



# DeskDirector

MANAGEMENT AND  
CONFIGURATION MANUAL

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## Overview

Welcome to DeskDirector, this document will outline everything you need to know about how to manage and configure DeskDirector for your clients and outline the various features we have built in.

There are two sections to this document;

1. [The Administration Console](#)

This section details the configuration around the web based Admin portal

2. [DeskDirector Feature configuration](#)

This section explains some of the specific features of DeskDirector and how they work

## SYSTEM REQUIREMENTS

Before we get started we thought we should highlight the system requirements for deploying the DeskDirector client.

The main requirement is that the PC being deployed to has Microsoft.net 3.5 installed. This was distributed with Windows 7 or Windows Server 2008 R2 and later operating systems. Equally it is commonly installed on Windows XP machines and is a common requirement for RMM (Remote Monitoring and Management) software such as LabTech.

### Hardware Requirements:

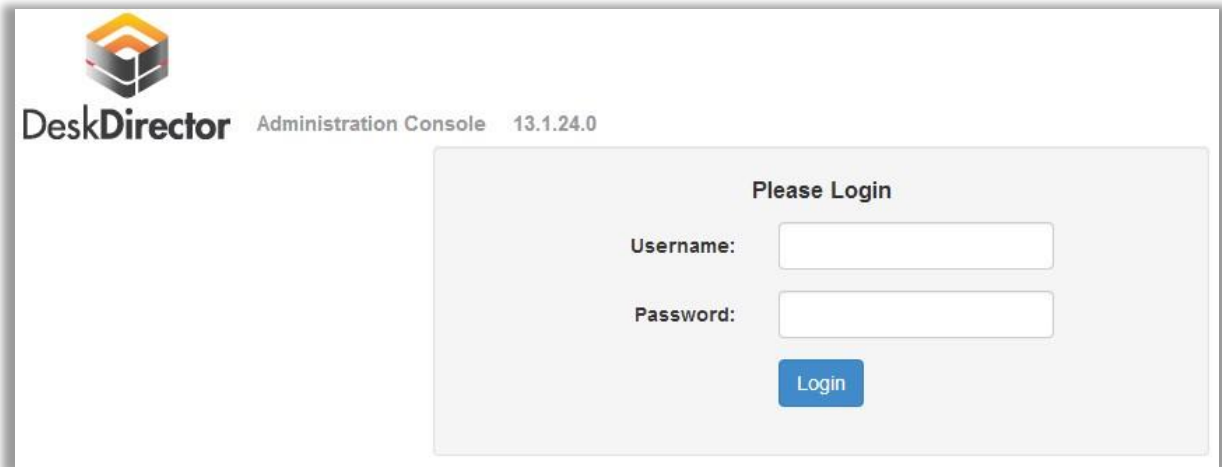
- 1 GHz or faster processor
- 512 MB of RAM
- 850 MB of available hard disk space (x86)
- 2 GB hard drive (x64)

The hardware requirements are a guide only, but you should expect DeskDirector to install and work on all but the oldest of computers.

## The Administration Console

By now we will have set everything up for you, you will now have the opportunity to make any changes to password, accounts, status's etc.

The URL for the administration console will usually be your companyname.deskdirector.com. If you would like it to be something in particular, please let us know and we can change this at any time. URL: <https://company.deskdirector.com/admin>



DeskDirector Administration Console 13.1.24.0

**Please Login**

**Username:**

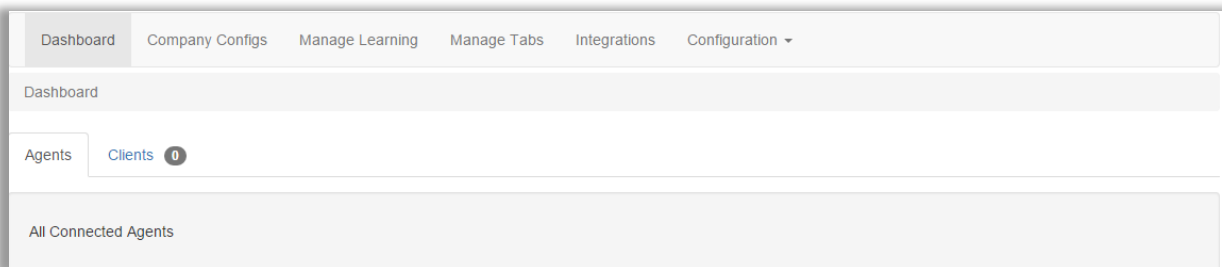
**Password:**

[Login](#)

Once you have logged in successfully using the credentials we have provided, you will be presented with 6 Tabs, we will go through each one now.

## CHAT DASHBOARD

The chat dashboard allows you as a DeskDirector admin to be able to view who is connected to the agent console to receive chats, their username, online status, version and if they have any active chats or not.



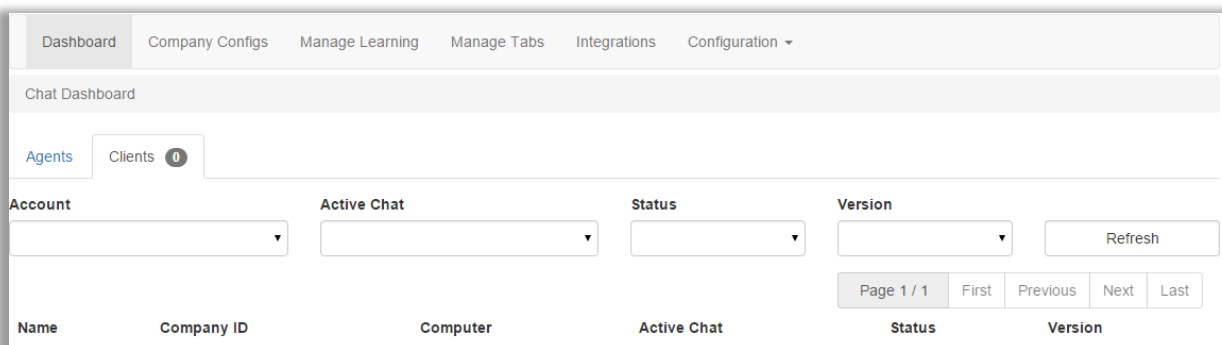
Dashboard Company Configs Manage Learning Manage Tabs Integrations Configuration ▾

Dashboard

Agents Clients 0

All Connected Agents

You are also able to view all your clients that are connected and using DeskDirector. You can filter by Company, Active Chats, Status, and Version number.



Dashboard Company Configs Manage Learning Manage Tabs Integrations Configuration ▾

Chat Dashboard

Agents Clients 0

Account  Active Chat  Status  Version  [Refresh](#)

Page 1 / 1 First Previous Next Last

Name	Company ID	Computer	Active Chat	Status	Version
------	------------	----------	-------------	--------	---------

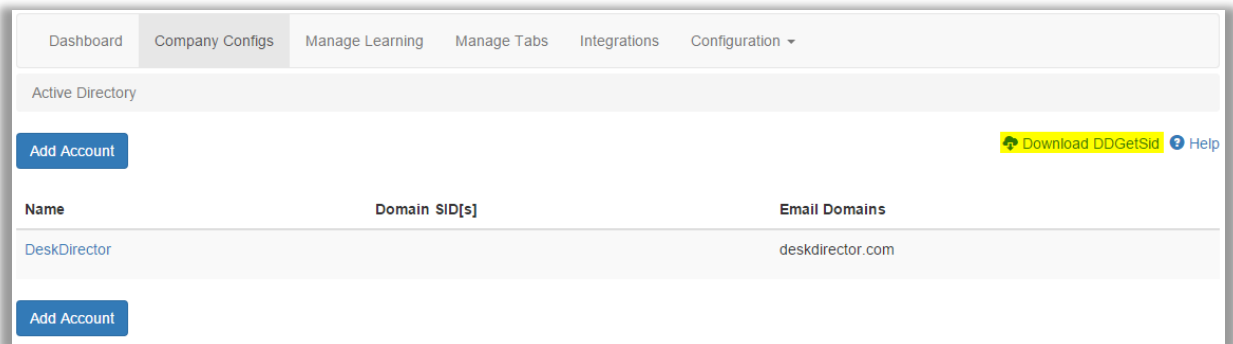
## COMPANY CONFIGS

Your clients have three ways to log into DeskDirector, the first method is the automatic login using Active Directory, the second is by using the customer's email and DeskDirector password, and the third is to use our [passwordless](#) feature.

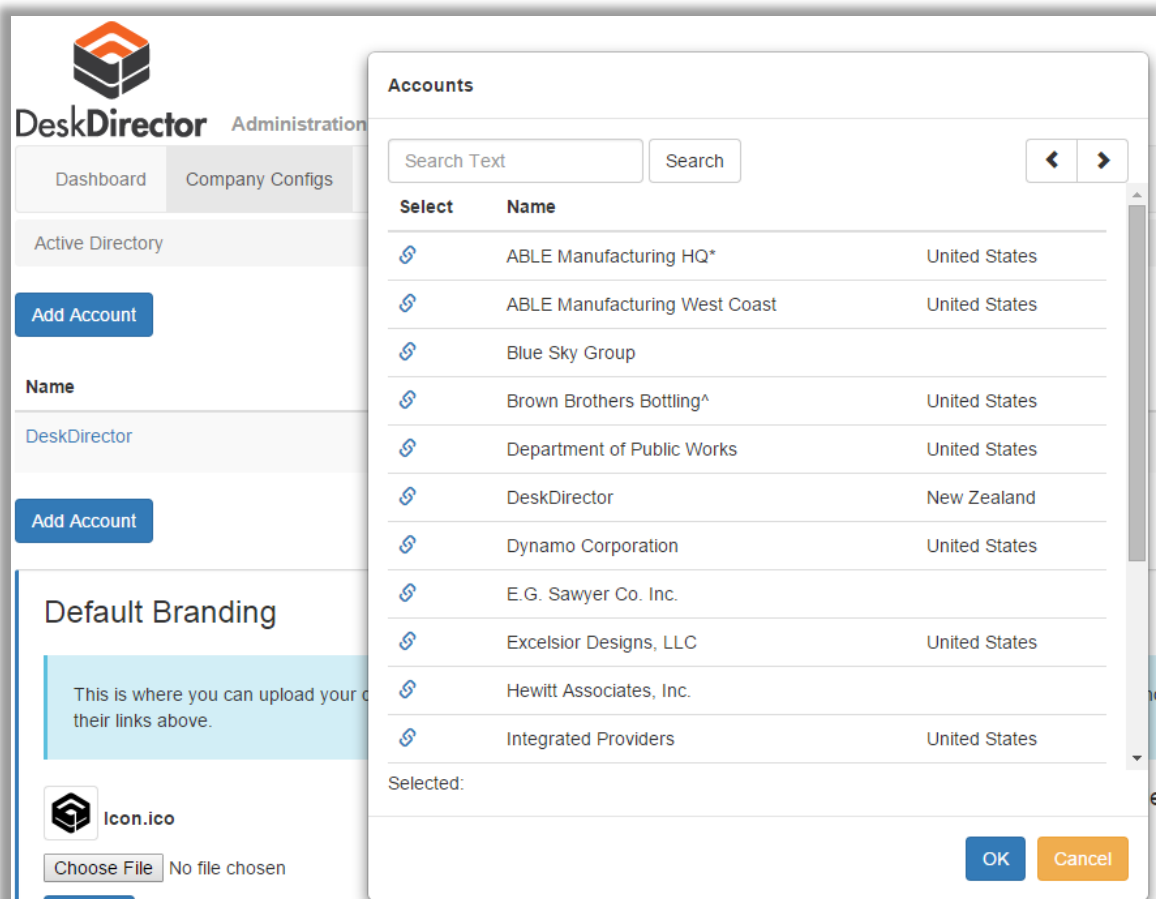
DeskDirector's Active Directory automatic login functionality works by using three components:

1. The Domain SID
2. Autotask CompanyID
3. Email address in the user's AD Profile

To obtain the Domain SID and user's email domain, we have included a tool which you can download and run. From this page download the DDGetSid.exe and run it on any machine on the client's domain. It could be an end user's computer or a server, as long as it's on the domain.



