Manual d-basics Servicedesk

1 Introduction

This document describes the use of d-basics ServiceDesk, a website that partners of d-basics can use to:

- request the installation of the d-basics software for their clients
- monitor the progress of ongoing installation

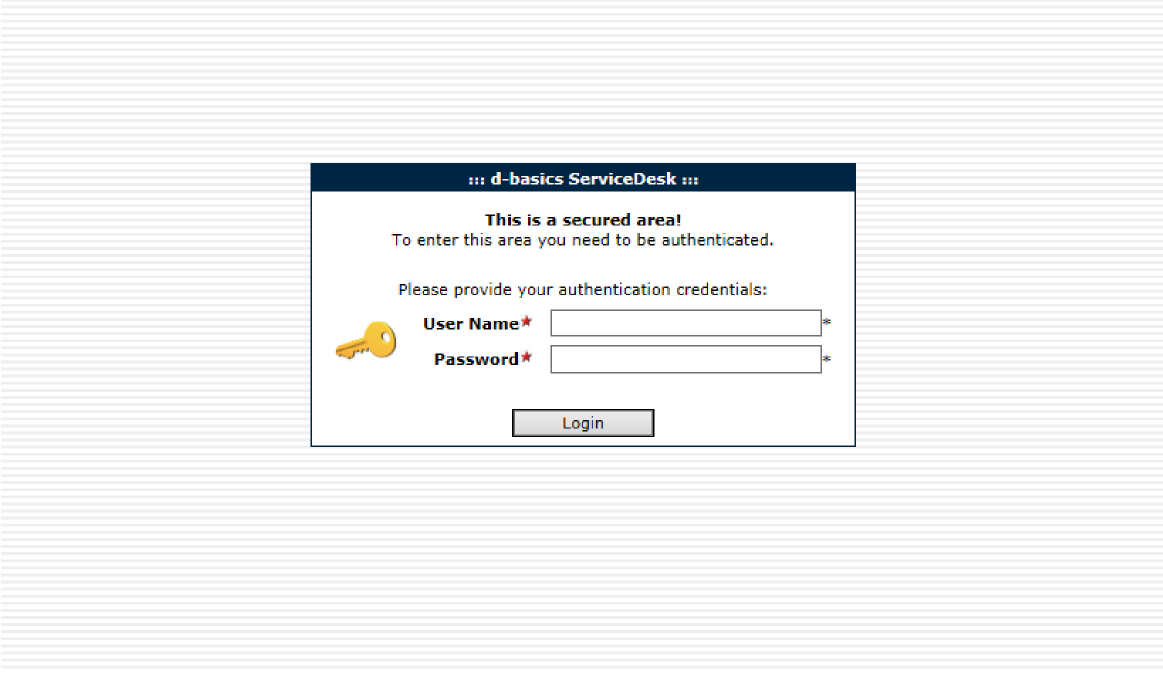
The web address of d-basics ServiceDesk is: https://servicedesk.d-basics.com.

d-basics b.v.
Tinstraat 3-5
4823AA Breda
The Netherlands

T: +31 (0)76 5239040
@: helpdesk@d-basics.com

2 Logging on

After opening the website, a user name and password must be entered to gain access to d-basics ServiceDesk.



Click on 'Login' after entering the user name and password that you received from d-basics.

Request account d-basics ServiceDesk

If you do not have a user name and password for d-basics ServiceDesk, you can send a request to create an account to helpdesk@d-basics.com.

