

FrontSupport 4.0 (beta) for Exchange / Outlook

Beta Guide

FrontSupport Overview

FrontSupport is a customer support / helpdesk 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.

In addition to storing and managing your customer support information, FrontSupport integrates the customer support issues with the contact information in your Exchange public contact folder.

FrontSupport's integration with Exchange

FrontSupport integrates with one of your Exchange's public contact folder so that you can see all the contact items in this public contact folder within FrontSupport. Within FrontSupport, you can then create helpdesk tickets and attach them to these contacts to indicate which contact reported which ticket. For more details on this, please see <http://www.frontzone.com/exchange>.

A note about documentation

When you install FrontSupport, the online documentation that is installed refers to how FrontSupport integrates with GoldMine and ACT! and it does NOT contain any information about Exchange / Outlook integration. This beta guide is the only documentation for Exchange / Outlook integration.

Installing FrontSupport

Just run the SETUPFS.EXE and that will install FrontSupport on your PC.

Steps to setup FrontSupport integration with Exchange

Here are the steps to setup integration between FrontSupport and your Exchange public contact folder:

- Make sure that all your customer contact information is in a public contact folder under "Public Folder\All Public Folders". You should be able to access this public folder from within Outlook. Also, do verify with your Exchange administrator that this folder has write permissions for all users. Without the read and write permissions, you will get an error.
- **Important Note:** FrontSupport uses the "User field 4" of each Exchange/Outlook contact item to track information related to FrontSupport. Please make sure that you are not using this field from the contact item. To verify it, you can open any contact item within Outlook. Within this contact item window in Outlook, select the "Miscellaneous Fields" dropdown in the "All Fields" tab. This will show the "User defined 4" field. Make sure that this field is empty because FrontSupport will write to this field
- Launch FrontSupport and click the "Setup Wizard" button in the login dialog. In the following wizard, choose the option to integrate with Exchange and follow the remaining steps.

- **Important Note about Profiles:** When using the “Setup Wizard” in the above step and when running FrontSupport, a window might pop up asking you to choose a “profile”. Choose the same profile that you use when launching Outlook. If you choose an incorrect profile (that doesn’t connect to your Exchange server) you will get an error message.

Getting started with using FrontSupport with Exchange / Outlook

Here is how you can start using FrontSupport with Exchange/Outlook integration:

- After you go through the setup wizard and setup the database, log into FrontSupport by entering the username and password in the login dialog.
- After you login, you will see the main issue window (that contains some initial sample issues) and the main contact list window (that contains the contact items from your Exchange public contact folder).
- You can double click any issue or contact item to see details of that issue or contact.
- To create a new issue for a contact, open a contact item and use the “New issue for this contact” toolbar button (the first button) in the toolbar of this contact window.
- You can also attach issues to contacts (or vice-a-versa) using drag-drop.
- To setup additional users to use FronSupport, use the “Users and Groups” tab in “File | Administration | Administrative Setup...” dialog.

The other features in the software are fairly self-explanatory once you spend a few minutes with the software.

Using FrontSupport Product Tour

Within FrontSupport, use the “Help | Product Tour...” command to launch the ‘FrontSupport Product Tour’. This PowerPoint slideshow walks you through the highlights of the product using the product screenshots. Even though this product tour illustrates GoldMine integration, the integration works almost in the same manner with Exchange / Outlook. This quick tour will help you familiarize yourself with different features of FrontSupport.

Contact FrontSupport Support

If you have any questions, please email us at support@frontzone.com.