After you have the Domain SID, hit the "add account" button and add the company you want to roll DeskDirector out to.





Copy the domain SID and email domain and paste as shown below.

The screenshot shows the DeskDirector configuration interface. At the top, there is a navigation bar with tabs: Dashboard, Company Configs (selected), Manage Learning, Manage Tabs, Integrations, and Configuration. Below the navigation bar, the breadcrumb trail reads 'Active Directory / DeskDirector'. A light blue informational banner contains text about domain SID and email domains. The main content area has two sections: 'Domain SID[s]' and 'Email Domains'. The 'Domain SID[s]' section has a yellow input field with the placeholder 'COMPANY'S SID' and an 'Add' button. Below it is a table with one row: 'Domain SID' and 'Remove'. The 'Email Domains' section has a yellow input field with the placeholder 'Enter email or its domain (name@email.com)' and an 'Add' button. Below it is a table with one row: 'Email Domain' and 'Remove'. The 'Email Domain' row contains the text 'deskdirector.com' and a red circular icon with a white 'x'.

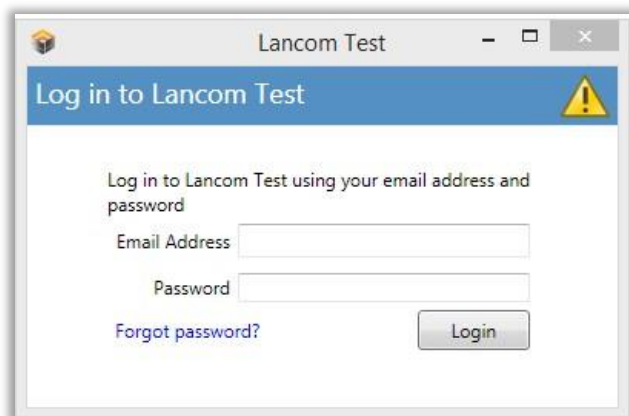
For more information on the DDGetSid tool and information on how to diagnose automatic login problems, please head over to the following link: [DDGetSID Tool](#)

If you have a RMM tool and are able to run scripts remotely, you could also run the following DS query from a domain controller to get the Domain SID:

```
dsquery * -filter (name=%computername%) -attr ObjectSID -l
```

### Things to note:

- If your customer does not have a domain controller, they will be forced to login using their portal email and [DeskDirector password](#) or use passwordless. Once a user has logged in, this will store an authentication cookie on that user's computer which will allow them to login automatically the next time and will not prompt for that password. This same behaviour will happen if your client works from out of the office, they will be presented with the same portal login/passwordless prompt.



This authentication cookie is stored in the registry under:

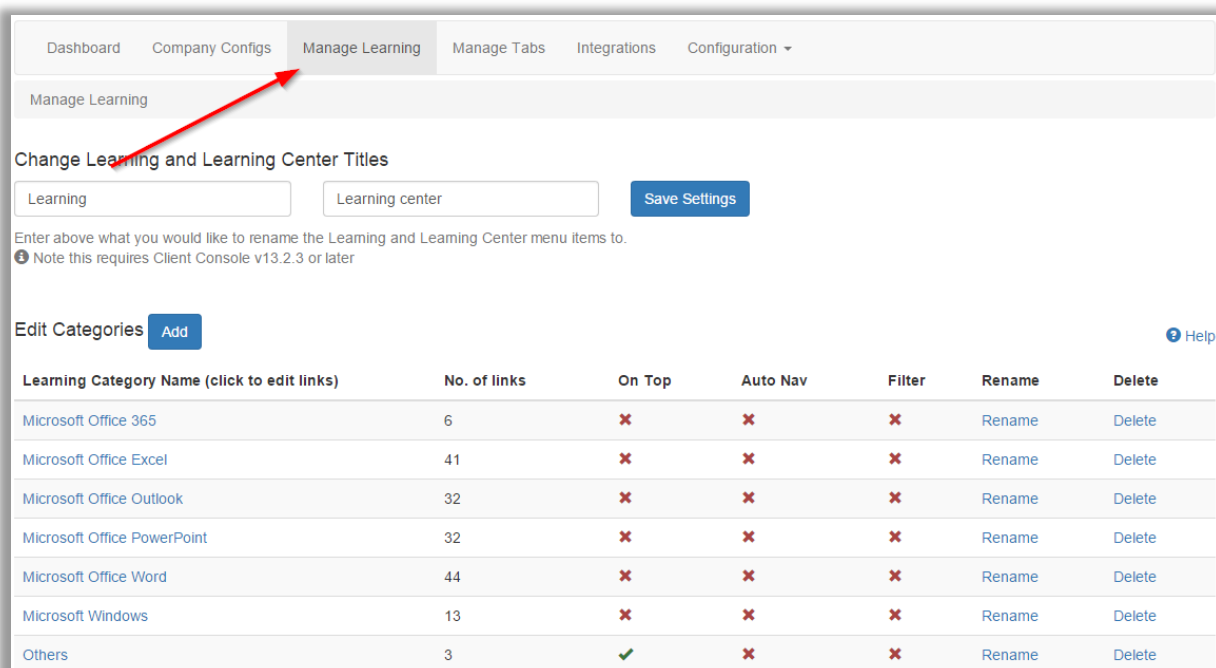
HKEY\_CURRENT\_USER > Software >  
DeskDirector > AuthCookie

This can be deleted to allow a user to re-authenticate. You can also bring up the portal prompt yourself by holding down "Shift" while opening the client, this will allow you to login as your customer with their portal credentials for testing purposes.

- DeskDirector authenticates users based on their email address, therefore the email address under the user's AD account must be present and also match the same email address that is under the contact in Autotask. For example, AD account for John Smith is john.smith@company.com. His Autotask contact must also be john.smith@company.com
- If this is different, a new contact will be created in Autotask with the user's AD email address and this will not have any ticket history etc. Similarly, there should only be one contact in Autotask with that email address.

## MANAGE LEARNING

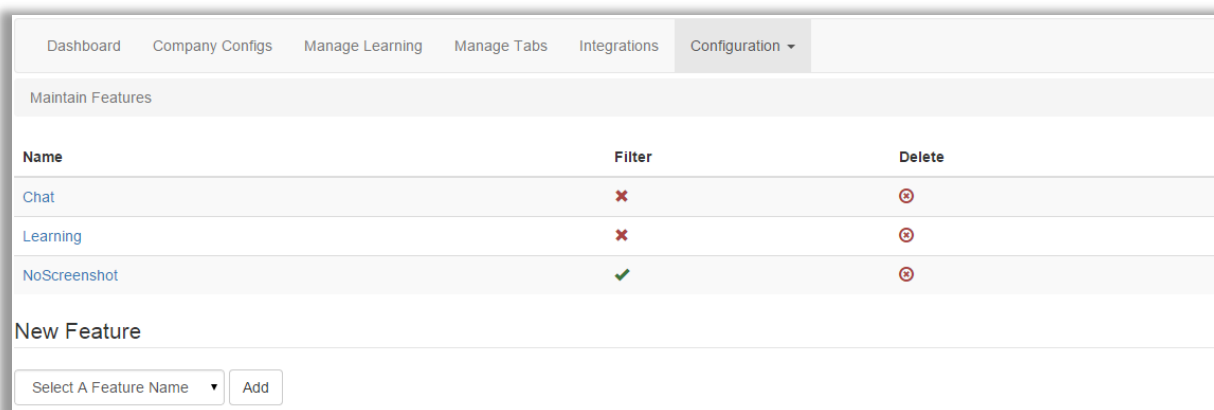
DeskDirector has a Learning Centre built in that allows you to post training and help documents, videos, PDF's, and more. As long as the linked material is available externally from a browser, the DeskDirector client will be able to embed this within the Learning Centre window.



Learning Category Name (click to edit links)	No. of links	On Top	Auto Nav	Filter	Rename	Delete
Microsoft Office 365	6	✗	✗	✗	Rename	Delete
Microsoft Office Excel	41	✗	✗	✗	Rename	Delete
Microsoft Office Outlook	32	✗	✗	✗	Rename	Delete
Microsoft Office PowerPoint	32	✗	✗	✗	Rename	Delete
Microsoft Office Word	44	✗	✗	✗	Rename	Delete
Microsoft Windows	13	✗	✗	✗	Rename	Delete
Others	3	✓	✗	✗	Rename	Delete

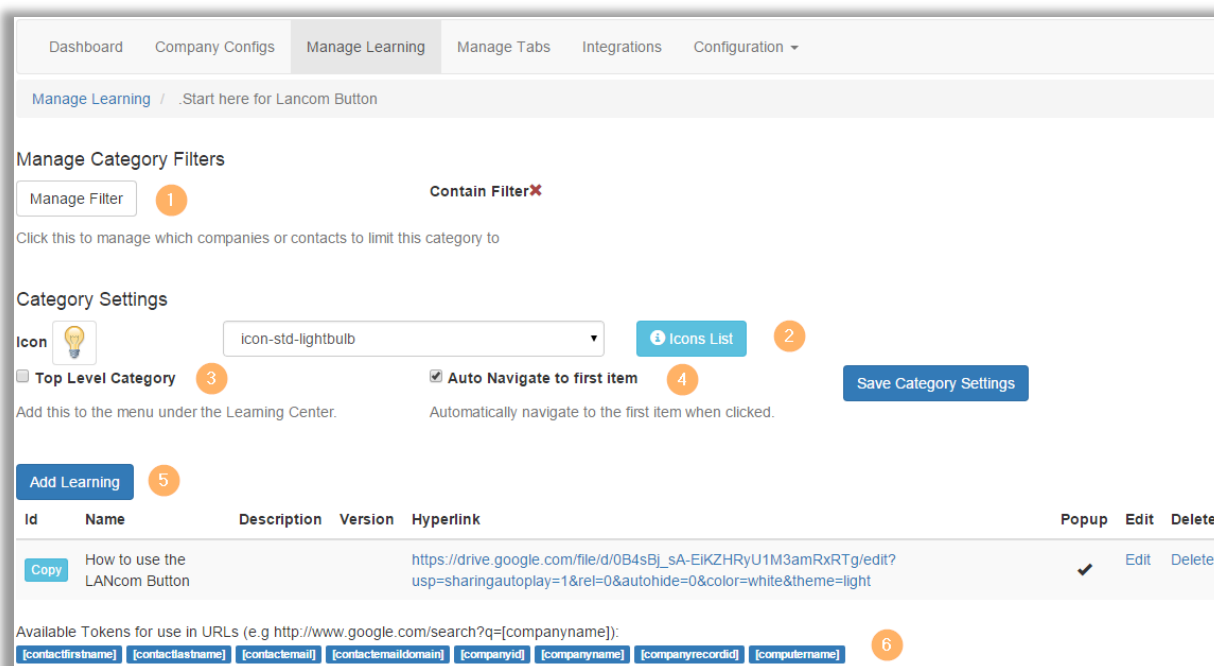


For your client to view the Learning Centre, you must enable the Learning feature on the **Configuration > [Maintain Features](#)** page.



