Contents

Customer-One Tutorial

What is Customer-One

The Customer-One program is the ***client***, or ***front end***, portion of the Customer-One system. All interaction between customers or staff members and the Customer-One service takes place by means of this Customer-One program. Customer-One will allow you to perform a number of different tasks. Amongst others, these are:

- Send mail to other users.
- Explore folder sections and download messages and files.
- Read news items.
- Search through knowledge bases.
- Participate in live on-line conferences.
- Access the help desk to solve new problems.

Related Topics:

Starting the Customer-One Program
Customer-One Components

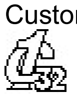
Starting the Customer-One Program

The Microsoft Windows program name is CUST1.EXE and the Windows NT Customer-One program is CUST1NT.EXE.   For a list of files that should be installed on your local hard drive, *see* the "Program Files" section in the Technical Reference portion of the manual.

If Customer-One was installed using the Customer-One installation program, the program would have been installed in a program group called "Customer-One" with one or both of the following programs installed:

Customer-One Windows front end program

Customer-One Windows NT front end program



Customer-One Components

The Customer-One program allows you to utilize the various components of the Customer-One service to who you are connecting.   Following is a brief overview of the individual components of a Customer-One service:

Related Topics:

- Mail
- Folders
- Service Requests & Help Desk
- Knowledge Base
- News
- Conference
- Custom Forms

Mail

Customer-One mail is dealt with as you would any similar correspondence. It is directed to you personally, you open it, read the contents and take the necessary action.

In order to create mail, you would use the Write Mail option. You are able to send mail to a specific Customer-One user, or to a number of users. If you do not know the users login ID to send mail to, you are able to select the correct person from an address list provided while on-line. Customer-One mail also allows you to attach a file with your mail item.

You can also create mail while off-line and, when you logon, it will be sent to the Customer-One user.

Folders

Customer-One has a folders module which is used to store information as you would in a conventional filing system. Information can be stored in a variety of different formats:

- The information could take the form of a ***message****.* Messages often have a number of *replies* (called *comments).* **For example**, you could post a message to a folder regarding a request for some ideas on a particular subject. Other Customer-One users could then reply with assistance and ideas. Each message reply or comment becomes a "**thread**" of the original message allowing you to follow the flow of the conversation.
- A message could also be posted with an ***attached file****.* Attached files are any standard MS-DOS file, i.e. ABC.ZIP, HELLO.EXE, etc.

Customer-One allows you access to two folder lists, a list of *Favorite* folders or a complete list of *All* folders. Favorite folders are a *quick* method of reading folder messages which are of particular interest to you, without having to browse through all the available folders.

A folder frequently contains *sub-folders or sections.* These sections contain messages with or without attached files.

By means of the *Message Thread window* you are able to trace all the replies and comments relating to the original message.

Customer-One Folders provide an area where you can exchange ideas, post bulletins (i.e. public messages) for other users of the system. It is also a forum for gathering or leaving information on various topics or subjects.

The Customer-One service will create various folders where messages and documents can be grouped together for easier viewing and retrieving.

In order to contribute messages to a folder, you can write the message (on- or off-line) and have it sent to the applicable folder.

Contact your representative at the Customer-One service if you are interested in having a folder created for a particular topic.

Service Requests & Help Desk

A service request is an electronic form you fill-in so as to request assistance on a problem from the help desk. Once you have submitted the service request, you can check on the status of that service request at any time by using the Help Desk module.

As a customer, accessing the Help Desk component of Customer-One, you will be able to view all outstanding service requests you have submitted and check-up on the status of those requests.

As a staff member, you will be able to view all the service requests which you are responsible for. In addition to this, you can perform various actions to the service request, i.e. comment, transfer, solve, etc.

Always search the knowledge base **first** when you are attempting to resolve a problem as it is possible that someone else has already solved a similar problem! If you still can't find a solution to your problem, you can then fill in an electronic service request. This will then be transferred to the help desk staff and assigned to an engineer. Once the engineer has resolved the problem, the service request is returned with a proposed solution.

The Help Desk window can also be used for other different types of service requests as well as other forms such as:

- Comments and suggestions
- Lead tracking
- Call management

Knowledge Base

Customer-One is unique in its approach to managing information. As the help desk resolves problems, the solutions are added to the knowledge base for others to view and learn from. The *two primary methods* of working with the knowledge-base are:

Queries	This is the primary method of extracting information from the knowledge base. The same search criteria you use to search for items is also used by the engineers and staff members of the Customer-One service.
Service Requests	Once a service request is resolved, the solution is added by the engineer to the knowledge base. This function could be limited to staff members only.

The Customer-One service you are connecting to could use the knowledge base to keep other information besides previously solved problems. These could include technical articles, press releases, etc.

The Customer-One system uses an intelligent client/server-based knowledge-base engine for storing and retrieving information. All that is required is to enter any *keywords* associated with your problem, i.e. printer & error (wildcards such as & and * can be used), and select a knowledge base collection (database) to search through. This is then transmitted to the Customer-One service you are connected to, which will perform the search on the entire contents of the knowledge base collection and return any matching results to you for viewing.

News

The news module is a mechanism which the Customer-One service utilizes to send useful and important information to all users. You can access the News list window at any time to view the latest news items, or set your system up so that any news items will *automatically* be displayed when you log on.

Conference

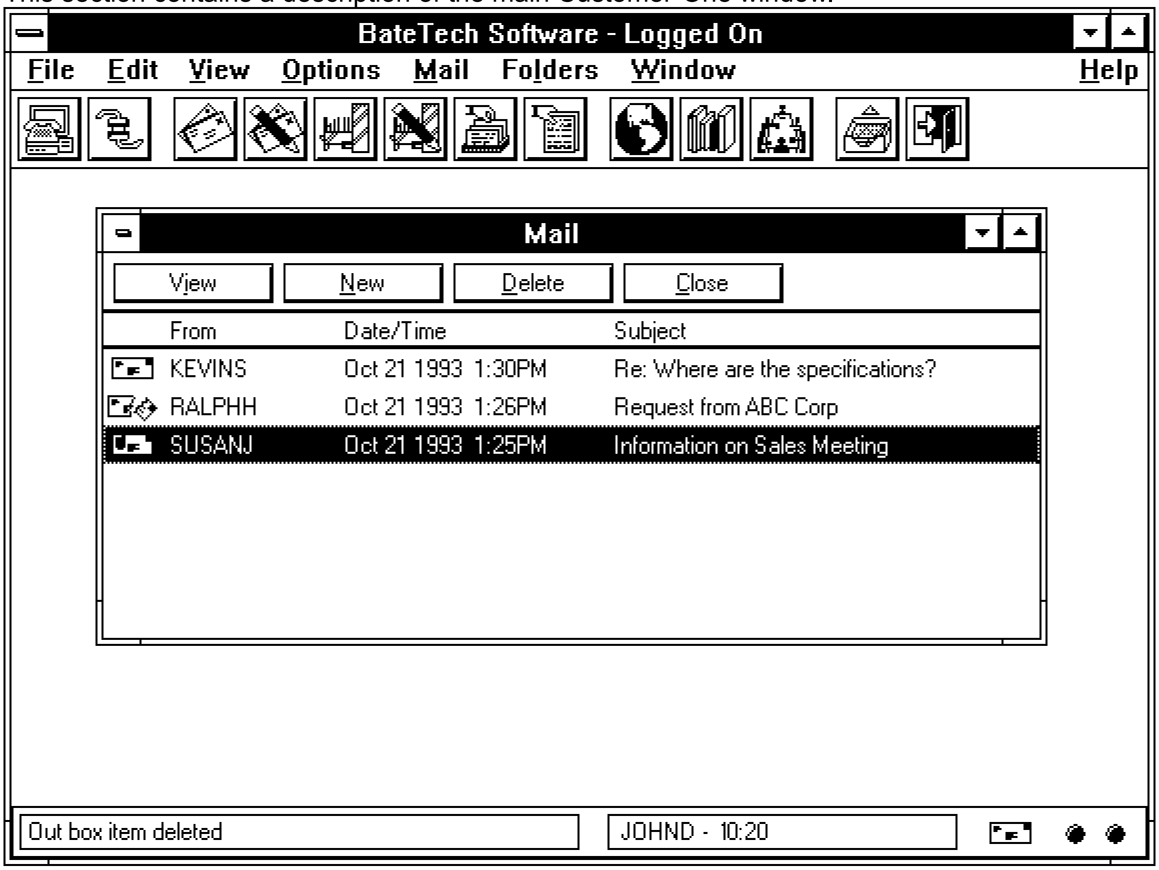
On-line electronic conferencing is available on the Customer-One service. This is interactive (live) conversation with other Customers-One users presently logged on to the system.

Custom Forms

It is possible that the Customer-One service has setup custom forms for its users to access. These forms will vary (depending on how the Customer-One service you are connected to has been setup) and can be used for gathering information, displaying data, etc. An **example** of a custom form is the User Details form. *All custom forms are placed in the View menu item.*

Customer-One Main Window

This section contains a description of the main Customer-One window.



The Customer-One main window uses standard Microsoft Windows conventions.

Related Topics:

- Window Title Bar
- Menu Bar
- Tool Bar
- Status Bar

Window Title Bar

On start-up, the window title bar will display "Customer-One - Logged Off". This status will change when a valid logon is achieved to a Customer-One service. The display will change to "Service Name - Logged On" with the "Service Name" being the name of the Customer-One service you have logged on to, i.e. "BateTech Software - Logged On"

Menu Bar

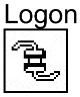
The menu bar displays all the menu options that can be used to activate the various features and components of the system. On start-up, prior to logging on, the menu items which are dependent on being logged-on to Customer-One are disabled (dimmed). Once valid logon is achieved, these menu items will become available (undimmed). For a summary list of all menu items and their short-cut keys, *see* the Customer-One Menu Bar Layout section.

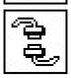
Tool Bar

The tool bar provides a mechanism to quickly select and run a Customer-One component. The tool bar items are as follows:

Settings Icon

Logon / Logoff Icon

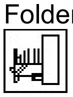




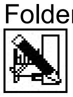
Mail List Icon

Mail Write Icon

Folder List Icon

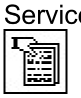


Folder Write Icon



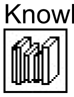
Help Desk Icon

Service Request Icon

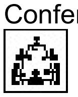


News List Icon

Knowledge Base Icon



Conference Icon



Out Box Icon

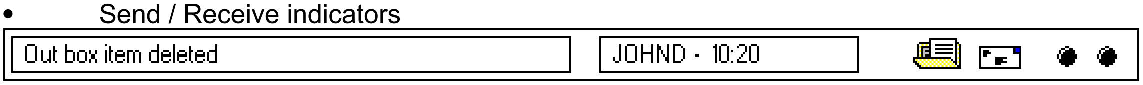
Exit Icon

See the various sections of this manual for further information on these tool bar icons. All tool bar icons also have a keystroke combination that will allow you to access these components without using a mouse. For a summary list of what each icon does, *see* the Customer-One Tool Bar Layout.

Status Bar

The status bar is located at the bottom of the Customer-One window and is enclosed in a raised border. This area will display status and information messages regarding the system. There are *four individual status areas* on the status bar. From left to right, they are:

- Status messages
- Logon messages
- Incoming notifications
- Send / Receive indicators



Related Topics:

[Status Messages]
[Logon Messages]
[Incoming Notifications]
[Send / Receive Indicators]

Status Messages

This status area is located on the left-hand side of the status bar and is enclosed in an inset border. This field will display status and error messages regarding the various components of the Customer-One program as it is being executed.

Logon Messages

This status area is located to the immediate *right* of the Status Message area and is also enclosed in an inset border.

This status area will display the *login ID* of the user logged on as well as the *total time logged on* to the Customer-One service. Logon time is displayed in *five second intervals.* While off-line, this status area is empty.

If an attached file is being up or downloaded, the logon information is cleared and *a percentage bar* is displayed indicating the status of the up or downloading operation. Once it is complete, the logon information is restored.

Incoming Notifications

This status area is located to the immediate *right* of the Logon Message area and is *not contained in any borders.* The following notifications will be displayed in this area of the status bar:

- Incoming mail.
- New service request or action.

If there are no incoming items, this status bar area will be blank. If there are multiple items waiting (i.e. four mail items), the icon will remain in place until the last item is viewed.

Incoming Mail Notification 

Selecting this icon from the status bar will open the Read Mail window so that you can read your new mail. For further information on reading mail, *see* the Reply to Mail section.

New Service Request and Action Notification 

Selecting this icon from the status bar will open the Service Request window so that you can view the new service request or the service request that has a new action. For further information on viewing a service request, *see* the Viewing an Existing Service Request section.

To Access Status Notification

There are two methods of accessing status bar notifications:

- Double-click on the icon on the status bar.
- Select the menu item File and Notification.

This will open the mail or service request item for you to review. *Remember,* if there are multiple items waiting (i.e. four mail items), the icon will remain in place until the last item is viewed.

Send / Receive Indicators

This status area is located in the *far right* of the status bar and is represented by *two round indicators* without any borders. The two indicators are:

- Send Indicator (Red)
- Receive Indicator (Green)

These indicators are *not* colored when inactive.

Send Indicator (Red)

The *right-hand* light (red) indicates that the front end program is sending information to the Customer-One service.

Receive Indicator (Green)

The *left-hand* light (green) indicates that the front end program is receiving information from the Customer-One service.

Settings

The Settings option allows you to configure your local program to communicate with the Customer-One service to whom you want to connect. Amongst others, the available *connectivity types* are:

- Modem
- LAN
- TCP/IP
- IPX

Settings are configured *prior to* communicating with your Customer-One service and *again* later if you wish to change any communication settings. Once you have created a communication setting, it will automatically appear in the Available Services list box of the Connection window.

Check with the Customer-One service you are connecting to for the *correct communication protocol* prior to setting up.

All communication settings are saved in the C1.INI file which resides in the default Windows directory. For further information on the C1.INI file, *see* the "C1.INI File Settings" section in the Technical Reference portion of the manual.

Related Topics:

Connection Window Explained
Open Connection Window
Adding a New Service
Script Files
Deleting a Service
Editing an Existing Service
Setting a Default Service

Connection Window Explained

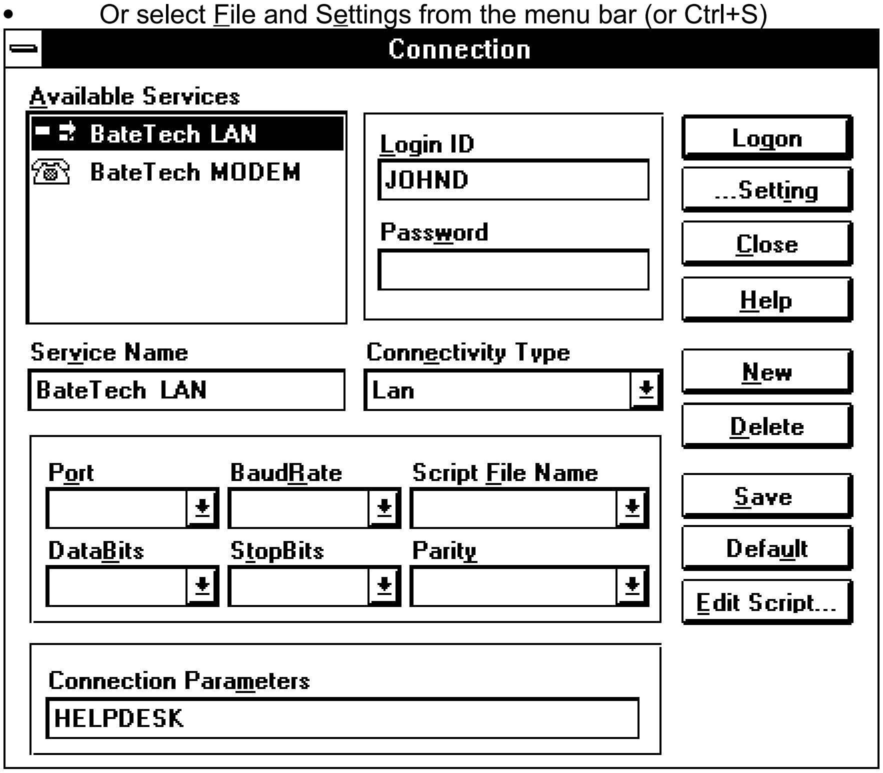
The Connection window is a *two-part* window. This window also allows you to logon to a Customer-One service. By pressing the ...Settings button, the settings portion of the window will be collapsed and only the logon fields and buttons will be available. This is a *toggle* button that, if pressed again, will expand the window to show all the settings fields and buttons.

Open Connection Window

Following is the procedure to open the Connection (settings) window.

- Click on the Settings icon on the tool bar

- Or select File and Settings from the menu bar (or Ctrl+S)



This Connection window can only be viewed or edited while off-line.

For further information on the Connection window, *see* the Settings Window section in the Customer-One Screen Reference portion of the manual.

Adding a New Service

There are *two basic connection settings* that can be setup: *network* (LAN, TCP/IP, etc.) and *modem.* For each of these two types of settings, certain *fields* have to be entered. Those fields which are required for the connection service type (that you are configuring) will be made available (undimmed) when you select the connectivity type.

Related Topics:

Adding a New Network Connection
Adding a New Modem Connection

Adding a New Network Connection

Following is the procedure to add a new network connection service:

1. Open the Settings window by selecting the Settings icon from the tool bar, or by selecting File and Settings from the menu bar (or Ctrl+S).
2. Press the New button to add a new connection service. The cursor will be placed in the Service Name field.
3. Enter a service name. Attempt to make this name as descriptive as possible, i.e. "BateTech LAN".
4. Move to the Connectivity Type field and select the connectivity type, i.e. LAN, TCP/IP, etc. At this point, the network setting field (Connection Parameters) will be made available for editing.
5. Move to the Connection Parameters field and enter the network parameters that match the network to which you are connecting. This is typically the *server* name of the *computer* to which you are connecting and which is running the Customer-One server programs
6. Move to the Login ID field and enter your login ID (as provided by your Customer-One service). The password is *not* entered at this point and will *not* be saved with the service if entered.
7. Press the Save button to save the new service as an available service. Once saved successfully, the status bar will display the following message:

    Connection settings saved

8. The new service will now be displayed in the Available Services list and will be preceded by the following icon:

If the network setting is not available in this Connectivity Type field, check to make sure that the appropriate file (i.e. C1LAN.DLL for LAN, etc.) is in the default Customer-One directory.

For further information on these fields, *see* the Network Edit Fields section in the Customer-One Screen Reference portion of the manual.

Adding a New Modem Connection

Following is the procedure to add a new modem connection service:

1. Open the Settings window by selecting the Settings icon from the tool bar, or by selecting File and Settings from the menu bar (or Ctrl+S).
2. Press the New button to add a new connection service. The cursor will be placed in the Service Name field.
3. Enter in a service name. Attempt to make this name as descriptive as possible, i.e. "BateTech Modem".
4. Move to the Connectivity Type field and select the connectivity type Modem. At this point, the modem setting fields (Port, BaudRate, Script File Name, DataBits, StopBits and Parity) will be made available for editing.
5. Move to the Port field and select the port to which your modem is connected.
6. Move to the BaudRate field and select the communication speed of your modem.
7. Move to the Script File Name field and select the name of the script file containing the connection information of the service to which you are going to connect. For further information on script files, *see* the "Working with Script Files" section in the Technical Reference portion of the manual.
8. Move to the DataBits field and select the data bit setting that matches the service to which you are going to connect.
9. Move to the StopBits field and select the stop bit setting that matches the service to which you are going to connect.
10. Move to the Parity field and select the parity setting that matches the service to which you are going to connect.
11. Move to the Login ID field and enter your login ID (as provided by your Customer-One service). The password is *not* entered at this point and will *not* be saved with the service if entered.
12. Press the Save button to save the new service as an available service. Once saved successfully, the status bar will display the following message:

    Connection settings saved

13. The new service will now be displayed in the Available Services list and will be preceded by the following icon:

☎

> If the comms setting is not available in this Connectivity Type field, check to make sure that the C1COM.DLL file is in the default Customer-One directory.

For further information on these fields, *see* the Modem Edit Fields section in the Customer-One Screen Reference portion of the manual.

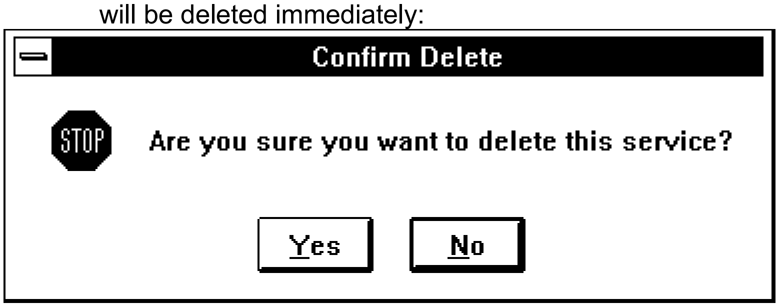
Script Files

Script files are text files with an extension of **.SFN** (i.e. BTS.SFN) which are located in the same directory as your Customer-One program files. These files contain information which is necessary for you to use your modem to connect to your Customer-One service. For further information on script files, *see* the "Working with Script Files" section in the Technical Reference portion of the manual.

Deleting a Service

Following is the procedure to delete an existing service (network or modem):

1. Open the Settings window by selecting the Settings icon from the tool bar, or by selecting File and Settings from the menu bar (or Ctrl+S).
2. Using the mouse or keyboard, select the service you wish to delete from the Available Service list.
3. Once the service is highlighted, Press the Delete button and the service will be deleted. If the menu item Options and Confirm Delete and Esc is checked, you will be prompted for confirmation prior to deleting this service. If the Confirm Delete and Esc menu option is not checked, the item will be deleted immediately:



Observe the status bar message area in the *lower left-hand corner* of the screen which will display the following message:

Connection service deleted

Editing an Existing Service

Following is the procedure to edit an existing connection service (network or modem):

1. Open the Settings window by selecting the Settings icon from the tool bar, or by selecting File and Settings from the menu bar (or Ctrl+S).
2. Using the mouse or keyboard, select the service you want to edit from the Available Services list. *Highlighting* the service you want to edit will automatically fill in all the relevant fields, i.e. modem or network fields.
3. Edit the necessary fields. *See* the previous sections for information on what parameters the modem and network fields will accept.
4. Press the Save button to save the modifications to the service. Once saved successfully, the status bar will display the following message:

   Connection service updated

Setting a Default Service

A default service is a connection service that will be used as the default service when opening the Logon (Connection) window.   Following is the procedure to set a default service:

1. Open the Settings window by selecting the Settings icon from the tool bar, or by selecting File and Settings from the menu bar (or Ctrl+S).
2. Select the service you wish to make the default from the Available Service list.   If there is already a service which is marked as default, it is *not* necessary to unselect that default service first.
3. Once the service is highlighted, press the Default button and the service will become the default service.
4. The default connection service is indicated by changing the icon to one of the following:

Default Modem Service 

Default Network Service 

Observe the status bar message area in the *lower left-hand corner* of the screen which will display following message:

Default service set

Logging On

You have to configure your connection type *prior to* attempting to logon to your Customer-One service. For further information on configuring your communication settings, s*ee* the Settings section.

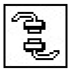
Related Topics:

Open Logon Window
Logging On
Setting Auto Logon
Out Box Items
Form Out of Date Error

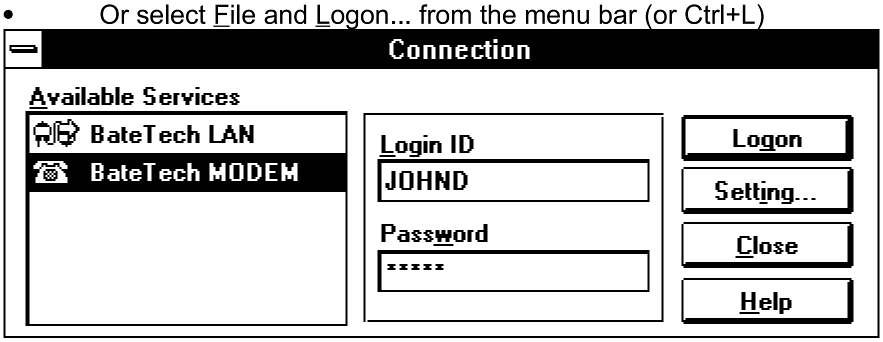
Open Logon Window

Following is the procedure to open the Connection (Logon) window.

- Click on the Logon Icon on the tool bar



- Or select File and Logon... from the menu bar (or Ctrl+L)



The Logon icon (as well as the Logon menu item under File) is a *toggle* button. Once you have logged on to the Customer-One service, the same icon and menu selection (including *short-cut keys*) will log you off again.

The Connection window displayed here is the same window displayed in the Settings section. Pressing the Settings button will open up the settings portion of the Connection window. This is a *toggle* button.

For further information on the Logon window, *see* the Connection (Logon) Window section in the Customer-One Screen Reference portion of the manual.

Logging On

Following is the procedure to log on to a Customer-One service:

1. Open the Connection window by selecting Logon icon from the tool bar, or by selecting File and Logon... from the menu bar (or Ctrl+L).
2. Select the service you want to connect to from the Available Services list.
3. Accept or change the name in the Login ID field.
4. Enter your password into the Password field. Text entered will be displayed as asterisks (****).
5. Press the Logon button to connect to the service. If a modem service was selected, the modem will start to dial and, if a network service was selected, you will be connected to the service. Once connected successfully, the status bar will display the following sequence of messages:

   Busy...

   Logged on successfully

It is not possible to logon to a service without the Login ID and Password fields first being entered.

Only users with valid login ID's and passwords are permitted access to a Customer-One service.

For further information on logon error messages, *see* the "Connection & Logon Messages" section in the Technical Reference portion of the manual.

Setting Auto Logon

Following is the procedure to set the menu item Options and Auto Logon so that you will always be prompted with the Connection window when starting the Customer-One program. This can be performed while on- or off-line:

1. Select the menu item Options and Auto Logon.
2. If there is no check mark **(√)** alongside the menu item Auto Logon, select the Auto Logon menu item. This will close the menu and set the auto logon option to *on*.
3. To confirm that the auto logon option is now on, repeat step #1 and verify that there is a check mark **(√)** alongside Auto Logon.
4. To turn auto logon *off*, repeat Steps #1 and #2 until there is no check mark **(√)** alongside the menu item Options and Auto Logon.

Out Box Items

It is possible to create mail, messages and service requests while *off-line* and send them to the server *after* logging on!

For further information on sending out box items, *see* the Sending Out Box Items section.

Form Out of Date Error

In order to logon to a Customer-One service and access their customized forms (including service requests, user details, etc.), you have to have the local FORM.FRM file (this could be a name other than FORM.FRM, i.e. SR.FRM) installed on your local computer. If the .FRM file is out of date, or has an incorrect version number, you will be prompted with the appropriate message when logging on.

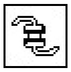
At this time, you should contact your Customer-One representative so as to obtain a new copy of the .FRM file. A common practice is to store these .FRM files in a *folder* (the folder name will depend on how Customer-One has been setup.)

If your .FRM file is out of date, you could experience problems working with the help desk, service request, user details, and other customized forms sections.

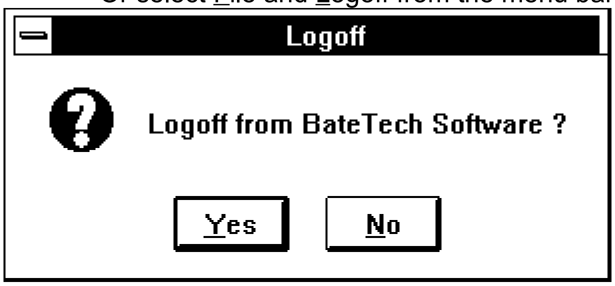
Logging Off

Following is the procedure to open the Logoff window.

- Click on the Logoff icon on the tool bar



- Or select File and Logoff from the menu bar (or Ctrl+L)



The name of the Customer-One service you are logging off from will be displayed in this window.

Obviously, this option will only be available if your are *logged-on* to Customer-One. Use this option to logoff from the Customer-One service. If you press the Yes button to logoff, the following message should be displayed in the status bar:

Logged off successfully

File Operations

There are *two* primary file operations that can be performed:

- Save As
- Print

Related Topics:

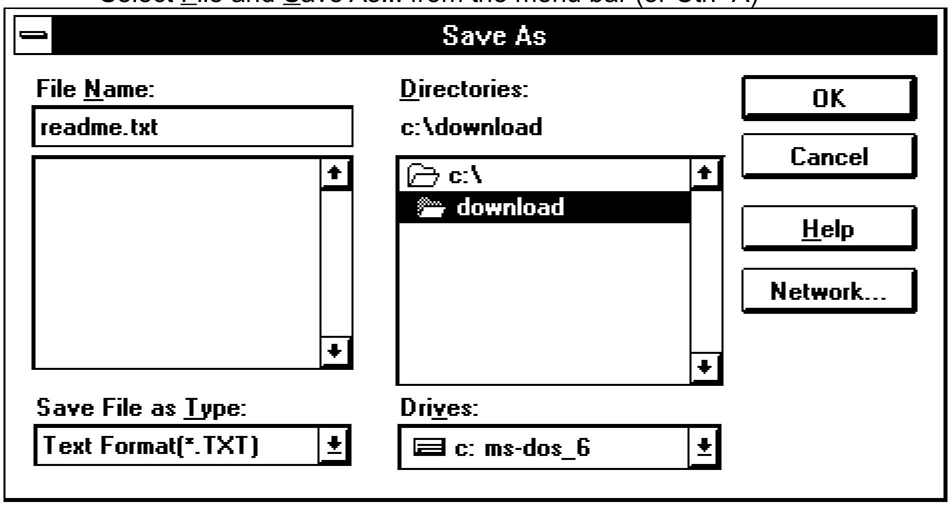
Save As
Print

Save As

Save As will save the contents of a window to a text file. If a list window is open and active at the time this menu item is selected, the contents of the list window will be saved as a text file. The Save As window is a standard Microsoft Windows Save As window.

Following is the procedure to open the Save As... window.

- Select File and Save As... from the menu bar (or Ctrl+A)



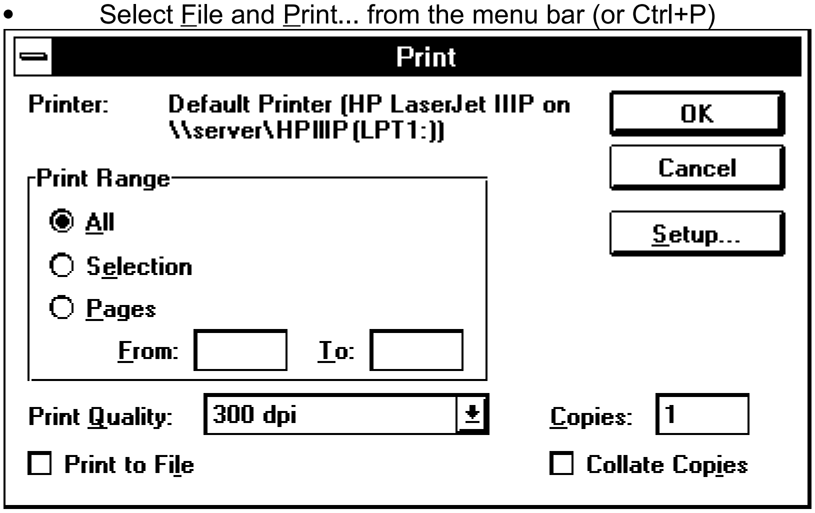
The menu items File and Save As will *not* be available on windows where it is not possible to save the contents of the window. For further information on saving files, *see* your Microsoft Windows manual.

Print

Print will send the contents of a window *to the default printer.* If a list window is open and active at the time this menu item is selected, the contents of the list window will be printed. The Print window is a standard Microsoft Windows Print window.

Following is the procedure to open the Print... window.

- Select File and Print... from the menu bar (or Ctrl+P)



The menu items File and Print will *not* be available on windows where it is not possible to print the contents of the window. For further information on printing files, *see* your Microsoft Windows manual.