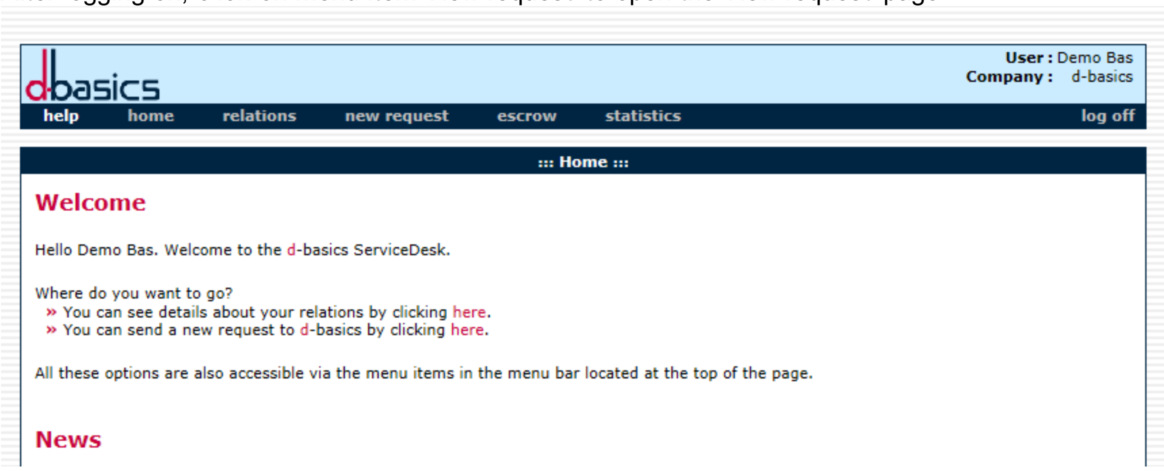
The account information will be sent to you by e-mail after d-basics has checked and approved your request.

3 Request installation

To enter an installation request, open d-basics ServiceDesk (https://servicedesk.d-basics.com) and complete the following steps:

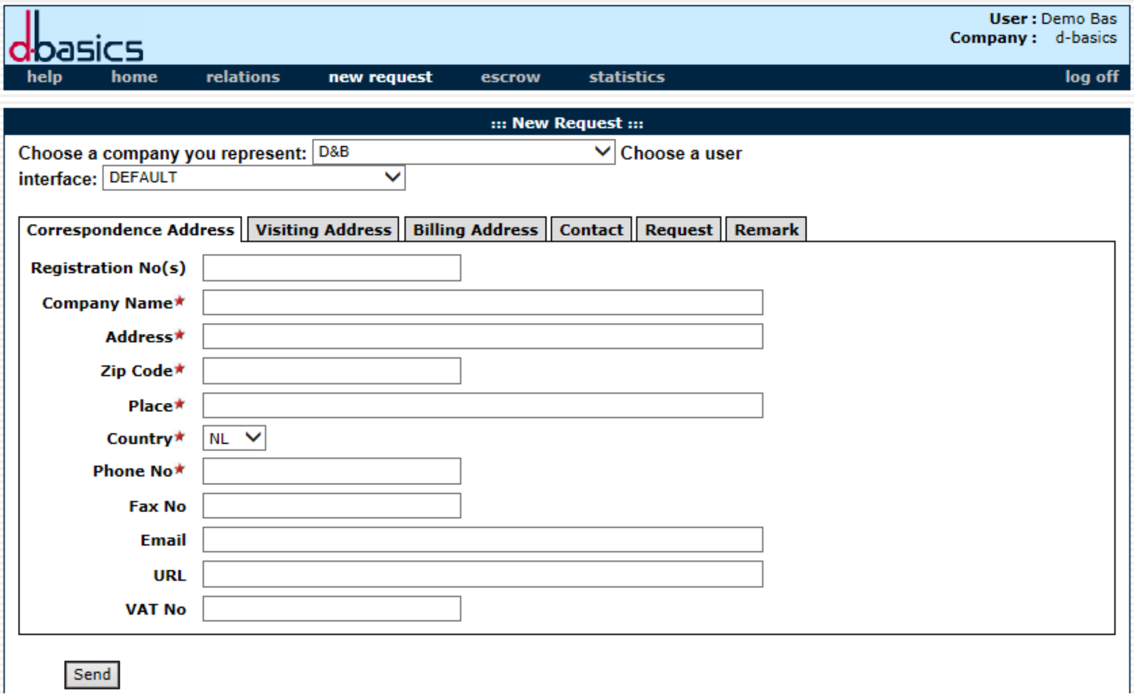
Step 1: Open 'New request page'

After logging on, click on menu-item 'New request' to open the 'New request' page.