To add a learning category, simply hit “Add” and enter the name for the category. Once this has been done, click on the category name itself (in the “manage learning” tab) to add any number of links to view from within DeskDirector.

From this screen there are some settings you can change for this category.



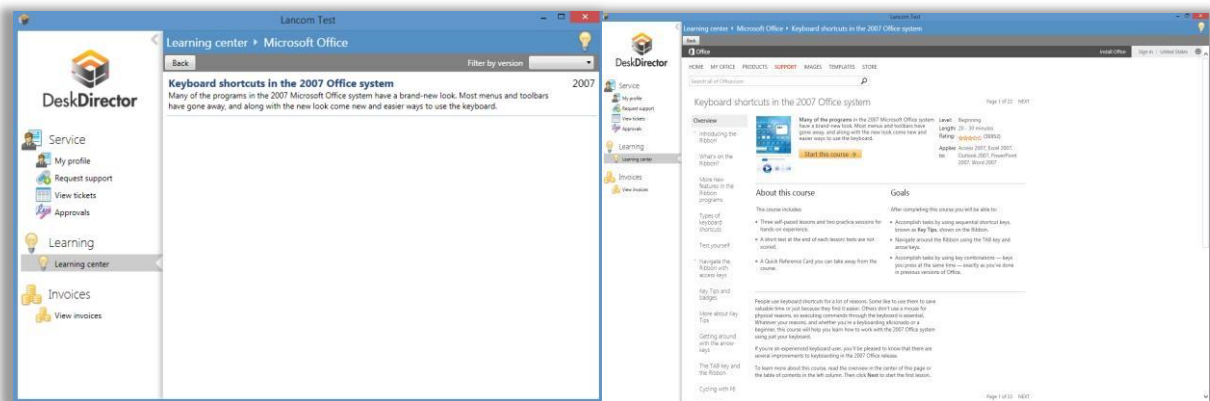
1. **Manage Filter:** this is where you can limit the category to a selection of companies *or* contacts
2. **Icon:** you can change the icon shown in the client console for this category here
3. **Top Level Category:** enabling this makes this category appear on the navigation side pane of the client console
4. **Auto Navigate to First Item:** enabling this will automatically open the first item in this category
5. **Add Learning:** click here to add a learning link to the Learning Centre. You will need to give it a name, a description, a version, and a URL.





6. **Tokens:** these can be used inside your URLs. An example use-case is a Google search for a user's company.
- [http://www.google.com/search?q=\[companyname\]](http://www.google.com/search?q=[companyname]) this will search for the current user's company.

Customer View:



## MANAGE TABS

This section configures which tabs you can access from the DeskDirector Staff HUD. There are two types of tabs; main tabs and session tabs. The difference between them is main tabs are always visible, and session tabs are visible when you have a ticket session opened.

Dashboard
Company Configs
Manage Learning
Manage Tabs
Integrations
Configuration

Manage Tabs

Main Tabs

#	Tab Name	Url	Edit	Del
0	ENG FEED	https://lancom.slack.com/messages/engineering-f...	Edit	Del
0	ENG FEED1	https://lancom.slack.com/messages/engineering-f...	Edit	Del
0	ENG FEED2	https://lancom.slack.com/messages/engineering-f...	Edit	Del
0	ENG FEED3	https://lancom.slack.com/messages/engineering-f...	Edit	Del
1	CONNECTWISE	https://connect.lancom.co.nz	Edit	Del
1	MY ACTIVITIES	https://connect.lancom.co.nz/v4_6_release/Conne...	Edit	Del
2	TIMESHEETS	https://connect.lancom.co.nz/v4_6_release/Conne...	Edit	Del

Ticket Session Tabs

#	Tab Name	Url	Edit	Del
1	IT Glue	https://lancom.itglue.com/cw/company[companyre...	Edit	Del
1	Knowledgebase	http://intranet/engwiki/Pages/[companyid].aspx	Edit	Del
1	Sharepoint	http://intranet/Clients/[companyid]/ClientLogs/...	Edit	Del
3	Google	https://www.google.com/search?q=[companyname]	Edit	Del

Tab Name

Tab Name

Type

Main Tab

Order Priority

Priority as integer number. Tabs are sorted by Priority number then by name.

Url String

Url String

Cookie

Cookie

Add New Tab

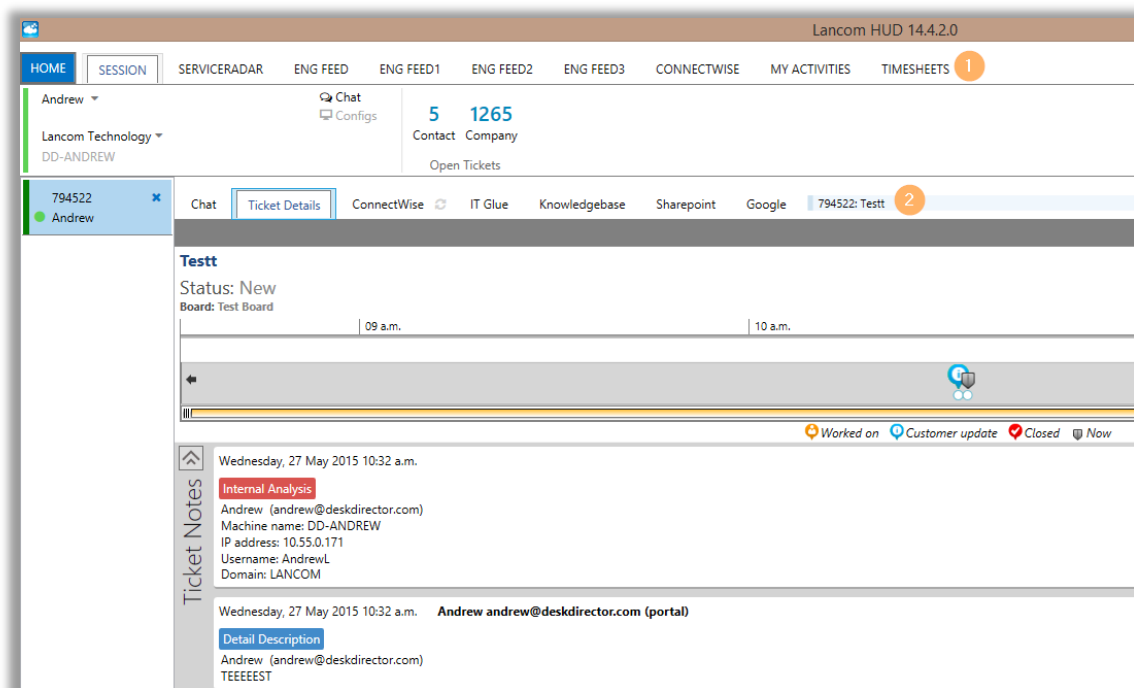
Available Tokens

Main Tabs can only accept member related tokens.

[memberid] [computename] [contactfirstname] [contactlastname] [contactemail] [contactemaildomain] [contactrecordid] [companyid] [companyname] [companyrecordid] [ticketnumber] [ticketcontactrecordid] [ticketcontactfirstname] [ticketcontactlastname] [ticketcontactemail] [ticketcontactemaildomain]



The view from the Staff HUD best illustrates the difference:



1. Main tabs
2. Session tabs

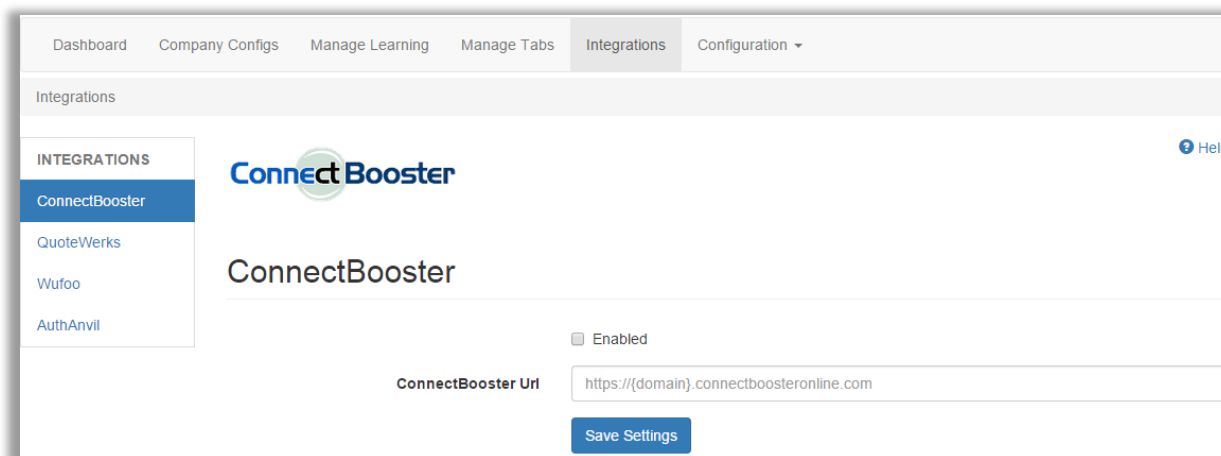
Like the Learning Centre it is possible to use tokens inside main and session tabs. The only caveat is that main tabs can only accept member related tokens.

**Note:** shown here are ConnectWise URLs – you can do the same with Autotask URLs.

## INTEGRATIONS

This section allows you to configure some of the integrations we have.

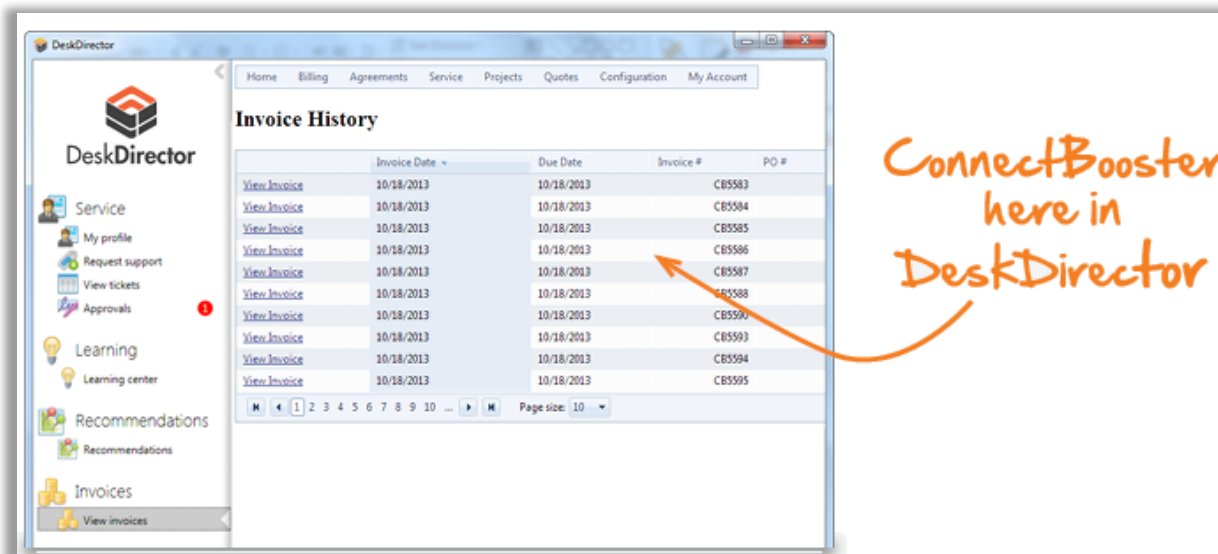
### Connectbooster



All you need to do to enable your ConnectBooster integration is to check the enable box and enter your ConnectBooster URL. This allows your customers to pay their invoices directly from the client console.