Options

There are a number of different options that you can change through the Options menu item, namely:

- Tool Bar (on or off)
- Status Bar (on or off)
- Confirm Delete and Esc (on or off)
- Auto Mail List (on or off)
- Auto Logon (on or off)
- Password ...
- Font ...
- Default Service...

All the options, with the *exception* of password, can be changed while on- or off-line.

Option settings are stored in the *C1.INI file* which is located in the Windows directory. For further information on the C1.INI file, *see* the "C1.INI File Settings" section in the Technical Reference portion of the manual.

Related Topics:

Tool Bar
Status Bar
Confirm Delete and Esc
Auto Mail List
Auto Logon
Password
Changing your Password
Font
Changing your Default Font
Default Service
Changing your Default Service
Changing your Default Service Request

Tool Bar

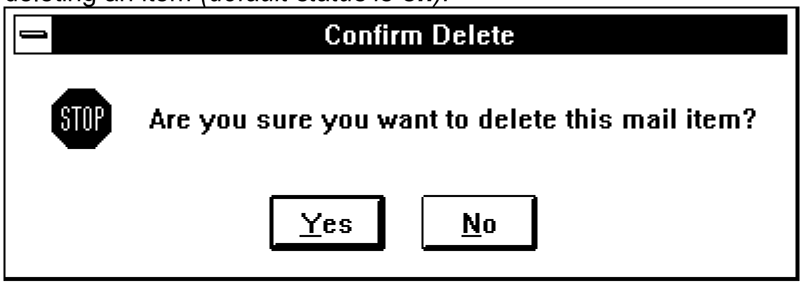
If on (checked), this menu item will display the tool bar at the top of the Customer-One window *(default status is **on**).*

Status Bar

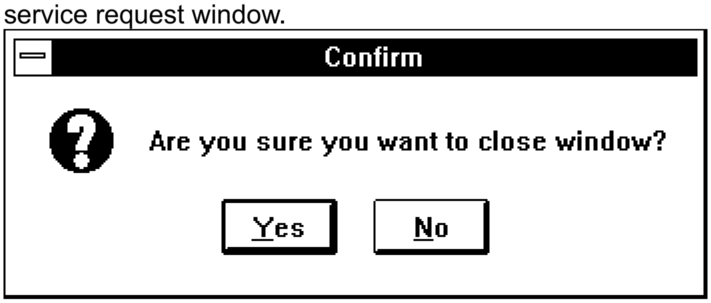
If on (checked), this menu item will display the status bar at the bottom of the Customer-One window *(default status is **on**).*

Confirm Delete and Esc

If on (checked), this menu item will prompt you with a dialog box to confirm your deletion decision prior to deleting an item *(default status is **on**):*



In addition to this, if checked, you will be prompted for confirmation prior to closing certain windows, ie. service request window.



Auto Mail List

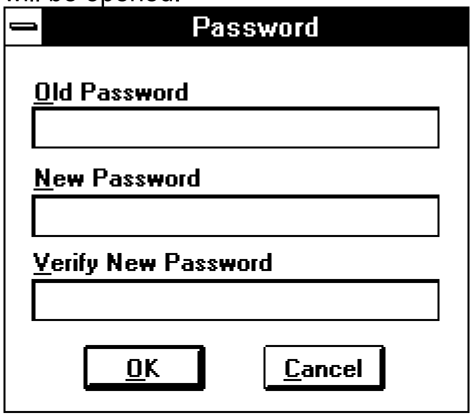
If on (checked), this menu item will automatically display the Mail list window when successfully logged on to a Customer-One service *(default status is **off**)*.

Auto Logon

If on (checked), this menu item will automatically display the Connection window every time you start the Customer-One program *(default status is **off**)*.

Password

This menu option will allow you to change your password.   By selecting this option, the password window will be opened.

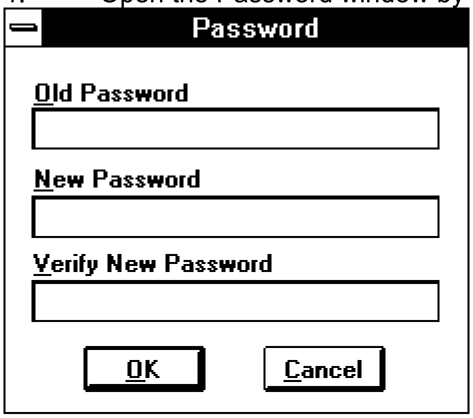


This window can only be opened *while on-line* to Customer-One.

Changing your Password

Following is the procedure to change your personal password. Characters entered are displayed as asterisks (****):

1. Open the Password window by selecting Options and Password... from the menu bar:



2. In the Old Password field, enter your old password. This is the same password you used to logon.
3. In the New Password field, enter your new password. A password can be a maximum of 15 characters and can be entered in either upper or lower case (Customer-One is *not case sensitive,* upper and lower case passwords are treated as the same).
4. In the Verify New Password field, enter your new password *again.* This will confirm that the new password has been entered correctly.
6. When complete, press the OK button to save the changes and close the password window. Press the Cancel button if you wish to close the password window without saving the changes. Observe the status bar message area in the *lower left-hand corner* of the screen which will display following message:

   Password changed

   If error messages are displayed, re-enter the fields.

You can only change your password *while on-line* to Customer-One.

Font

Customer-One uses the standard Windows Font dialog box to edit the font setting. The font setting will only affect the list windows (i.e. Mail, Folders, Help Desk, News, etc.) and the multi-line edit area of the write windows (i.e. Write Mail, Write Message, etc.).

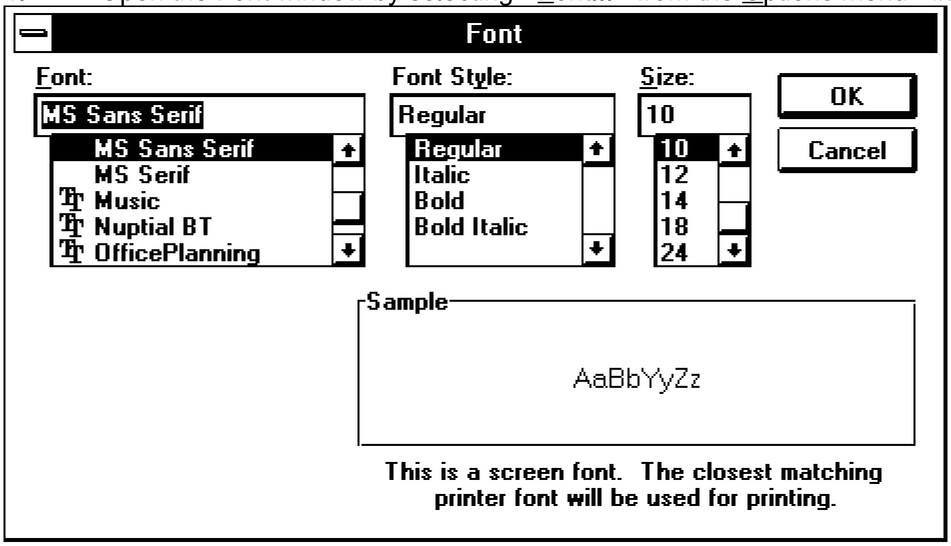
The fonts available for selection will be dependent upon what fonts you have installed in your computer. All installed fonts will be available to select from, however, *some fonts will not display legible text* (i.e. the Morse Code font type!). Observe the Sample area (in the Font window) for an idea of what the font you have selected will look like. The style and size of the font can also be set in this window.

For further information on changing fonts, *see* your Microsoft Windows manual.

Changing your Default Font

Following is the procedure to change your default font:

1. Open the Font window by selecting Font... from the Options menu in the menu bar:



2. Select the new font from the Font list.
3. Select the style of the new font from the Font Style list.
4. Select the size of the new font from the Size list. Your selections will be displayed in the Sample area of the Font window.
5. Press either the OK button to save your changes and close the window, or the Cancel button to abort the changes and close the window.

Be aware, that if you have many fonts installed in your system, this window could take a while to load.

Default Service

This menu option will allow you to change your default Customer-One service to which you connect. This is used when working off-line with mail, messages and service requests.

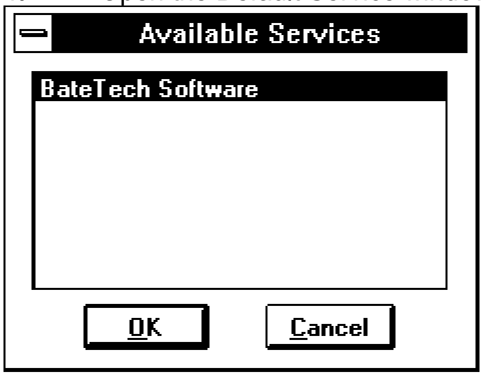
As you can connect to multiple Customer-One services, it is necessary to designate one Customer-One service as a default.

When first starting the Customer-One front end program, you will be prompted to set a default service. However, if you select the menu item Options and Default Service... there will be no services listed. You have to first logon to a valid Customer-One service before this list will be populated. Once there are Customer-One services listed here, you can select one as a default service.

Changing your Default Service

Following is the procedure to change your default service:

1. Open the Default Service window by selecting Options and Default Service... from the menu bar:



2. To select a service as default, do one of the following:

    - Double-click on the service name.
    - Highlight the service name and press the OK button.

    Observe the status bar message area in the *lower left-hand corner* of the screen which should display the following message:

        Default service set

Changing your Default Service Request

Following is the procedure to change your default service request. By changing the default service request, the C1.INI file will be updated with the new information. Now when you perform any of the following, the new default service request will be opened:

- Press the Service Request icon on the tool bar.
- Press the New button located along the top of the Help Desk list window.
- Press the Search button located along the top of the Help Desk list window.

1. Open the Available Requests window by selecting Options and Default Request... from the menu bar:

2. To select a service request to set as default, do one of the following:

   - Double-click on the service request name.
   - Highlight the service request name and press the OK button.

   Observe the status bar message area in the *lower left-hand corner* of the screen which should display the following message:

      Default service request set

Custom Forms

General

Customer-One uses a forms technology that allows a Customer-One service to customize the following aspects of the front end program you are using:

- Service requests
- Service request actions
- Custom forms

Related Topics:

Service Requests
Service Request Actions
Custom Forms

Service Requests

For further information on the service requests, *see* the Customizable Service Requests section.

Service Request Actions

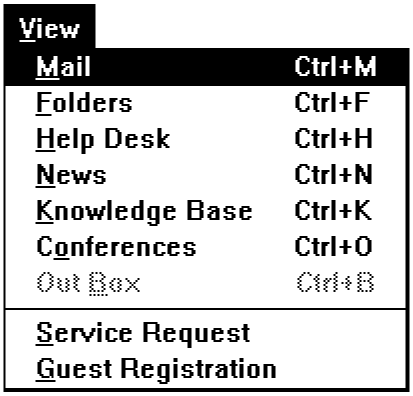
For further information on the service requests, *see* the Customizable Actions section.

Custom Forms

Custom forms are windows that the Customer-One service can setup to *display or capture* information. An example of a custom form is the User Details form. For further information on the User Details form, *see* the User Details Form section.

View Custom Forms

These forms are all listed in the menu item View below the separator bar which is below the Out Box item.



In this **example**, the custom forms are:

- Service Request
- Guest Registration

Typically, custom forms can only be viewed while on-line. The exception is the default Service Request form which can be viewed and completed while off-line.

Sample Custom Forms

User Details Form
Guest Registration Form

User Details Form

The User Details window is where you can change your personal profile. This window is a *definable form.* This means that the Customer-One administrator has the ability to modify the user details form to fit their requirements or remove the User Details window completely. The *accelerator keys* for the various fields can also vary depending on how the User Details window has been configured. The form used in this chapter is a **sample** User Details form.

There are mandatory (or " hard") fields that should always appear on this form, such as:

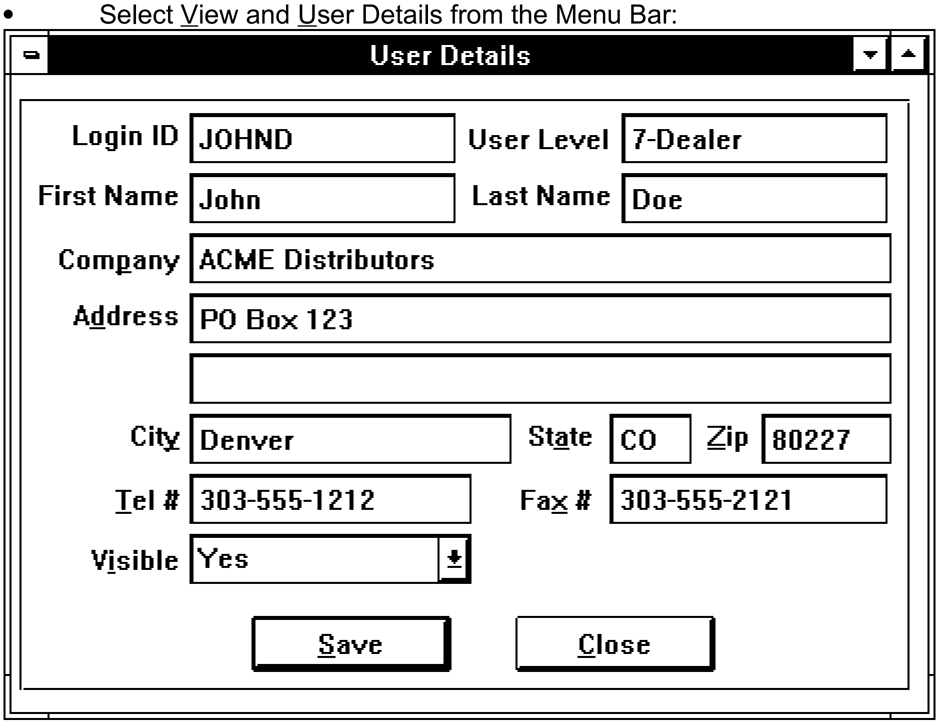
- Login ID
- First Name
- Last Name
- Visible
- User Level

Depending on the Customer-One service that you are connected to, certain of these fields may *not* be available for editing. Only the Customer-One administrator has the ability to change these fields.

Open User Details Window

Following is the procedure to open the User Details window.

- Select View and User Details from the Menu Bar:



The User Details form could also be called by a different name.

For further information on the User Details window, *see* the User Details Window section in the Customer-One Screen Reference portion of the manual.

Visible (User) Setting

This setting allows you to change your status *so that other users can or cannot see you.* The options available for this field are Yes and No. The following functions are affected by changing this setting to ***No****:*

Mail	You will *not* be visible to other users in the mail Address window.
Conference	Other users will *not* be able to invite you to a conference.

User Access Level Setting

User access level is a *read-only field* setup by the Customer-One administrator. A user access level determines which functions you are permitted to perform on the Customer-One service to which you are connected. **To change your user access level, you will have to contact your Customer-One service representative.**

Definable User Details Fields

There can be a number of other fields that can appear on this form, such as:

- Company Name
- Telephone #
- Fax #
- Address
- City
- State
- Billing Details

Edit User Details

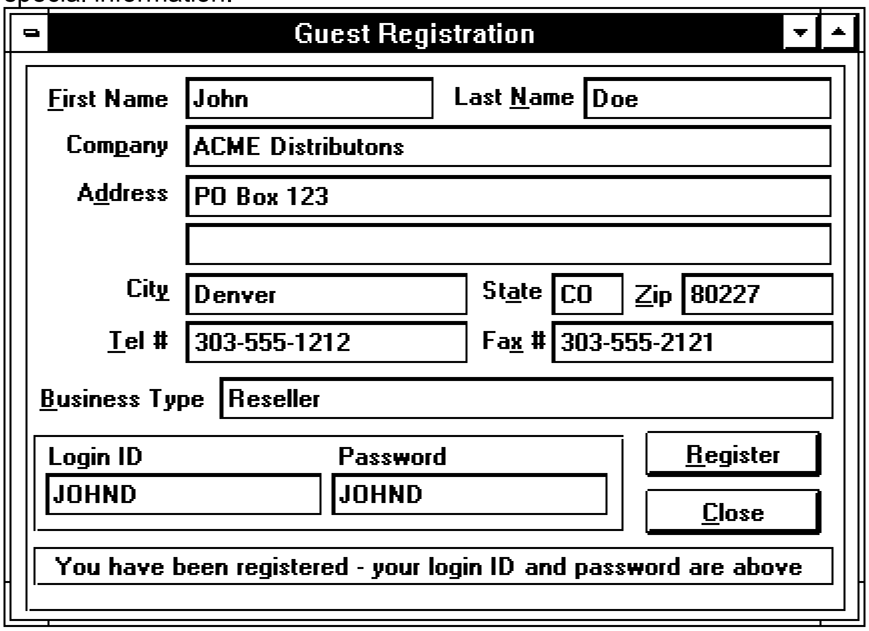
Following is the procedure to edit your user details:

1. Open the User Details window by selecting View and User Details from the menu bar. The User Details form could be under a different name with different short-cut keys.
2. Select the field you wish to change and edit as necessary.
3. When complete, press the OK button to save the changes and close the User Details window. Press the Cancel key if you wish to close the user details window *without* saving the changes. Observe the status bar message area in the lower left-hand corner of the screen which will display the following message:

    Details saved

Guest Registration Form

The Guest Registration form is a good example of a custom form for *capturing information.* This form can be utilized when a guest logs on to the Customer-One system so that they can register with the administrator and receive a login ID and password. This form also makes use of a *status field* to display special information.



Using Lookup Fields and Lists

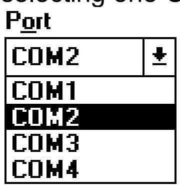
Service requests and custom forms can make use of lookup fields. Lookup fields using combo list boxes can take the following formats:

Related Topics:

- Drop-List
- Drop-Down List

Drop-List

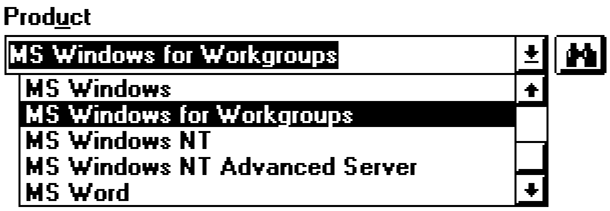
A drop-list is used to display a group of information.   In the following **example**, you are limited to selecting one COM port.



These values (COM1, COM2, etc.) are usually *hard-coded* into this type of combo list box.

Drop-Down List

A drop-down list is normally used to lookup information from a database table.   In the following **example**, the drop-down list has a lookup button (located at the right of the field) which, when pressed, will start the search on the database table.   You can typically also enter text to search for which will help narrow down the search:



The items displayed in this list are often *dynamically updated* by other components of the program, such as other custom forms or service requests.

Also, when selecting an item from a drop-down list, it could *automatically populate* other fields on a form if the form or service request has been setup this way.

Mail

The mail component of Customer-One will allow you to send mail to (and receive mail from) any user of the Customer-One system.

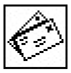
Related Topics:

- Open Mail List Window
- Mail List Icons
- View Mail
- Reply to Mail
- Open Write New Mail Window
- Write New Mail
- Submitting Mail while Off-Line
- Open Address Mail Window
- Working with the Address Book
- Deleting Mail
- Working with Attachments
- Incoming Mail Notification

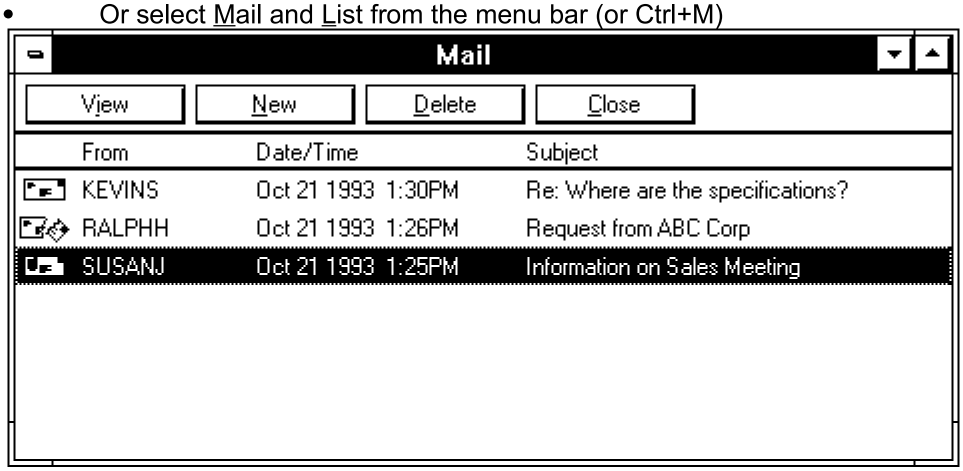
Open Mail List Window

Following is the procedure to open the Mail list window.

- Click on the Mail icon on the tool bar



- Or select Mail and List from the menu bar (or Ctrl+M)



For further information on the Mail list window, *see* the Mail Window section in the Customer-One Screen Reference portion of the manual.

Mail List Icons

Each mail item in the Mail list window is preceded by an icon, indicating the ***type of mail item***. One of the following icons is displayed alongside each mail item:

 New unread mail

 Read mail

 New unread wail with attachment

 Read mail with attachment

View Mail

Following is the procedure to view your mail:

1. Open the Mail window by selecting the Mail icon from the tool bar, or by selecting Mail and List from the menu bar (or Ctrl+M).
2. This will open the Mail list window and position the cursor on the first mail item. Mail is displayed in *reverse date* order, i.e. newest mail at the top (first).
3. To read a mail item, do one of the following:
   - Double-click on the mail item.
   - Highlight the mail item and press the Enter key.
   - Highlight the mail item and press the View button at the top of the Mail list window.
   - Highlight the mail item and select the menu item Mail and then Read.
4. This will open the Read Mail window.

The subject of the mail item is displayed in the window title bar, i.e. Mail - Information on Sales Meeting.

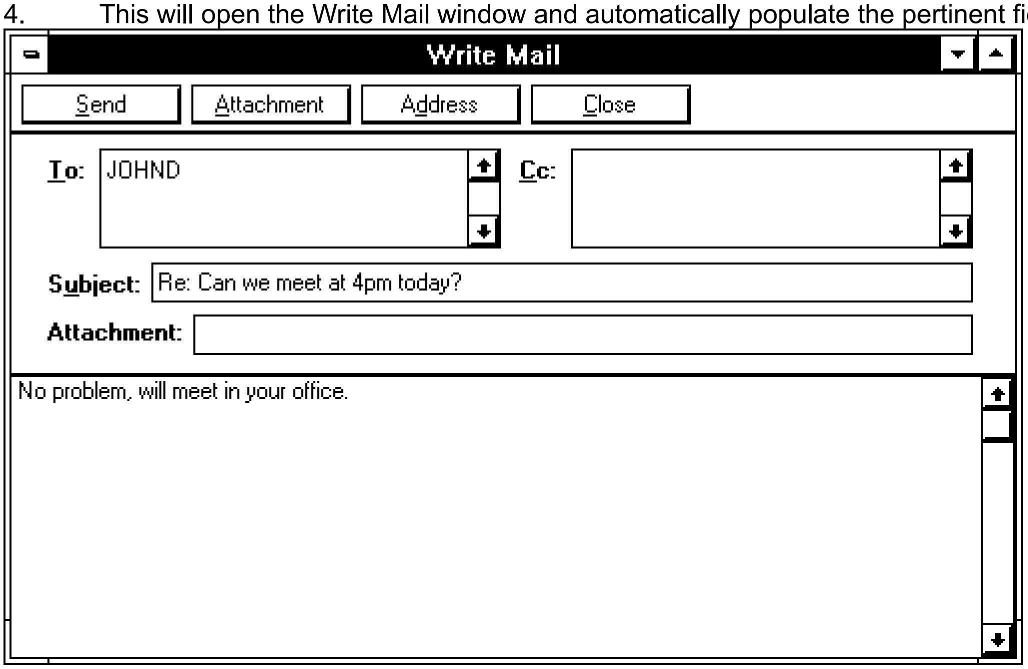
*T*he icon in the Mail list window will automatically change to an *opened envelope* once a new mail item is read.

For further information on the Read mail window, *see* the Read Mail Window section in the Customer-One Screen Reference portion of the manual.

Reply to Mail

Following is the procedure to reply to a mail item:

1. Open the Mail window by selecting the Mail icon from the tool bar, or by selecting Mail and List from the menu bar (or Ctrl+M).
2. This will open the Mail window and position the cursor on the first mail item. Mail is displayed in reverse date order, i.e. newest mail at the top (first).
3. Locate and open (read) the mail item you wish to reply to and do one of the following:
    - Select Mail and Reply... from the menu bar.
    - Press the Reply button located at the top of the read Mail window.
4. This will open the Write Mail window and automatically populate the pertinent fields.



5. The *reply to mail* window is the same as the Write Mail window, except that it automatically inserts the following information:

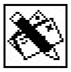
To	This is the author of the mail item to whom you are replying.
Subject	This is the subject of the original mail message to which you are replying. A "Re:" is inserted in front of the subject.

For further information on replying to mail, *see* the Write New Mail section.

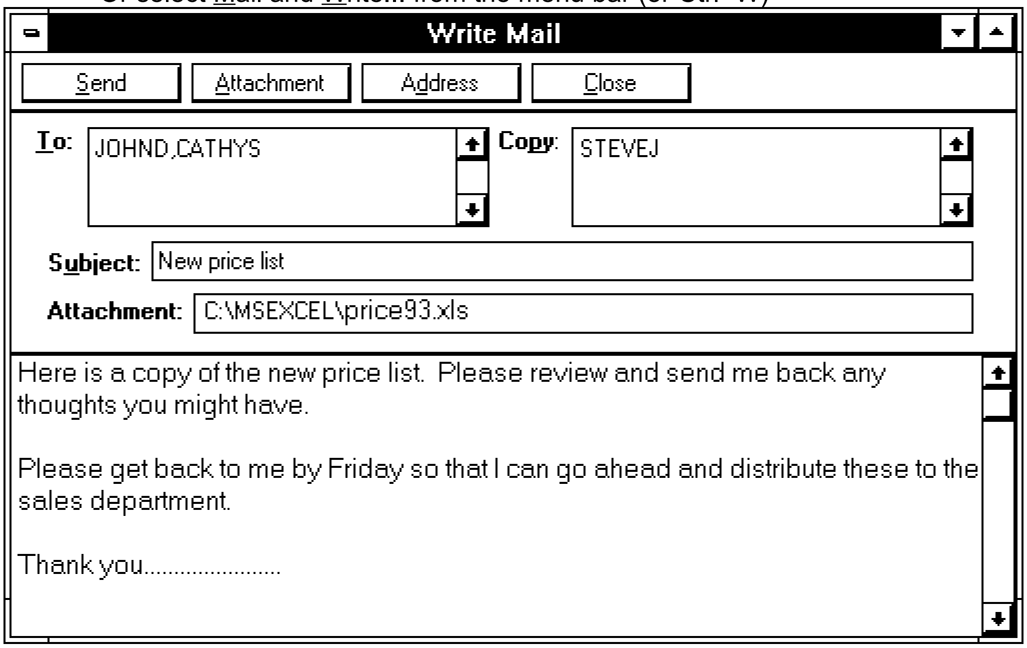
Open Write New Mail Window

Following is the procedure to open the Write Mail window.

- Click on the Write Mail icon on the tool bar



- Or select Mail and Write... from the menu bar (or Ctrl+W)



For further information on the Write Mail window, *see* the Write Mail Window section in the Customer-One Screen Reference portion of the manual.

Write New Mail

Following is the procedure to write new mail:

1. Open the Write Mail window by selecting the Write Mail icon from the tool bar, or by selecting Mail and Write... from the menu bar (or Ctrl+W).
2. This will open the Write Mail window and position the cursor on the To field.
3. Enter the login ID of the user ('s) you wish to send the mail item to. Separate the login ID's with a comma (**,**) i.e. JOHND, PAULS, etc. The same applies to the Copy field. If you are not sure of the login ID's of the users you wish to send the mail item to, open the Address window by pressing the Address button.
4. Move the cursor to the Subject field and enter a subject description.
5. Move the cursor to the Details field (below the Attachment field) and enter the content of the mail. You have full word processing capabilities in this edit area. Do not press the Enter key at the end of a line as the sentence will automatically wrap around.
6. On completion, press the Send button and the mail will be sent. If you are off-line, the mail item will be placed in the out box until you logon. If you are on-line at the time the Send button is pressed, the mail will be sent immediately. Observe the status bar message area in the *lower left-hand corner* of the screen which should display the following message:

   Mail sent

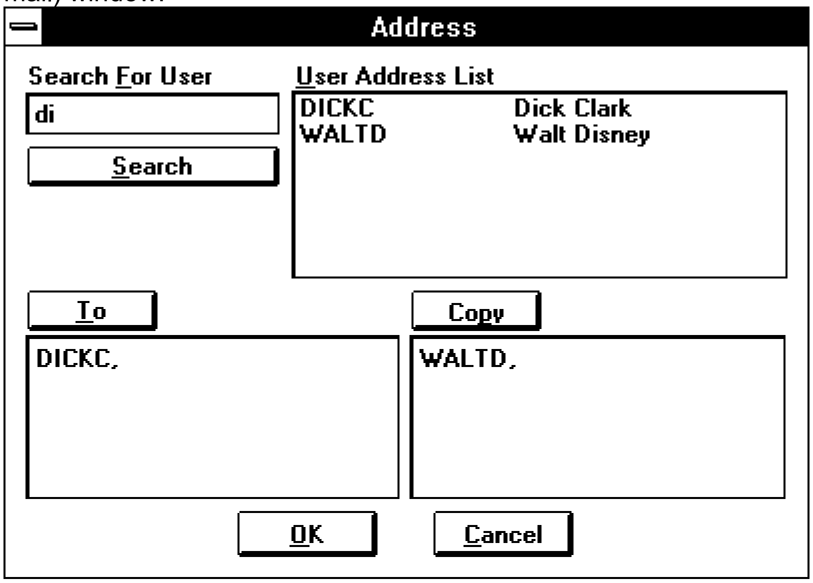
Pressing the INS (Insert) key on your keyboard will also open the Write Mail window, as long as you are in the Mail list window at the time.

Submitting Mail while Off-Line

For further information on writing mail while off-line, *see* the Submitting Mail Off-Line section.

Open Address Mail Window

To open the Address window, press the Address button located at the top of the Write Mail (or reply to mail) window:



The Address window will allow you to look for users to whom you want to address your mail.

In order to search for users using the Address window, you have to be on-line.

Working with the Address Book

Following is the procedure to search for a user (or users) to send mail to:

1. Open the Address window by pressing the Address button in the Write Mail (or reply to mail) window.
2. This will open the Address window and position the cursor in the Search For User field.
3. Enter the first or last name of the user you want to search for. There are a number of ways that the search can take place:
    - The entire name does not have to be entered. You can enter the first few characters of the name you are looking for and all matching users starting with those characters will be displayed
    - If you leave this field blank, all users will be displayed.

Some Customer-One systems can have many users, resulting in your Customer-One system pausing until *all* the users are displayed.

4. Press the Search button to display all users that match your search criteria. Matching users will be displayed in the User Address List.
5. Select user (or users) to send the mail item to and press either the To or the Copy buttons.
    - If the To button is pressed, the users selected will be placed in the To field of the Write Mail window.
    - If the Copy button is pressed, the users selected will be placed in the Copy field of the Write Mail window.

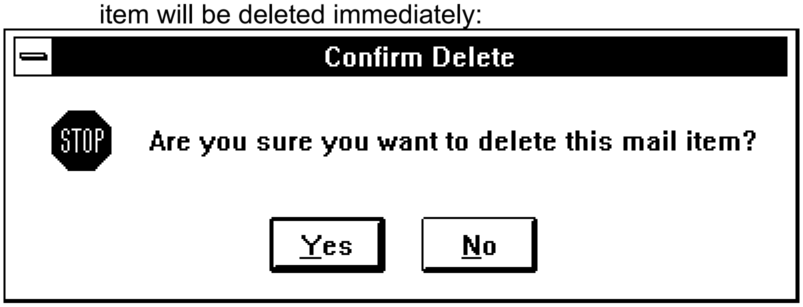
    Once the To or Copy buttons have been pressed and the user names copied, the selected names in the User Address List will be cleared allowing you to select other users to send the mail item to.
6. When complete, press the OK button to save your selection and return to the Write Mail window. All users placed in the To and Copy list boxes (in the Address window) will be copied to the appropriate fields in the Write Mail window. Press Cancel to close the Address window and discard all selected users.

