



Manual d-basics Servicedesk

© 2018 d-basics b.v.

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.

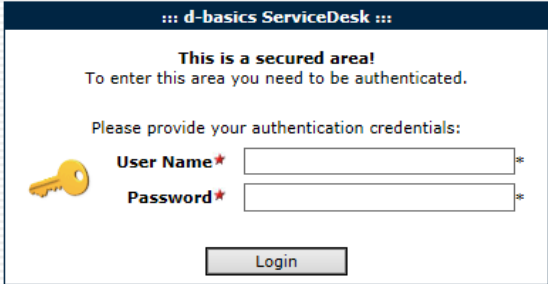
Tinstraat 3-5
4823AA Breda
The Netherlands

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.



The screenshot shows a login window titled "d-basics ServiceDesk". The window contains the following text and elements:

- Header: **::: d-basics ServiceDesk :::**
- Message: **This is a secured area!**
To enter this area you need to be authenticated.
- Instruction: Please provide your authentication credentials:
- Input fields: A yellow key icon is positioned to the left of two input fields. The first field is labeled "User Name*" and the second is labeled "Password*". Both fields have a small asterisk icon at the end.
- Button: A "Login" button is located below the input fields.

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.

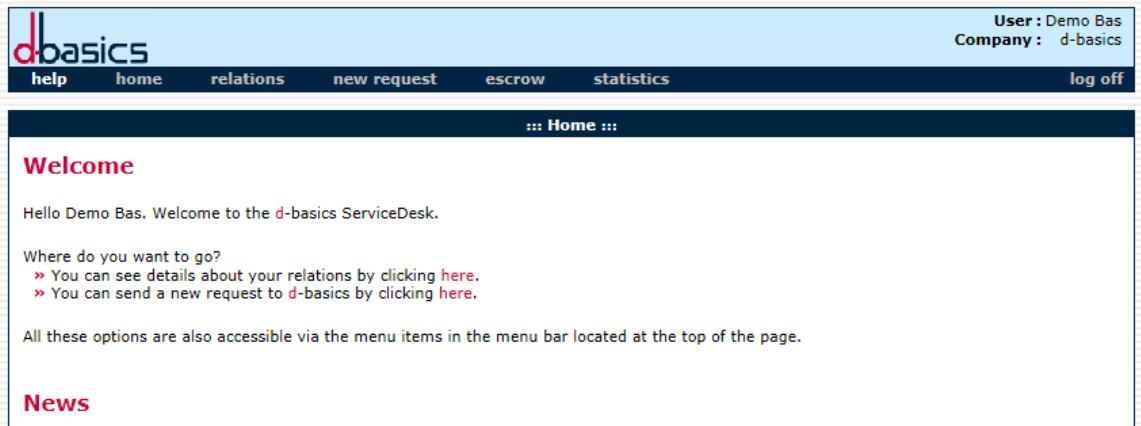
The account information will be sent to you by e-mail after d-basics has checked and approved your request.

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.



The screenshot shows the d-basics ServiceDesk interface. At the top left is the d-basics logo. To the right, the user information is displayed: 'User: Demo Bas' and 'Company: d-basics'. Below the logo is a horizontal menu bar with the following items: 'help', 'home', 'relations', 'new request', 'escrow', 'statistics', and 'log off'. The main content area is titled '::: Home :::'. It features a 'Welcome' section with the text 'Hello Demo Bas. Welcome to the d-basics ServiceDesk.' followed by 'Where do you want to go?' and two bullet points: '» You can see details about your relations by clicking [here](#).' and '» You can send a new request to d-basics by clicking [here](#).'. Below this is a note: 'All these options are also accessible via the menu items in the menu bar located at the top of the page.' At the bottom of the main content area is a 'News' section.

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.

The screenshot shows the d-basics web application interface. At the top right, it displays 'User: Demo Bas' and 'Company: d-basics'. The navigation menu includes 'help', 'home', 'relations', 'new request', 'escrow', 'statistics', and 'log off'. The main content area is titled 'New Request' and contains a form for entering company information. The form has two dropdown menus: 'Choose a company you represent:' (set to 'D&B') and 'Choose a user'. Below these is an 'interface:' dropdown (set to 'DEFAULT'). The form is divided into tabs: 'Correspondence Address', 'Visiting Address', 'Billing Address', 'Contact', 'Request', and 'Remark'. The 'Correspondence Address' tab is active, showing fields for: Registration No(s), Company Name*, Address*, Zip Code*, Place*, Country* (set to 'NL'), Phone No*, Fax No, Email, URL, and VAT No. A 'Send' button is located at the bottom left of the form.