From the client's perspective:

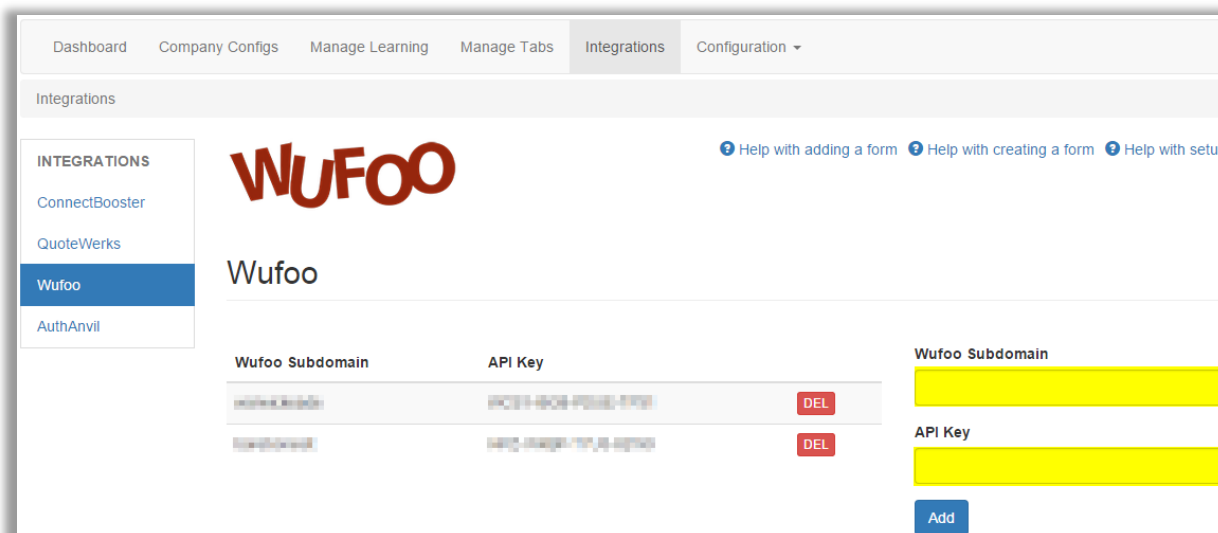


### QuoteWerks

QuoteWerks allows your customers to access and approve quotes you have created for them from inside the Client Console. Just follow [this](#) knowledge base article on how to set up the integration.

### Wufoo

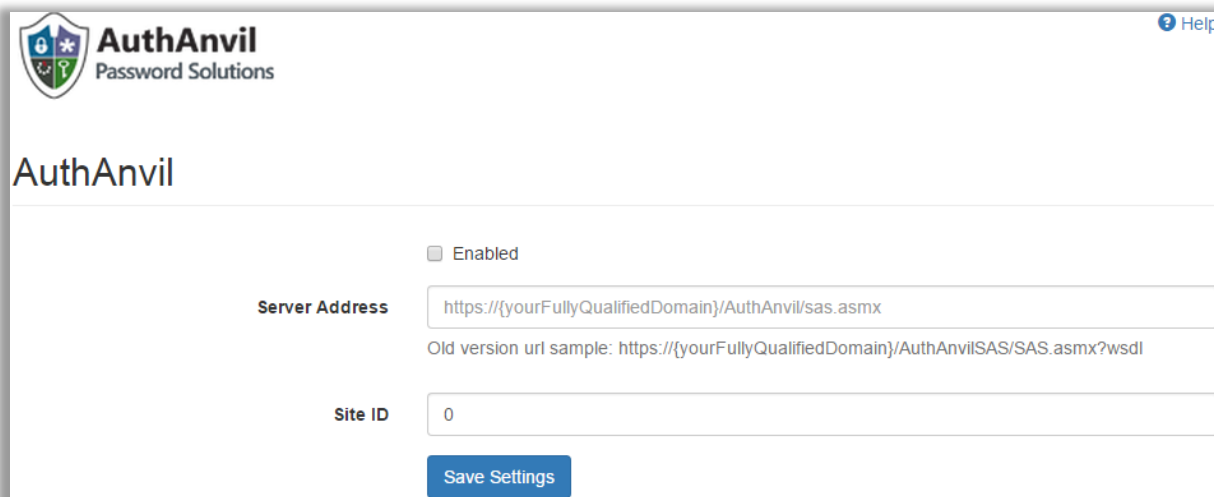
Wufoo is an online form builder. By using our integration with Wufoo your users can fill out a form to request support. This means that you can get that information that you need on the first contact but it also means your clients are guided through a structured support request. To set it up, register with [Wufoo](#), enter your API key that you get from them, and your Wufoo subdomain.



There are three helpful links on this page to help you with setting the Wufoo integration up.

### AuthAnvil

To enable two factor authentication with AuthAnvil just enter your AuthAnvil domain and site ID.



**AuthAnvil**  
Password Solutions

Help

**AuthAnvil**

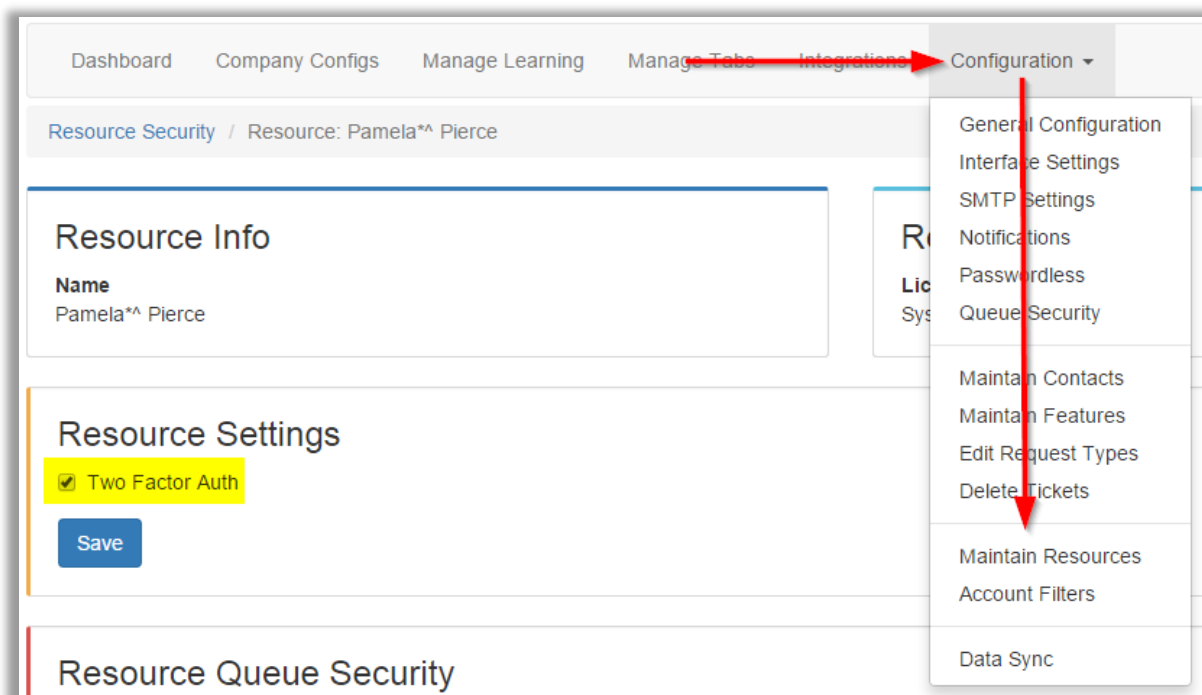
☐ Enabled

**Server Address**   
Old version url sample: https://{yourFullyQualifiedDomain}/AuthAnvilSAS/SAS.asmx?wsdl

**Site ID**

**Save Settings**

You will have to enable two factor authentication within your resource's record on the [Maintain Resources](#) page. Click on the resource's name and check the two factor authentication check box.



Dashboard Company Configs Manage Learning Manage Tabs Integrations **Configuration**

Resource Security / Resource: Pamela\*\* Pierce

**Resource Info**

**Name**  
Pamela\*\* Pierce

**Resource Settings**

☒ Two Factor Auth

**Save**

**Resource Queue Security**

**Configuration** dropdown menu:

- General Configuration
- Interface Settings
- SMTP Settings
- Notifications
- Passwordless
- Queue Security
- Maintain Contacts
- Maintain Features
- Edit Request Types
- Delete Tickets
- Maintain Resources
- Account Filters
- Data Sync

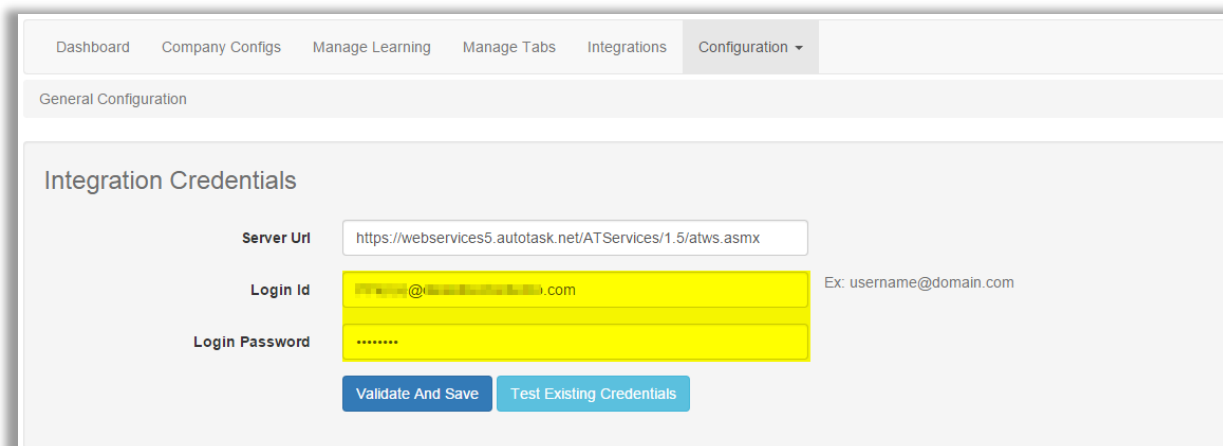
## GENERAL CONFIGURATION

This section is the heart of DeskDirector and lets you set various settings, statuses, priorities, etc.

### Autotask Integration Details

In this section, you will fill in the Autotask resource login id and password (there is no need to change the URL).

You can validate your credentials to test whether they are working by hitting the "test existing credentials" button.