Deleting Mail

Deleting Mail from the Mail List Window

Following is the procedure to delete a mail item from the Mail list window:

1. Open the Mail window by selecting the Mail icon from the tool bar, or by selecting Mail and List from the menu bar (or Ctrl+M).
2. This will open the Mail window and position the cursor on the first mail item. Mail is displayed in reverse date order, i.e. newest mail at the top (first).
3. Select the mail item you wish to delete and press the Delete key located at the top of the mail Window. If the menu item Options and Confirm Delete and Esc is checked, you will be prompted for confirmation prior to deleting the mail item. If Confirm Delete and Esc is not checked, the item will be deleted immediately:



Observe the status bar message area in the *lower left-hand corner* of the screen which should display the following message:

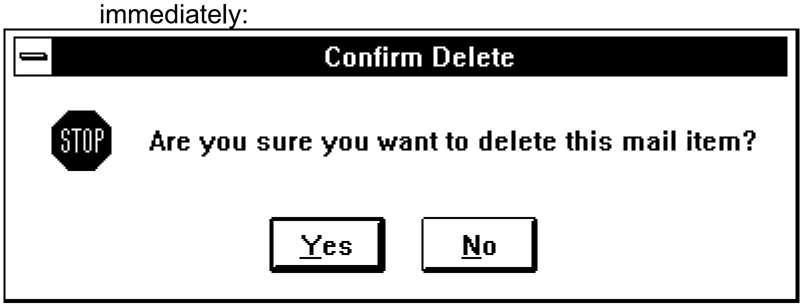
Mail deleted

Pressing the DEL (Delete key) on your keyboard will also delete the selected mail item

Deleting Mail from the Read Mail Window

Following is the procedure to delete a mail item from the Read Mail window:

1. Open the Mail window by selecting the Mail icon from the tool bar, or by selecting Mail and List from the menu bar (or Ctrl+M).
2. This will open the Mail window and position the cursor on the first mail item. Mail is displayed in reverse date order, i.e. newest mail at the top (first).
3. Using the mouse or keyboard, select the mail item you want to read. To read that mail item, do one of the following:
   - Double-click on the mail item.
   - Highlight the mail item and press the Enter key.
   - Highlight the mail item and press the View button at the top of the Mail list window.
   - Highlight the mail item and select the menu item Mail and then Read.
4. This will open the Read Mail window allowing you to read the item prior to deleting it.
5. Press the Delete key located at the top of the mail Window to delete the mail item. If the menu item Options and Confirm Delete and Esc is checked, you will be prompted for confirmation prior to deleting the mail item. If Confirm Delete and Esc is not checked, the item will be deleted immediately:



Observe the status bar message area in the *lower left-hand corner* of the screen which should display the following message:

Mail deleted

Working with Attachments

Attachments are files which are attached to *mail items.* It is possible to both send and receive attached files. It is only possible to send one attachment with a mail item. If more than one file needs to be attached, we suggest that you ***compress*** those files into one file using any standard file compression program.

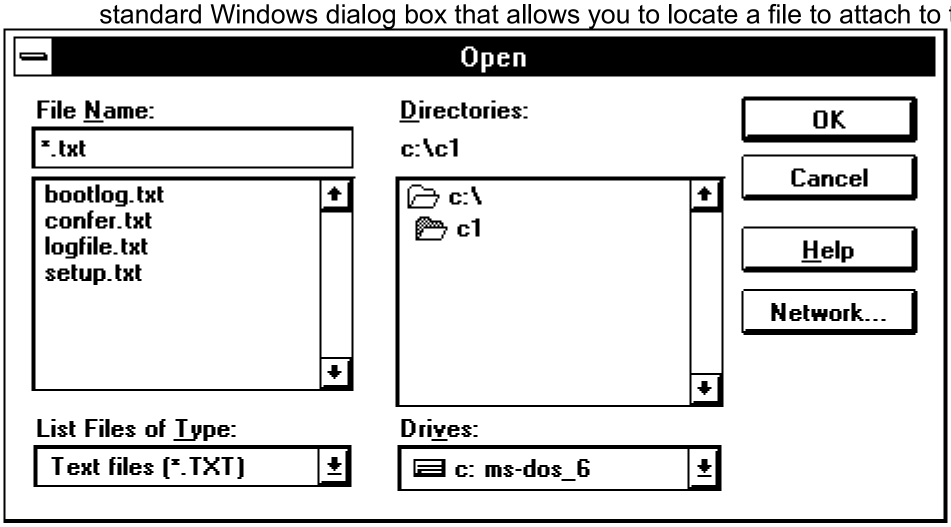
Related Topics:

Sending Mail with an Attached File
Retrieving an Attached File from a Mail Item

Sending Mail with an Attached File

Following is the procedure to send a mail item with an attached file:

1. Open the Write Mail window by selecting the Write Mail icon from the tool bar, or by selecting Mail and Write from the menu bar (or Ctrl+W).
2. This will open the Write Mail window and position the cursor on the To field.
3. From any field, press the Attachment button to activate the Open window. The Open window is a standard Windows dialog box that allows you to locate a file to attach to this mail item:



For further information on using this window, *see* your Microsoft Windows manual.

4. Select the file you wish to attach and press the OK button when complete. The Open window will be closed and you will be returned to the Write Mail window. The *name* of the attached file will be displayed in the Attachment field.
5. Finish the mail item as outlined in the section Write New Mail. When complete, press the Send button and the mail item *and* the attached file will be sent. Observe the status bar message area in the lower left-hand corner of the screen which should display the following message:

   Uploading [file name]

   Mail sent

Retrieving an Attached File from a Mail Item

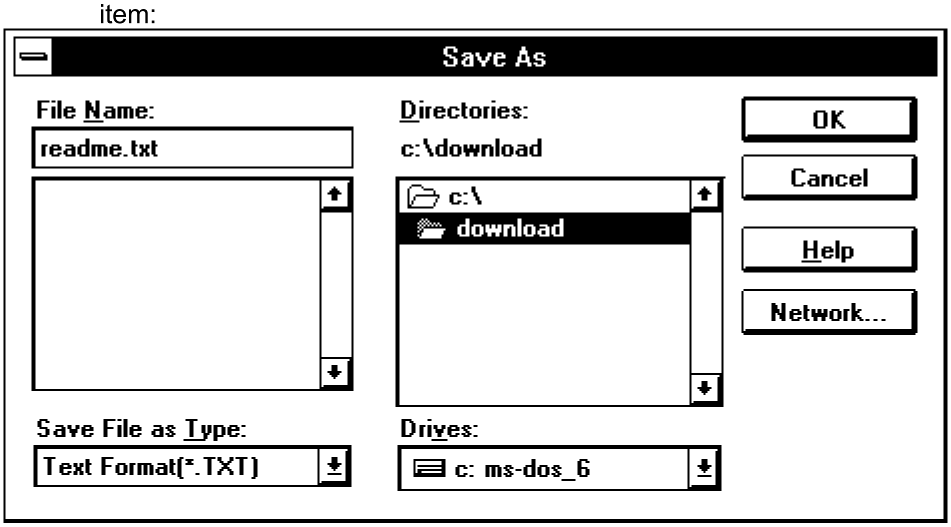
Following is the procedure to retrieve a mail item which has a file attached to it:

1. Open the Mail window by selecting the Mail icon from the tool bar, or by selecting Mail and List from the menu bar (or Ctrl+M).
2. This will open the Mail window and position the cursor on the first mail item. Mail is displayed in reverse date order, i.e. newest mail at the top (first).
3. Select the mail item (with the attachment) that you wish to read and press the Enter key to view. Mail items that have attachments are marked with one of the following two icons:

 New Unread Mail with Attachment

 Read Mail with Attachment

4. From any field, press the Attachment button to open the Save As window. The Save As window is a standard Windows dialog box that allows you to save the file which is attached to this mail item:



For further information on using this window, *see* your Microsoft Windows manual.

5 Select the location (path) you wish to save the attached file to and press the OK button when complete. The file will be saved in the path specified and the Save As window will be closed. You will be returned to the Read Mail window. Observe the status bar message area in the lower left-hand corner of the screen which should display the following messages:

Downloading [file name]

File download successful

Incoming Mail Notification

When logging onto Customer-One, a mail icon will be displayed in the status bar if there is new mail waiting for you

If there are multiple mail items waiting, the icon will remain in place until the last item is viewed.

To read a mail item from the status bar, double-click with the left-hand mouse button on the mail icon in the status bar.

If the Mail list window is open (and you are on-line) at the time a new mail item is received, there will be ***an audible warning*** and the mail list will be updated with the new mail.

Folders

The Folders component of Customer-One will allow you to read and submit messages, up and download files and follow message conversations in the various folders (forums).

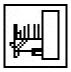
Related Topics:

Open Folders List Window
Folder List Icons
Folders & Sections Explanation
Relationship of Folders, Sections & Messages
Original & Thread Messages Explanation
Favorite and List All Sections
Open Folder Section and View Messages
Searching for Messages
View Message Details
Read a Message
Commenting on a Message
Working in the Message Thread Window
Open Write New Message Window
Write a New Message
Submitting Messages while Off-Line
Working with Attachments
Saving / Deleting Favorite Selections

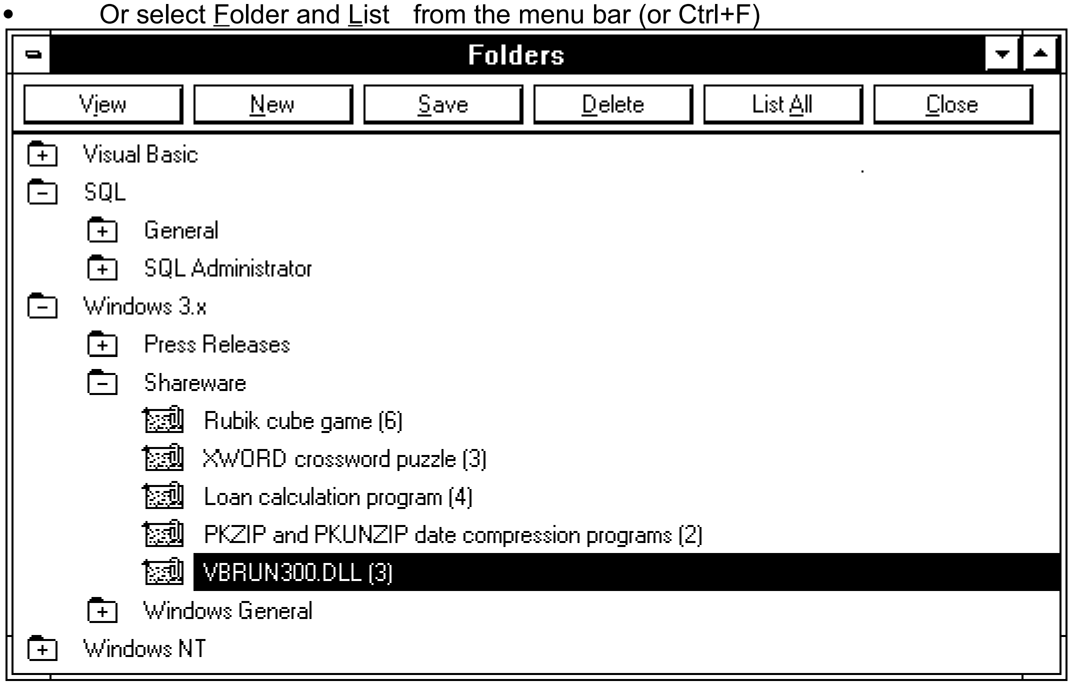
Open Folders List Window

Following is the procedure to open the Folders list window:

- Click on the Folder icon on the tool bar



- Or select Folder and List from the menu bar (or Ctrl+F)



For further information on the Folders list window, *see* the Folders Window section in the Customer-One Screen Reference portion of the manual.

Folder List Icons

Each folder and message is preceded by a specific icon.   One of the following icons is displayed alongside each folder, section and message line:

 This icon is displayed alongside all UNOPENED folders and sections (collapsed).

 This icon is displayed alongside all OPENED folders and sections (expanded).

 This icon is displayed alongside all ORIGINAL messages.

 This icon is displayed alongside all ORIGINAL messages that have attached files.

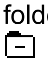
 This icon is displayed alongside all THREAD messages.

 This icon is displayed alongside all THREAD messages that have attached files.

Folders & Sections Explanation

The Folder list window in the Customer-One front end displays all information in a method similar to a directory "tree". Each folder can have *multiple sections* although sections cannot have sub-sections, only messages. A folder will typically have a broad description (i.e. Windows) while the sections (or sub-folders) will be more specific (i.e. File Manager/Paint Brush/Write) and should handle a specific subject relating to the folder.

The folders are aligned along the left-hand margin, while the sections are indented in from the left margin. The **+** and **-** symbols in the folder and section icons indicates if that folder or section is in a expanded or collapsed state.

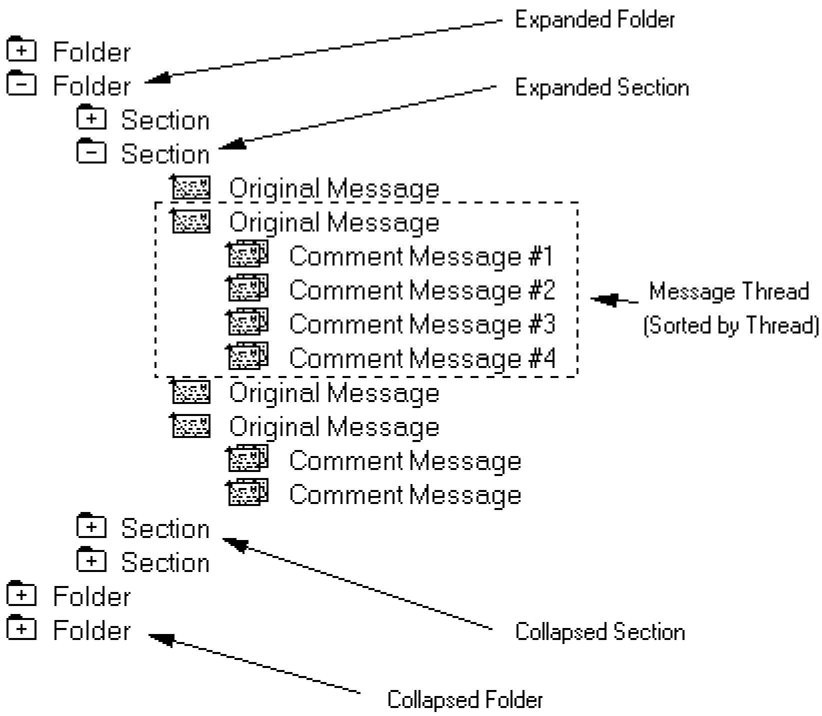
To expand a folder, double-click on the folder or section icon (or press the Enter key over a highlighted folder or section). Once a folder or section has been expanded, its icon changes to:


To collapse a folder, double-click on the folder or section icon (or press the Enter key over a highlighted folder or section). Once a folder or section has been collapsed, its icon changes to:


Relationship of Folders, Sections & Messages

When we created Customer-One we looked for a simple analogy for a system that enabled us to store many documents in a structured and categorized manner, in much the same way as we store documents in a filing cabinet, with drawers and folders.

Folders is an area where you can store and retrieve messages and documents with attached files. In order to ease the management of these documents, the messages are categorized into sections within folders, i.e. a message is located in a section which is located in a folder:



In the diagram above, both the original and comment messages can have attached files. The messages will then have the icon representing an attached file:

For original message with an attached file

For comment (thread) message with an attached file

Original & Thread Messages Explanation

Customer-One users have the ability to create new messages or to reply to existing messages. If you reply to a message, Customer-One keeps track of the conversation (referred to as a "thread"). This helps you follow an entire conversation, even if they are reading a comment message located in the middle of the thread.

Messages are contained in sections. If a new message is submitted, it is classified as an *original* message. Original messages have one of the following *two icons* preceding it, depending if the message has an attached file or not:

 or


If you comment on a message, the comment message is classified as a *thread* message but is still associated to that original message. Thread messages have one of the following two icons preceding it, depending if the message has an attached file or not:

 or


Thread messages are indented to distinguish them from original messages.

Favorite and List All Sections

Customer-One displays folder sections in *two modes,* Favorite (default) and All. When you initially open the Folder list window, you are in Favorite mode and "favorite" folders and sections are displayed. This includes:

- Folder sections that were previously opened.
- Folder sections that were previously saved as favorite.

This allows you to keep a list of your favorite sections for easy viewing. You can still *switch* between the two modes by pressing the List All/Favorite button.

The *first time* the folder list window is opened, there will be no folders or sections setup as Favorite.

You will then be prompted to retrieve folders from the Customer-One service.

Open Folder Section and View Messages

Viewing Messages for the First Time

When using Customer-One for the first time, you will not have any folders or sections saved as favorite in your C1.INI file. Following is the procedure to view messages for the first time:

1. Open the Folder list window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the following dialog box:

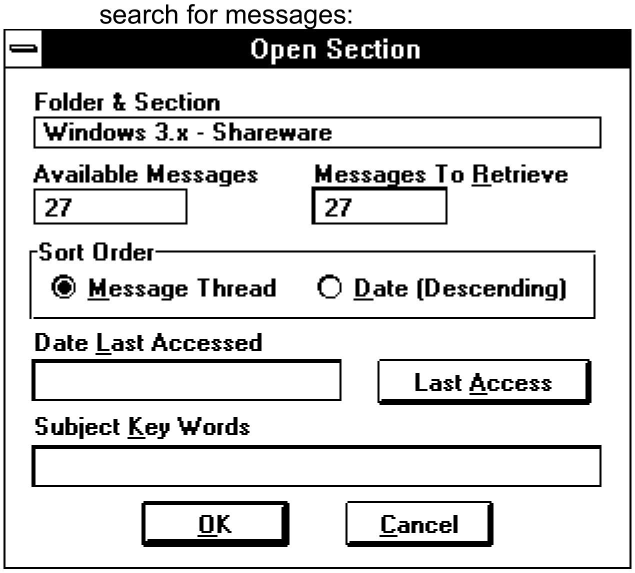
3. After pressing the OK button, the folder list will display all the folders available from which to select. Now, as you save and/or open sections, they will be saved as favorite folders and will be displayed in the folder list next time you open the Folder list window.

Once a folder section has been accessed, it will be saved to the **C1.INI** file and the next time you load the folders module, it will be listed as a Favorite folder. For further information on saving and deleting favorite folders, *see* the Saving / Deleting Favorite Selections section.

Viewing Messages Normally

Once you have a list of favorite folders and sections saved, you are able to view those messages by executing the following procedure:

1. Open the Folder window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the Folder list window (in favorite mode) and position the cursor on the first folder item. Folders are displayed in the order they were previously selected, not in alphabetical order.
3. Using the mouse or keyboard, select the folder you want to open. To open that folder (or section) do one of the following:
    - Double-click on the folder.
    - Highlight the folder and press the Enter key.
    - Highlight the folder and press the View button at the top of the Folder list window.
    - Highlight the folder and select the menu item Folder and then Read/Expand.
4. This will open the folder and display the available sections for that folder.
5. Repeat step #3 for the section you wish to open.
6. Once the section has been opened, the Open Section window will be displayed allowing you to search for messages:



   For further information on opening folder sections, *see* the Searching for Messages section.

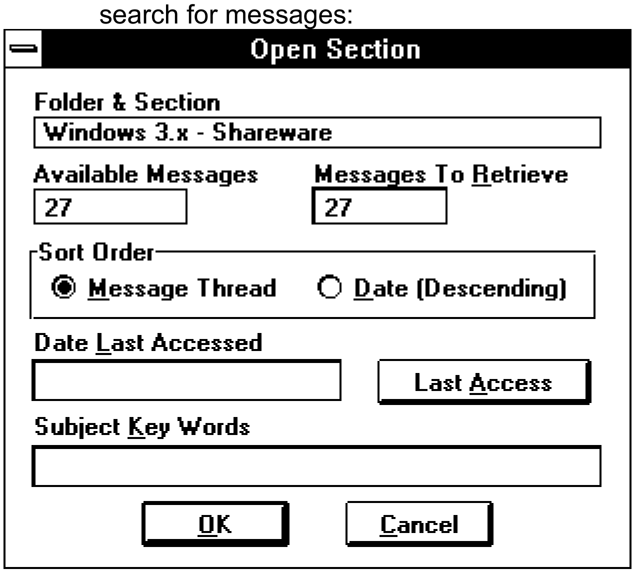
7. Once you have narrowed your search down to those messages you want to retrieve, press the OK button to display the messages. Messages matching your search parameters will be displayed below the folder and section that you expanded.

For further information on the Open Section window, *see* the Open Section Window section in the Customer-One Screen Reference portion of the manual.

Searching for Messages

Following is the procedure to limit the messages displayed by searching for messages:

1. Open the Folder window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the Folder list window (in favorite mode) and position the cursor on the first folder item.
3. Using the mouse or keyboard, select and open the folder and the section you want to open.
4. Once the section has been opened, the Open Section window will be displayed allowing you to search for messages:



Following is a list of what each field and button will allow you to do. Any combination of these fields will allow you to narrow your message search.

If the message count in the Available Messages field is high, we suggest that you be as specific as possible in searching for messages.

Related Topics:

Messages to Retrieve
Sort Order
Date Last Accessed
Subject Key Words

Messages to Retrieve

This field will display the total number of messages available in this section. You can change this number to any number to display only that number of messages. **For example**, if there are 100 messages in a section, by changing this field to 50 will return the 50 *most recent messages* in that section. As a reminder, the Available Messages field will always display the total number of available messages in this section.

Sort Order

Messages can be displayed by two different sort order: Thread and Date.

Sorted by Message Thread

Selecting this option will display all the messages in thread order.   The original message will first be displayed, and then all the comment messages which are associated with that original message.   Any comments on a message will be displayed (indented) below the original message.   This will allow you to follow a message flow by viewing all the comment messages associated with the original message. Following is **an example** of how messages which are sorted by thread are displayed:

- Windows 3.x
  - File Manager
  - Windows General
    - Looking for a large file text editor (3)
      - Re: Looking for a large file text editor (7)
      - Re: Looking for a large file text editor (2)
    - Question on alternate Program Manager (16)
      - Re: Question on alternate Program Manager (13)
    - Windows code to display free memory (18)
    - VB Companion Products & Services (20)
    - Transferring Excel Data to Money (7)
    - WordBasic Macros for WinWord (66)
    - New Features in Windows 3.1 (12)

Sorted by Date (Descending)

Selecting this option will display all the messages in reverse date order.   The latest messages will be displayed first.   Thread messages will not be displayed below the original message they are associated with.   Neither will the thread (comment) messages be indented.   Following is **an example** of how messages which are sorted by date are displayed:

- Windows 3.x
  - File Manager
  - Windows General
    - Re: Looking for a large file text editor (2)
    - Re: Looking for a large file text editor (7)
    - Looking for a large file text editor (3)
    - Re: Question on alternate Program Manager (13)
    - Question on alternate Program Manager (16)
    - Windows code to display free memory (18)
    - VB Companion Products & Services (20)
    - Transferring Excel Data to Money (7)
    - WordBasic Macros for WinWord (66)
    - New Features in Windows 3.1 (12)

Date Last Accessed

If you press the Last Access button, the date and time you last accessed this section will be inserted into the Date Last Accessed field. If your C1.INI file does not have any record of when you last accessed this section, the Last Access button will not be available (dimmed). This option will allow you to view all messages since you last accessed this section. This will allow you to view the new messages submitted since you last accessed this section.

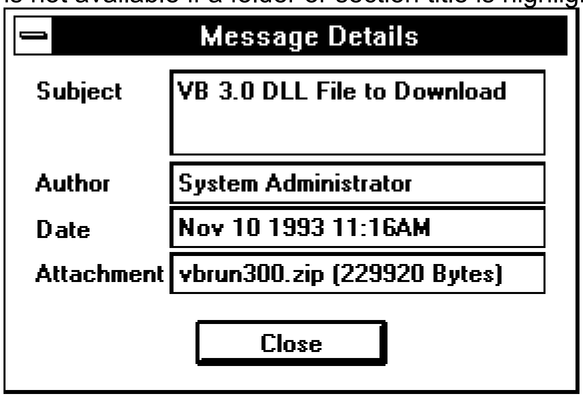
Subject Key Words

If you want to limit the messages that get displayed by subject key word, enter the keywords you want to search for.   No wild-card searches are permitted here although words can be entered in either upper or lower-case.   Words to search for can appear anywhere in the message subject.

Do not enter single letters (i.e. A) as all the messages with the letter 'a' or 'A' in it will be returned.

View Message Details

The **right-hand mouse button** is available *while scrolling* through the messages in the Folder list window. This is also activated by highlighting the message and pressing the Alt+Enter key. This feature is not available if a folder or section title is highlighted.

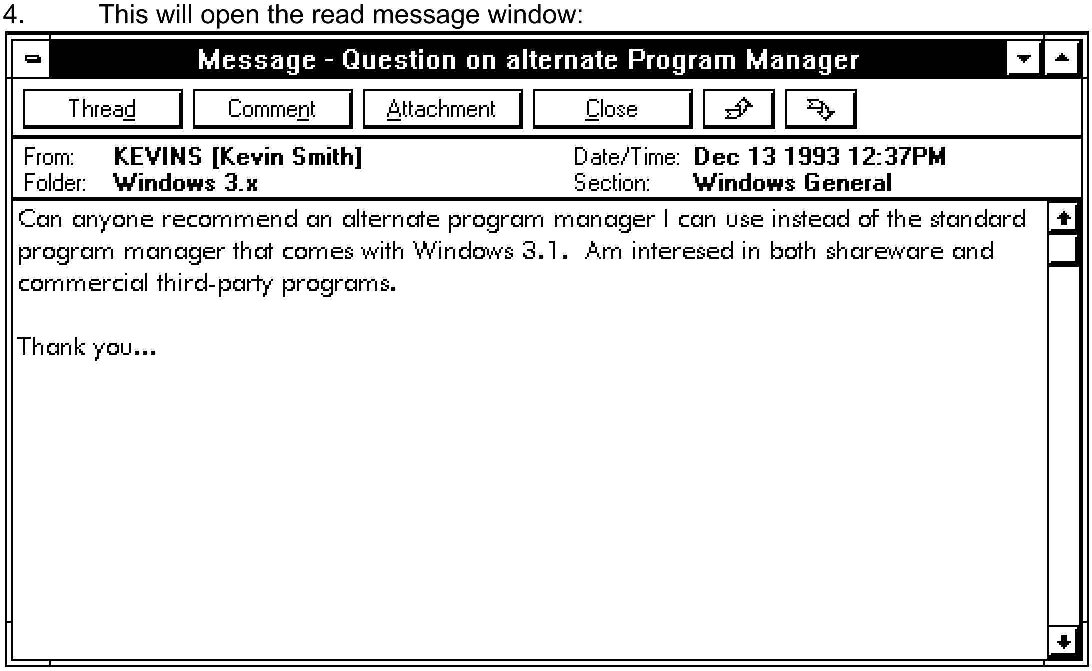


This window displays brief information on the highlighted message including: subject, author, date and time the message was submitted and attachment (if any).

Read a Message

Following is the procedure to select and read a message:

1. Open the Folder window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the Folder list window (in favorite mode) and position the cursor on the first folder item.
3. Using the mouse or keyboard, select the message you want to open and do one of the following:
   - Double-click on the message.
   - Highlight the message and press the Enter key.
   - Highlight the message and press the View button at the top of the folder list window.
   - Highlight the message and select the menu item Folder and Read/Expand.
4. This will open the read message window:



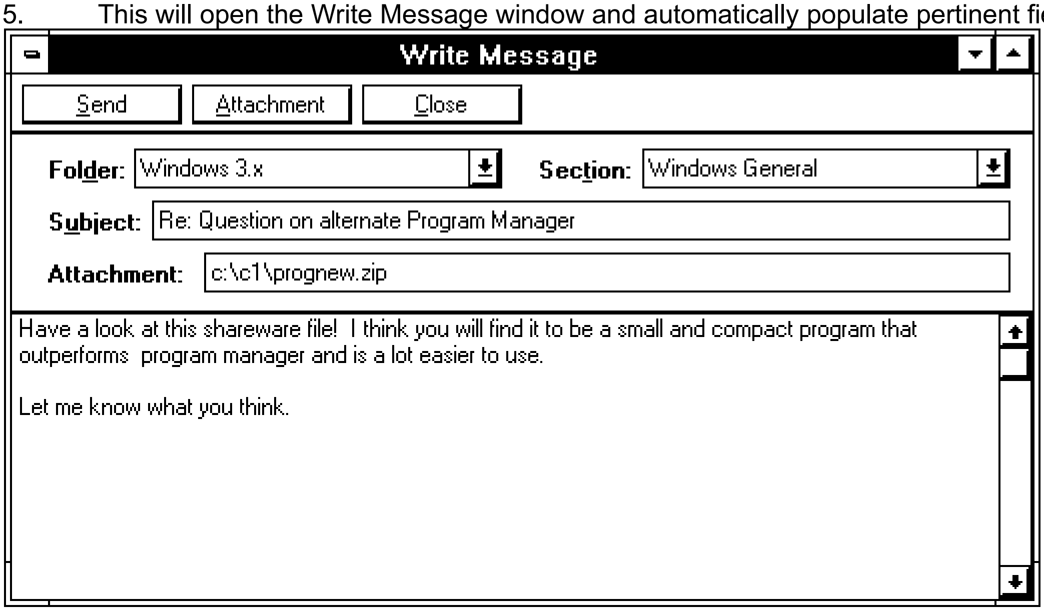
The subject of the message is displayed in the window title bar, i.e. "Message - Question on alternate Program Manager"

For further information on the Read Message window, *see* the Read Message Window section in the Customer-One Screen Reference portion of the manual.

Commenting on a Message

Following is the procedure to comment on a message:

1. Open the Folder window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the Folder list window (in Favorite mode) and position the cursor on the first folder item. Folders are displayed in the order they were previously selected.
3. Using the mouse or keyboard, expand the folder and section to view the list of messages you want to access.
4. Locate the message you want to comment on and open if using the procedures discussed in the Read a Message section.
5. This will open the Write Message window and automatically populate pertinent fields:



6. This window is the *same as* the Write Message window, *except that* it automatically inserts the following information:

Folder	This is the folder where the message you are commenting on is located.
Section	This is the folder section where the message you are commenting on is located.
Subject	This is the name of the message subject on which you are commenting. A "Re:" is inserted in front of the message subject name.

It is not possible to edit these three fields.

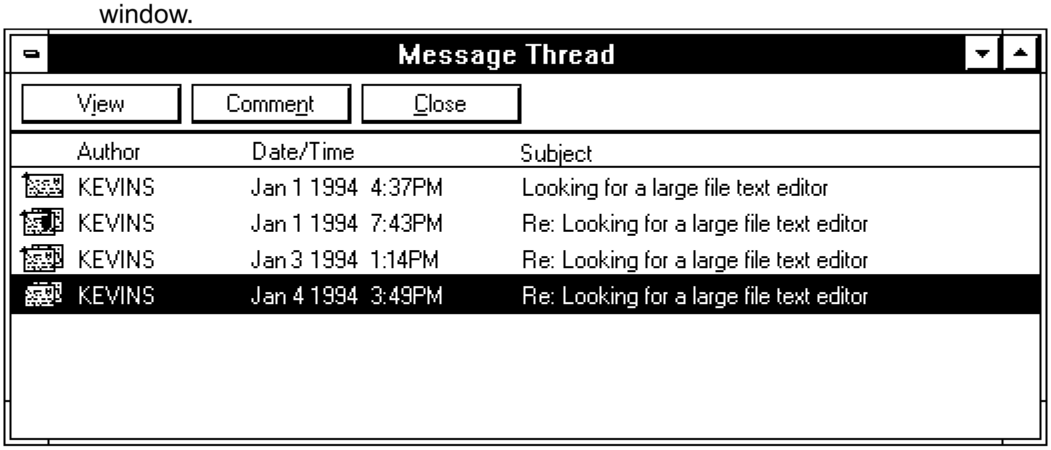
7. Enter the message content in the details form and when complete, press the Send button located at the top of the window.

