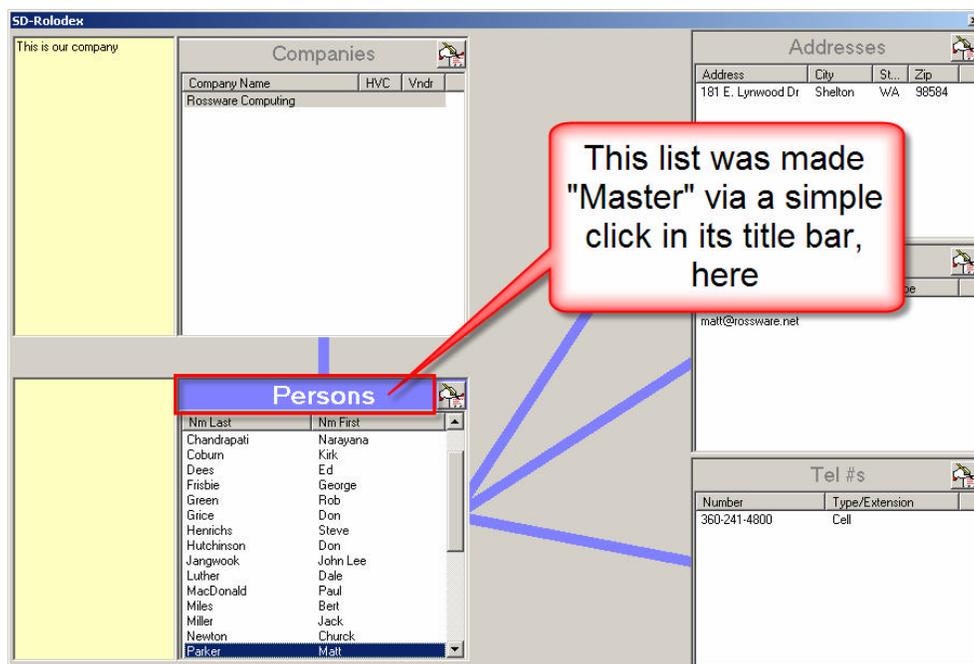
A further trick: if you have the Windows focus within a particular list and strike a letter or number key on your keyboard, it will instantly move your pointer to the place in the list that matches your keystroke. Thus, suppose you have a long list of names and want to find a person named Smith. Place your focus in the "Nm Last" column, and hit "S". That will take you instantly to names beginning with "S". Usually, if you further hit "m", it will take you to name that begin with "Sm", and so on.

Given the hierarchical manner in which the data is arranged, you'll note that in standard mode the Persons box only displays Person's that are connected with the selected Company. Furthermore, only those Addresses display that are connected with the selected Company or Person, and so on. This works great for most purposes, but suppose (for whatever reason) you want to see your entire list of Persons, or the entire List of Emails, and so on.

That's where the "MasterList" concept comes in.

In its default mode, your SD-Rolodex sets its Companies list as *Master*. What this means is, all Companies are loaded into that list, and other lists only show what's applicable to higher-in-the-hierarchy selections. That's the default mode, but is not the *only* one.

Fact is, you can make any list into the "Master" simply by clicking on its title header. You'll note, when this is done, some of the graphics change to show that box now has such "Master" status, and suddenly *all* items that are properly part of that list (whether Persons, Addresses Emails or TelNmbrs) show within it.



We think most of the time you'll likely want to keep the Companies list as Master, but whenever there's a preference to temporarily swap in another list as Master instead, just click to make it so.

## ***Chapter 3***

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### **Editing Your Data**

In general, to delete any line item in any listbox, just right-click on it (this is the normally-ruling convention within a plethora of ServiceDesk contexts that display items of text line-by-line). The one exception from this convention, within the Rolodex, is that a few columns in a few of the boxes have other functions assigned to the right-click action (see Chapter 5). Wherever that's the case (and assuming you want to delete) just assure your right-click is on a column that does not have any such special *other* function.

To edit any line item in any listbox, just double-click on it. This will open the same red box as was used to initially create a new listing, but now the box is oriented for editing instead.

## ***Chapter 4***

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### **About Particular Fields**

Most of the columns in these boxes are obvious in intended use. We'll now discuss some exceptions:

#### From the Companies List:

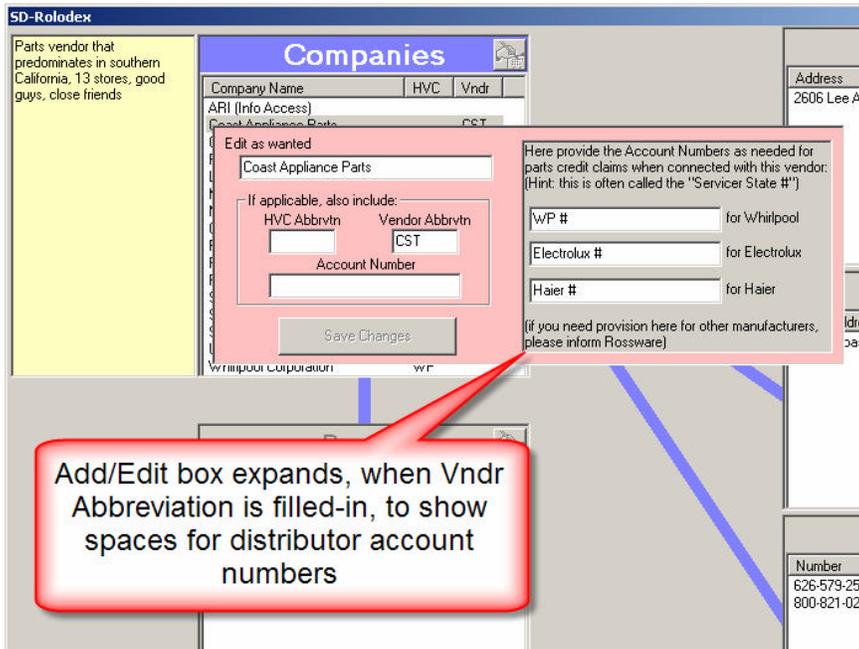
On its face, you'll note that aside from its obvious first column ("Company Name"), this box includes two narrow columns — labeled, respectively, "HVC" and "Vndr".

The first corresponds with the ServiceDesk Quick-Entry Templates where you're permitted to create an HVC (HighVolumeClient) abbreviation, for the particular clients for whom you do a large volume of jobs. The idea is, if you're listing a company here for whom you also have a Quick-Entry Template (and with an HVC abbreviation), you can include that same abbreviation, so as to tie the two together. This inclusion will also serve as an on-its-face reminder that the company is also an HVC, and of what its HVC abbreviation is.

The second narrow column in this section ("Vndr") is for companies you place in the list that happen to be parts vendors. It's to provide

the two- or three-letter abbreviation that's used, in various ServiceDesk contexts, to designate that vendor. Formerly, these vendors and their abbreviations were setup *ad hoc* via the Inventory and PartsProcess systems. Now, we intend for this SD-Rolodex to be the venue, where you specify the vendors and their abbreviations somewhat more purposefully.

When you go to add or edit a Company in the Companies list (and the red add/edit box appears), you'll notice that if you provide a Vendor abbreviation in the provided space, the overall box expands to show a new area for input.



This area is for placing in the Distributor Account Numbers (sometimes known as "Servicer State Numbers") that, for some manufacturers, must be provided with each claim for warranty reimbursement on parts (it's the account number via which the manufacturer sees the vendor in question). The intent is, when ServiceDesk fills-in the on-screen NARDA for you, it will look to see who supplied the part, then go here to see what the applicable Distributor number is, and plug that into the appropriate place of the NARDA for you.<sup>1</sup>

<sup>1</sup> Please note that with first release of the Rolodex in February 2010, this extended claims functionality has not yet been implemented. In fact, use of parts vendors (as designated within the Rolodex) has not been integrated into SD parts operations at all. That's all a next stage in the process, and we purposely want to allow a gap between first release and such integrations — so that you, the user, can have time to appropriately setup your vendors within the Rolodex, before other operations depend on the setup.

From the Persons List:

This area is totally self-explanatory.

From the Persons List:

Ditto.

From the Email/Urls List:

This box has a second column labeled "Type". The purpose of this column is to give you a place to indicate, in respect to any particular email address (and if needed), whether it's business, personal, etc. We suspect often this column will be left blank.

BTW, if you're not clear on what's meant by "Urls," it's the abbreviation for Uniform-Resource-Locator. That's the fancy title for what most people simply call a website address. The simple thinking is, besides listing email addresses here, you may also find it convenient to list websites.

From the Tel #s List:

Here again, there's nothing that's not obvious.

## ***Chapter 5***

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### **Linking Tricks**

In the Companies list, if there is a listing with an HVC abbreviation, a simple right-click on that abbreviation will instantly open the client's associated Quick-Entry Template for you.

In the Emails/Urls list, right-clicking on an email will open your default email program configured with a new mail item addressed to the email in question. Right-clicking on a website url will open the website.

In the TelNmbrs list, right-clicking on a telephone number will invoke the internal auto-dial feature.

SD-Rolodex

Parts vendor that predominates in southern California, 13 stores, good guys, close friends

Companies		HVC	Vndr
ARI (Info Access)			
Coast Appliance Parts		CST	
Creative Logics			
First Source Servall			
LG			
Merchant Warehouse			
NESDA			
OPEA			
Printek Corp.			
Ross Family			
Rossware Computing			
Service Company Solutions			
ServiceBench			
ServicePower			
USA			
Whirlpool Corporation			

WP

Addresses			
Address	City	St...	Zip
2506 Lee Avenue	So. El...	CA	91733

Email/Urls	
Email Address or URL	Type
parts@coastparts.com	

Tel #s	
Number	Type/Extension
626-570-2550	Fax
800-821-0244	Voice

right-click on an email address to open an email to that party

right-click on a HVC abbreviation to open the associated company's Quick-Entry Template

right-click on a telephone number to auto-dial