Dashboard Company Configs Manage Learning Manage Tabs Integrations Configuration ▾

General Configuration

### Integration Credentials

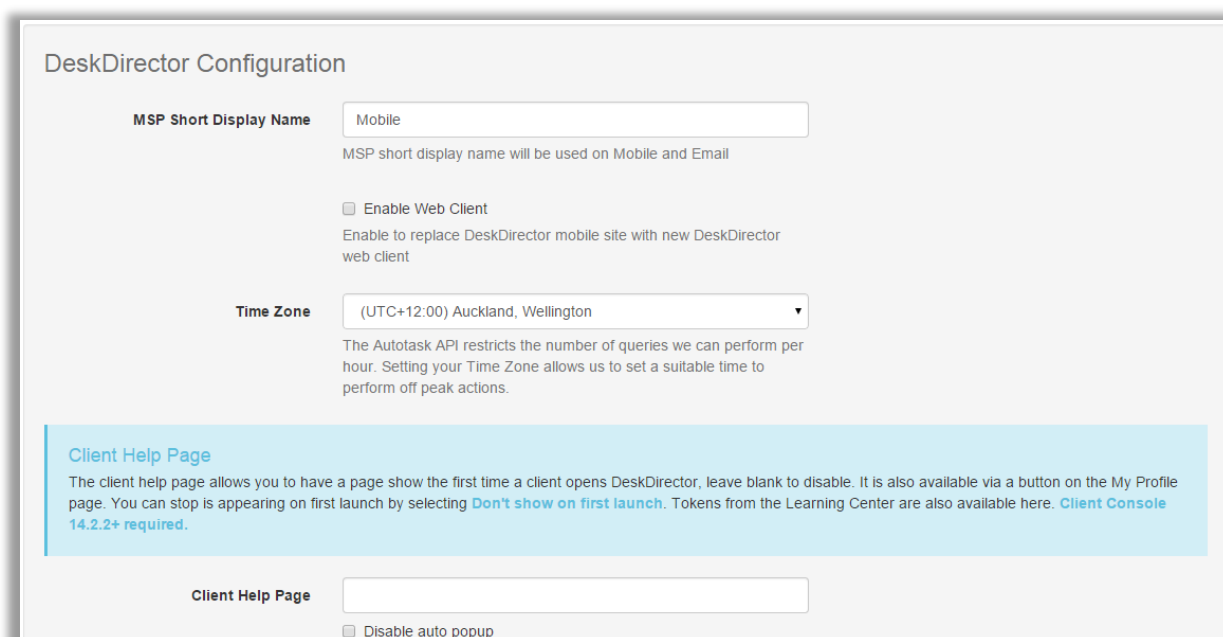
**Server Url**

**Login Id**  Ex: username@domain.com

**Login Password**

## DeskDirector Configuration

From here you can set the display name that DeskDirector web will use, your time zone – we use this to determine the best time to do off peak actions, and you can also enter a URL of a client help page which will be shown to users the first time they login to DeskDirector.



### DeskDirector Configuration

**MSP Short Display Name**   
MSP short display name will be used on Mobile and Email

☐ **Enable Web Client**  
Enable to replace DeskDirector mobile site with new DeskDirector web client

**Time Zone**  ▾  
The Autotask API restricts the number of queries we can perform per hour. Setting your Time Zone allows us to set a suitable time to perform off peak actions.

**Client Help Page**

The client help page allows you to have a page show the first time a client opens DeskDirector, leave blank to disable. It is also available via a button on the My Profile page. You can stop it appearing on first launch by selecting **Don't show on first launch**. Tokens from the Learning Center are also available here. [Client Console 14.2.2+ required.](#)

**Client Help Page**

☐ **Disable auto popup**

The Statuses and Priority below will be used to activate certain features within DeskDirector.

The VIP Priority name is the priority tickets will have when they are logged through DeskDirector by a VIP. Just select a priority from the drop-down box. **Note:** we pull these priorities and statuses from Autotask and sync them to our database, if you've made a recent change to your queues you will need re-sync the queue list.

**FASTTRACK STATUS** – This status will be used for the Client FastTrack button

**APPROVAL REQUIRED** – This status will be set for all tickets needing approval



APPROVAL GRANTED – Ticket status will be changed if it has been approved.

APPROVAL DECLINED – Ticket status will be changed if the request was declined.

CHANGE TICKET STATUS WHEN NOTE ADDED – Ticket status to put the ticket into when a note is added to the ticket.

The configuration panel includes the following sections:

- Approval Required Status:** A dropdown menu currently set to "Waiting Approval".
- Approval Granted Status:** A dropdown menu currently set to "Approved".
- Approval Declined Status:** A dropdown menu currently set to "Denied".
- Auto-Approve Options:** Two checkboxes, "Approver Auto-Approve" (checked) and "VIP Auto-Approve" (unchecked). Below them is explanatory text: "The above feature will skip the approval process if an approver/VIP is logging a ticket. The ticket will go straight to the 'granted' status as above."
- Change Ticket Status when note added:** A dropdown menu. Below it is explanatory text: "The above feature will change the status of a ticket to one of your choosing when a note is added. **Make sure you leave blank to disable.** This action won't be performed if ticket is currently in a approval related status."
- FastTrack Status:** A dropdown menu currently set to "Escalate". Below it is explanatory text: "The status used for the FastTrack action. DeskDirector will change the ticket status to the FastTrack status when a client uses the FastTrack button on a ticket".
- VIP Priority:** A dropdown menu currently set to "High". Below it is explanatory text: "Chose the priority to be used for tickets submitted by VIPs. DeskDirector will set this specific priority when they submit tickets through DeskDirector."

A "Save Configuration" button is located at the bottom of the panel.

## Re-sync Autotask Data

The interface is titled "Refresh Field Description Tables". It contains a light blue informational box with the heading "Refresh Field" and the following text: "Autotask has several related tables of information (e.g. tickets have status and priority, notes have note type). DeskDirector refreshes these on a daily basis. If you have updated those tables, (e.g. added a new ticket type or status) please select specific table and hit Refresh Fields."

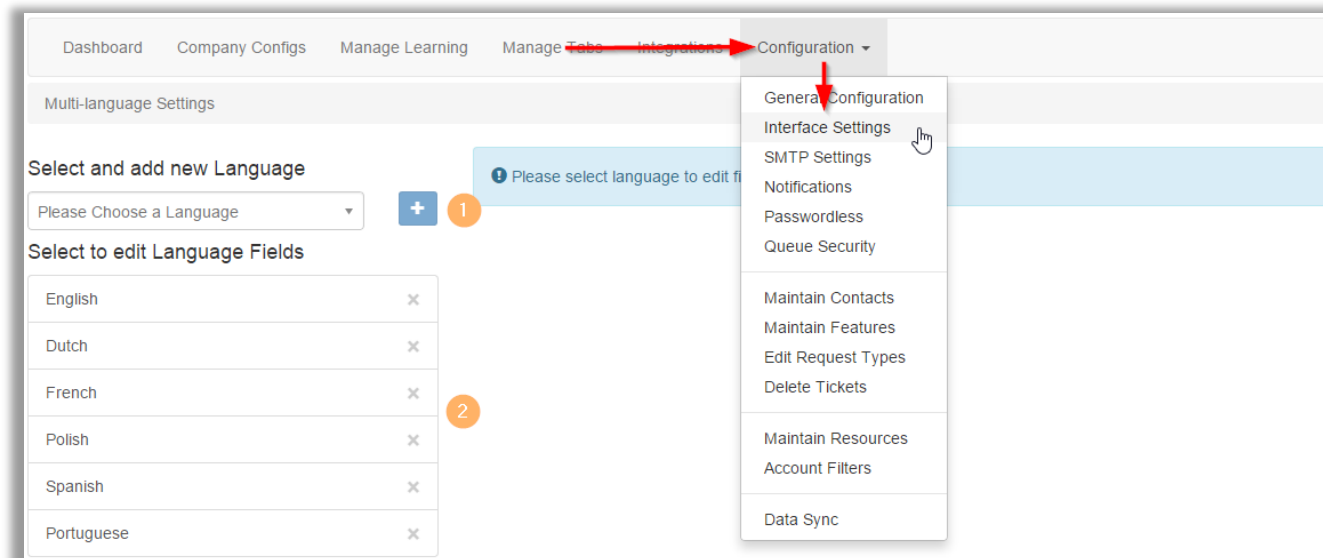
Below the box is a row of checkboxes for selecting tables to refresh: Account, Attachment, Resource, Ticket, Ticket Note, TimeEntry, and All. The "All" checkbox is currently selected.

A "Refresh Fields" button is located at the bottom left of the interface.

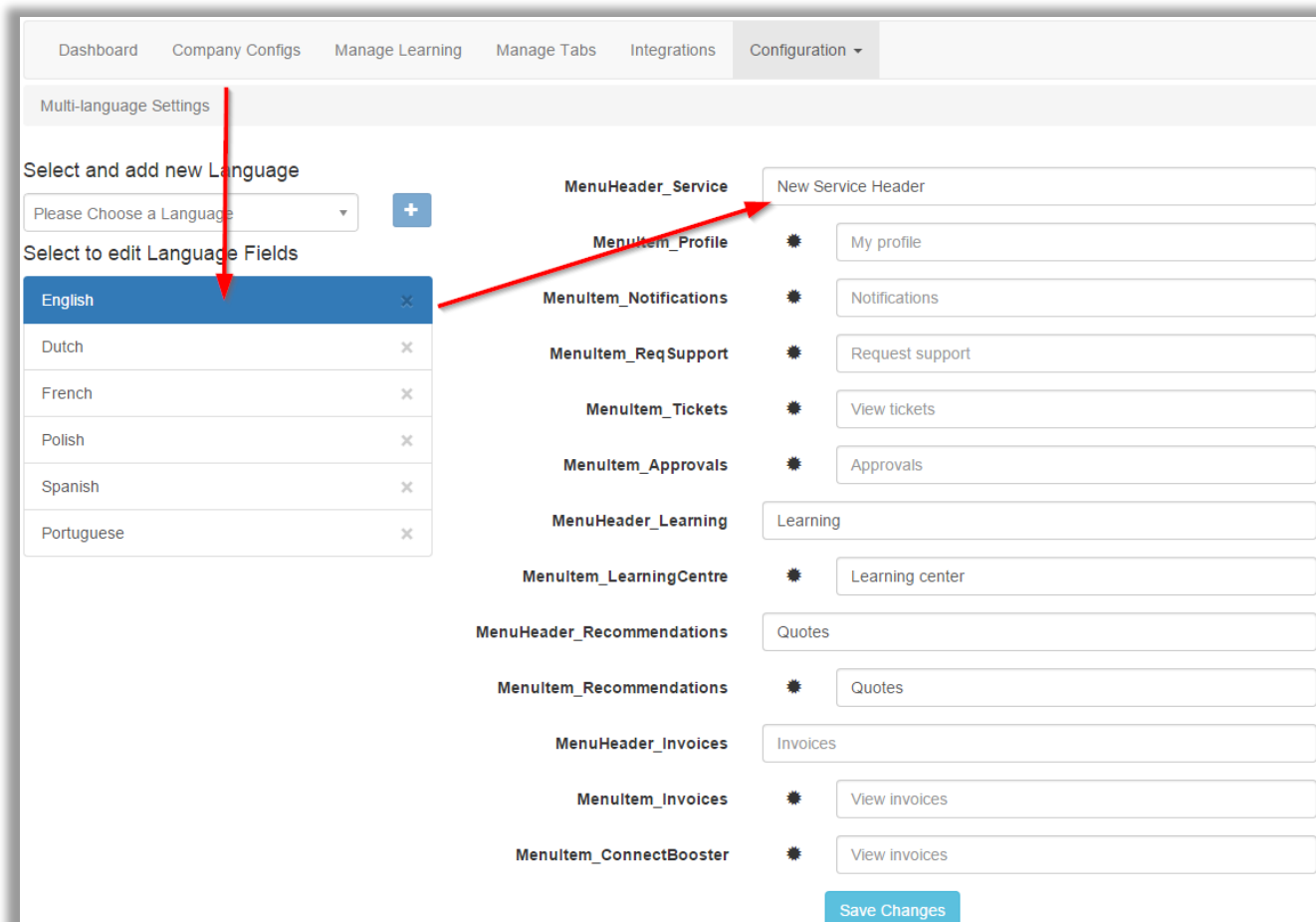
Just select which fields you want to re-sync to our database and hit refresh.

## INTERFACE SETTINGS

DeskDirector web is multi-lingual – it is in this section where you can add or remove languages from the language drop down menu. You can also change the menu item translations/names for each language.