Step 2: Enter address information

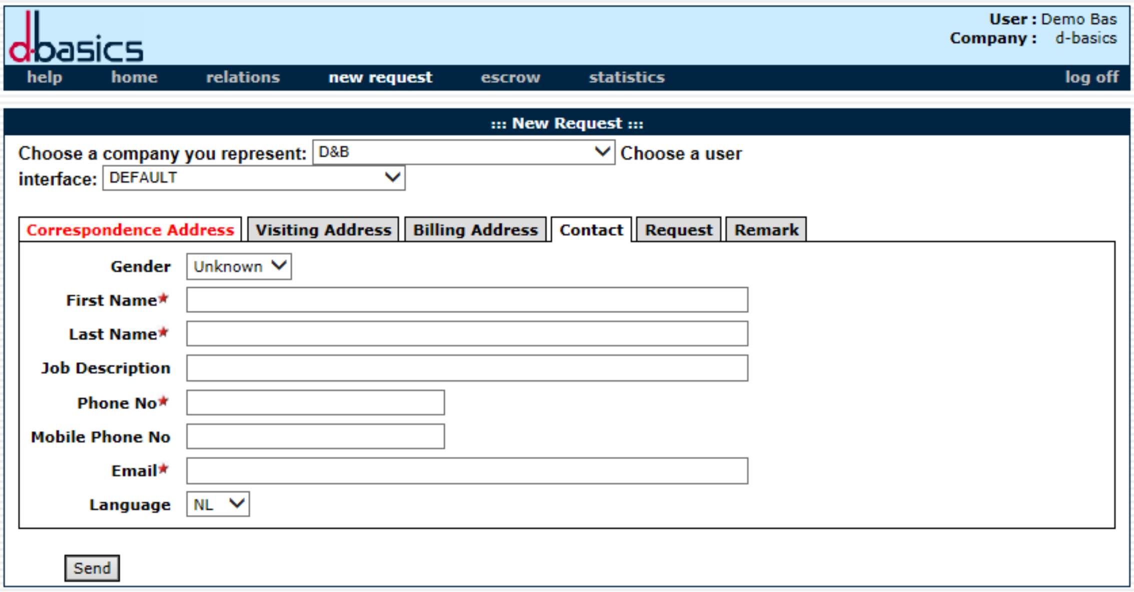
On the tab 'Correspondence address' enter the address information of the company that must receive a copy of the d-basics extraction software.



At least enter the information of those fields which are marked with a red asterisks. The tabs 'Visiting address' and 'Billing address' offer the possibility a visiting and invoice address, entering these addresses is optional.

Step 3: Entering contact person details

Entering the details of a contact person is required. Open the tab 'Contact' and enter at least the information of those fields which are marked with a red asterisks.