For further information on how to comment on a message, *see* the Write a New Message section.

Working in the Message Thread Window

The message Thread window will only display those messages (original and thread) relating to the message you are presently reading. Following is the procedure to open and work with the message Thread window:

1. Open the Folder window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the Folder list window (in Favorite mode) and position the cursor on the first folder item.
3. Using the mouse or keyboard, select and open the message you want to read. This will open the read message window.
4. Press the Thread button located at the top of this window. This will open the Message Thread window.

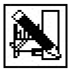


5. This window will only display those messages associated with the message you are presently reading. If you are reading an original message, this window will display all the comment messages associated with this message. If you are reading a thread (comment) message, this window will display the original message, as well as all other comments messages associated with this thread.
6. This window functions like the Folders list window as described in the Open Folder Section and View Messages section.

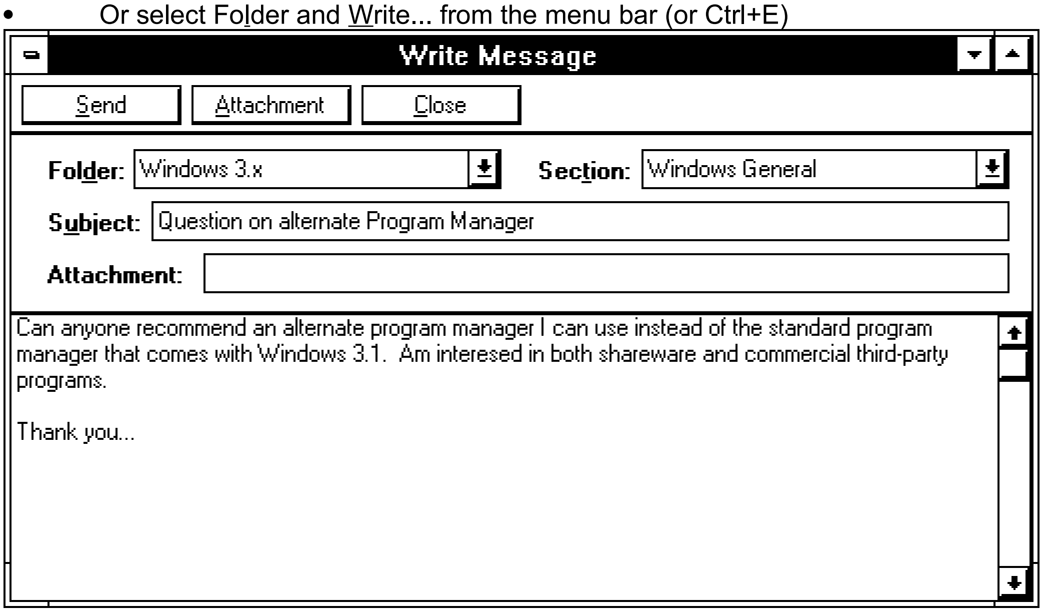
Open Write New Message Window

Following is the procedure to open the Write Message window.

- Click on the Write Message icon on the tool bar



- Or select Folder and Write... from the menu bar (or Ctrl+E)



For further information on the Write Message window, *see* the Write Message Window section in the Customer-One Screen Reference portion of the manual.

Write a New Message

Following is the procedure to write a new message:

1. Open the Write Message window by selecting the Write Message icon from the tool bar, or by selecting Folders and Write... from the menu bar (or Ctrl+E).
2. This will open the Write Message window and position the cursor on the Folder field.
3. Select the folder name you wish to send the message to from the Folder pull-down list. Only *favorite* folders are displayed in this list.
4. Move the cursor to the Section field and select the section you want to send the message to. Once again, only favorite sections are displayed in this list.
5. Move the cursor to the Subject field and enter a subject (description) for this message.
6. Move the cursor to the message details field (below the Attachment field) and enter the content of the message. You have full word processing capabilities. Do not press the Enter key at the end of a line as the sentence will automatically wrap around.
7. When complete, press the Send button and the message will be sent. If you are off-line, the message will be placed in the out box. If you are on-line at the time the Send button is pressed, the message will be sent immediately. Observe the status bar message area in the lower left-hand corner of the screen which should display the following message:

    Message sent

To send a message to a folder which is not in you list of favorite folders or sections, you have to be in that section. In other words, the folder and section must be open in order to be able to send a message to it.

The INS (Insert) key on your keyboard will also open the Write Message window as long as the Folder list window is open.

Submitting Messages while Off-Line

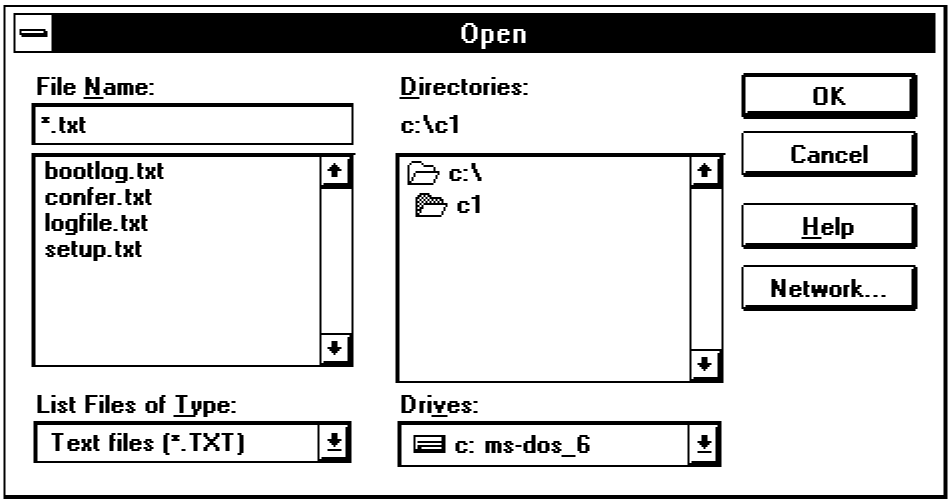
For further information on writing folder messages while off-line, *see* the Submitting Folder Messages Off-Line section.

Working with Attachments

Sending a Message with an Attached File

Following is the procedure to send a message with an attached file:

1. Open the Write Message window by selecting the Write Message icon from the tool bar, or by selecting Folders and Write... from the menu bar (or Ctrl+E).
2. This will open the Write Message window and position the cursor on the Folder field.
3. From any field, press the Attachment button to activate the Open attachment window. The Open window is a standard Windows dialog box that allows you to locate a file to attach to this mail item:



For further information on using this window, *see* your Microsoft Windows manual.

4 Select the file you wish to attach and press the OK button. The Open window will be closed and you will be returned to the Write Message window. The name of the attached file will be displayed in the Attachment field.

5. Finish the message as outlined in the section Write a New Message. Once the Send button has been pressed, the message and the attachment will be sent. Observe the status bar message area in the lower left-hand corner of the screen which should display the following messages:

   Uploading [file name]

   Message sent

Retrieving an Attached File from a Message

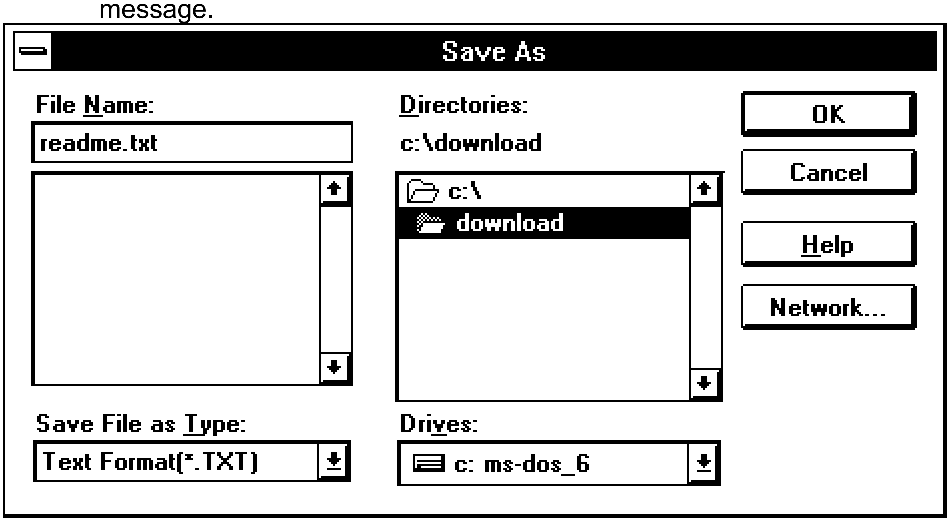
Following is the procedure to retrieve a message with an attached file:

1. Open the Folder window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the Folder list window (in favorite mode) and position the cursor on the first folder item.
3. Expand the folder and section to display the message you want to view.
4. Once the section has been opened and the messages are displayed, select the message (with the attachment) that you wish to read and press the Enter key to view. *Remember,* messages that have attachments will have one of the following two icons:

 Original message with attachment

 Thread message with attachment

5. From any field, press the Attachment button to open the Save As window. The Save As window is a standard Windows dialog box that allows you to save the file which is attached to this message.



For further information on using this window, *see* your Microsoft Windows manual.

6. Select the location (path) you wish to save the attached file to and press the OK button. The file will be saved in the path specified and the Save As window will be closed. You will be returned to the Read Message window. Observe the status bar message area in the lower left-hand corner of the screen which should display the following messages:

   Downloading [file name]

   File download successful

Saving / Deleting Favorite Selections

There are *two modes* (or working environments) in which to view folders and sections: *List All* and *Favorite.* Favorite mode (default) displays only those folders and sections that have been *previously saved.* List All displays all the available folders and sections. When working in these two modes, the Save and Delete buttons are available.

If you open a section to view messages, that section will be automatically save to your list or favorite folders.

Related Topics:

Favorite Mode Characteristics
List All Mode Characteristics
Saving a Folder or Section as Favorite
Deleting a Favorite Folder or Section

Favorite Mode Characteristics

When in favorite mode, the Folders list window will have the following characteristics:

Window Title	When in Favorite mode, the Folders window title will be "Folders".
Delete Button	The Delete button will be available. It is now possible to delete a Favorite section from your favorite list. Deleting this section only removes it as a Favorite selection in your C1.INI file, and will *not* remove it from the Customer-One server.
Save Button	The Save button will *not* be available when in this mode and the button will be dimmed.
List All Button	The List All button will be available for you to switch to the List All folder sections mode. If you are switching over from List All mode, this button will change from Favorite to List All.

List All Mode Characteristics

When in list all mode, the Folders list window will have the following characteristics:

Window Title	When in List All mode, the Folders window title will be "Folders - All".
Delete Button	The Delete button will *not* be available when in this mode and the button will be dimmed.
Save Button	The Save button will be available. It is now possible to save a section to your favorite list. Saving a section adds it as a favorite selection in your C1.INI file. The next time you open the folders window in the default favorite mode, any sections previously saved will be displayed as a favorite selection.
Favorite Button	The Favorite button will be available for you to switch to the favorite folder sections mode. If you are switching over from favorite mode, this button will change from List All to Favorite.

Saving a Folder or Section as Favorite

Following is the procedure to save a folder section as favorite. In order to do this, you have to be in List All mode:

1. Open the Folder window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the Folder list window (in favorite mode) and position the cursor on the first folder item.
3. Press the List All button so as to switch from the default Favorite mode to the List All mode. You will now be viewing all the folders available at the Customer-One server. The Delete button is now dimmed and the Save button is available (undimmed).
3. Using the mouse or keyboard, select the section you want to save as favorite.

You can only save sections as favorite, not folders.

4. Press the Save button located at the top of this window. The section will now be saved to your C1.INI file as a favorite folder.

5. Repeat steps #4 and #5 to save all the sections that you want to save as favorite. Observe the status bar message area in the lower left-hand corner of the screen which should display the following message:

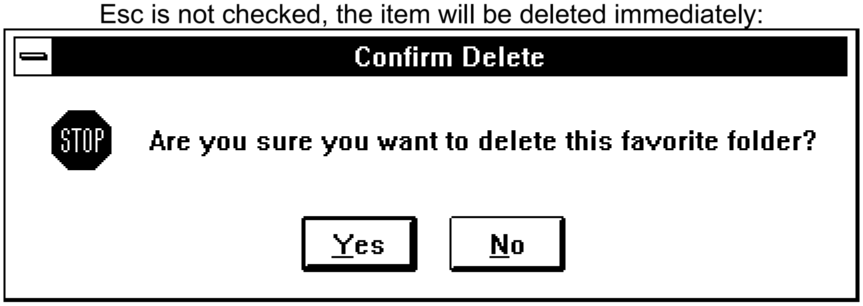
   Saved folder section as favorite

If you open a section (even if there are no messages in the section), that section will automatically be saved as a favorite selection.

Deleting a Favorite Folder or Section

Following is the procedure to delete a favorite folder or section. In order to do this, you have to be in Favorite mode:

1. Open the Folder window by selecting the Folder icon from the tool bar, or by selecting Folder and List from the menu bar (or Ctrl+F).
2. This will open the Folder list window (in favorite mode) and position the cursor on the first folder item. The Delete button is now available (undimmed) and the Save button is dimmed.
3. Using the mouse or keyboard, select the folder or section you want to delete.
4. Press the Delete button located at the top of this window. The folder and/or section will now be removed from your C1.INI file. If the menu Options and Confirm Delete and Esc is checked, you will be prompted for confirmation prior to deleting the folder or section. If Confirm Delete and Esc is not checked, the item will be deleted immediately:



Observe the status bar message area in the lower left-hand corner of the screen which should display one of the following messages:

Folder deleted

Section deleted

If you delete a favorite folder, the sections contained in that folder will also be deleted.

Help Desk

The Help Desk component is used to submit and manage service requests on the Customer-One system.

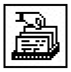
Related Topics:

Open Help Desk List Window
Customizable Service Requests
Service Request Fields
Service Request Status Information
Priority & Impact Levels
Service Request Status States
Viewing an Existing Service Request
Open Search for Service Request Window
Searching for Service Requests
Open New Service Request Window
Adding a New Service Request while Off-Line
Submitting a New Service Request while On-Line
Actions
Service Request Action List
Viewing Details of a Service Request Action
Entering a New Action on a Service Request
Closing a Service Request
Timing Service Requests
Service Request Escalation
Different Types of Service Requests

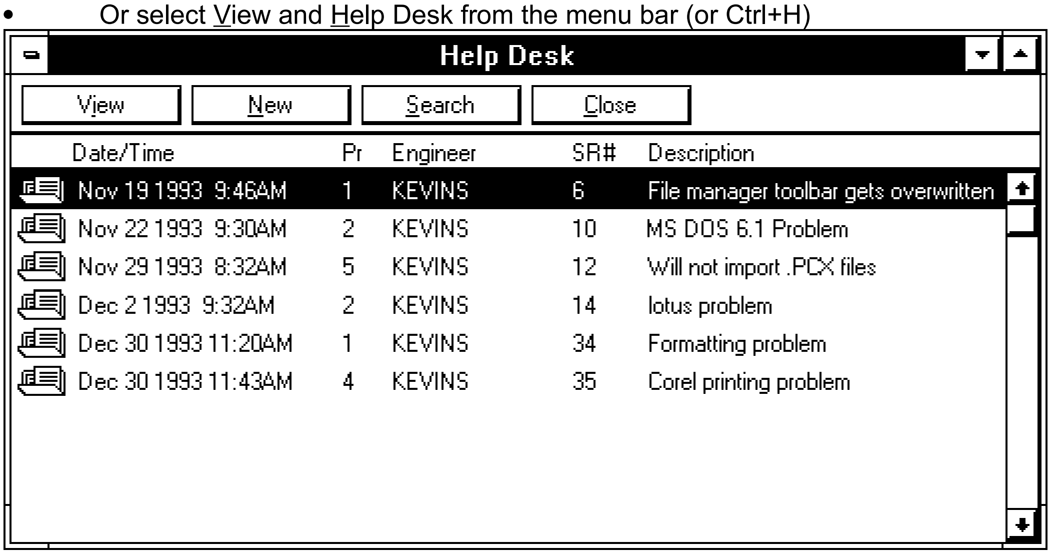
Open Help Desk List Window

Following is the procedure to open the Help Desk list window:

- Click on the Help Desk icon on the tool bar



- Or select View and Help Desk from the menu bar (or Ctrl+H)



The Help Desk list window displays outstanding service requests (those that have not been closed). This window can display a number of different types of service requests, i.e. hardware service request, software service request, call tracking service request, etc. All service requests that you have submitted or are responsible for are displayed in this one window.

Depending on your access level, you will *see* either of the following:

- The service requests you have submitted (if you have logged on as a customer)
- The service requests you are responsible for (if you have logged on as a staff member)

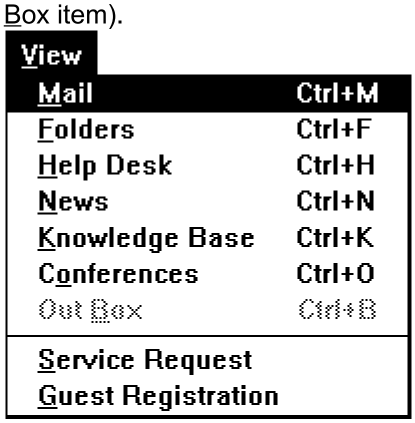
For further information on the Help Desk list window, *see* the Help Desk Window section in the Customer-One Screen Reference portion of the manual.

Customizable Service Requests

This manual refers to help desk items as *service requests*. Service requests are forms which are defined (created) by the Customer-One service to which you are connected. For this reason, the actual service requests available in your Customer-One service can be different than those used in this manual.

In addition to this, the actions used on service requests are also defined by the Customer-One service. For this reason, the actions available on a service request can be different than those that appear in this manual.

A Customer-One service can have a number of different service requests and forms available for you to use. These forms are all listed in the menu item View below the separator bar (which is after the Out Box item).



Service Request Fields

There are many different fields that can appear on a service request form. However, in order for the Help Desk component of Customer-One to function properly, there has to be certain mandatory fields.

Related Topics:

Mandatory Service Requests Fields
User-Defined Service Request Fields

Mandatory Service Requests Fields

Mandatory fields (or "hard fields") appear on all service requests that appear in the Help Desk list window. When viewing the service request form, the fields can appear in any order and can be labeled differently than the samples used in this manual. **For example**, where we refer to a service request number as "SR#", it could also be called "Problem #", a user could be called "User Name", "Client", etc.

Any mandatory field could also be disabled (or hidden).

Mandatory fields which are required on all service request forms are:

- Service request number
- Date & time logged
- Status
- Responsible staff member
- Customer name
- Service request title or subject
- Service request details
- Priority level
- Impact level
- Action detail list

Following is a more detailed description of these fields:

Service Request Number

This is a number which is *automatically assigned* to a service request to identify it. Service request numbers can also be preceded by a character, i.e. M999. A service request number is **never changed** and will remain with that service request until deleted.

This field can also be called by a different name.

Responsible Staff Member (also called Engineer)

This is the Customer-One staff member who is responsible for this service request. There is always one, *and only one,* person that can be responsible for a service request. As a service request is processed, it can however can change from one responsible person to another any number of times. The staff member or engineer displayed in this field is the person currently responsible for the service request.

This field can also be called by a different name.

Status

When a new service request is logged and has a staff member assigned as responsible for it, it's status is set to *Open.* There are a number of different status states a service request can take. For further information on service request status *states*, *see* the Service Request Status States section.

This field can also be called by a different name.

Date / Time Logged

This is the date and time the service request was received at the Customer-One service and was assigned a number and a responsible staff member.

This time is the *local time* of the Customer-One service.

This field can also be called by a different name.

Customer Name

This is the name of the customer who has requested help.

This field can also be called by a different name.

Problem Title / Description

This is a brief description of the service request. This same description is also displayed in the Help Desk list window.

This field can also be called by a different name.

Problem Details

This is where the details of the service request is entered. This is typically a multi-line edit field.

This field can also be called by a different name.

Priority Level

Every service request gets assigned a certain priority when it is transmitted to the Customer-One service There are a maximum of 5 priority levels, ranging from 1 to 5 (1 being the most critical and 5 the least important). The descriptive names for the various priorities are defined by the Customer-One service to which you are connected.

This field can also be called by a different name.

Impact Level

Similar to priority levels, every service request gets assigned a certain impact level when it is transmitted to the Customer-One service. Impact levels typically refer to the impact of the problem being reported *on the customers' operations.* There are a maximum of 5 impact levels, ranging from 1 to 5 (1 being the highest impact and 5 the least impact). The descriptive names for the various impacts are defined by the Customer-One service to which you are connected. This field can also be called by a different name.

Action Details

The action details field is a list box that displays the various actions that have taken place on the service request. The actions are displayed in reverse date order (i.e. newest action first). By selecting one of the actions from this box, the problem details field is updated with the text that was entered for that action.

User-Defined Service Request Fields

Depending on how the Customer-One service you are connected to has been configured, there are a number of different user-defined fields that could appear. In the **example** used in this manual, the user-defined fields are:

- Company Name
- Telephone Number
- Fax Number
- Product Name
- Reseller
- Hardware

Service Request Status Information

Each service request is automatically assigned the following information **when the service request is received (logged) at the Customer-One service**:

- A unique number, i.e.   SR# 46.
- A responsible staff members login ID, i.e. STEVEJ.
- A status, i.e. OPEN.
- Date & time, i.e. Dec. 31 1993 6:10PM.

SR #	Date	Status	Responsible
46	Dec 31 1993 6:10PM	Open	STEVEJ

Priority & Impact Levels

Each service request is assigned a priority and impact level when it is logged. The types and severity of the priority vary depending on how the Customer-One service you are connected to has been configured.

Priority and impact level 1 are the highest and the most important where 5 is the least important. Both priority and impact levels are represented by the numbers 1 - 5.

Following is a **sample** list of priority levels:

1- Critical

2 - High

3 - Medium

4 - Low

5 - Information

Following is a **sample** list of impact levels:

1- Severe

2 - High

3 - Moderate

4 - Low

5 - None

Depending on how your Customer-One service has been configured, certain service requests can be *manually* escalated. This means that the priority and/or the impact levels for a service request can be changed, up or down.

Certain Customer-One services implement *automatic* escalation. The priority and impact level of a service request will determine if it needs to be automatically escalated to the next highest priority level.

For further information on automatic service request escalation, *see* the Service Request Escalation section.

Service Request Status States

A service request goes through a number of different status states until it is finally closed.   Each state is represented by an icon.   The different service request status states are:

Related Topics:

New
Open
Pending
Closed - Solved
Closed - Unsolved

New

A new service request is represented by the following icon:

A service request which is not immediately assigned to a responsible staff member has a status of *New.*

If a service request is completed off-line, it has a status of *New* until such time that it is transmitted to the Customer-One service and assigned to a responsible staff member.

Open

An open service request is represented by the following icon:


An open service request is one which is currently being worked on and is not yet closed. A service request in this state is subject to *automatic escalation.* Automatic escalation is setup by the Customer-One administrator. **For example***,* if a service request is logged with a certain priority and impact level, the time the service request is logged is recorded. Once the service request has remained open beyond what is acceptable for that priority and impact it is *automatically escalated* to the next higher priority level.

Pending

A pending service request is represented by the following icon:


A pending service request is one which is "on hold". **For example**, this can be due to additional information being necessary before the service request can be closed. Or the staff member (who is responsible for the service request) could be waiting for information from a vendor before resolving the service request.

Closed - Solved

A solved service request is represented by the following icon:


This is the final successful resolution of a service request. If the customers' questions have been answered and the problem is resolved, the service request can be closed as solved. Typically, once the service request has been resolved, the problem and solution are also uploaded to the knowledge base.

Closed - Unsolved

An unsolved service request is represented by the following icon:

If the customers' questions have not been answered, but you still wish to close the service request, it can be closed as unsolved.

Viewing an Existing Service Request

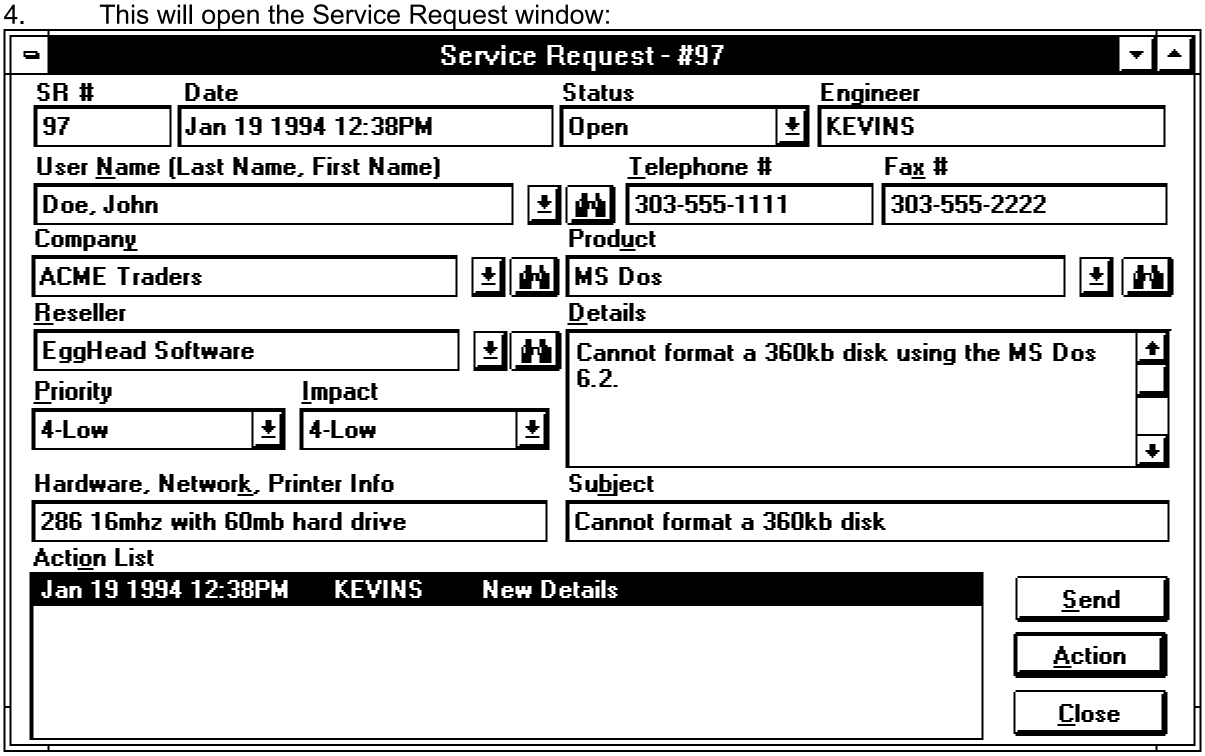
If logged on as a customer, you may only be able to view the service requests you submitted. If logged on as a staff member, you will *see* all the open service requests you are responsible for.

Once again, your user access level will determine what features of the Help Desk component you have access to.

Following is the procedure to view a service request:

1. Open the Help Desk list window by selecting the Help Desk icon from the tool bar, or by selecting View and Help Desk from the menu bar (or Ctrl+H).
2. This will open the Help Desk window and position the cursor on the first service request. Service requests are displayed in date order, i.e. oldest service request at the top (first).
3. To open and view a service request do one of the following:
   - Double-click on the service request.
   - Highlight the service request and press the Enter key.
   - Highlight the service request and press the View button at the top of the Help Desk list window.

   If there are a number of service requests being displayed and it is hard to find the one you are looking for, limit the service requests being displayed by pressing the Search button. For further information on searching for service requests, *see* the Searching for Service Requests section.
4. This will open the Service Request window:



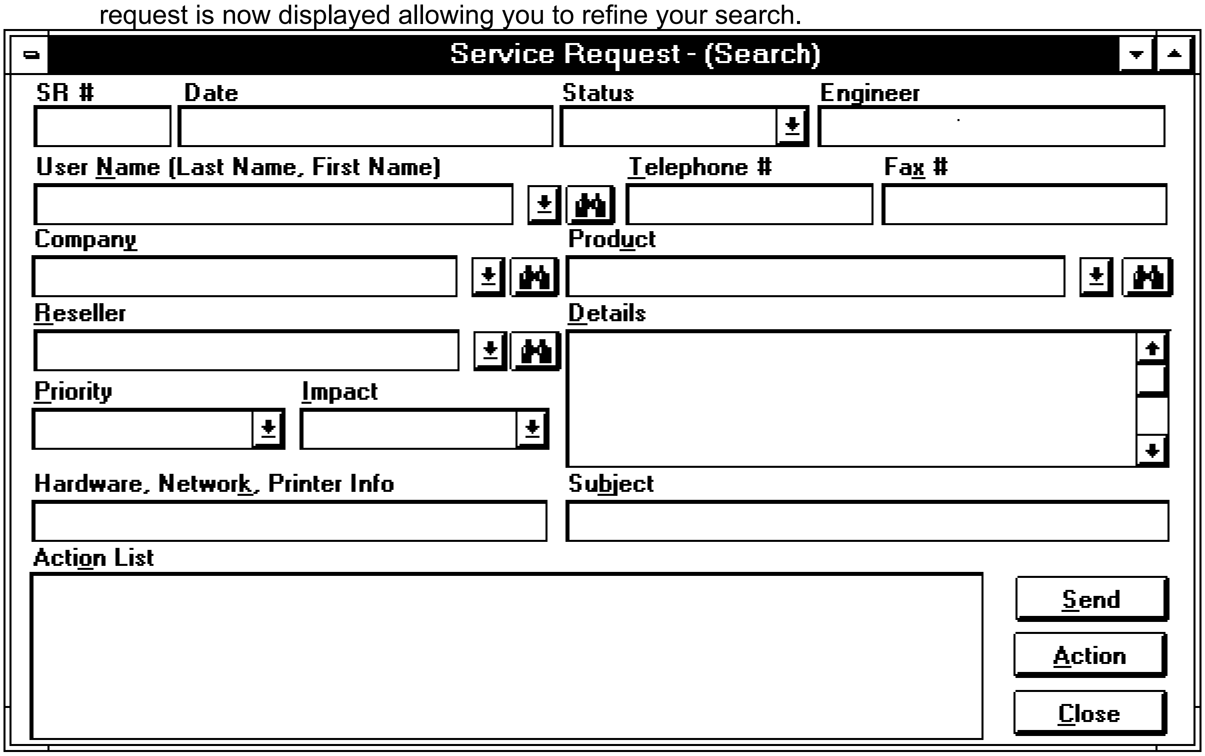
The service request number is displayed in the window title bar, i.e. Service Request - #97.

The fields displayed when viewing a service request details are typically *read-only*. To edit a service requests, open the Action window by pressing the Action button. For further information on using actions, *see* the Entering a New Action on a Service Request section.

Open Search for Service Request Window

Following is the procedure to open the search for a service request window so as to search for a particular service request(s):

1. Open the Help Desk list window by selecting the Help Desk icon from the tool bar, or by selecting View and Help Desk from the menu bar (or Ctrl+H).
2. This will open the Help Desk list window and position the cursor on the first service request. Service requests are displayed in date order, i.e. oldest service request at the top (first).
3. Press the Search button located at the top of the Help Desk list window. The default service request is now displayed allowing you to refine your search.



All fields on the service request are available, including the service request number, date/time, status and responsible staff member (or engineer) fields.

For further information on the Search for Service Request window, *see* the Search for Service Request Window section in the Customer-One Screen Reference portion of the manual.

When searching for a service request, all fields, including service request number, date, status and responsible staff member.

Searching for Service Requests

Depending on your user access level, the search for service request feature may be disabled or limited. **For example***,* if you are logged on as a customer, you may only be able to search for service requests that were logged by you. If you are logged on as a staff member, you may be able to search for any combination of service requests.