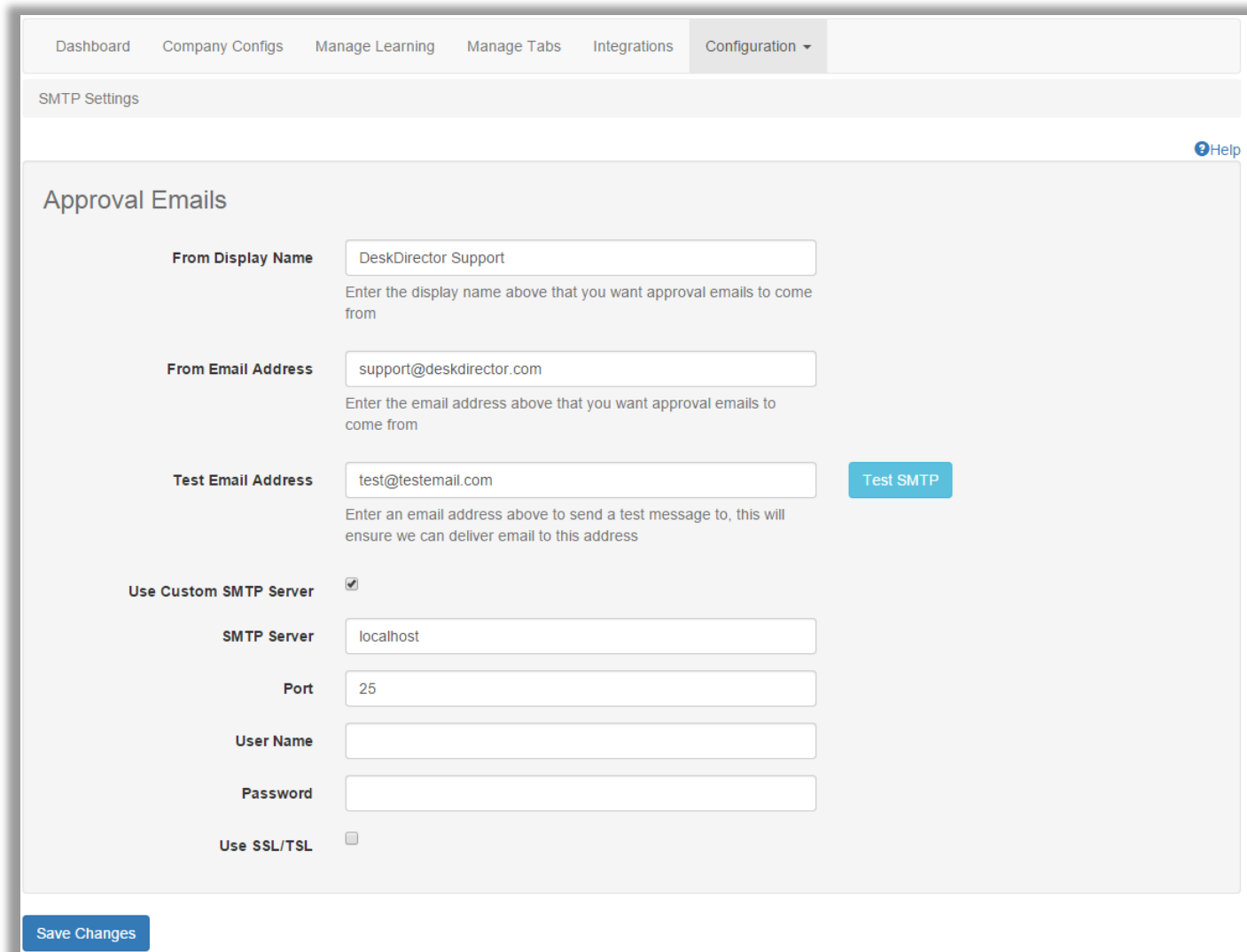


1. Select a language you want to be accessible from DeskDirector Web and hit the add button
2. Click on a language from this list to change the menu item



## SMTP SETTINGS

With the case of Approvals, when a ticket is set to Approval Required, an email is sent to the list of contacts that have the approver permission. In order for this to work, we need some information from you on how you would like these emails to be sent:



The screenshot shows the 'SMTP Settings' page in the DeskDirector interface. The page has a navigation bar at the top with links: Dashboard, Company Configs, Manage Learning, Manage Tabs, Integrations, and Configuration (selected). Below the navigation bar is a sub-header 'SMTP Settings'. The main content area is titled 'Approval Emails'. It contains several form fields: 'From Display Name' (DeskDirector Support), 'From Email Address' (support@deskdirector.com), 'Test Email Address' (test@testemail.com), 'Use Custom SMTP Server' (checked), 'SMTP Server' (localhost), 'Port' (25), 'User Name' (empty), 'Password' (empty), and 'Use SSL/TSL' (unchecked). There are two buttons: 'Test SMTP' (blue) and 'Save Changes' (blue). A 'Help' link is visible in the top right corner.

Dashboard Company Configs Manage Learning Manage Tabs Integrations Configuration

SMTP Settings

Help

### Approval Emails

**From Display Name** DeskDirector Support  
Enter the display name above that you want approval emails to come from

**From Email Address** support@deskdirector.com  
Enter the email address above that you want approval emails to come from

**Test Email Address** test@testemail.com **Test SMTP**  
Enter an email address above to send a test message to, this will ensure we can deliver email to this address

**Use Custom SMTP Server** ☒

**SMTP Server** localhost

**Port** 25

**User Name**

**Password**

**Use SSL/TSL** ☐

**Save Changes**

**FROM DISPLAY NAME** – Just the name you would like to appear as the display name in your client's inbox

**FROM EMAIL ADDRESS** – Enter the email address that you would want approval emails to come from. For example: [support@deskdirector.com](mailto:support@deskdirector.com)

You can test whether you receive these emails by entering your email address here and hitting the Test SMTP button. We will send a dummy email to the address you enter here.

You can choose to use a custom SMTP server rather than our own. Simply tick the box "Use Custom SMTP Server" and fill in your server details. We definitely recommend doing this to ensure mail arrives at the recipients' mailboxes.

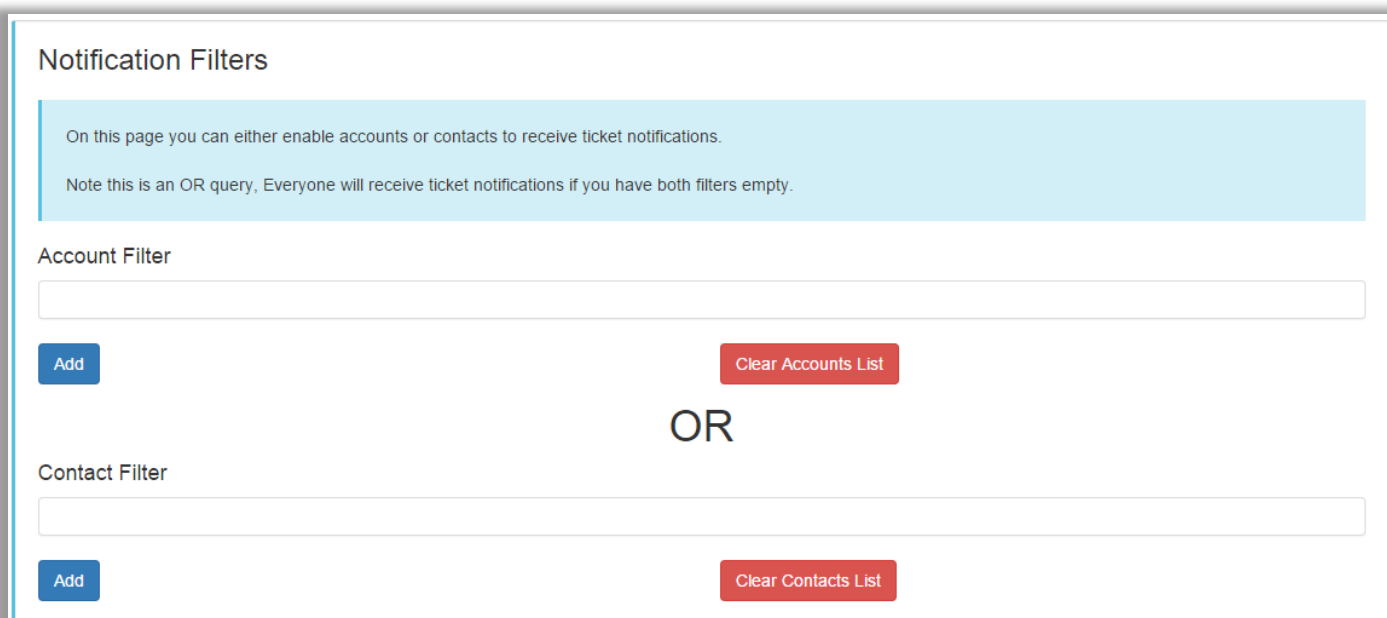
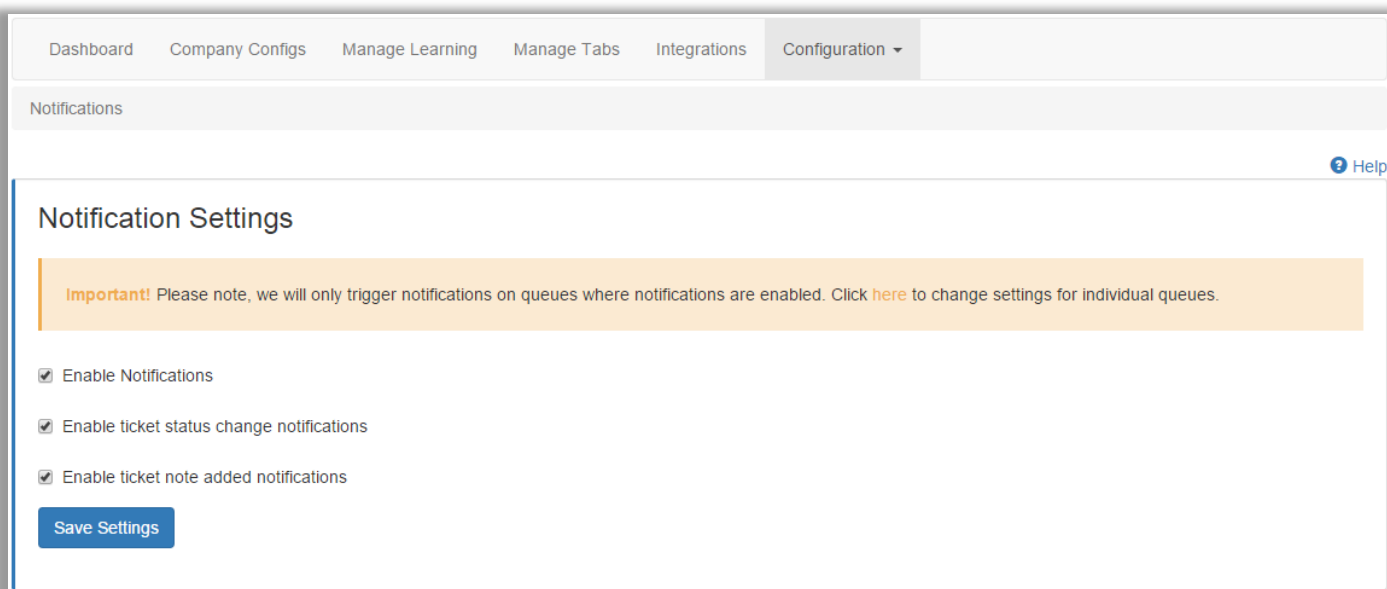


**Further reading:** Head to the following link to learn more about DeskDirector's approval process:

<http://kb.deskdirector.com/knowledgebase/articles/243981-approvals-in-deskdirector>

## NOTIFICATIONS (PRO PLAN)

In this section you will be able to select which type of notifications DeskDirector sends to your clients as well as which companies or contacts receive these notifications. In this section there are two types of notification: ticket status change notifications and ticket note added notifications.