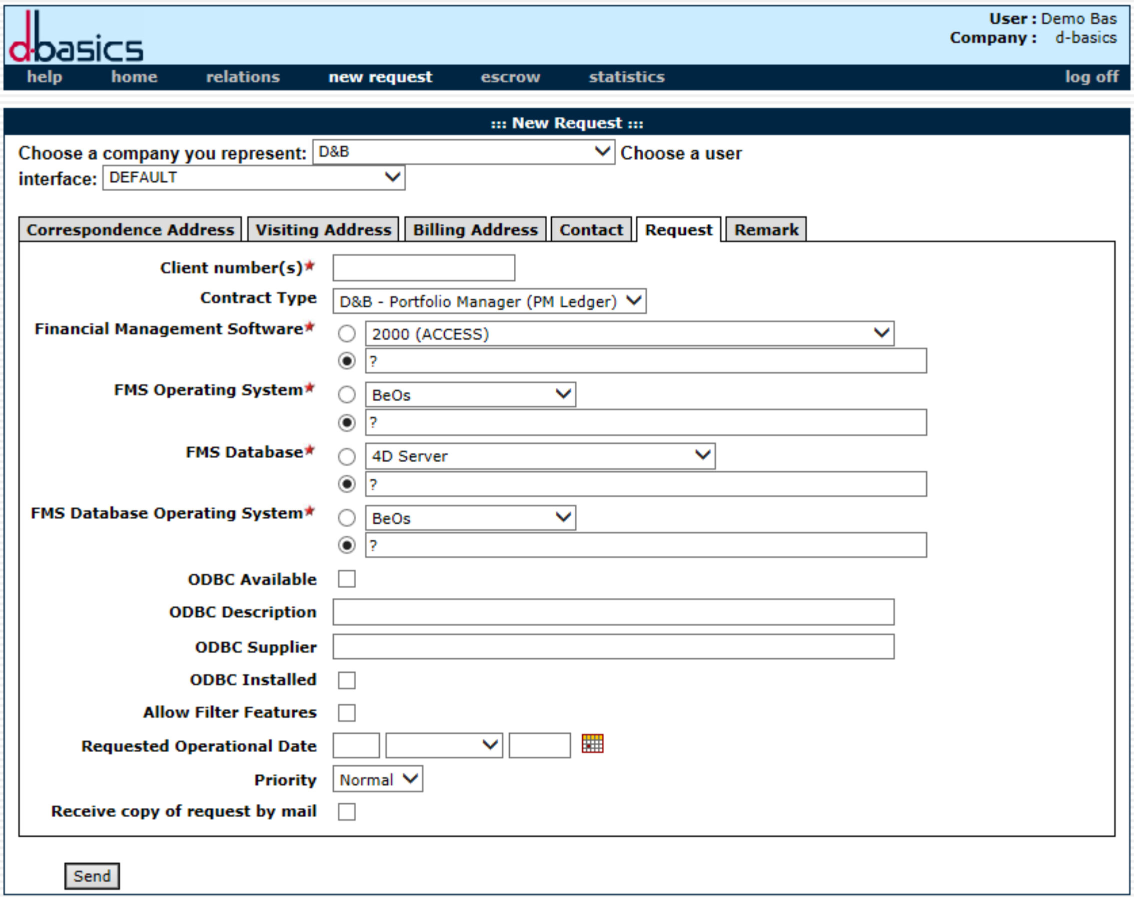


Important!

Make sure that d-basics receives the contact information of the correct contact person. This person must have sufficient user rights to install software and should - prior to sending an installation request - be well informed about the fact that software will be installed and why this software is needed.

<u>**Step 4:** Enter information accounting package</u>

The tab 'Request' offers the possibility enter some technical/operational information



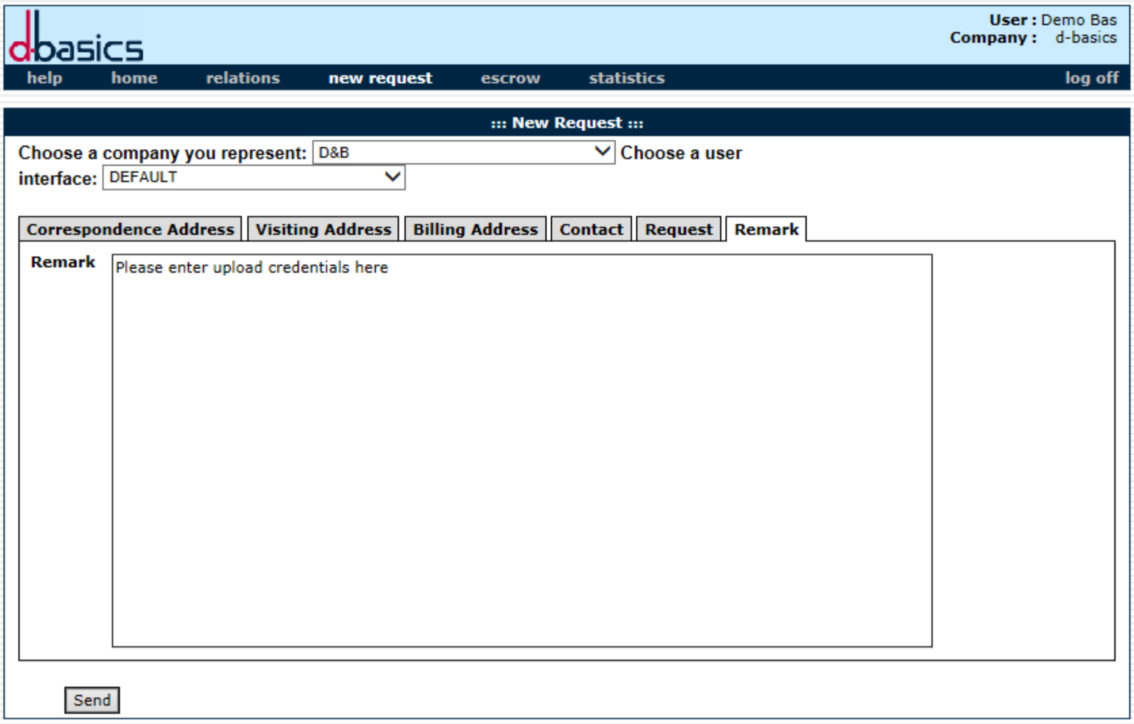
If applicable, at least enter the following information:

- client number(s)
- contract type
- Accounting package (financial management software)

If the accounting package is unknown or is not on the list of connected accounting packages, any relevant information regarding the accounting package should be entered in the text box below the pull down menu with accounting packages,

Step 5: remarks

The tab 'Remarks' offers the possibility to add additional information that is relevant for the request.



Important!

The data files created by the d-basics software can be uploaded automatically if the recipient has a portal that supports this automatic upload.
During the actual upload of data files the d-basics software has to authenticate with a user name and password.

For a quick installation and configuration of the d-basics software it is important that:

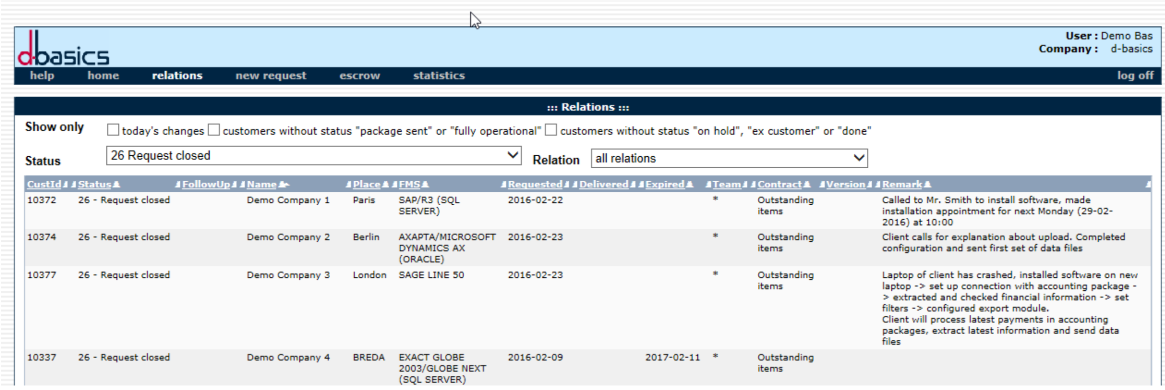
1. the user name and password for the portal of the recipient are entered in the remark field when sending a request
2. on the portal of the recipient all is prepared to receive data files from the client (create and activate account etc.).

4 Check progress installation

The menu option 'Relations' opens a list of companies for which an installation has been requested earlier.

List of companies

.



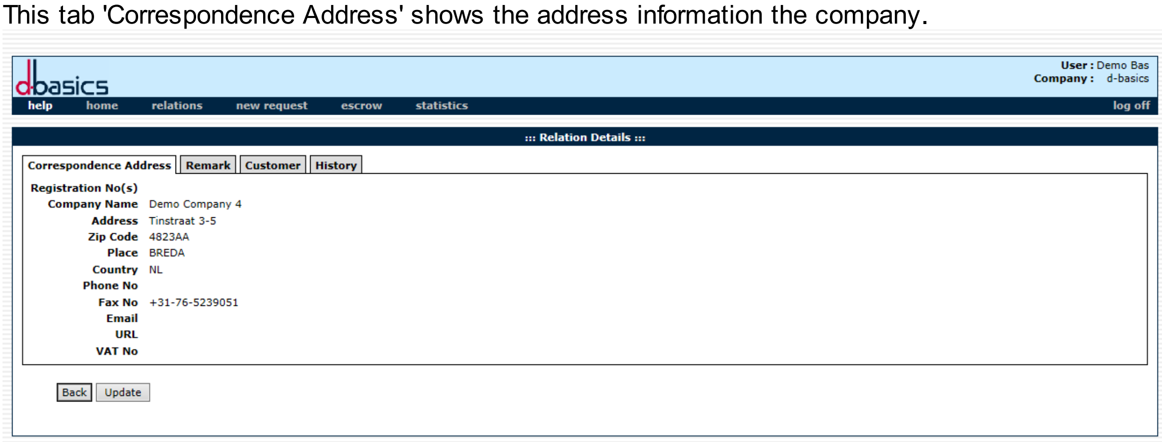
The filters above the list of companies can be used to specify which companies must be displayed. By default only active clients - either operational or not operational - are displayed.