Following is the procedure to search for a particular service request:

1. Open the Help Desk list window by selecting the Help Desk icon from the tool bar, or by selecting View and Help Desk from the menu bar (or Ctrl+H).
2. This will open the Help Desk list window and position the cursor on the first service request. Service requests are displayed in date order, i.e. oldest service request at the top (first).
3. Press the Search button located at the top of the Help Desk list window. The default service request is now displayed allowing you to refine your search. When searching for a service request, all fields, including service request number, date, status and responsible staff member.
4. Select the field (or fields) you want to search on and enter the relevant information. **For example**:
    - To search for a particular service request, enter the number of the service request you are looking for in the service request number field.
    - To search for all service requests for a staff member, enter the login ID of the staff member for whom you are looking.
    - To search for all open service requests, select the status for which you are looking.
    - To search for all service requests for a staff member with a particular status, enter the login ID of the staff member and the status for which you are looking.
5. Once the search criteria have been entered, press the Send button to start the search.
6. You will be returned to the Help Desk list window which will be displaying all the service requests that match your search criteria. If no service requests match your search, the help desk list window will be empty.

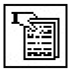
Searching over many different fields will take longer to return matching service requests.

In the descriptive fields, such as Problem Title and Details, *you will have to enter the exact text* that matches the field. **For example**, if a problem title is "Windows NT backup problem", entering NT in the problem title field will *not* return this service request. The complete title would have to be entered in its entirety and would have to have the *correct syntax*.

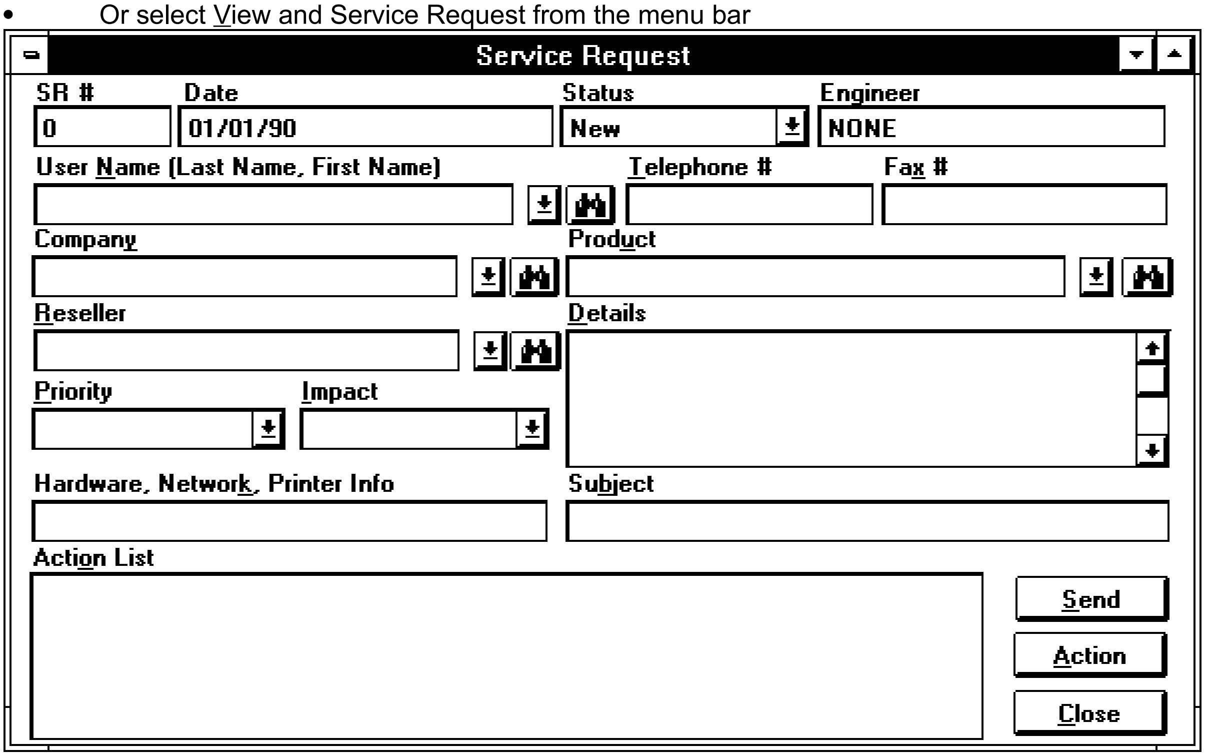
Open New Service Request Window

Following is the procedure to open the new Service Request window:

- Click on the Service Request icon on the tool bar



- Or select View and Service Request from the menu bar



The service request in this manual will *not necessarily* be the same form as utilized by your Customer-One service. The service request can be customized to reflect the requirements of your Customer-One service.

For further information on the Service Request window, *see* the Service Request Window section in the Customer-One Screen Reference portion of the manual.

Adding a New Service Request while Off-Line

For further information on submitting service requests while off-line, *see* the Submitting Service Requests Off-Line section.

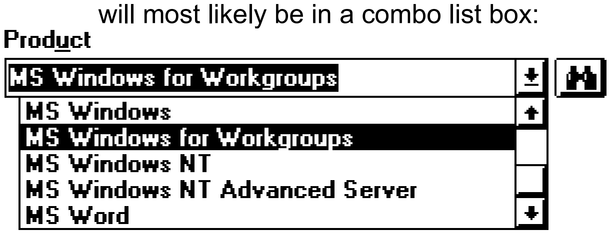
Submitting a New Service Request while On-Line

There are many fields that may require *validating* before a service request can be successfully transmitted to the Customer-One service. If a service request is filled in while on-line, *immediate* validation of the fields can take place.

Following is the procedure to submit a new service request:

1. Open the Service Request window by selecting the Service Request icon from the tool bar, or by selecting View and Service Request from the menu bar (service request could be called by a different name). The service request can also be opened by selecting the New button from the Help Desk list window.

2. Enter all the details in the fields populating the service request. Those fields *requiring validation* will most likely be in a combo list box:

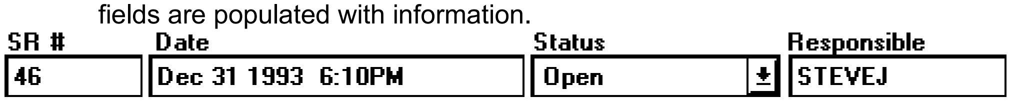


   For further information on working with combo list boxes, *see* the Using Lookup Fields and Lists section.

3. It is important to enter relevant and descriptive information into the problem details field as this is where all the information pertaining to the problem is entered.

4. Once all the service request fields have been filled in, press the Send button to transmit the service request to the Customer-One help desk.

5. Confirmation that the service request has been successfully logged with the Customer-One service will be when the service request number, date/time, status and responsible staff member fields are populated with information.



   These fields can be called by different names.

Actions

General

An "action" is *a method of editing a service request*. Each service request has different actions associated with it. Depending on your user access levels and how the service request has been configured, different action levels will be available for you to perform.

The Customer-One service you are connecting to has the ability to limit access to particular actions based on your user level.

Customizable Actions

Actions are definable by the Customer-One service you are connecting to and can be changed, so they might appear differently than those discussed in this manual.

All actions should the following fields and buttons in common (although they can appear by different names or be hidden):

- Details field
- OK button
- Cancel button

Following are optional fields which could appear on action forms:

- Duration field

On all action windows, the service request number is displayed on the window title bar behind the window name, i.e. Comment - #46.

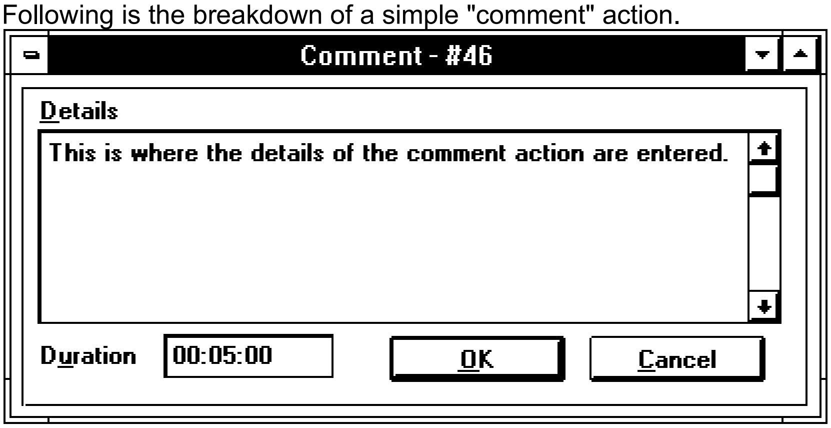
Sample Actions

Following is a list of **sample** actions that can be performed to a service request.

The appearance and availability of these action, as well as their content, *can vary* depending on how the Customer-One service you are connected to has been setup.

Sample Comment Action

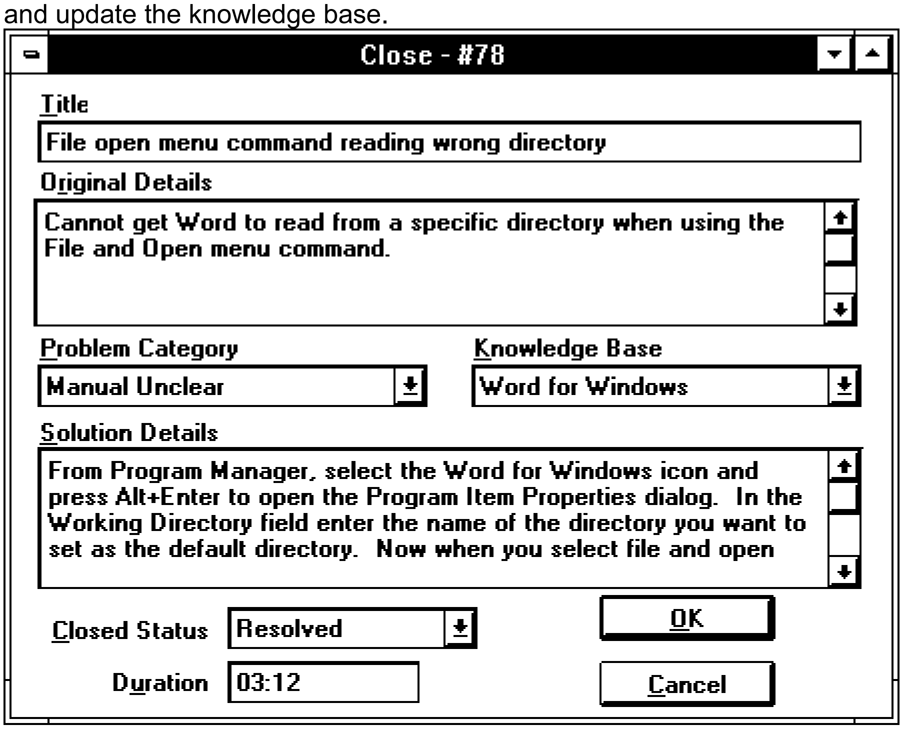
Following is the breakdown of a simple "comment" action.



The Comment action will allow you to enter any text regarding the service request. Once the text has been entered, pressing the OK button will add that action to the service request and close the Comment window. The Duration field records how long this action window is open.

Sample Close Action

This action is more complex and can be used by a Customer-One staff member to close a service request and update the knowledge base.



This action allows the user (typically on a staff member) to close a service request. The following is also performed when closing a service request using this action:

- Assigning a category to the problem in the Problem Category field.
- Updating the knowledge base (collection "Word for Windows") with the original problem and solution details of the service request. This particular Close action gives you the ability to edit (or "clean up") the service request fields prior to updating the knowledge base.
- Close the service request as resolved or unresolved.
- Record the time spent solving the service request in the Duration field. This is the time the Close action window was open.

Sample Action Types

Following is a list of **sample** actions that could be implemented on a service request:

Action Name	Action Description
Comment Action	This action could allow a user to comment on a service request.
Schedule Action	This action could allow a staff member to call back the customer who logged the service request at a particular time.
Close Action	This action could allow a staff member to close a service request.
Transfer Action	This action could allow the responsibility of a service request to be transferred from one staff member to another.
Escalate Action	This is action could allow a user to up or downgrade the priority and/or impact of a service request.
Vendor Action	This action could allow a staff member to transfer a service request to an external or third-party source or vendor for resolution.
Reopen Action	This action could allow a user to reopen closed service request.

Standard Action Fields and Buttons

All actions would typically have the following in common:

Service Request Number

The service request number is always displayed in title bar of the action window, i.e. Comment - #46.

Duration Field

This field keeps track of the actual time spent on the action. Once the Action window is closed (by pressing the OK button), the time spent on the action is added to the duration table for the service request. Prior to closing and accepting this action, you can accept or change the time spent on the action. This is not a mandatory field and could be omitted from the action.

Details Field

This edit field allows you to enter details related to the action you are entering. This is a multi-line edit field that will automatically wrap-around at the end of a sentence.

OK Button

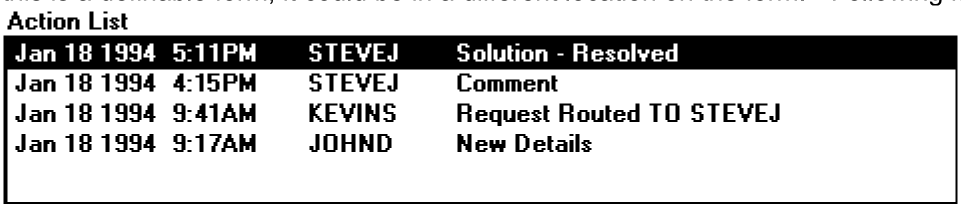
This button will accept the action and adds it to the service request. All actions accepted will be displayed in the action list on the service request. This button also closes the action window.

Cancel Button

This button will cancel the action and return you to the service request. All action details will be canceled.

Service Request Action List

Each service request has a action list area where a summary of all actions performed to a service request are displayed. The action List is typically located at the bottom of the service request form although, as this is a definable form, it could be in a different location on the form. Following is a **sample** action list:


Action List

Jan 18 1994	5:11PM	STEVEJ	Solution - Resolved
Jan 18 1994	4:15PM	STEVEJ	Comment
Jan 18 1994	9:41AM	KEVINS	Request Routed TO STEVEJ
Jan 18 1994	9:17AM	JOHND	New Details

The action description will contain different information depending on what action was taken. In this **sample** action list, the bottom entry is the first action and reflects the original details of the service request when it was logged.

A service request that has just been logged will only have one action in this list, namely the original or new details. As the service request is worked on, the actions list will display a list of all the actions.

The Customer-One service you are connected to could change the form to display different information in the action list.

Viewing Details of a Service Request Action

Following is the procedure to view the different actions taken on a service request:

1. Open the Help Desk list window by selecting the Help Desk icon from the tool bar, or by selecting View and Help Desk from the menu bar.
2. Select the service request you wish to perform an action on and press the View button.
3. Select the action from the action list that you want to view (the action list box is typically located at the bottom of the service request window):

Action List

Jan 18 1994	5:11PM	STEVEJ	Solution - Resolved
Jan 18 1994	4:15PM	STEVEJ	Comment
Jan 18 1994	9:41AM	KEVINS	Request Routed TO STEVEJ
Jan 18 1994	9:17AM	JOHND	New Details

   If the action you want to view is not visible, and there are scroll bars visible, use them to scroll up or down until the action you want to view is visible.

4. Once the action you want to view in visible, do one of the following to view the action details:
   - Double-click on the action in the action list.
   - Highlight the action in the action list and press the Enter key.
   - Highlight the action in the action list and press the Send button.

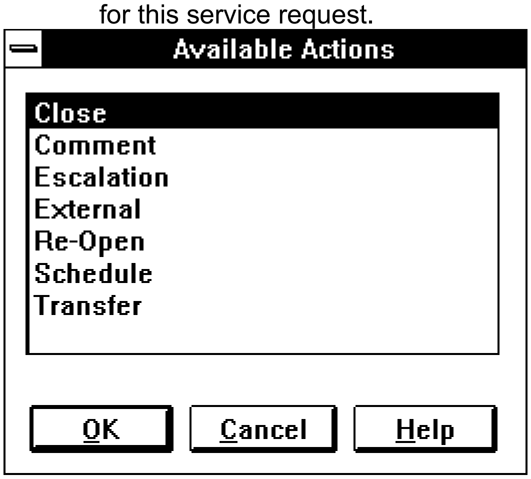
   This will read the action details for the selected action and populate the service request details field with the action information.

5. To select a different action to view, select the next action from the action list box and repeat step #4.

Entering a New Action on a Service Request

Following is the procedure to enter a new action on a service request:

1. Open the Help Desk list window by selecting the Help Desk icon from the tool bar, or by selecting View and Help Desk from the menu bar.
2. Select the service request you wish to perform an action on and press the View button.
3. Once the service request is open, press the Action button to display a list of all available actions for this service request.



   Only those actions that your customer-One service has setup for this service request will be displayed.

4. Select an action by do any of the following:
   - Double-click on the action in the Available Actions action list.
   - Highlight the action in the Available Actions list and press the OK button.
5. Enter the details for the action you have selected and when complete, press the OK button to accept and return to the service request.

As each action is setup by the Customer-One service you are connected to, the functionality of the action window can vary from those described in this manual. Contact your Customer-One service for details on using the various actions.

Closing a Service Request

Service requests can be closed in one of two *different states:*

- Solved
- Unsolved

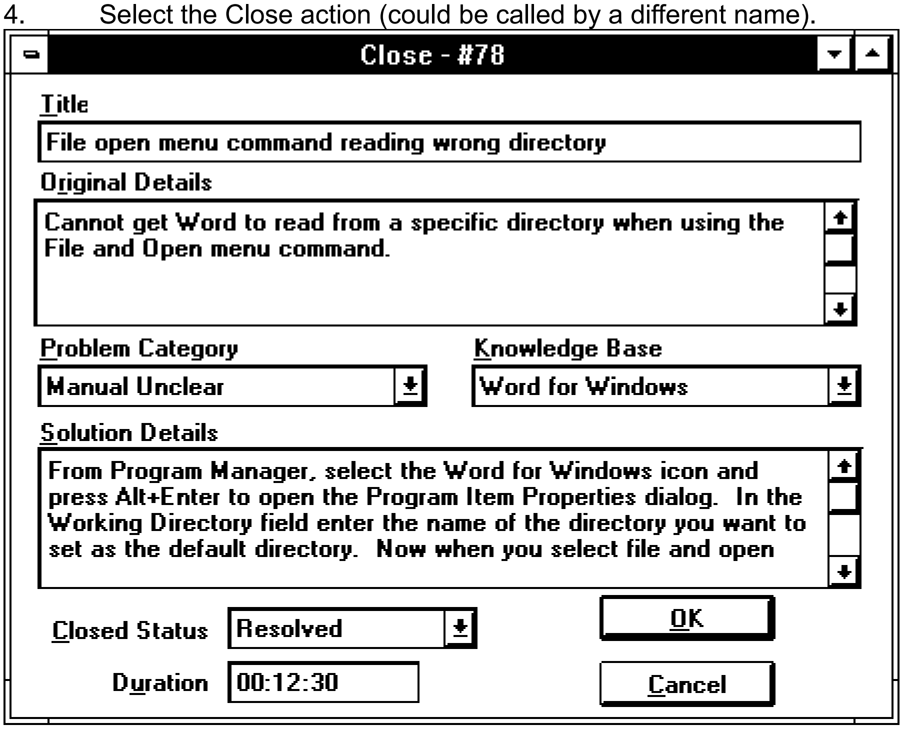
Most Customer-One services are setup so that only staff members can close service requests. This could however vary from one Customer-One service to the next.

The ultimate state in which to close a service request is "Solved".

However, it is sometimes necessary to close a service request that has not been solved.

Following is the procedure to use the Close action:

1. Open the Help Desk list window by selecting the Help Desk icon from the tool bar, or by selecting View and Help Desk from the menu bar.
2. Select the service request you wish to perform an action on and press the View button.
3. Once the service request is open, press the Action button to display a list of all available actions for this service request.
4. Select the Close action (could be called by a different name).



In this **example**, the close action has been setup to automatically update the knowledge base with the solution to the problem.

5. Edit the details of the various fields and when complete, press the OK button to save the action and return to the service request.

Depending on how the Close action has been setup, the service request could be saved either as solved or as unsolved (referred to in this **example** as Resolved and Unresolved). Regardless of the state the service request was closed in, the service request will now be removed from the Help Desk list window. You can still view the service request by searching for all closed service requests in the Search window. For further information on searching for closed service requests, *see* the Searching for Service Requests section.

Timing Service Requests

Once a service request is received at the Customer-One service, it is possible for the help desk to keep track of the length or time a service request is open, as well as how much time was spent on a service request.

Related Topics:

Total Time a Service Request Is Open
Time Spent Working on a Service Request
Displaying Duration in the Action List

Total Time a Service Request Is Open

This is simply performed by calculating the time between when the service request was logged and when it was solved.

Time Spent Working on a Service Request

All service requests and actions have the capability (if set by the Customer-One service to which you are connected) to implement a duration field. If this is implemented, the duration field will record the total time an action is open. The user could be given the ability to change the time prior to saving the action (by pressing the OK button).

Displaying Duration in the Action List

In the action list of a service request, the Customer-One administrator can elect to display the time spent (duration) on a service request action.

Action List

Jan 18 1994	5:11PM	STEVEJ	Solution - Resolved	15:10
Jan 18 1994	4:15PM	STEVEJ	Comment	1:45
Jan 18 1994	9:41AM	KEVINS	Request Routed TO STEVEJ	0:15
Jan 18 1994	9:17AM	GUEST	New Details	10:18

This will provide you detailed time information on exactly how long someone spent on each action of a service request.

Once again, the duration field is optional and the Customer-One service you are connecting to does not have to display this field.

Service Request Escalation

Escalation is when a service request is promoted (or demoted) from one priority level to another. There are two ways to perform this:

- Manual escalation
- Automatic escalation

When a service request is submitted, it is assigned a priority and impact level. Priority level being the importance of the service request and impact being the impact this problem is having on your work.

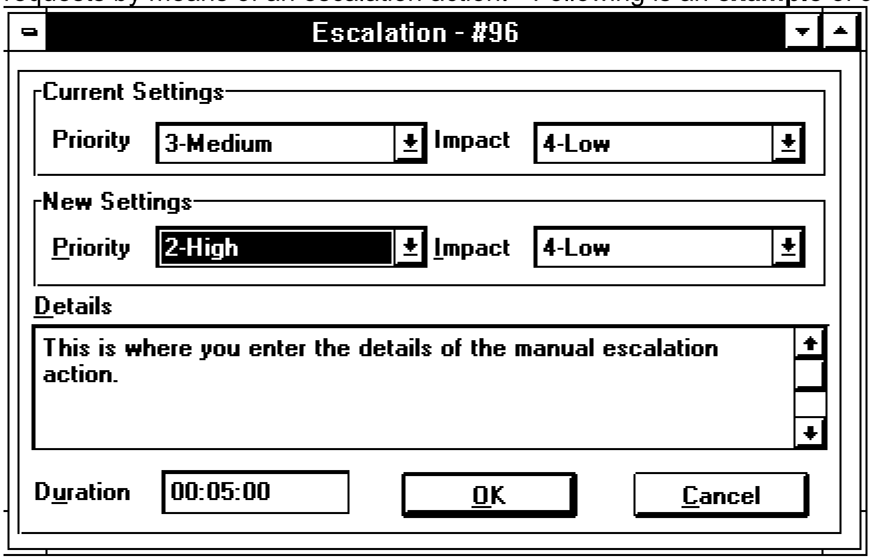
Implementation of both manual and automatic escalation is setup by the Customer-One service to which you are connecting.

Related Topics:

Manual Escalation
Automatic Escalation
Automatic Escalation Example

Manual Escalation

If the Customer-One service has setup manual escalation, this will be available on individual service requests by means of an escalation action. Following is an **example** of a manual escalation action:



By using this action, a user is able to change the priority and/or impact of a service request. This is particularly important when automatic escalation is implemented.

Automatic Escalation

Customer-One has the ability to automatically escalate a service request **to the next higher priority level** if it has been open for too long. This is a feature that can be enabled or disabled by the Customer-One administrator. The administrator also has the ability to put automatic escalation "on hold".

Automatic escalation is based on ***the combination of*** the priority and impact levels of a service request. The Customer-One system works on a two-dimensional grid which is defined by the Customer-One administrator.

	Impact 1 Severe	**Impact 2** High	**Impact 3** Moderate	**Impact 4** Low	**Impact 5** None
Priority 1 Severe	10 Minutes	20 Minutes	30 Minutes	40 Minutes	50 Minutes
Priority 2 High	20 Minutes	30 Minutes	40 Minutes	50 Minutes	60 Minutes
Priority 3 Medium	30 Minutes	40 Minutes	50 Minutes	60 Minutes	70 Minutes
Priority 4 Low	40 Minutes	50 Minutes	60 Minutes	70 Minutes	80 Minutes
Priority 5 Informational	50 Minutes	60 Minutes	70 Minutes	80 Minutes	90 Minutes

Automatic escalation uses the *intersection of* the two levels (i.e. priority and impact) to determine the maximum time a service request can be open before being escalated.

Automatic escalation is a mechanism for constantly upgrading the priority of a service request so that the customer and their service request will not be forgotten. As there is always a staff member responsible for each service request, they will be constantly advised of the service request being escalated.

This process is typically *not visible* to the user.

Automatic Escalation Example

For example, using the table outlined in the Automatic Escalation section, assume a service request is logged with the following priority and impact levels:

Priority Level = 3

Impact Level = 3

The service request will be escalated to a priority of 2 after being open for 50 minutes. It's priority and impact levels will then be:

Priority Level = 2

Impact Level = 3

The same service request will then be escalated to a priority of 1 after being open for an additional 40 minutes. Its priority and impact levels will then be:

Priority Level = 1

Impact Level = 3

The service request will remain at this priority level until it is closed.

Different Types of Service Requests

Some Customer-One systems will be setup to have one service request for all requests, while other Customer-One services will have multiple different service requests for different purposes:

- One for software-related problems.
- One for PC-related problems.
- One for mainframe-related problems.
- etc.

Although the most frequent use of service requests is in a help desk environment, it is also used in a variety of other applications where it is important for a company to monitor and keep track of service requests. Other **examples** of how service requests are used are:

- Comments & suggestions
- Call tracking
- Sales lead tracking

News

The News component of Customer-One will allow you to read new news items that the administrator has uploaded to the service.

Related Topics:

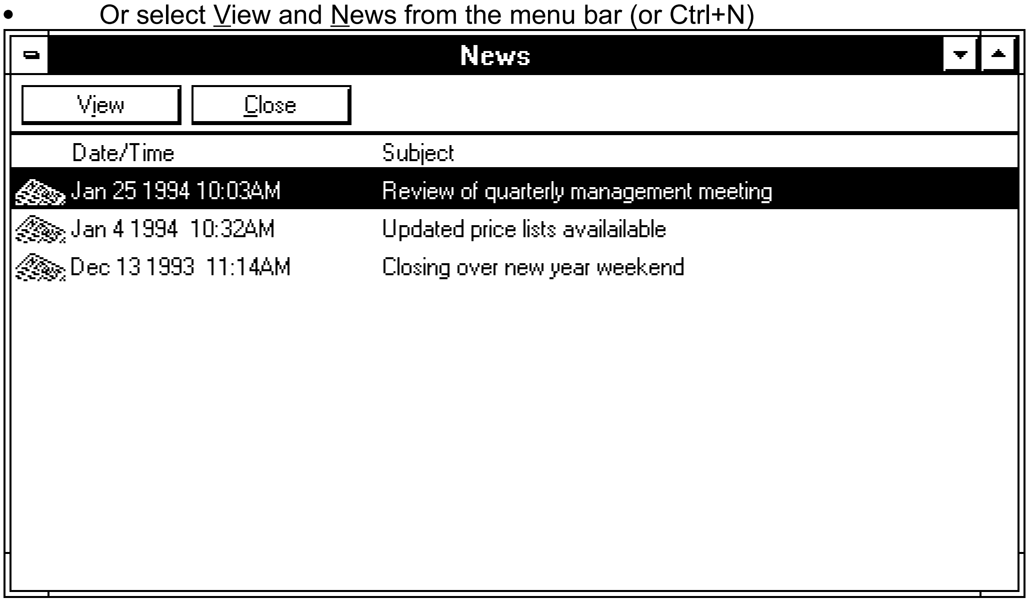
Open News List Window
View News List
Reading a News Item

Open News List Window

Following is the procedure to open the News list window:

- Click on the News icon on the tool bar

- Or select View and News from the menu bar (or Ctrl+N)



For further information on the New list window, *see* the News Window section in the Customer-One Screen Reference portion of the manual.

View News List

Following is the procedure to view news items:

1. Open the News list window by selecting the News icon from the tool bar, or by selecting View and News from the menu bar (or Ctrl+N).
2. This will open the News list window and position the cursor on the first news item. News items are displayed in date order, i.e. most recent news item at the top (first).
3. To open and view a news item do one of the following:
   - Double-click on the news item.
   - Highlight the news item and press the Enter key.
   - Highlight the news item and press the View button at the top of the News list window.
4. This will open the read News window. For further information on reading news items, *see* the Reading a News Item section.

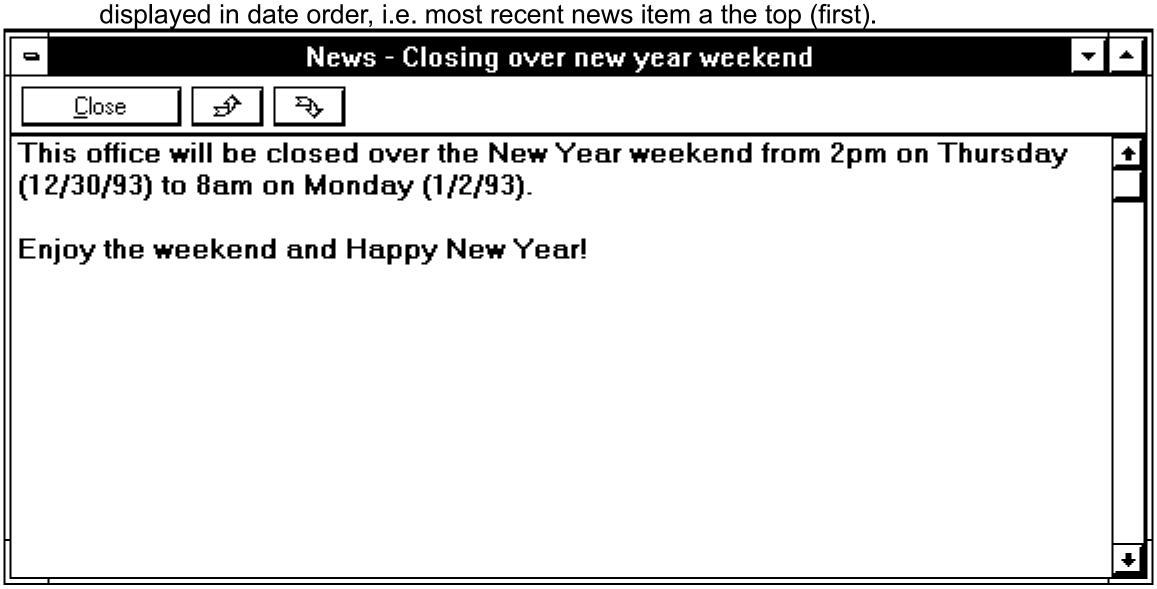
The news title (subject) will now be displayed in the window title bar.

The subject of the news item is displayed in the window title bar, i.e. "News - Quarterly Management Meeting"

Reading a News Item

Following is the procedure to read a news item:

1. Open the News window by selecting the News icon from the tool bar, or by selecting View and News from the menu bar (or Ctrl+N).
2. This will open the News window and position the cursor on the first news item. News items are displayed in date order, i.e. most recent news item a the top (first).



For further information on the Read News window, *see* the Read News Window section in the Customer-One Screen Reference portion of the manual.

3. Using your mouse or keyboard, locate and select the news item you want to read.
4. The read News window will be opened allowing you to view the contents of the news item.
5. When complete, press the Close button to close the Read News window.

Knowledge Base

The Knowledge Base component is a full-text search-and-retrieval tool to extract information from database collections.