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.

The screenshot shows the d-basics web application interface, similar to the previous one. The 'New Request' form is shown with the 'Contact' tab selected. The 'Correspondence Address' tab is also visible. The 'Contact' tab shows fields for: Gender (set to 'Unknown'), First Name*, Last Name*, Job Description, Phone No*, Mobile Phone No, Email*, and Language (set to 'NL'). A 'Send' button is located at the bottom left of the form.

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.

Step 4: Enter information accounting package

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

The screenshot shows the 'New Request' form in the d-basics interface. The form is titled 'New Request' and includes the following fields and options:

- Choose a company you represent: D&B
- Choose a user: [empty]
- interface: DEFAULT
- Correspondence Address
- Visiting Address
- Billing Address
- Contact
- Request (selected)
- Remark
- Client number(s)*: [empty]
- Contract Type: D&B - Portfolio Manager (PM Ledger)
- Financial Management Software*: 2000 (ACCESS)
- FMS Operating System*: BeOs
- FMS Database*: 4D Server
- FMS Database Operating System*: BeOs
- ODBC Available:
- ODBC Description: [empty]
- ODBC Supplier: [empty]
- ODBC Installed:
- Allow Filter Features:
- Requested Operational Date: [empty]
- Priority: Normal
- Receive copy of request by mail:
- Send button

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.

The screenshot shows the 'd-basics' web interface. At the top right, it displays 'User: Demo Bas' and 'Company: d-basics'. The navigation menu includes 'help', 'home', 'relations', 'new request', 'escrow', 'statistics', and 'log off'. The main content area is titled 'New Request' and contains several dropdown menus: 'Choose a company you represent:' (set to 'D&B'), 'Choose a user', and 'interface:' (set to 'DEFAULT'). Below these are tabs for 'Correspondence Address', 'Visiting Address', 'Billing Address', 'Contact', 'Request', and 'Remark'. The 'Remark' tab is active, showing a large text area with the placeholder text 'Please enter upload credentials here'. A 'Send' button is located at the bottom left of the form.

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

Custid	Status	FollowUp	Name	Place	FMS	Requested	Delivered	Expired	Team	Contract	Version	Remark
10372	26 - Request closed		Demo Company 1	Paris	SAP/R3 (SQL SERVER)	2016-02-22			*	Outstanding items		Called to Mr. Smith to install software, made installation appointment for next Monday (29-02-2016) at 10:00
10374	26 - Request closed		Demo Company 2	Berlin	AXAPTA/MICROSOFT DYNAMICS AX (ORACLE)	2016-02-23			*	Outstanding items		Client calls for explanation about upload, Completed configuration and sent first set of data files
10377	26 - Request closed		Demo Company 3	London	SAGE LINE 50	2016-02-23			*	Outstanding items		Laptop of client has crashed, installed software on new laptop -> set up connection with accounting package -> extracted and checked financial information -> set filters -> configured export module. Client will process latest payments in accounting packages, extract latest information and send data files
10337	26 - Request closed		Demo Company 4	BREDA	EXACT GLOBE 2003/GLOBE NEXT (SQL SERVER)	2016-02-09		2017-02-11	*	Outstanding items		

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.

Correspondence Address	Remark	Customer	History
Registration No(s) Company Name Demo Company 4 Address Timstraat 3-5 Zip Code 4823AA Place BREDA Country NL Phone No Fax No +31-76-5239051 Email URL VAT No			

Back Update

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 screenshot shows the 'Customer' tab selected in the 'Relation Details' view. The 'Current state' is '26 Request closed'. Below it is a 'Change state' dropdown menu. A large text area is provided for 'Add remark (max 500)'. At the bottom left, there is a checkbox for 'Receive copy of changes by mail'. At the bottom center, there are 'Back' and 'Update' buttons.

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).

The screenshot shows the 'History' tab selected in the 'Relation Details' view. It displays a table with the following data:

History	Date	Text
	25-02-2016 9:38	Laptop of client has crashed, installed software on new laptop -> set up connection with accounting package -> extracted and checked financial information -> set filters -> configured export module. Client will process latest payments in accounting packages, extract latest information and send data files

At the bottom left, there are 'Back' and 'Update' buttons.

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) .