Check company details

Click on the corresponding line in the list of companies to display the details of an individual company.

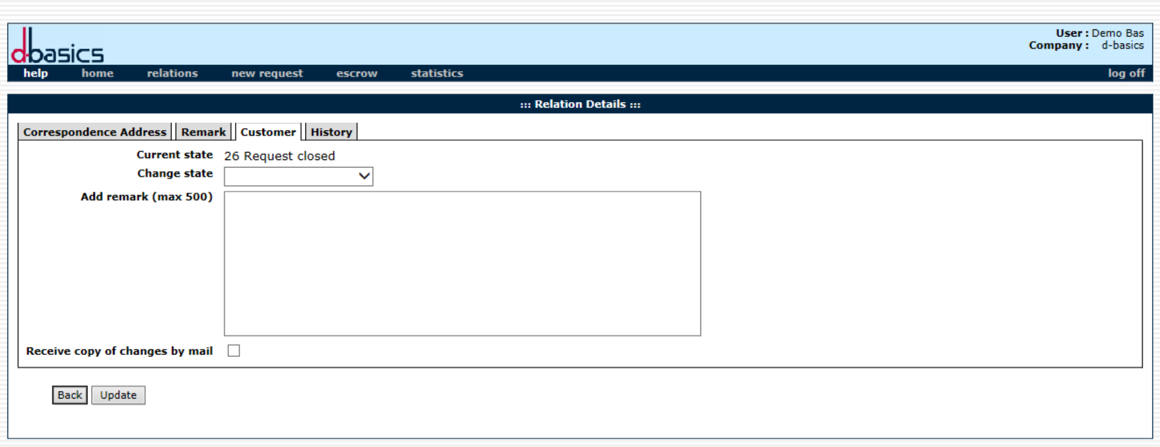
TAB CORRESPONDENCE ADDRESS

This tab 'Correspondence Address' shows the address information the company.



TAB CUSTOMER

The tab 'Customer' offers the possibility to enter remarks and to change the status of a company. Partners only have the possibility to select the status 'Software installed'.

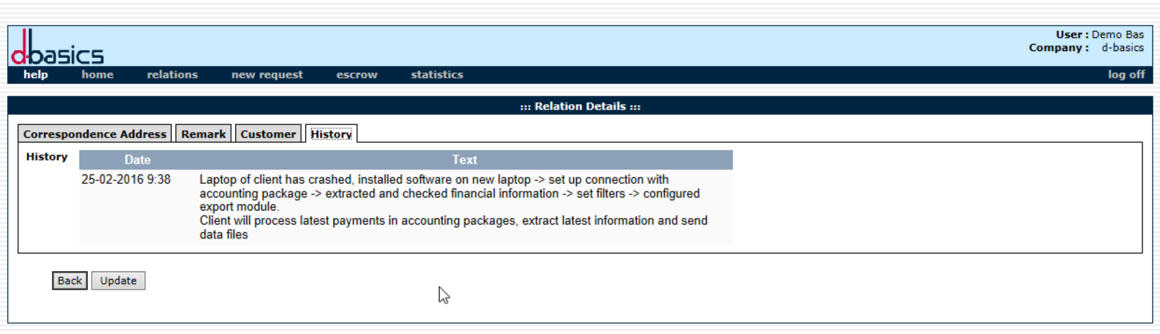


The tab 'Customer' offers the possibility to enter remarks and to change the status of a company. Partners have the possibility to select the status 'Operational', 'Customer has issue' and 'Software installed'.

Only change the status of a client if appropriate and make sure to enter all relevant additional information in the remark text-box.

TAB HISTORY

The tab 'History' contains a list of all earlier remarks (entered either by the d-basics helpdesk or a partner user of the d-basics ServiceDesk).



Remark:

Remarks are only shown if - **before opening the details of a company** - a partner is selected via the option 'Relation' (above the list of companies) .