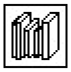
Related Topics:

Opening the Knowledge Base Window
Query Search Words
Executing an Existing Knowledge Base Query
Executing a New Knowledge Base Query
Deleting an Existing Knowledge Base Query
Displaying Query Results
Reading a Knowledge Base Query Result
Saving a Knowledge Base Query

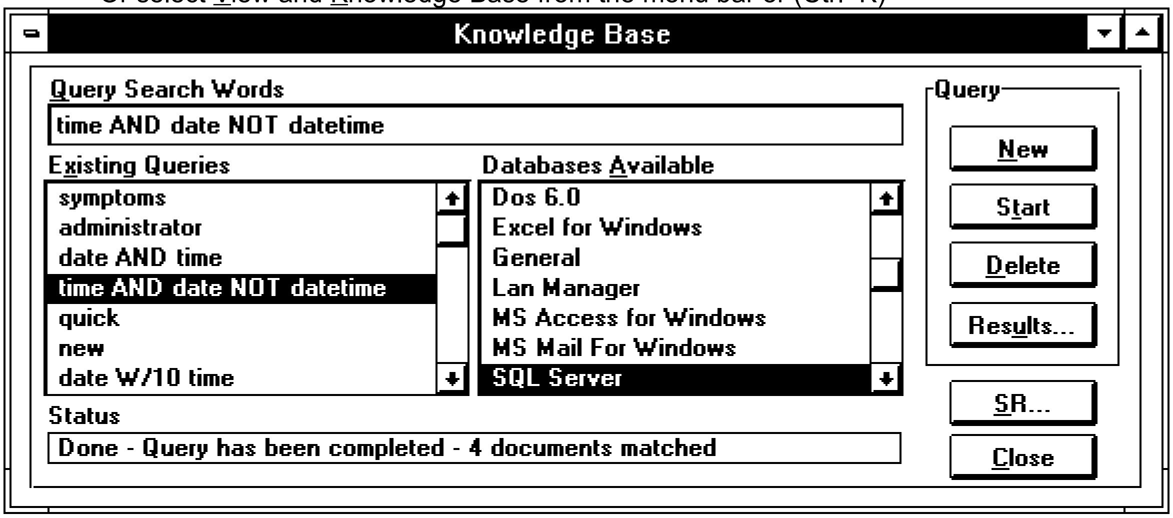
Opening the Knowledge Base Window

Following is the procedure to open the Knowledge Base window:

- Click on the Knowledge Base icon on the tool bar



- Or select View and Knowledge Base from the menu bar or (Ctrl+K)



The Knowledge Base query window allows you to send queries to the Customer-One knowledge base. You enter the words you want to search for and then select a Database collection to search against. Pressing the Start button will send the query to the Customer-One knowledge base engine which will return any matching knowledge base items.   These items are viewed in the Queries list window.

For further information on the Knowledge Base Query window, *see* the Knowledge Base Query Window section in the Customer-One Screen Reference portion of the manual.

Query Search Words

You can be flexible when inputting text to search for in a knowledge base query. Search words can be both upper and/or lower case. The query returns all matching knowledge base items, regardless of case. **Examples** of identical query search words are:

Setup

SETUP

SeTuP

The Knowledge Base query window will accept **wildcards**, similar to those used in the DOS operating system. **Examples** of wildcards are:

- * The * represents a word or a group of characters, i.e. set* will return all queries starting with the word "set", including "setup", "setting", etc.
- ? The ? substitutes for a single character (unlike the * which substitutes for any number of characters), i.e. set? will return all queries starting with the word "set" that have one more character after the word, including "sets", etc.
- & The & will allow you to query a knowledge base for multiple words, i.e. "setup & print". This will allow you to narrow down a lengthy search.

The Knowledge Base query window will ***not*** allow searches for short words or articles, such as "and", "or", "for", etc. Searches may only be performed on complete words unless wildcards are used. **For example***:* "setu" will *not* return any knowledge base items (unless the original knowledge base item was input that way), whereas "setu?", "setu*" and "setup" will return the same items.

When searching for text that may return *many matching knowledge base files,* it is important to try be as specific as possible.

If a large number of matching knowledge base files are found, viewing all these items *may take a long time,* especially if the method of communication is slow, i.e. modem.

Executing an Existing Knowledge Base Query

Following is the procedure to load and execute an existing knowledge base query:

1. Open the Knowledge Base query window by selecting the Knowledge Base icon from the tool bar, or by selecting View and Knowledge Base from the menu bar (or Ctrl+K).
2. Select the query from the Existing Queries list that you wish to execute. Selecting the query will automatically place it in the Query Search Words field and highlight the database collection in the Databases Available list. At this point the query can be executed or modified. If modified or changed, the new query will be saved in the Existing Queries list, overwriting the old query.
3. Observe the query Status field which will display the following message:

   Done - Query has been completed - # documents matched

   The # indicates the number of files that have been found that match your search criteria.
4. If you wish to execute the search again, press the Start button. If there are new files that have been added to the knowledge base after you created the search, these new files will be added to the search results list.

Executing a New Knowledge Base Query

Following is the procedure to create and execute a new knowledge base query:

1. Open the Knowledge Base query window by selecting the Knowledge Base icon from the tool bar, or by selecting View and Knowledge Base from the menu bar (or Ctrl+K).
2. Press the New button. The cursor will be positioned on the Query Search Words field.
3. Enter the search string to search for. For further information on entering text to search for, *see* the Query Search Words section.
4. Select a database collection from the Databases Available list.
5. Press the Start button to start executing the search. Once the query has started, observe the Status field which will display the following messages:

    New query - still being processed

    Followed by the following message when the search has been completed:

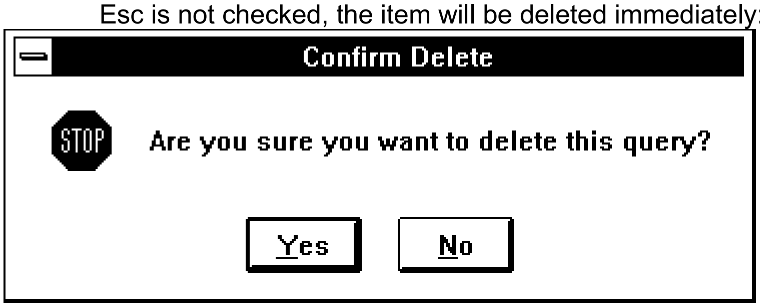
    Done - Query has been completed - # documents matched

    The # indicates the number of files that have been found that match your search criteria. The actual number, if any, of knowledge base items matched to your query will be displayed.

Deleting an Existing Knowledge Base Query

Following is the procedure to delete an existing knowledge base query:

1. Open the Knowledge Base query window by selecting the Knowledge Base icon from the tool bar, or by selecting View and Knowledge Base from the menu bar (or Ctrl+K).
2. Select the query from the Existing Queries list that you wish to delete. Selecting the query will automatically place it in the Query Search Words field and highlight the database collection in the Databases Available list. At this point the query can be deleted.
3. Press the Delete button to delete the query. If the menu Options and Confirm Delete and Esc is checked, you will be prompted for confirmation prior to deleting the query. If Confirm Delete and Esc is not checked, the item will be deleted immediately:



Observe the status bar message area in the lower left-hand corner of the screen which should display the following message:

Query deleted

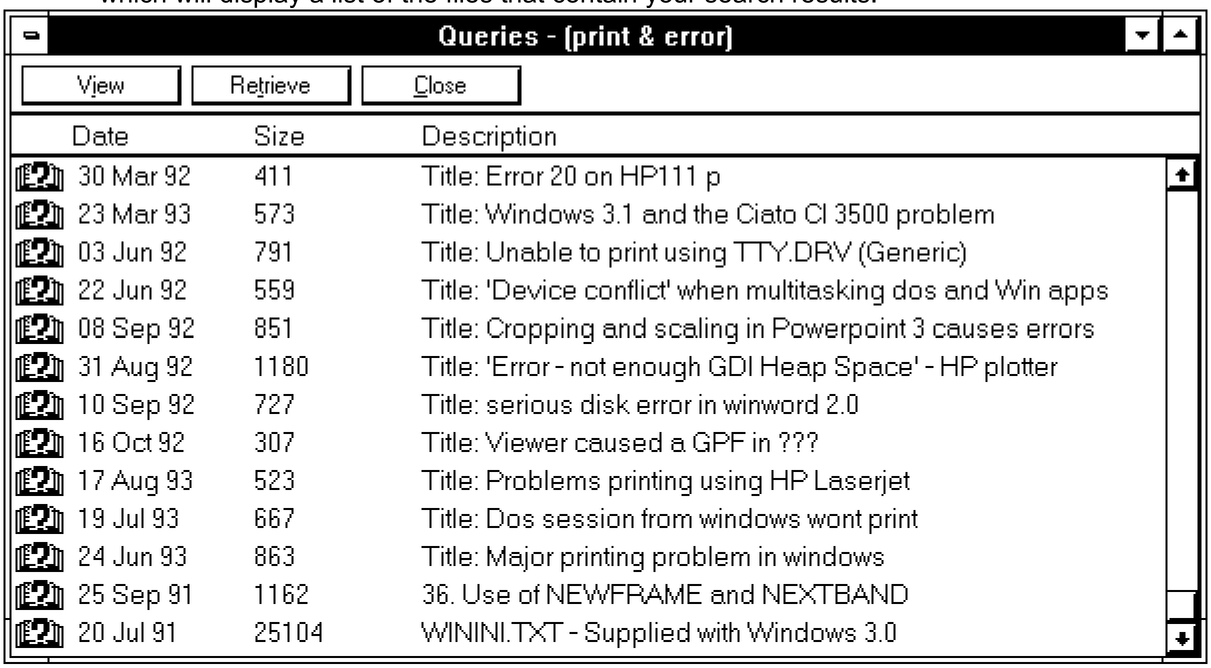
Displaying Query Results

Following is the procedure to display the results of a successful query that returned matching documents:

1. Open the Knowledge Base window by selecting the Knowledge Base icon from the tool bar, or by selecting View and Knowledge Base from the menu bar (or Ctrl+K).
2. Enter a new query or select a query from the Existing Queries list that you wish to execute.
3. Execute the query by pressing the Start button.
4. If the query returns matching documents the status field will display the following message:

   Done - Query has been completed - # documents matched

5. If there are matching documents, press the Results... button to open the Queries list window which will display a list of the files that contain your search results.



For further information on reading knowledge base items, *see* the Reading a Knowledge Base Query Result section.

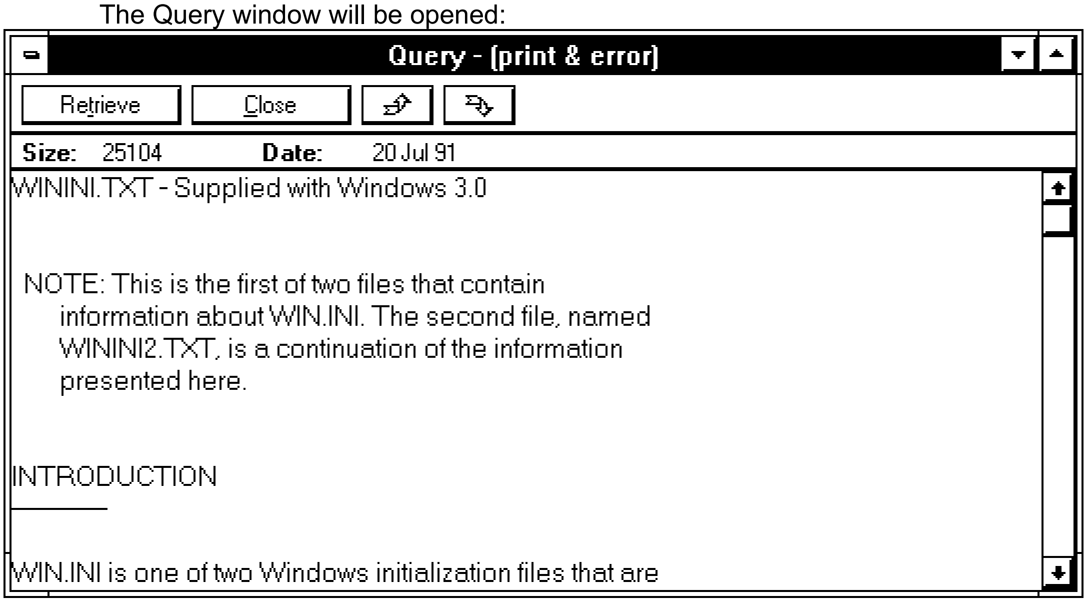
For further information on the Queries list window, *see* the Queries Window section in the Customer-One Screen Reference portion of the manual.

Reading a Knowledge Base Query Result

Following is the procedure to view (read) a query result. Query results are in the form of text files that contain text that match your search criteria:

1. Open the Knowledge Base window by selecting the Knowledge Base icon from the tool bar, or by selecting View and Knowledge Base from the menu bar (or Ctrl+K).
2. Enter a new query or select a query from the Existing Queries list that you wish to execute.
3. Execute the query by pressing the Start button.
4. If the query returns files that match your search, press the Results... button to open the Queries list window.
5. To open and read a knowledge base query result, do one of the following:
   - Double-click on the knowledge base item.
   - Highlight the knowledge base item and press the Enter key.
   - Highlight the knowledge base item and press the View button at the top of the knowledge base Queries list window.

   The Query window will be opened:



When a knowledge base item is read, the customer-One service will return the first page of information (typically 1,024 bytes). If there is more information to be displayed, the following will appear at the bottom of the window:

MORE ...

In order to view the entire contents of the knowledge base item, retrieve the file using the Retrieve button located at the top of the Query window. This will display the entire knowledge base file.

For further information on the Read Query window, *see* the Query Window section in the Customer-One Screen Reference portion of the manual.

Saving a Knowledge Base Query

A knowledge base item can be saved to your local hard drive (or any other drive of your choice) *from two different places:*

- Queries List window
- Query View window

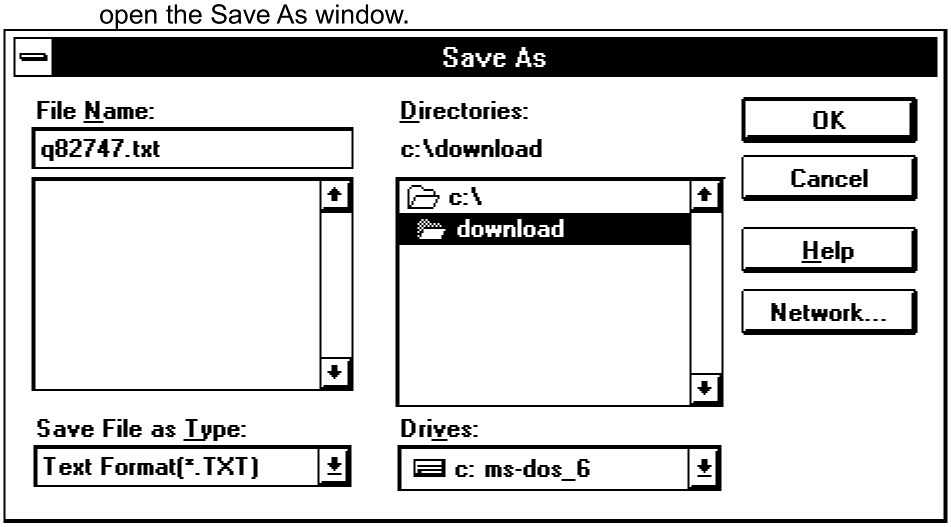
Related Topics:

Saving from the Queries List Window
Saving from the Query View Window

Saving from the Queries List Window

Following is the procedure to save a query from the Queries list window:

1. Open the Knowledge Base window by selecting the Knowledge Base icon from the tool bar, or by selecting View and Knowledge Base from the menu bar (or Ctrl+K).
2. Enter a new query or select the query from the Existing Queries list that you wish to execute.
3. Execute the query by pressing the Start button.
4. If the query returns files that match your search, press the Results... button to open the Queries list window.
5. Select the knowledge base file that you want to save and press the Retrieve button. This will open the Save As window.



The Save As window is a standard Microsoft Windows Save As dialog.

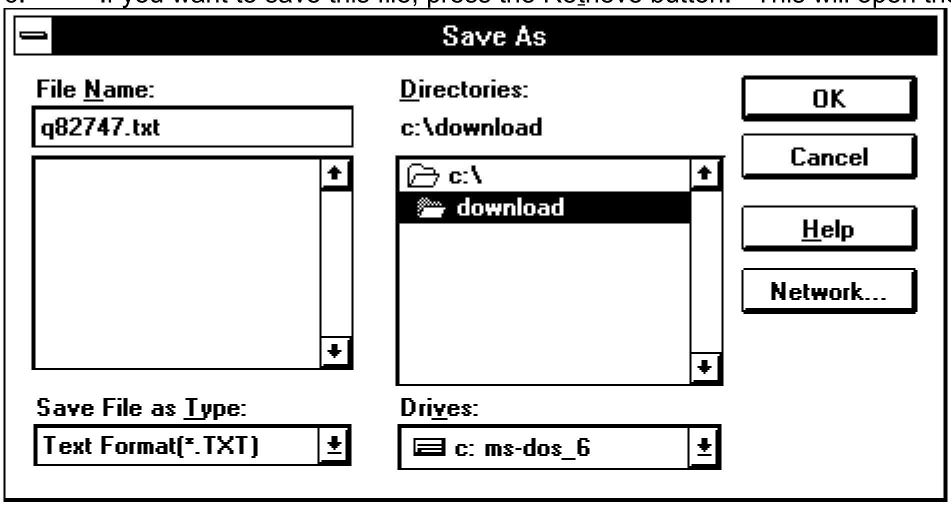
6. The knowledge base file name is automatically inserted in the File Name field.

For further information on saving files, *see* your Microsoft Windows manual.

Saving from the Query View Window

Following is the procedure to save a query from the Query view window:

1. Open the Knowledge Base window by selecting the Knowledge Base icon from the tool bar, or by selecting View and Knowledge Base from the menu bar (or Ctrl+K).
2. Enter a new query or select the query from the Existing Queries list that you wish to execute.
3. Execute the query by pressing the Start button.
4. If the query returns files that match your search, press the Results... button to open the Queries list window.
5. Select a knowledge base file and press the View button to read the contents of the file.
6. If you want to save this file, press the Retrieve button. This will open the Save As window.



The Save As window is a standard Microsoft Windows Save As dialog.

7. The knowledge base file name is automatically inserted in the File Name field.

For further information on saving files, *see* your Microsoft Windows manual.

Conference

On-line electronic conferencing is available on the Customer-One service.   This is interactive (live) conversation with other Customers-One users presently logged on to the system.

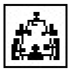
Related Topics:

Open Conference Window
Starting a New Conference
Joining an Existing Conference
Participating in a Conference

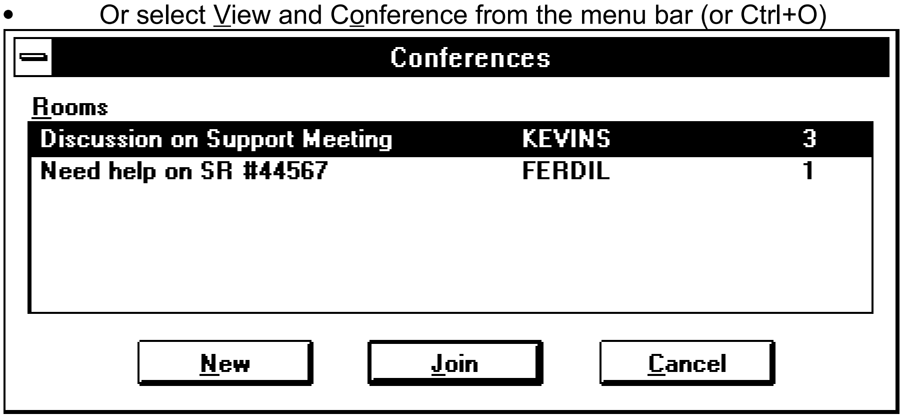
Open Conference Window

Following is the procedure to open the Conference window:

- Click on the Conference icon on the tool bar



- Or select View and Conference from the menu bar (or Ctrl+O)



The conference list window displays a list of all conferences in progress. If there are no conferences in progress, you are prompted with a dialog box asking you if you want to start a conference. For further information on starting a new conference, *see* the Starting a New Conference section.

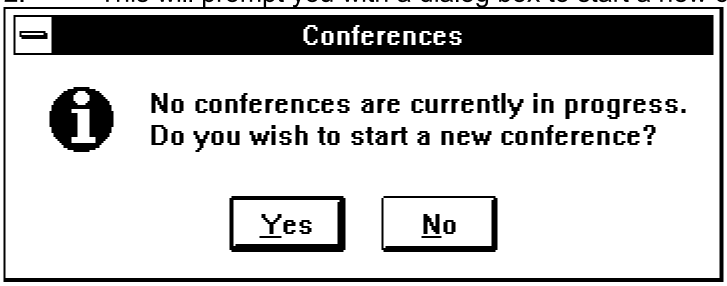
For further information on the Conference list window, *see* the Conferences List Window section in the Customer-One Screen Reference portion of the manual.

Starting a New Conference

If No Other Conferences are in Progress

Following is the procedure to start a new conference if no other conferences are in progress:

1. Open the conference window by selecting the Conference icon from the tool bar, or by selecting View and Conference from the menu bar (or Ctrl+O).
2. This will prompt you with a dialog box to start a new conference:



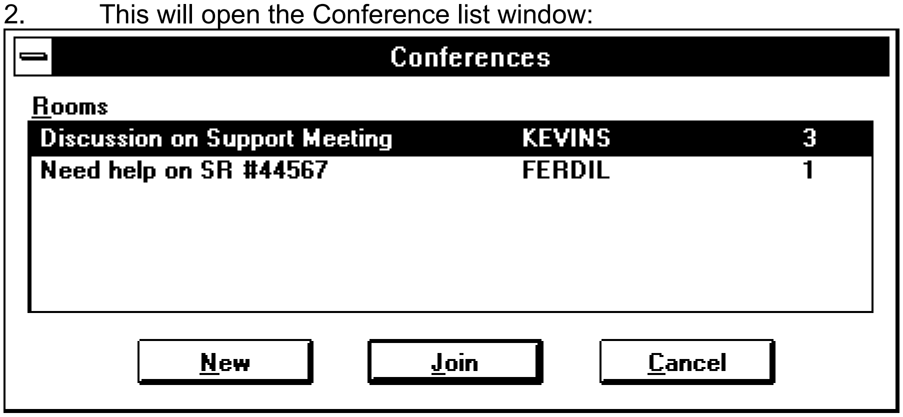
3. Press the Yes button to start a new conference. This will open the Start New Conference window.

4. Enter a name (required) for the conference you wish to start and press the OK button to proceed.
5. You will now be taken to the main conference window where you can continue with your conference.

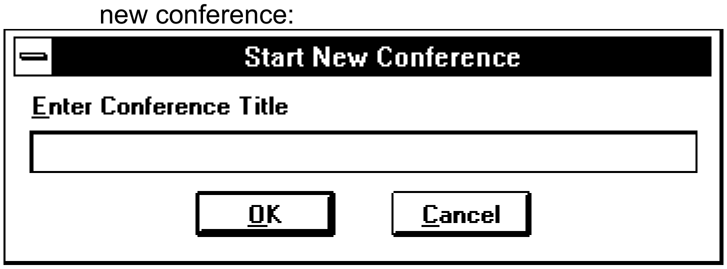
If Other Conferences are in Progress

Following is the procedure to start a new conference if there are other conferences already in progress:

1. Open the Conference window by selecting the Conference icon from the tool bar, or by selecting View and Conference from the menu bar (or Ctrl+O).
2. This will open the Conference list window:



3. Press the New button to start a new conference. This will prompt you with a dialog box to start a new conference:



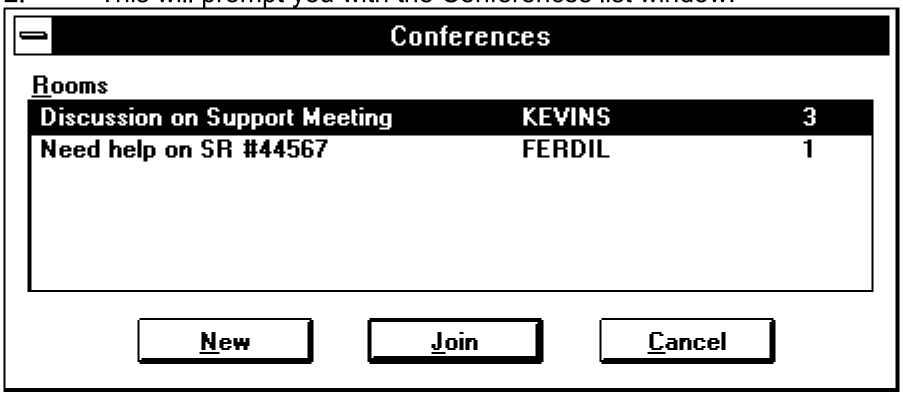
4. Enter a name (required) for the conference you wish to start and press the OK button to proceed.
5. You will now be taken to the main conference window where you can continue with your conference.

Joining an Existing Conference

Following is the procedure to join a conference already in progress:

1. Open the Conference window by selecting the Conference icon from the tool bar, or by selecting View and Conference from the menu bar (or Ctrl+O).

2. This will prompt you with the Conferences list window:



   If there are no conferences in progress, you will be prompted to start a new conference.

3. To join a conference, do one of the following:
   - Double-click on the conference you want to join.
   - Highlight the conference you want to join and press the Enter key.
   - Highlight the conference you want to join and press the Join button.

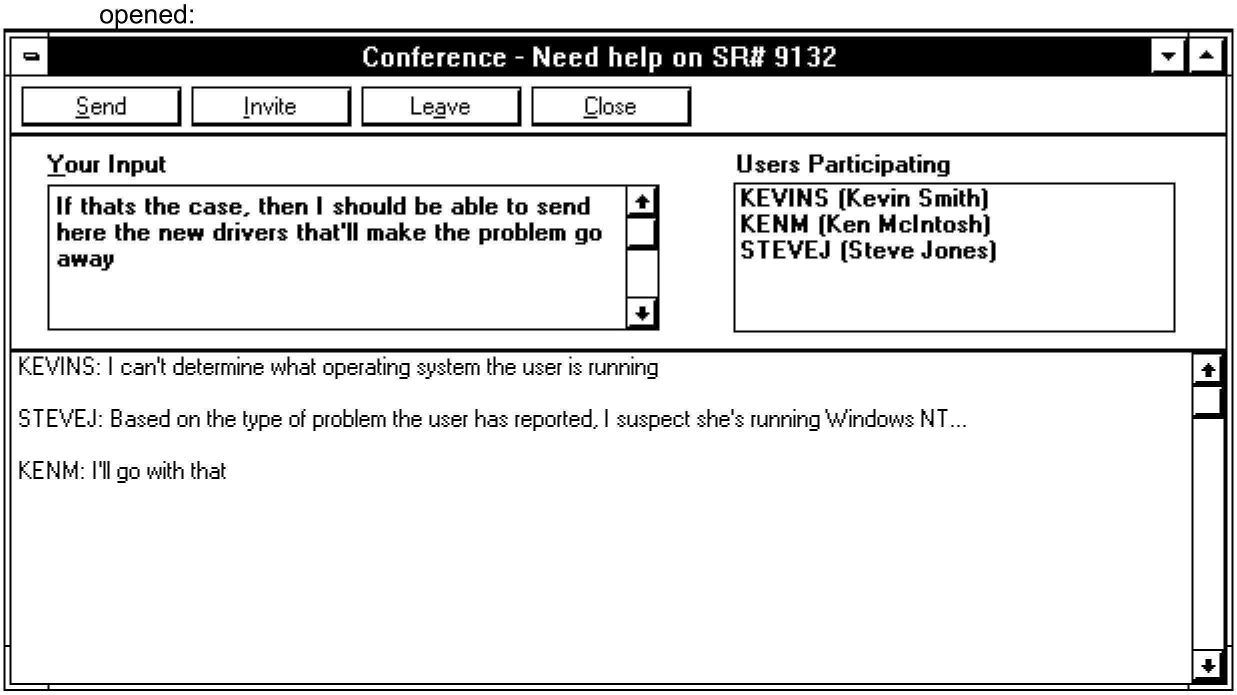
4. You will now be taken to the main Conference window where you can continue with the conference.

Participating in a Conference

Following is the procedure to participate in a conference:

1. Open the Conference window by selecting the Conference icon from the tool bar, or by selecting View and Conference from the menu bar (or Ctrl+O)

2. Start or join a conference as outlined in the previous steps.   The Conference window will be opened:



For further information on the Conference window, *see* the Conference Window section in the Customer-One Screen Reference portion of the manual.

2. Enter your conversation in the Your Input field and when complete, press the Send button located at the top of the window.

3. The Your Input field will be cleared (ready for new text) and the text will be pasted in the main conversation detail area which is located below the Your Input field.   All users participating in the conference will be able to view your conversation input.

4. All other conversations by the various users participating in this conference will also be displayed in the main conversation detail area.

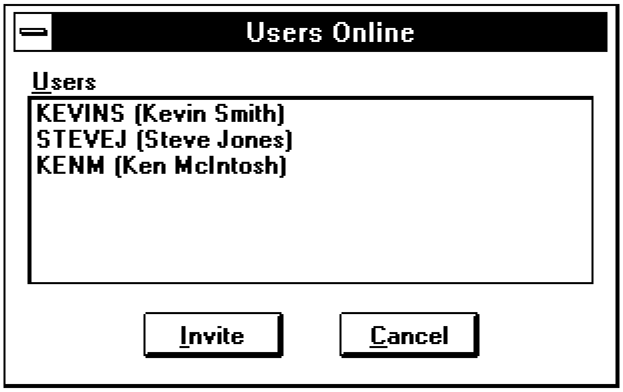
Related Topics:

Inviting a User to Join a Conference
Leaving a Conference
Closing a Conference

Inviting a User to Join a Conference

Following is the procedure to invite another user to a conference in which you are participating:

1. Press the Invite button located at the top of the conference window. This will open the Users Online window.



2. A list of users presently on-line with the Customer-One service will be displayed. If there are no other users on-line, the Users On-line window will only display *your name.*

You cannot invite yourself to your own conference.

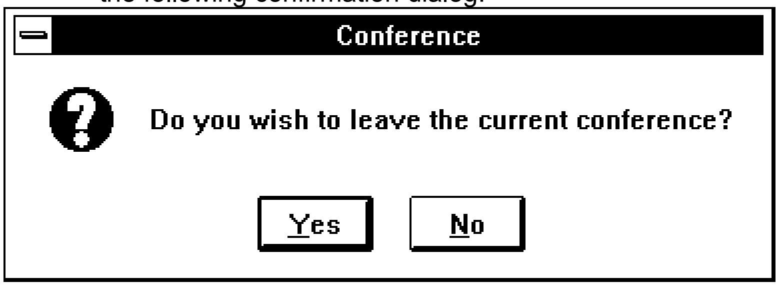
3. To invite a user to join this conference, do one of the following:
   - Double-click on the user name.
   - Highlight the user and press the Enter key.
   - Highlight the user and press the Invite button.
4. You will now be returned to the main conference window and the invitation will be sent to the user you invited. The user you invited has the option *not to accept* the invitation.
5. If the user accepts the invitation, their name will appear in the Users Participating list in the main conference list and you can continue the conference.

You must already be in a conference to be able to invite another user to join.

Leaving a Conference

Following is the procedure to leave a conference:

1. Press the Leave button located at the top of the conference window. You will be prompted with the following confirmation dialog:



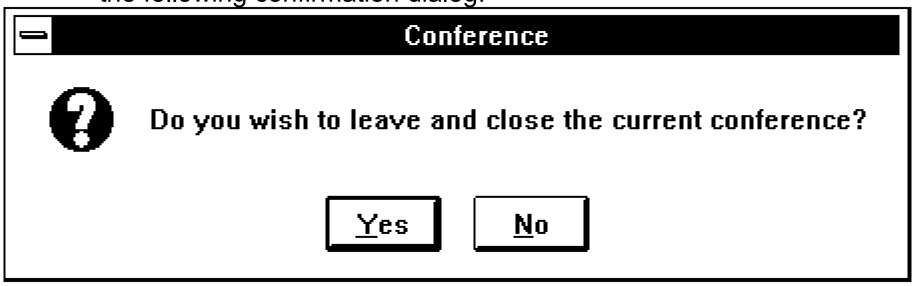
2. Press the Yes button to leave the conference or the No button to remain in the conference. This will leave the Conference window open.