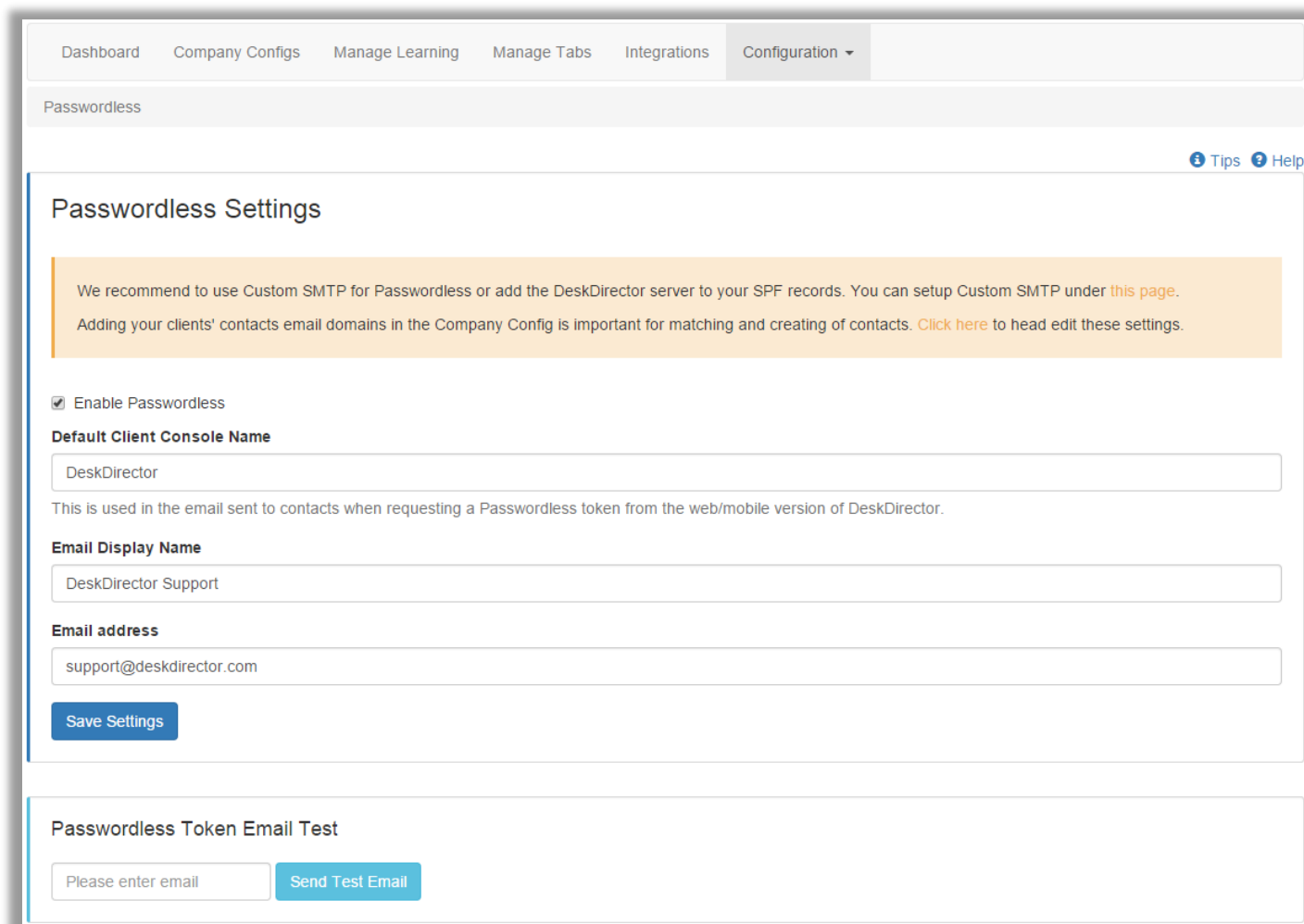


Simply tick the notifications you want to enable and hit save. If you want to set up a filter just hit the add button and select an account. Selected accounts will have access to notifications, anyone not listed will not receive notifications. A blank filter means everyone receives notifications.

In order to notifications to be received by your clients you must enable notifications on each queue you want to use notifications on. This is done on the [queue security](#) page.

## PASSWORDLESS

In this section you can enable the [Passwordless](#) feature. Simply tick the checkbox and populate the form with the required info. If you have set up a custom SMTP server we will forward the Passwordless emails through there.



The screenshot shows the 'Passwordless' settings page in the DeskDirector interface. At the top, there's a navigation bar with links: Dashboard, Company Configs, Manage Learning, Manage Tabs, Integrations, and Configuration (selected). Below the navigation bar, the page title 'Passwordless' is displayed. The main content area is titled 'Passwordless Settings'. It includes an orange informational box with recommendations about using Custom SMTP and adding client email domains. Below this, there's a checkbox labeled 'Enable Passwordless' which is checked. Underneath, there are three input fields: 'Default Client Console Name' (containing 'DeskDirector'), 'Email Display Name' (containing 'DeskDirector Support'), and 'Email address' (containing 'support@deskdirector.com'). A blue 'Save Settings' button is located below the email address field. At the bottom of the settings section, there's a 'Passwordless Token Email Test' section with an input field for an email address and a blue 'Send Test Email' button.

You can also test to see whether you will receive the Passwordless token email by entering your email address and hitting the test email button.

## QUEUE SECURITY

From the queue security page you will be able to see which of your queues are accessible by clients, accessible by your Staff, and which of your queues have notifications enabled. You can also change these settings for each individual queue by drilling into the queue name.

The following image show the list of queues with a quick view of the features enabled and whether those features have a filter or not. The next image is of the client portal queue; from here we can enable certain features and filter access to them as well.

Dashboard   Company Configs   Manage Learning   Manage Tabs   Integrations   Configuration ▾			
Queue Security			
<a href="#">Sync Queue List</a>			
The Queue list will re-sync every day, if you have just updated your queues and want to force an update, click the above sync button.			
Icons:  Enabled,  Has Filter			
Name	Client Accessibility	Resource Accessibility	Notification Enabled
Client Portal			
IT:Change Requests			
IT:Level I			
IT:Level II			
Monitoring Alert			
Post Sale			
SW:Change Requests			
SW:Defect			
SW:Internal			
SW:Level I			
SW:Level II			

#### Queue : Client Portal

##### Notifications

Notification monitor is **Enabled**.

[Disable](#)

Notification to client will only be triggered if this is turned on.

##### Client Console Accessibility

Queue is currently **Enabled** in the Client Console.

[Disable](#)

###### Account Filter

[Add](#)

[Clear Accounts List](#)

###### Contact Filter

[Add](#)

[Clear Contacts List](#)

##### Staff HUD Accessibility

Queue is currently **Enabled** in the Staff HUD.

[Disable](#)

###### Resource Filter

[Add](#)

[Clear Resources List](#)

## MAINTAIN CONTACTS

In this section, you can view details on your contacts. The list provides a view of their name, their company, whether they have a password set, how many bad login attempts they have made, and what permissions they have.

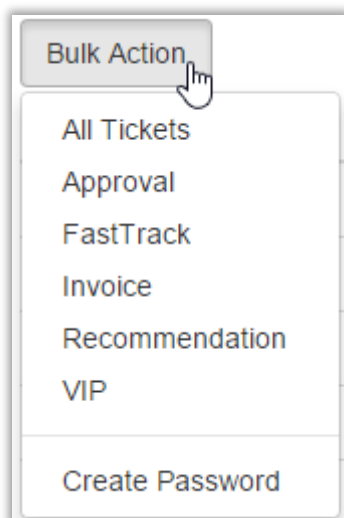
Contacts can have the following permissions:

- ALL TICKETS – they will be able to see tickets from anyone at their company rather than just their own
- APPROVAL – this contact is an approver for their company. Any tickets logged by their staff using a request type that requires approval will need to be approved by this contact.
- RECOMMENDATION – this contact will be able to view their recommendations within DeskDirector
- VIP – this contact is marked as a VIP; tickets created by this contact will have the VIP priority you have set up. You can also allow them to have their tickets approved automatically on the general configuration page.
- FASTTRACK – this contact has access to the fasttrack feature, they will have an extra button available for them when they are viewing a ticket
- INVOICE – this contact will be able to view their invoices inside DeskDirector

Maintain Contacts					
<b>Search Text</b> <input type="text" value="Search 'Name' or 'Company' or 'Email'"/>		<b>VIP</b> <input type="text"/>			
<b>Approval</b> <input type="text"/>	<b>Recommendation</b> <input type="text"/>	<b>All Tickets</b> <input type="text"/>	<b>FastTrack</b> <input type="text"/>	<b>Invoice</b> <input type="text"/>	<input type="button" value="Search"/>
<input type="button" value="Bulk Action"/>					Page 1 / 2 Total 51 <input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>
<input type="checkbox"/>	Name	Company	Password Set	Bad Logins	Permissions
<input type="checkbox"/>	Bill Ayble	Superbowl of Food, Inc.	×	0	
<input type="checkbox"/>	Janet Blake	Superbowl of Food, Inc.	×	0	
<input type="checkbox"/>	James Burke	Superbowl of Food, Inc.	×	0	
<input type="checkbox"/>	Missy Clark	Superbowl of Food, Inc.	×	0	
<input type="checkbox"/>	Phill Claxton	Superbowl of Food, Inc.	×	0	
<input type="checkbox"/>	Internal Contact	Superbowl of Food, Inc.	×	0	
<input type="checkbox"/>	Donna Corsis	Superbowl of Food, Inc.	×	0	

1. Filter – you can filter down contacts using these drop down boxes
2. Bulk action – from here you can perform actions on all the contacts you have selected
3. Password set – you can quickly check whether a contact has a password set
4. Permissions – you can quickly see what permissions each contact has

## Bulk Actions



Bulk actions allow you to apply permissions to multiple contacts at once.

- Apply a filter using the drop down boxes
- Select the contacts you want to receive a certain permission
- Select the permission
- In the following modal that pops up; select whether you want to enable the feature or disable it

If you drill down into one of the contact records you will be able to see a bit more information on that contact and set a password for them, as well as enable permissions.

### Contact Info

**Full Name**  
Phill Claxton

**Email**  
phill@deskdirector.com

**Account**  
DeskDirector

### Contact Details

**General Feature Access**  
[Chat](#) [Learning](#)

**Auto-login Issues**  
Missing Company Active Directory SID

### Contact Queue Security

<b>Client Portal</b>	<b>IT:Change Requests</b>	<b>IT:Level I</b>	<b>IT:Level II</b>
<b>Monitoring Alert</b>	<b>Post Sale</b>	<b>SW:Change Requests</b>	<b>SW:Defect</b>
<b>SW:Internal</b>	<b>SW:Level I</b>	<b>SW:Level II</b>	<b>Triage</b>

### Set Password

**Password**

Minimum length is eight

**Verify Password**

[Set New Password](#)

### Contact Permissions

- ☒ **All Tickets** Provide access all company tickets
- ☒ **Approver** Mark as an approver (Recommend: Approver is best fit with all tickets permission)
- ☒ **FastTrack** Allow fast track ticket
- ☒ **Invoice** Give access to invoices (Requires [ConnectBooster](#) integration)
- ☒ **VIP** Mark as a VIP
- ☒ **Recommendations** Give access to quotes

[Save Permissions](#)

## MAINTAIN FEATURES

From here you can enable chat and the learning centre for your clients.