If you are the last person in the conference, the conference will be closed.

Closing a Conference

Following is the procedure to leave a conference:

1. Press the Close button located at the top of the conference window. You will be prompted with the following confirmation dialog:



2. Press the Yes button to close the conference window. If you are the last person in the conference, the conference will be closed.

This option will only close the Conference window, and *not* the conference, if there are still other users participating in the conference.

Out Box

The out box is where all mail items, messages and service requests created off-line are stored. From the Out Box window you can edit or delete previously created items.

Related Topics:

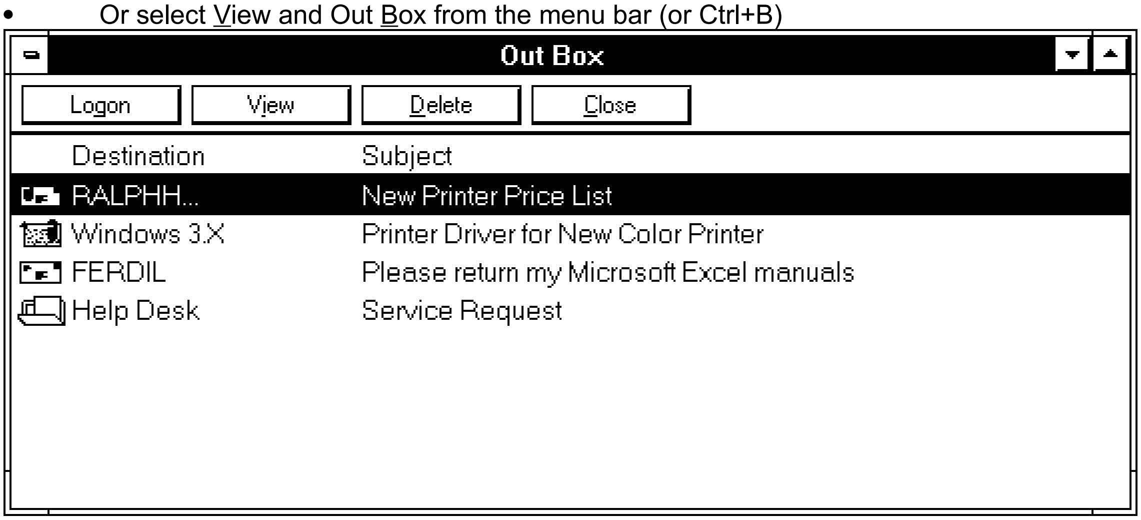
Opening the Out Box
Selecting a Default Service
Submitting Items Off-Line
Deleting Out Box Items
Edit Out Box Items
Sending Out Box Items

Opening the Out Box

Following is the procedure to open the Out Box window:

- Click on the Out Box icon on the tool bar

- Or select View and Out Box from the menu bar (or Ctrl+B)



The Out Box list window displays a list of all items which have *not yet been sent* to the Customer-One service. Items which can be included in the out box are:

- Mail
- Folder messages
- Service requests

When any one of these items is created *off-line* and sent, they will be placed in the out box until such time as you logon to the Customer-One service.

Each out box item is preceded by an icon, indicating the *type* of item it is. For further information on these icons, *see* the previous sections of this manual.

The Out Box can only be accessed while off-line and if there are items already in the out box. At all other times, the out box button and menu option will be unavailable.

For further information on the Out Box list window, *see* the Out Box Window section in the Customer-One Screen Reference portion of the manual.

Selecting a Default Service

As you can use the same program to connect to multiple Customer-One services, a default service has to be set. This service is setup using the menu item Options and Default Service..... For further information on setting a default service, *see* the Default Service section.

If you want to send an item created off-line to the another service, change the default service prior to creating that item.

Submitting Items Off-Line

Submitting Mail Off-Line

Following is the procedure to write new mail while off-line:

1. Open the Write Mail window by selecting the Write Mail icon from the tool bar, or by selecting Mail and Write from the menu bar (or Ctrl+W).
2. The Write Mail window will now be opened and the cursor will be positioned on the To field.
3. Finish writing the mail as outlined in the Write New Mail section portion of this manual.
4. When complete, press the Send button and the mail will be sent to the out box. Observe the status bar message area in the lower left-hand corner of the screen which should display the following message:

   Item sent to out box

While working off-line, it is not possible to access the address book.

Submitting Folder Messages Off-Line

Following is the procedure to write a new message while off-line:

1. Open the Write Message window by selecting the Write Message icon from the tool bar, or by selecting Folders and Write from the menu bar (or Ctrl+E).
2. The Write Message window will now be opened and the cursor will be positioned on the Folder field.
3. Finish writing the message as outlined in the Write a New Message section portion of this manual.
4. Upon completion, press the Send button and the message will be sent to the out box. Observe the status bar message area in the lower left-hand corner of the screen which should display the following message:

    Item sent to out box

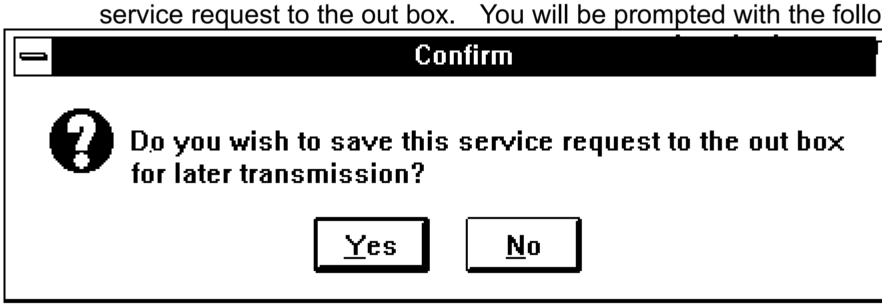
When working off-line, only the folders and section saved as favorite will be displayed in the Folder and Section fields.

Submitting Service Requests Off-Line

There are some fields that could require validating before a service request can be successfully transmitted to the Customer-One service. If a service request is filled in while off-line, immediate validation of the fields can not take place. Some service requests will allow you to input a form without validating the content of the various fields.

Following is the procedure to submit a new service request while off-line:

1. Open the Service Request window by selecting the Service Request icon from the tool bar, or by selecting View and Service Request from the menu bar (service request could be called by a different name).
2. Enter all the details in the fields on the service request. Lookup fields (i.e. comb list boxes) that normally require validation will not be available for selection while off -line.
3. It is important to enter relevant and descriptive information into the problem details field as this is where all the information pertaining to the problem is entered.
4. Once all the service request fields have been filled in, press the Close button to transmit the service request to the out box. You will be prompted with the following window:



Press the Yes button to send the service request to the out box. Observe the status bar message area in the lower left-hand corner of the screen which should display the following message:

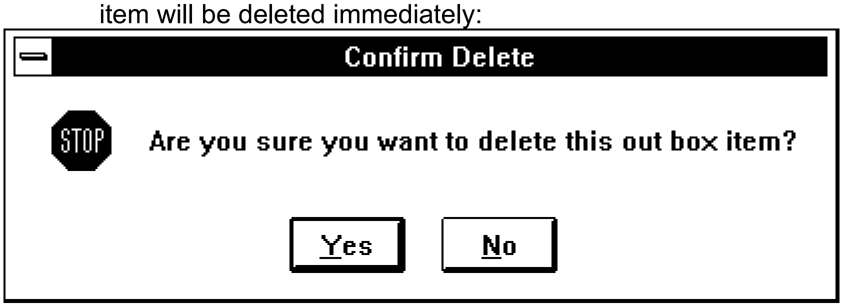
Item sent to out box

Deleting Out Box Items

Following is the procedure to delete any out box item (mail, messages or service requests):

1. Open the Out Box by selecting the Out Box icon from the tool bar, or by selecting View and Out Box from the menu bar (or Ctrl+B).

2. Using the mouse or the keyboard, select the item you wish to delete and press the Delete button If the menu Options and Confirm Delete and Esc is checked, you will be prompted for confirmation prior to deleting the out box item. If Confirm Delete and Esc is not checked, the item will be deleted immediately:



Observe the status bar message area in the lower left-hand corner of the screen which should display the following message:

Out box item deleted

You have to be *off-line* in order to access the out box.

Edit Out Box Items

Following is the procedure to edit any out box item (mail, message or service request)*:*

1. Open the Out Box by selecting the Out Box icon from the tool bar, or by selecting View and Out Box from the menu bar (or Ctrl+B).
2. Using the mouse or the keyboard, select the item you wish to edit, and do one of the following:
   - Double-click on the out box item.
   - Highlight the out box item and press the Enter key.
   - Highlight the out box item and press the View button at the top of the Out Box list window.
3. Depending on which *type* of item was selected for editing, the Write Mail, Write Message or Service Request window will be opened. You are now able to edit the item
4. When editing is complete, press the Send button to send the item to the out box again.

This procedure can only be performed *while off-line.*

Sending Out Box Items

There are *two methods* of sending the Out Box items to the server: via the out box or by regular Logon. Both open the same Connection (Logon) window.

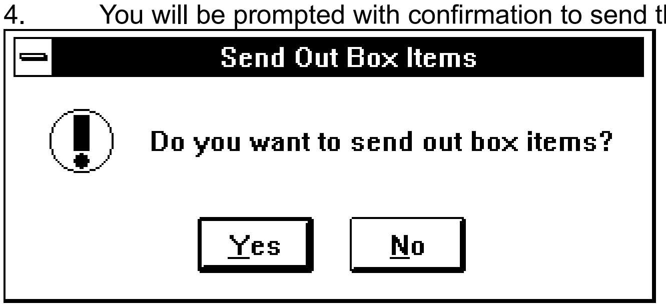
Related Topics:

Sending via the Out Box
Sending via Regular Logon

Sending via the Out Box

Following is the procedure to send an out box item (mail, message or service request) through the Out Box window. This procedure can only be performed while off-line*:*

1. Open the Out Box by selecting the Out Box icon from the tool bar, or by selecting View and Out Box from the menu bar (or Ctrl+B).
2 Press the Logon button on the Out Box window to open the Connection window.
3. Logon to the service you want to send the Out Box items to. For further information on starting a connecting to a Customer-One service, *see* the Logging On section.
4. You will be prompted with confirmation to send the out box items to the server:



5. Press the Yes button to send the off-line items. Observe the status bar message area in the lower left-hand corner of the screen which should display any of the following messages:

   Mail sent

   Message sent

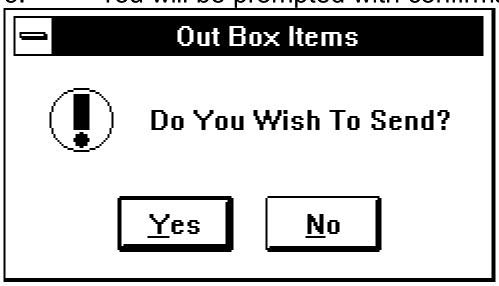
   Service request sent

6. After the items have been successfully sent, the items will be *removed* from the out box.

Sending via Regular Logon

Following is the procedure to send an out box item (mail, message or service request) through the regular logon process. This procedure can only be performed *while off-line:*

1. Open the Connection window by selecting the Logon icon from the tool bar, or by selecting File and Logon from the menu bar (or Ctrl+L).
2. Logon to the service you want to send the Out Box items to. For further information on logging on to a Customer-One service, *see* the Logging On section.
3. You will be prompted with confirmation to send the out box items to the server:



5. Press the Yes button to send the off-line items. Observe the status bar message area in the lower left-hand corner of the screen which should display the following messages:

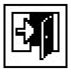
   Mail sent

   Message sent

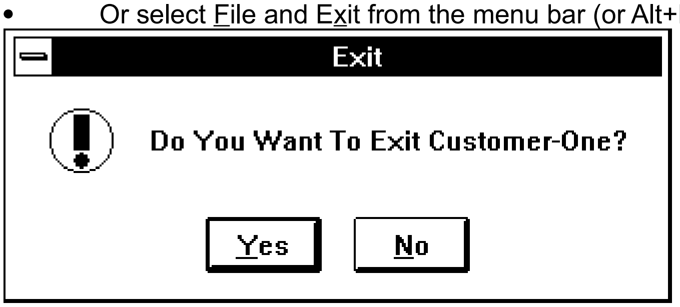
   Service request sent
6. After the items have been successfully sent, the items will be *removed* from the out box.

Exit

- Click on the Exit icon on the tool bar



- Or select File and Exit from the menu bar (or Alt+F4)



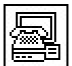
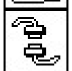
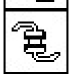
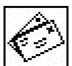
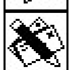
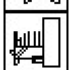
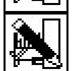
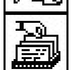
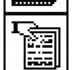
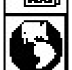
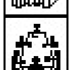
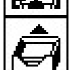
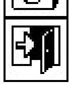
Press the Yes button to exit Customer-One, or the No button to cancel the exit operation and continue working. (If you are off-line at the time you select Exit, you will *not* be prompted with this dialog box).

Customer-One Layout

Customer-One Tool Bar Layout

Following is a summary of the layout of the Customer-One tool bar. This is a comprehensive list of all the menu choices available together with any *short-cut* keys associated with them.

All the tool bar choices are not available at all times. The tool bar choices not available will be dimmed. **For example**, when you are off-line, only those menu choices which are available will be undimmed. The menu choices not available will appear dimmed.

Tool Bar Icons	Menu Key	Short-Cut	Available	Description
	Alt,F,E	Ctrl+S	Off-line Only	Configure Connection Settings
	Alt,F,L	Ctrl+L	Off-line Only	Logon to Customer-One Service
	Alt,F,L	Ctrl+L	On-line Only	Logoff from Customer-One Service
	Alt,M,L	Ctrl+M	On-line Only	View Mail List
	Alt,M,W	Ctrl+W	On- and Off-line	Write New Mail
	Alt,L,L	Ctrl+F	On-line Only	View Folder List
	Alt,L,W	Ctrl+E	On- and Off-line	Write New Folder Message
	Alt,V,H	Ctrl+H	On-line Only	View Help Desk List of Service Requests
	Varies		On and Off-line	Open New Default Service Request
	Alt,V,N	Ctrl+N	On-line Only	View News List
	Alt,V,K	Ctrl+K	On-line Only	Query Knowledge Base
	Alt,V,O	Ctrl+O	On-line Only	Participate in a Conference
	Alt,V,B	Ctrl+B	Off-line Only	View Out Box List
	Alt,F,X	Alt+F4	On- and Off-line	Exit Customer-One

Customer-One Menu Bar Layout

Following is a summary of the layout of the menu bar. This is a comprehensive list of all the menu choices available together with any *short-cut keys* associated with them.

All the menu choices are not available at all times. **For example**, when you are off-line, only those menu choices which are available will be undimmed. The menu choices not available will appear dimmed.

Related Topics:

File Menu
Edit Menu
View Menu
Options Menu

File Menu

Menu Item	Menu Key	Short-Cut	Description
Settings...	Alt,F,E	Ctrl+S	Configure Connection Settings
Logon / Logoff	Alt,F,L	Ctrl+L	Log On / Off Customer-One Service
Notification	Alt,F,N		Display Notification Item in Status Bar
Abort	Alt,F,A	Ctrl+Break	Aborts an Action, i.e. Download, Listing of Items, etc.
Close	Alt,F,C	Esc Key	Closes Active Open Window
Save As...	Alt,F,S	Ctrl+A	Save Contents of a Window to a Text File
Print...	Alt,F,P	Ctrl+P	Send Contents of Window to the Printer
Exit	Alt,F,X	Alt+F4	Close the Customer-One Program

Edit Menu

Menu Item	Menu Key	Short-Cut	Description
Cut	Alt,E,T	Ctrl+X or Shift+Del	Cut a Highlighted Section of Text
Copy	Alt,E,C	Ctrl+C or Ctrl+Ins	Copy a Highlighted Section of Text
Paste	Alt,E,P	Ctrl+V or Shift+Ins	Paste Copied or Cut Text Section
Delete	Alt,E,D	Del	Delete Highlighted Section of Text

View Menu

Menu Item	Menu Key	Short-Cut	Description
Mail	Alt,V,M	Ctrl+M	View Mail List
Folders	Alt,V,F	Ctrl+F	View Folder List
Help Desk	Alt,V,H	Ctrl+H	View Help Desk List of Service Requests
News	Alt,V,N	Ctrl+N	View News List
Knowledge Base	Alt,V,K	Ctrl+K	Query Knowledge Base
Conferences	Alt,V,O	Ctrl+O	Participate in a Conference
Out Box	Alt,V,B	Ctrl+B	View Out Box List

The customizable forms set up by the Customer-One Server will appear at the bottom of the view menu, separated by a single horizontal separator bar. These forms will vary depending on exactly how many forms the Customer-One service you are connecting to has created and included in the FORM.FRM.

Two standard forms which should always appear here are (if setup by the Customer-One service you are connecting to):

Menu Item	Menu	Short-Cut	Description

	Key		
Service Request	Varies		Open New Service Request
User Details	Varies		Edit Personal User Details

Options Menu

Menu Item	Menu Key	Short-Cut	Description
Tool Bar	Alt,O,T		Turns Tool Bar Off or On
Status Bar	Alt,O,S		Turns Status Bar Off or On
Confirm Delete and Esc	Alt,O,C		Turns Confirmation Prior to Deleting an Item or closing and Window Off or On
Auto Mail List	Alt,O,M		Automatically Displays Mail List on Logon
Auto Logon	Alt,O,L		Prompts User with Logon Window at Startup of Program
Password...	Alt,O,P		Change Logon Password (On-line Only)
Font...	Alt,O,F		Change Default Font
Default Service...	Alt,O,D		Set Default Customer-One Service
Default Request...	Alt,O,R		Set Default Customer-One Service Request

Mail

Menu Item	Menu Key	Short-Cut	Description
List	Alt,M,L	Ctrl+M	View Mail List
Read	Alt,M,R		Read Mail
Write...	Alt,M,W	Ctrl+W	Write New Mail
Reply...	Alt,M,Y		Reply to Mail
Delete	Alt,M,D	Del (Mail List Only)	Delete Mail

Folders

Menu Item	Menu Key	Short-Cut	Description
List	Alt,L,L	Ctrl+F	View Folder List
Read/Expand	Alt,L,R		Expand / Collapse a Folder / Section or Read a Message
Write...	Alt,L,W	Ctrl+E	Write New Folder Message
Comment...	Alt,L,N		Comment on a Folder Message

Window

Menu Item	Menu Key	Short-Cut	Description
Cascade	Alt,W,C		Cascade all Open Windows

Tile Horizontally	Alt,W,H		Tile all Open Windows Horizontally
Tile Vertically	Alt,W,T		Tile all Open Windows Vertically
Arrange Icons	Alt,W,I		Arrange all Icons along Bottom of Customer-One Window
Close All	Alt,W,A		Close all Open Windows

Help

Menu Item	Menu Key	Short-Cut	Description
Contents	Alt,H,C		Display Contents of Help File
Search...	Alt,H,S		Search for Help on a Specific Keyword
Active Window	Alt,H,W	F1	Help on Active Window
How to Use Help	Alt,H,H		How to Use On-Line Help
About Customer-One...	Alt,H,A		About Customer-One Program

Customer-One Screen Reference

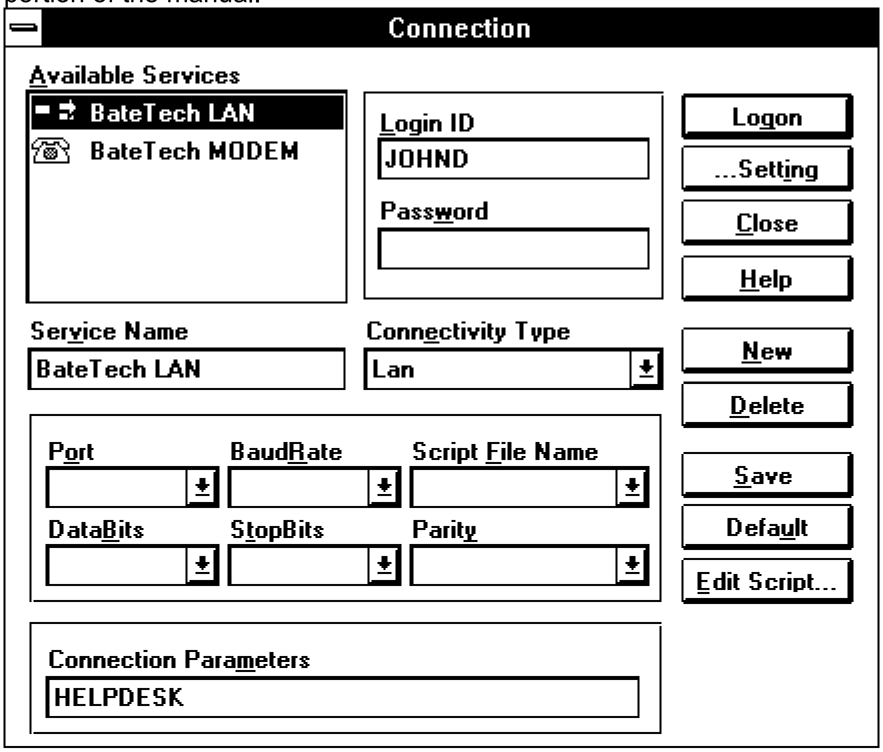
This section contains a more detailed overview of the various windows in the Customer-One program. For additional information on using these windows, refer to the Tutorial section of this manual.

Related Topics:

Settings Window
Connection (Logon) Window
User Details Window
Mail Window
Read Mail Window
Write Mail Window
Address Mail Window
Folders Window
Open Section Window
Read Message Window
Write Message Window
Help Desk Window
Service Request Window
Search for Service Request Window
News Window
Read News Window
Knowledge Base Query Window
Queries Window
Query Window
Conferences List Window
Conference Window
Out Box Window

Settings Window

For information regarding using the various options in this window, *see* the Settings section in the Tutorial portion of the manual.



Related Topics:

- Common Fields
- Network Edit Fields
- Modem Edit Fields
- Buttons
- Procedures

Common Fields

Common fields are fields shared by both the Modem and Network settings. This will become clearer as you read on and use the window.

Available Services

This list box displays all the previously configured services to which you can connect. Services displayed here have been *previously setup* using this Connection window. As soon as you save a new service it is added to the Available Services list. To change a service, select the service from the Available Services list and its settings will be automatically displayed in the various fields.

Select a service from this list to connect to, edit or delete.

One of the following icons are displayed alongside each of the service names and describes what type of service the item is:

	Network connection
	Default network connection
	Modem connection
	Default modem connection

There can only be one default service at any one time (network or modem). When the Connection window is opened, you will be prompted to connect to the *default* service.

Login ID

Enter your unique login ID in this field. All entries are automatically displayed in upper-case. Maximum length of this field is 15 characters.

Password

Enter your unique password in this field. Password will display as asterisks (******)** when being entered. A valid password has to be entered in order to gain access to any Customer-One service. Maximum length of this field is 15 characters.

Service Name

This option allows you to enter a descriptive name for the service you are setting up. *A maximum of 20 alphanumeric characters are allowed here.* Use meaningful names here, i.e. "C1 - LAN" for the server called C1 and communicating across a LAN network, or "C1 - COM2" for modem communications on COM2 to with a server called C1.

Connectivity Type

There are *two basic options* to select from here: *Modem or Network.*

If Modem is selected, only the Modem settings fields are available to edit. If Network (LAN, TCP/IP, IPX, etc.) is selected, only the Network settings fields are available to edit.

If the network or modem setting is not available in the Connectivity Type field, check to make sure that the appropriate file (i.e. C1COM.DLL, C1LAN.DLL, etc.) is in the default Customer-One directory.

Network Edit Fields

The network edit field will only be available if you have selected a network connectivity type (such as LAN, TCP/IP, IPX, etc.) in the Connectivity Type field.

Connection Parameters

Check with the Customer-One service you will be communicating with for the server name and/or parameters to enter into this field. *Maximum length of this field is 30 characters.*

Modem Edit Fields

The modem edit fields will only be available if you have selected a modem connectivity type in the Connectivity Type field.

Port

The Port field is where you select the communication port that you wish to use to communicate via and is displayed when the pull-down combo list is selected. Available options are:

COM1, COM2, COM3 or COM4

COM1 through COM4 are all related to the *serial port* used by your modem. Also consult your modem manual to determine what COM port your modem is configured to use.

BaudRate

The BaudRate field is where you specify the BPS (bits per second) speed of your modem. Available options are:

1200, 2400, 4800, 9600, 14400 or 19200 BPS

Check with the Customer-One service that you will be connecting to for the BaudRate speed of *their* modem. Make sure the baud rate of your modem *does not exceed* the baud rate of the Customer-One modem. If the maximum speed of the Customer-One modem is 9600 bps, and you have a 14400 bps modem, set the BaudRate field to 9600. Should you have a 2400 bps modem, and the Customer-One modem speed is 9600 bps, then set the BaudRate field to 2400.

Script File Name

The script file contains modem commands for setting up your modem. A script file is a text file which contains all the modem settings necessary for the modem to communicate properly. The file is read by your *Customer-One* program and executed when you start your log on process.

All script files should reside in the same directory as the Customer-One program and *must* have an extension of **.SFN**. The list of script files available is displayed when the Script File Name pull-down combo list is selected.

For further information on script files, *see* the "Working with Script Files" section in the Technical Reference portion of the manual.

DataBits

Available options for this field are:

5, 6, 7 or 8

Check with the Customer-One service that you will be communicating with for the DataBit number to enter in this field. This field defines the number of data bits that make up one character.

Most characters are transmitted in 8 data bits.

StopBits

StopBits are not actually bits, they are *timing units between bits.* Available options are:

1, 1.5 or 2

Check with the Customer-One service you will be communicating with for the stop bit number to enter in this field.

Parity

Parity is a method for *error checking*.   Available options are:

None, Even, Odd, Mark or Space

Check with the Customer-One service you will be communicating with for the parity value to enter in this field.

Buttons

Logon Button

Once all necessary fields (login ID and password) have been entered, and a service has been selected from the Available Services list box, press the Logon button to connect to the Customer-One. service

Settings Button

Pressing this button will close the settings half of the Connection window displaying only the logon window. Pressing this button again will open up the settings half of the Connection window. This is a *toggle button.*

Close Button

This button will cancel all new settings and close the Connection window. **Remember to save** any new or changed settings prior to closing this window. The Escape (Esc) key will also allow you to close this window.

Help Button

This button will activate the Customer-One on-line help file for the Settings window and its various options.

New Button

This button allows you to install a new service with new communication settings. If you have been working on another service, make sure you save those settings prior to pressing the New button.

Delete Button

This button allows you to delete the service highlighted in the Available Services list. If the menu item Options and Confirm Delete and Esc are checked, you will be prompted for confirmation prior to deleting this service.

Save Button

This button allows you to save a service with its new communication settings. Once saved, the new service name will be displayed in the Available Services list box.

Default Button

This button will allow you to set a default service to logon to. The icon alongside the service in the Available Services list box *will change* to indicate which service has been setup as a default:

 Default network connection

 Default modem connection

Only one default service can be set.

Edit Script... Button

This button will allow you to edit (using Windows NOTEPAD.EXE) the file currently selected in the Script File Name field. If no .SFN file is selected, the user will be prompted to create a new .SFN file.

This function applies to the Modem connectivity type *only.*

For information on how to use NOTEPAD.EXE, refer to your Windows manual.

Procedures

Open Connection Window

Adding a New Service

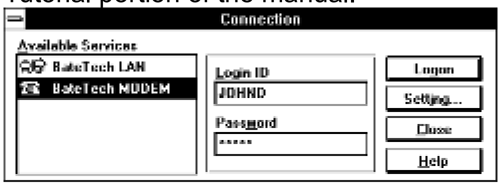
Deleting a Service

Editing an Existing Service

Setting a Default Service

Connection (Logon) Window

For information regarding using the various options in this window, *see* the Logging On section in the Tutorial portion of the manual.



Available Services

This list box displays all the previously configured services to which you can connect. Services displayed here have been *previously setup* using this Settings window. Select a service from this list to connect to.

One of the following icons are displayed alongside each of the service names and describes what type of service the item is:

 Network Connection

 Default Network Connection

 Modem Connection

 Default Modem Connection

There can only be one default service at any one time (network or modem). When the Connection window is opened, you will be prompted to connect to the *default* service.

Login ID

Enter your unique login ID in this field. All entries are automatically displayed in upper-case. Maximum length of this field is 15 characters.

Password

Enter your unique password in this field. Password will display as asterisks (******)** when being entered. A valid password has to be entered in order to gain access to any Customer-One service. Maximum length of this field is 15 characters.

Related Topics:

Buttons
Procedures

Buttons

Logon Button

Once all necessary fields (login ID and password) have been entered, and a service has been selected from the Available Services list box, press the Logon button to connect to Customer-One.

Settings Button

Pressing this button will open the settings half of the Connection window displaying both the logon and the settings portions of the window. Pressing this button again will close the settings half of the Connection window. This is a *toggle button.*

Close Button

This button will cancel all new settings and close the Connection window. **Remember to save** any new or changed settings prior to closing this window. The Escape (Esc) key will also allow you to close this window.

Help Button

This button will activate the Customer-One on-line help file for the Settings window and its various options.

Procedures

Open Logon Window

Logging On

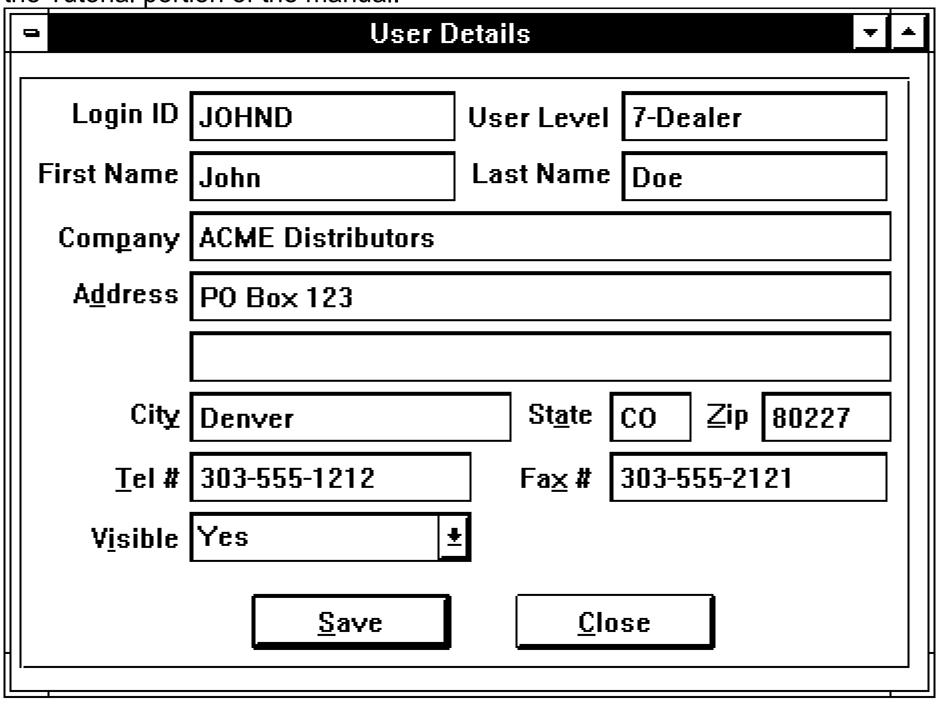
Setting Auto Logon

Logging Off

User Details Window

This is a customizable form and could be different to the window that appears when connect to your Customer-One service.   Could also appear as a different name.   *Short-cut* keys for these fields can also vary.

For information regarding using the various options in this window, *see* the User Details Form section in the Tutorial portion of the manual.



Related Topics:

Mandatory Fields
Buttons
Procedures

Mandatory Fields

Following are the mandatory (or " hard") fields that should always appear on all User Details form. The names associated with these fields *could change* depending on how the Customer-One service you are connecting to has designed the user details form.

Login ID

This is a read-only field that displays your login ID name.