Maintain Features

Name	Filter	Delete
Chat	×	×
Learning	×	×
NoScreenshot	✓	×

New Feature

Select A Feature Name ▼

Select A Feature Name
Chat
Learning
No screenshot

Add

Just select a feature from the drop down and click add. After it has been added to the feature list, you will be able to drill down into the feature to apply an account or contact filter.

Maintain Features / Filter: Chat

Feature: Chat

Account Filter

Add

Clear Accounts List

Contact Filter

Add

Clear Contacts List

## EDIT REQUEST TYPES

This section is especially important – this is where you set up request types that your customers can use to request support. You can also set up account or contact filters for each request type. Creating a request type is easy – just enter the name and parent name (top level category name), and select the rest from the dropdowns.

You can also paste a Wufoo form URL into the “form URL” field. This will embed your Wufoo form into DeskDirector allowing you to get all the information you require in the first contact with your clients.

## Edit Request Types

**Request Type Filter** select account or contact to check request types that they can access



## Request Types

Computer	2 ▼
Hardware Problem	⊗
I need software installed on my computer	⊗
Email	3 ➤
Filtered - I Need Assistance	Filtered ⊗
Printer	1 ➤
User	2 ➤
Wufoo Form Example	⊗

## New Request Type

**Name**

**Parent Name**

☒ Enable

**Queue Name**

**Ticket Type**

**Ticket Status**

**Ticket Priority**

**Ticket Source**

**Ticket Issue**

**Ticket Subissue Type**

**Form Url**

[Form Tutorial](#)

## DELETE TICKETS

Because there is no practical way to check your Autotask instance for deleted tickets, we need to you tell us which tickets you have deleted if you ever do. Just head over to the delete tickets section and enter a list of ticket numbers. Once this action has been performed those tickets will no longer show up in DeskDirector.

Delete Tickets

### Delete Tickets

**Attention**  
Delete tickets will remove tickets that is stored within our cache, use this if you have deleted a ticket in Autotask and it continues to display in DeskDirector. If you do delete a ticket you didn't mean to you can simply add a note to that ticket in Autotask and our clever engine will bring it back next time it syncs.

**Ticket Numbers**  
Enter ticket[s] to delete here (Separate multiples with a space, new line, comma or semicolon)

Delete Tickets

## MAINTAIN RESOURCES

From this page you can see all of your Autotask resources and what restrictions they have on their Staff HUD. By drilling into a resource you can set an account restriction to limit the HUD to certain accounts for that resource. You can also set a custom queue restriction, so that resource will only have access to certain queues.

Resource Security

Help

Page 1 / 1 Total 16
First
Previous
Next
Last

Name	Chat Disabled	Custom Account Restriction	Custom Queue Restriction
<a href="#">Autotask Administrator</a>			
<a href="#">Scott Anderson</a>			
<a href="#">Michael Brown</a>			
<a href="#">Gary Davis</a>			
<a href="#">Timothy Jackson</a>			
<a href="#">Allison Johnson</a>			
<a href="#">Cindy Jones</a>			

Drilling into a resource:



Resource Security / Resource: Pamela^^ Pierce

### Resource Info

**Name**  
Pamela^^ Pierce

### Resource Details

**License Type**  
System Administrator

### Resource Settings

☐ Two Factor Auth

**Save**

### Resource Queue Security

Currently this resource's queue security is based on [Queues Security](#)

**Note:** This list won't refresh when you edit [Custom Queue Filter](#) below. Please refresh this page to display latest restriction for this resource.

<b>Client Portal</b> Monitoring Alert SW:Internal	IT:Change Requests Post Sale SW:Level I	<b>IT:Level I</b> SW:Change Requests SW:Level II	<b>IT:Level II</b> SW:Defect <b>Triage</b>
---------------------------------------------------------	-----------------------------------------------	--------------------------------------------------------	--------------------------------------------------

### Custom Queue Filter

**Note:** Adding a Custom queue Filter to a resource will override any filters set in [Queue Security](#).

**Add Queues**
**Clear Queue List**

### Account Filter

**Choose Account Filter**

Default

The Account filter is used to define the list of accounts that the resource has access to. They are setup under the [Account Filters](#) section

**Save**

Queues listed in green are accessible by this resource from the Staff HUD. By adding a queue filter you will be able to further restrict queue access in the Staff HUD.

To add an account filter, select one from the drop down. Custom account filters can be created from the **Account Filters** section.

## ACCOUNT FILTERS

In this section you can create or alter account filters for the Staff HUD. Account filters restrict which types of company are accessible from the Staff HUD. The default account type filter is "customer", this means that only companies that are paying customers of yours are visible from the various drop downs and list views of the Staff HUD.

Account Filters

Default
[Edit Custom Filters](#)

### Default - Edit Filter Type

**Filter Type**

Account Type/Territory ▼

The **Account Type/Territory** filter type allows you to restrict access to accounts by their Type and Territory.  
The **Account List** filter type allows you to restrict access to only specific accounts

Save

### Filter Setting

The following settings are based on the Filter Type set above.

#### Account Type Filter

Customer ✕

Customer ▼ Add

Clear Account Type List

AND

#### Territory Name Filter

Southeast ▼ Add

Clear Account Type List

At the bottom of this page you can check out which companies are included in the filter:

Filter Demo		
Accounts that's match above filter. (Count: 17 / 17)		
Name	Account Type	Territory
HLA (Manufacturing) HQ	Customer	Northeast
HLA (Manufacturing) West Coast	Customer	West
HLA (HQ)	Customer	Northeast
HLA (Retail) (HQ)	Customer	Northeast
HLA (Retail) (West)	Customer	West
DeskDirector	Customer	
HLA Corporation	Customer	Northeast

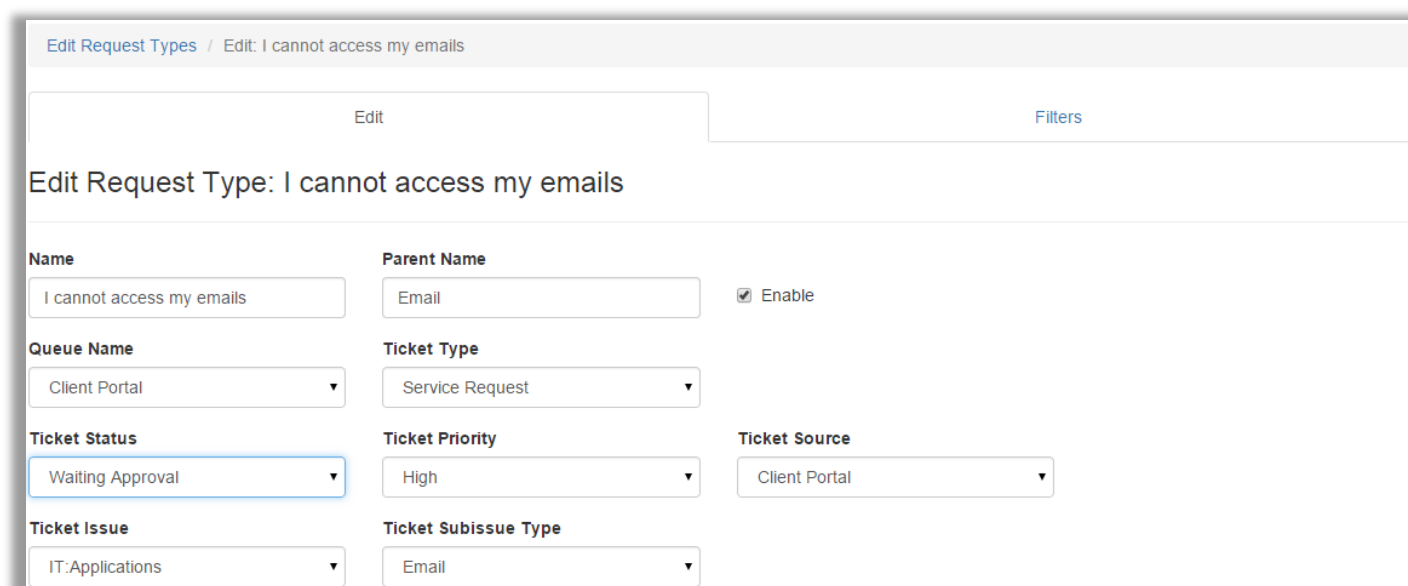
# DeskDirector Feature Setup

## APPROVALS

Approvals in DeskDirector work by leveraging both queue statuses and request types. As a result you end up with a very flexible approval system.

### Approval Workflow

- The client chooses a request type in DeskDirector (e.g. I need a new employee setup) these request types are created and configured in the [Edit Request Types](#) section of the Admin Console.
- When the ticket is submitted the ticket is created and set with a specific status. DeskDirector has been configured in the [General Configuration](#) section of the Admin Console to know the name of the status that is used for tickets requiring approval (e.g. Approval Required). See example below of a request type.



Edit Request Types / Edit: I cannot access my emails

Edit Filters

### Edit Request Type: I cannot access my emails

<b>Name</b> I cannot access my emails	<b>Parent Name</b> Email	<input checked="" type="checkbox"/> Enable
<b>Queue Name</b> Client Portal	<b>Ticket Type</b> Service Request	
<b>Ticket Status</b> Waiting Approval	<b>Ticket Priority</b> High	<b>Ticket Source</b> Client Portal
<b>Ticket Issue</b> IT:Applications	<b>Ticket Subissue Type</b> Email	

- Approvers who you have given the approval right to from that company will then receive an email and a notification (if on DeskDirector pro or enterprise plans) that there is a ticket that requires approval. They can then navigate to the approval section to grant or deny the support request.
- They will be asked for a reason for granting or denying, which will be added as a note to the ticket. The ticket will be put into your approval granted status if the approver grants approval, else it will be put into the deny status if they decline.
- An email is sent to all approvers letting them know if a ticket has been granted or declined.

### Approval Setup

In order to setup approvals, just follow the simple instructions below:

- Create three statuses on each Autotask queue you intend to have tickets that need approval. These statuses can have any name you like but one will be needed for tickets that require approval (e.g. Approval Required), one for if that approval was given (e.g. Approval Granted) and another if it was denied (e.g. Approval Denied).
- Add the names of these statuses to the three fields in the General Configuration section of the Admin Console.

- Now this is done you will need to choose the request types that need approval, these are often those that are a change or are security related such as access rights. Once selected all you need to do is edit the type and change the "Ticket Status" section to create the ticket in the approval required status.
- Finally you will need to choose who the approvers at each client are. This is done by granting them the Approval right from the [Maintain Contacts](#) section.
- Make sure that the approvers also have the "access all tickets" right, otherwise they will not be able to approve tickets that don't belong to them.
- Optionally you can set DeskDirector to not require approval for tickets submitted by those you have given the approval right to. This is done in the [General Configuration](#) tab in the Admin Console. There is also an option to allow contacts who you have marked as a VIP to auto-approve.

It is often good practise to configure other workflow rules around the approval process to ensure approvals happen in a timely manner and that once approved tickets get handled correctly. Because the approval stages are just managed through statuses in Autotask you can still use the standard Autotask workflow rules to kick off workflow.

For example you could configure a workflow to change the Approval Granted status to another one that your dispatcher or coordinator is looking for (e.g. Ready to Schedule). Another example could be triggering an email to your team for a ticket that has been submitted requiring approval and hasn't been approved in over a week.

The power is in your hands.