First Name

This is where you enter your first name. This field is mandatory and *cannot be left blank.*

Last Name

This is where you enter your last name. This field is mandatory and *cannot be left blank.*

Visible

This is where you change your status *as to if other users can view you.* The options available for this field are Yes and No. The following functions are affected by changing this setting to ***No****:*

Mail	Other users will *not* be able to send mail to unless they know your login ID. You will not be visible in the Address Book.
Conference	Other users will *not* be able to invite you to a conference.

User Level

This is a read-only field that displays your user *access level.* Levels are setup by the Customer-One service and determine what functions you are permitted to perform. To change your user access level, contact your Customer-One service.

For further information on user access levels , *see* the "User Access Levels" section in the Introduction portion of the manual.

Buttons

OK Button

This button will *save all changes* made to the Users detail form.

Cancel Button

This button will close the User Details window *without saving* any changes. The Escape (Esc) key will also close this window.

As this window is defined by the Customer-One service you are connected to, the total appearance of the form could be different, including; fields, labels and buttons.

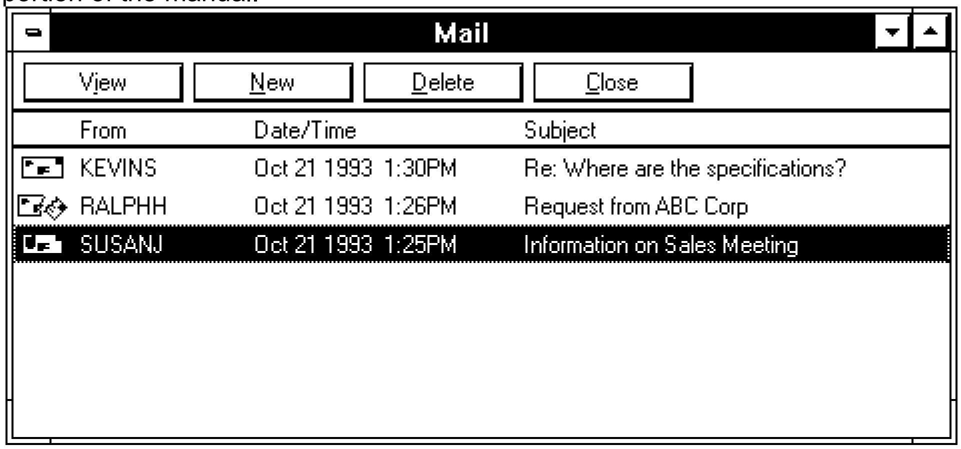
Procedures

User Details Form

User Details Form

Mail Window

For information regarding using the various options in this window, *see* the Mail section in the Tutorial portion of the manual.



Related Topics:

- List Columns
- Buttons
- Procedures

List Columns

Each mail item in the Mail list window is preceded by an icon, indicating the *type of mail* item. One of the following icons is displayed alongside each mail item:

	New unread mail.
	Read mail.
	New unread mail with attachment.
	Read mail with attachment.

The Mail list window displays the following information:

From	Author of the mail item.
Date / Time	Date and time the mail item was received at the server,
Subject	Brief description of the subject (title) of the mail item.

Buttons

View Button

This button will allow you to view a highlighted mail item. It opens the Read Mail window. Pressing the Enter key will also allow you to read a mail item.

New Button

This button will allow you to submit *a new mail item.* It opens the Write Mail window. The Insert (Ins) key will also allow you to add a new mail item.

Delete Button

This button will allow you to delete a highlighted mail item. You will be prompted for confirmation if the menu item Options and Confirm Delete and Esc is checked. The Delete (Del) key will also delete a mail item.

Close Button

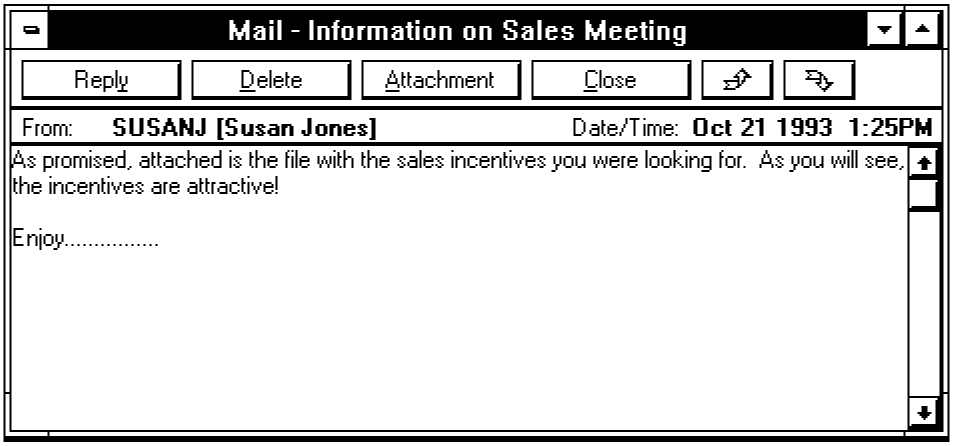
This button will close the Mail list window. The Escape (Esc) key will also close this window.

Procedures

View Mail

Read Mail Window

For information regarding using the various options in this window, *see* the Mail section in the Tutorial portion of the manual.



Related Topics:

- Titles
- Buttons
- Procedures

Titles

The Read Mail window displays the following information at the top of the window:

From	Author of the mail item.
Date/Time	Date and time that the mail item was received at the server.

Buttons

Reply Button

This button will allow you to reply to this mail item. It opens the Write Mail window.

Delete Button

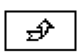
This button will allow you to delete this mail item. You will be prompted for confirmation if the menu item Options and Confirm Delete and Esc is checked.

Attachment Button

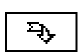
This button will allow you *to download the file* attached to the mail item presently being viewed. The button is dimmed if there are no files attached to this mail item. This will open the Attachment window. For further information on using the attachment window, *see* the Working with Attachments section.

Close Button

This button will close the Mail List window. The Escape (Esc) key will also close this window.

Previous Button 

This button is represented by an *up-arrow* icon. This button will allow you to retrieve the previous mail item from the mail list. If there are no previous mail items, the button will be dimmed. Short-cut for previous mail item is Alt+<.

Next Button 

This button is represented by a *down-arrow* icon. This button will allow you to retrieve the next mail item from the mail list. If there are no mail items ahead, the button will be dimmed. Short-cut for next mail item is Alt+>.

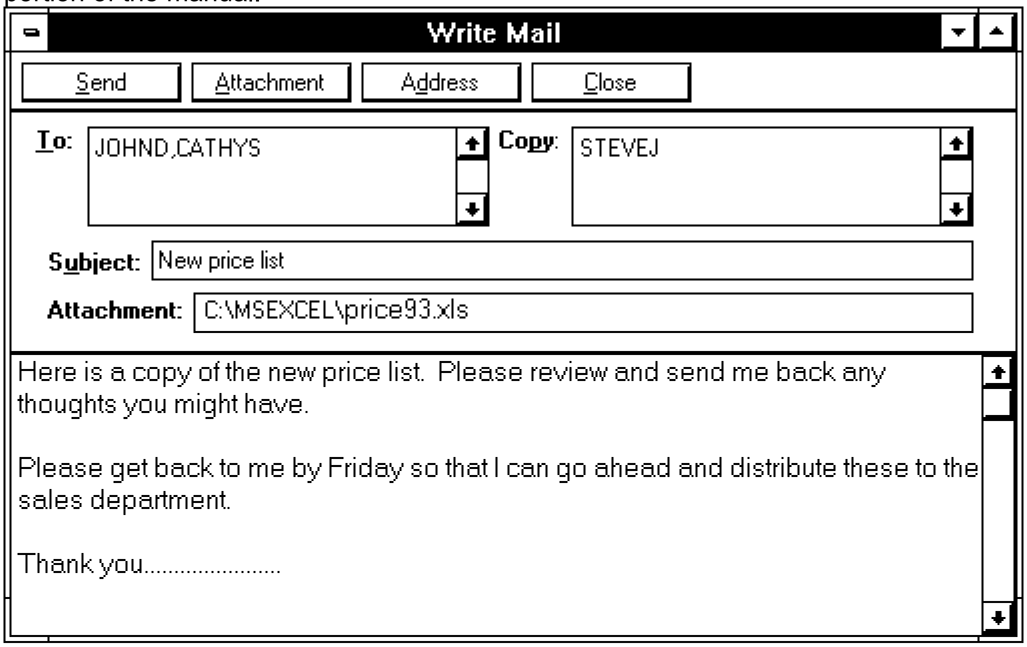
Procedures

Reply to Mail

Deleting Mail from the Read Mail Window

Write Mail Window

For information regarding using the various options in this window, *see* the Mail section in the Tutorial portion of the manual.



Related Topics:

- Fields
- Buttons
- Procedures

Fields

To

Users login ID to whom the mail item is being sent. There can be more than one login ID as long as the users are separated by a comma (**,**) i.e. JOHND, JANEJ, etc.

Copy

Users login ID to whom the mail item is being Copied (carbon copied) to. There can be more than one login ID as long as the users are separated by a comma (**,**) i.e. JOHND, JANEJ, etc.

Subject

A brief description of the subject or title of the mail item *Maximum length of this field is 40 characters.*

Attachment

This is a read-only field that displays the *path and file name* of any files attached to this mail item. If there are no attachments, this field will remain empty.

Details

This is the mail content area which is located below the Attachment field. This is a multi-line text area where the main content of the mail item is entered. Text will automatically wrap-around at the end of the sentence.

Buttons

Send Button

This button will allow you to send (transmit) the mail item. In order for a mail item to be sent, there must be a login ID in the To field, and a mail description in the Subject field (the Copy field is *optional)*. You will be advised if the mail was successfully sent by a messages being displayed in the status bar.

Attachment Button

This button opens the Attachment window and will allow you to attach a file to a mail item. For further information on using the attachment window, *see* the Working with Attachments section.

Address Button

This button opens the Address window and will allow you to search for a user (or users) to send a mail item to. You have to be on-line to open this window.

Close Button

This button will close the Write Mail window. The Escape (Esc) key will also close this window.

Procedures

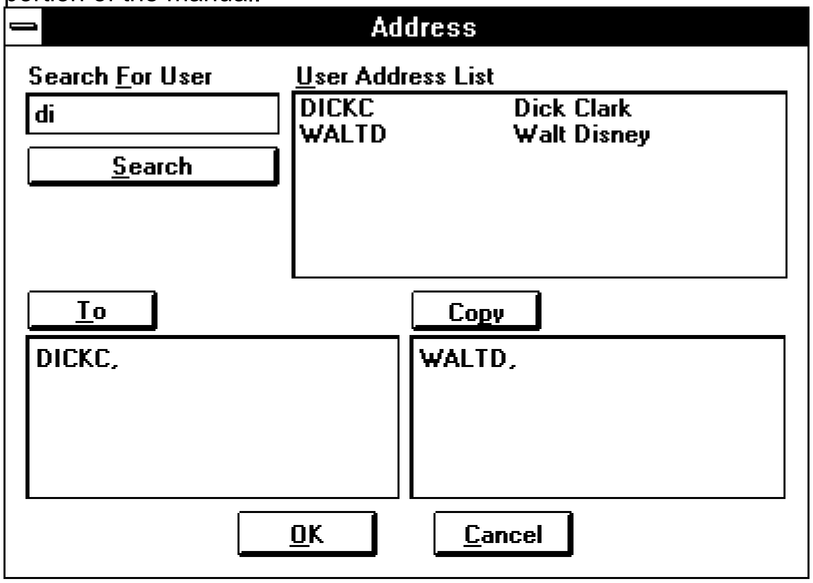
Open Write New Mail Window

Write New Mail

Submitting Mail while Off-Line

Address Mail Window

For information regarding using the various options in this window, *see* the Mail section in the Tutorial portion of the manual.



Related Topics:

- Fields
- Buttons
- Procedures

Fields

Search For User

Enter all or part of the first or last name of the user(s) you are searching for. Once entered, press the Search button to search for the users that match your search criteria. Leave this field *blank* if you want to search for *all users*.

If there are many users, the search could take a long time if you leave this field blank.

User Address List

This list box field will display the matching users from your search. Select one or more users from this list to send mail to, or to copy (cc) mail to.

To

This list box field is located below the To button. Users selected to send mail to from the User Address List box are automatically placed in this field. Once the OK button is pressed, the users will be transferred to the To field in the Write Mail window.

Copy (Carbon Copy)

This list box field is located below the Copy button. Users selected to send mail to from the User Address List field are automatically placed in this field. Once the OK button is pressed, the users will be transferred to the Copy field in the Write Mail window.

Buttons

Search Button

This button will institute a search based on the text entered in the Search For User field.

To Button

Once a user (or multiple users) is highlighted in the User Address List box, pressing the To button will place the users into the To box at the bottom of the window.

Copy Button

Once a user is highlighted in the User Address List box, pressing the Copy button will place the users into the Copy box at the bottom of the window.

OK Button

This button will accept the users in the To and Copy list boxes and return to the Write Mail window. The users selected to send To or Copy will be placed in the appropriate fields in the Write Mail window.

Cancel Button

This button will close the Address window and return to the Write Mail window. The Escape (Esc) key will also close this window. All names selected will be lost.

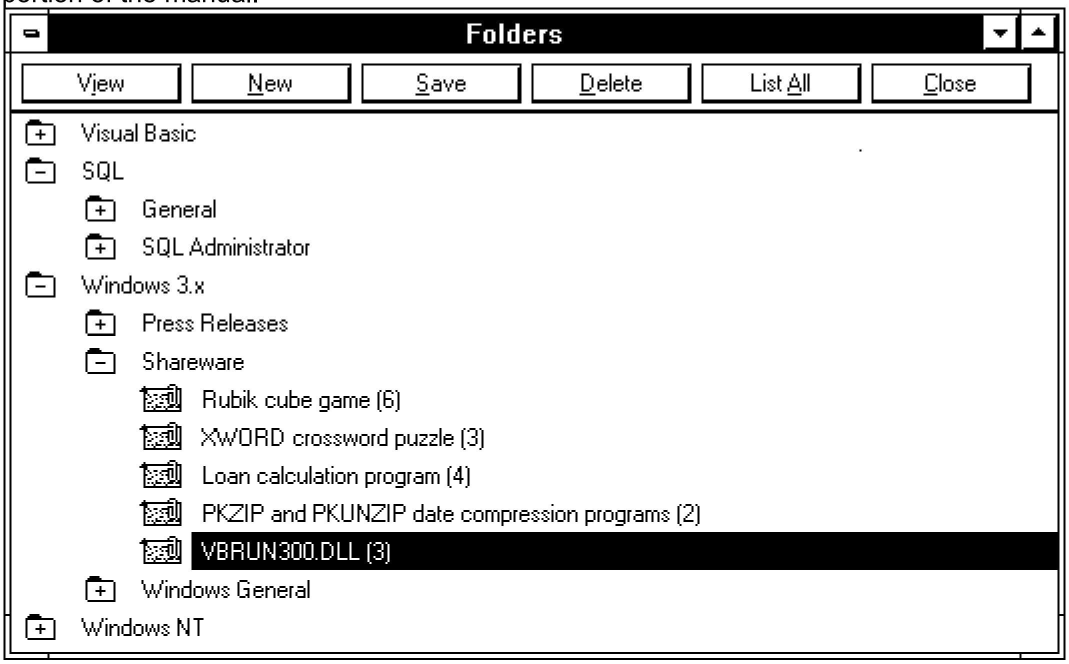
Procedures

Open Address Mail Window

Working with the Address Book

Folders Window

For information regarding using the various options in this window, *see* the Folders section in the Tutorial portion of the manual.



Related Topics:

- List Columns
- Buttons
- Procedures

List Columns

Each folder, section and message is preceded by an icon. One of the following icons is displayed alongside each folder, section and message line:

 This icon is displayed alongside all UNOPENED folders and sections (collapsed).

 This icon is displayed alongside all OPENED folders and sections (expanded).

 This icon is displayed alongside all ORIGINAL messages.

 This icon is displayed alongside all ORIGINAL messages with attachments.

 This icon is displayed alongside all THREAD messages.

 This icon is displayed alongside all THREAD messages with attachments.

The folder list window displays the following information:

Folder	Folder name.
Section	Section name.
Message	A brief description of the subject or title of the message followed by the number of times the message has been accessed by other users.

Buttons

View Button

When positioned on a folder or section name, this button will open or close that folder or section. When a section has not yet been expanded (to display its messages), the View button will open the Open Section window which will allow you to limit the messages displayed for that section. The Enter key will also allow you to open or close a folder (or read a message). When a message is highlighted, the View button will open the Read Message window so that you can view the contents of that message.

New Button

This button will allow you to submit a new message. It opens the Write Message window. When the Write Message window is opened by pressing the Ins key, the folder and section name will be automatically placed in the appropriate fields in the Write Message window.

The Insert (Ins) key will also allow you to add a message.

Save Button

This button is *only available* when working in "List All" mode and will *only work* with sections. It allows you to mark a section from the list of available section as a Favorite (frequently used), which will be available when the Favorite button is pressed. Favorite sections are stored in your C1.INI file.

Delete Button

This button is *only available* when working in "Favorite" mode and will work with both folders and sections. It allows you to delete a favorite folder or section. When deleted, the folder or section will be removed from your C1.INI file.

List All / Favorite

This button will allow you to *toggle* between *two* modes: *List All* and *Favorite.* Favorite mode displays only the folders and sections that have been previously saved or accessed. List All displays all the folders and sections available at the Customer-One server.

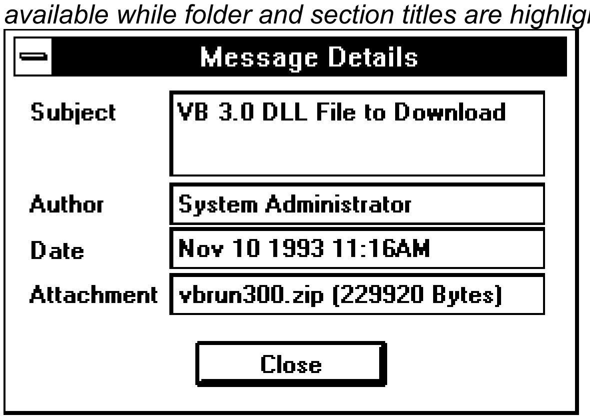
Default mode to view folders and sections is *Favorite.*

Close Button

This button will close the folder list window. The Escape (Esc) key will also close this window.

Right-Hand Mouse Button

The right-hand mouse button is available while scrolling through the messages in the Folder List window. This is also activated by highlighting the message and pressing the Alt + Enter key. This feature is *not available while folder and section titles are highlighted.*



This dialog box displays brief information on the highlighted message, including:

Subject	Full description of the message.
Author	Login ID of the user who submitted the message.
Date	Date and time the message was received at the Customer-One server.
Attachment	Attached file name and its size in bytes (if any).

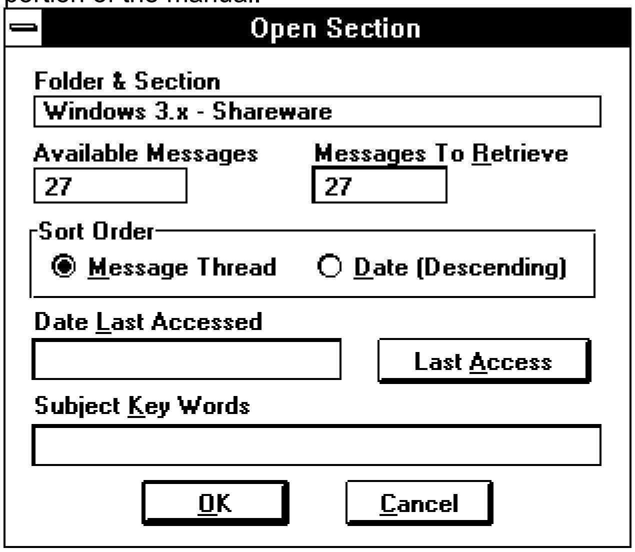
Procedures

Open Folders List Window

Saving / Deleting Favorite Selections

Open Section Window

For information regarding using the various options in this window, *see* the Folders section in the Tutorial portion of the manual.



Related Topics:

- Fields
- Buttons
- Procedures

Fields

Folder & Section

This is a read-only field that displays the folder and section you have selected.

Available Messages

This is a read-only field that displays the total number of messages available for the folder section you have selected.

Messages to Retrieve

This field displays the total number of available messages for the folder section you have selected. You are able to set a specific number of messages to retrieve. *If,* **for example**, there are 100 messages available to retrieve, and you want to retrieve the latest 50, change the Messages to Retrieve field to 50, and press the OK button. The latest 50 messages, *based on date,* will then be retrieved.

Message Thread Sort Order

If this option is selected, the messages will be sorted by original message. All the original messages will be displayed with their associated *thread (comment) messages* below them.

Date Sort Order

If this option is selected, the messages will be sorted by reverse (descending) date order. The most recent messages will be displayed first. This is the best method of viewing all the latest messages (original and thread).

Date Last Accessed

This field displays the last date you accessed this folder section. If you want to view all new messages since you last accessed this folder section, press the Last Access button to insert the date and time you last accessed this section and press the OK button to proceed. If you want to view messages after a different date, change the date.

Subject Key Words

Enter any message *subject* key words to search for. *This field is not case-sensitive;* both upper and lower case characters can be entered and all matching messages will be retrieved.

Buttons

Last Access Button

This button will insert the date and time this folder section was last accessed so that you can limit the messages to only those messages which are new, i.e. those that have been submitted since you last accessed that section. The date and time a folder section was last accessed is stored in your C1.INI file.

OK Button

This button will search for and retrieve the message based on the parameters entered into the various fields in the Open Section window.

Cancel Button

This button will cancel this window and return you to the Folders list window. The Escape (Esc) key will also close this window.

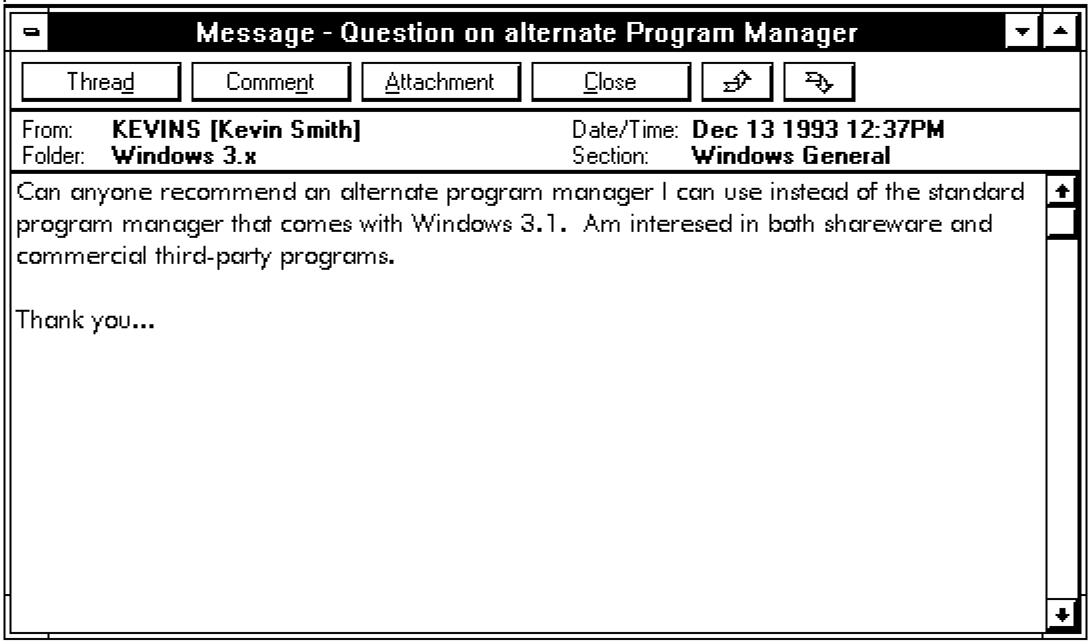
Procedures

Searching for Messages

View Message Details

Read Message Window

For information regarding using the various options in this window, *see* the Folders section in the Tutorial portion of the manual.



Related Topics:

- Titles
- Buttons
- Procedures

Titles

The read Message window displays the following information at the top of the window:

Author	Author of the message (including login ID and full name), i.e. JOHND [John Doe].
Date/Time	Date and time the message was received at the Customer-One server.
Folder	Folder name message is located in.
Section	Section name message is located in.

Buttons

Thread Button

This button opens the Message Thread window. The Message Thread windows displays the conversation thread of the selected message. The original message, as well as all comments to that message will be displayed in this window. This is an easy method of isolating all the comments associated with one particular message.

Comment Button

This button opens the Write Message window and allows you to submit a comment on the message. The Folder, Section and Subject fields in the Write Mail window will automatically be populated with the necessary information so as to reply to this message.

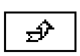
Attachment Button

This button opens the Save As window and will allow you to download the file attached to the message presently being viewed. The button is dimmed if there are no attachments.

Close Button

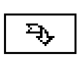
This button will close the Message window. The Escape (Esc) key will also close this window.

Previous Button



This button is represented by an *up-arrow* icon. This button will retrieve the previous message from the folder list. If there are no previous messages, the button will be dimmed. Short-cut for previous message is Alt+<.

Next Button



This button is represented by an *down-arrow* icon. This button will retrieve the next message from the folder list. If there are no messages ahead, the button will be dimmed. Short-cut for next message is Alt+>.

Procedures

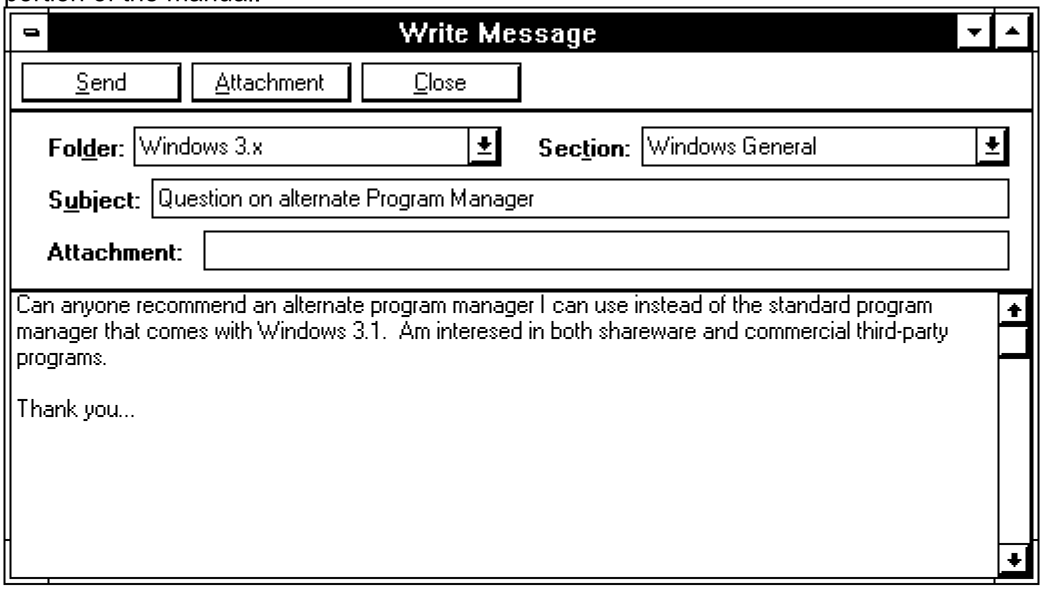
Read a Message

Commenting on a Message

Working in the Message Thread Window

Write Message Window

For information regarding using the various options in this window, *see* the Folders section in the Tutorial portion of the manual.



Related Topics:

- Fields
- Buttons
- Procedures

Fields

Folder

The folder name field is a combo list box that allows you to select from a list of available folders. When off-line, only folders saved as favorite (or viewed when listing folders in favorite mode) will be displayed. To view all folders in this combo list box field, make sure you are on-line and are in the folder and section you want to send the message to.

Section

The section name field is a combo list box that allows you to select from a list of available sections. When off-line, only sections saved as favorite (or viewed when listing folders in favorite mode) will be displayed. To view all sections in this combo list box field, make sure you are on-line and are in the folder and section you want to send the message to.

Subject

This is where a brief description on the subject or title of the message is entered. The subject will be displayed in the Folder list window. Maximum length of this field is 40 characters.

Attachment

This is a read-only field that displays information on the attached file. This field will remain *empty* until a file has been attached.

Details

This is the main message area and is located below the Attachment field. This is a multi-line text area where the main content of the message is entered. Text will automatically wrap-around at the end of the sentence.

Buttons

Send Button

This button will send the message to the Customer-One service. In order for a message to be sent, *all fields must be filled in* (attachment is an optional field). You will be advised if the message was successfully sent by status messages being displayed in the status bar.

Attachment Button

This button opens the Open window and will allow you to attach a file to a message. Once a file has been attached to a message, information on this file is displayed in the Attachment field (located below the Subject field).

Close Button

This button will close the Write Message window. The Escape (Esc) key will also close this window.

Procedures

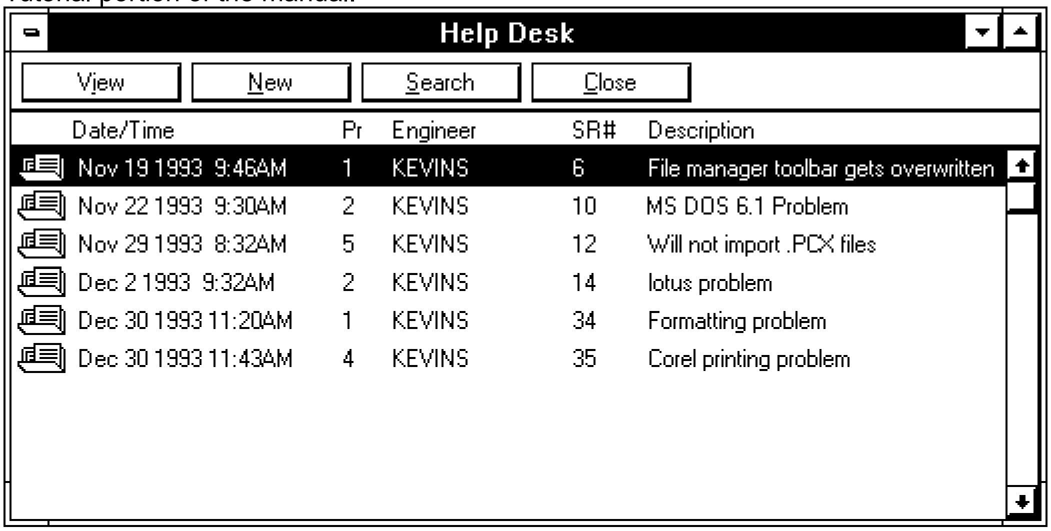
Open Write New Message Window

Write a New Message

Submitting Messages while Off-Line

Help Desk Window

For information regarding using the various options in this window, *see* the Help Desk section in the Tutorial portion of the manual.



Related Topics:

- List Columns
- Buttons
- Procedures

List Columns

Each service request is preceded by one of the following status icons:

	This icon is displayed alongside all new and unassigned service requests.
	This icon is displayed alongside all current open service requests.
	This icon is displayed alongside all routed service requests which are presently being worked on but are "on hold".
	This icon is displayed alongside all resolved closed service requests.
	This icon is displayed alongside all unresolved closed service requests.

The information displayed in this windows is:

Status	Current status of the service request. This is represented by an icon (*see* above).
Date/Time	Date and time service request was logged.
Priority	Current priority setting of the service request (usually displayed in a different color).
Engineer	Engineer currently responsible for the service request.
SR#	Unique number assigned to the service request.
Description	Description of the service request.

Buttons

View Button

This button will open the selected service request for viewing.

New Button

Pressing this button will open a new service request. The new service request will have a status of 'New' and will have no number, date/time or engineer assigned to it until it has been sent to the Customer-One service.

Search Button

This will open the default service request (similar to the new service request) in search mode. This is where you can search for single (or multiple) service requests.

Close Button

This button will close the Help Desk list window. The Escape (Esc) key will also close this window.

Procedures

Open Help Desk List Window

Viewing an Existing Service Request

Submitting a New Service Request while On-Line

Adding a New Service Request while Off-Line

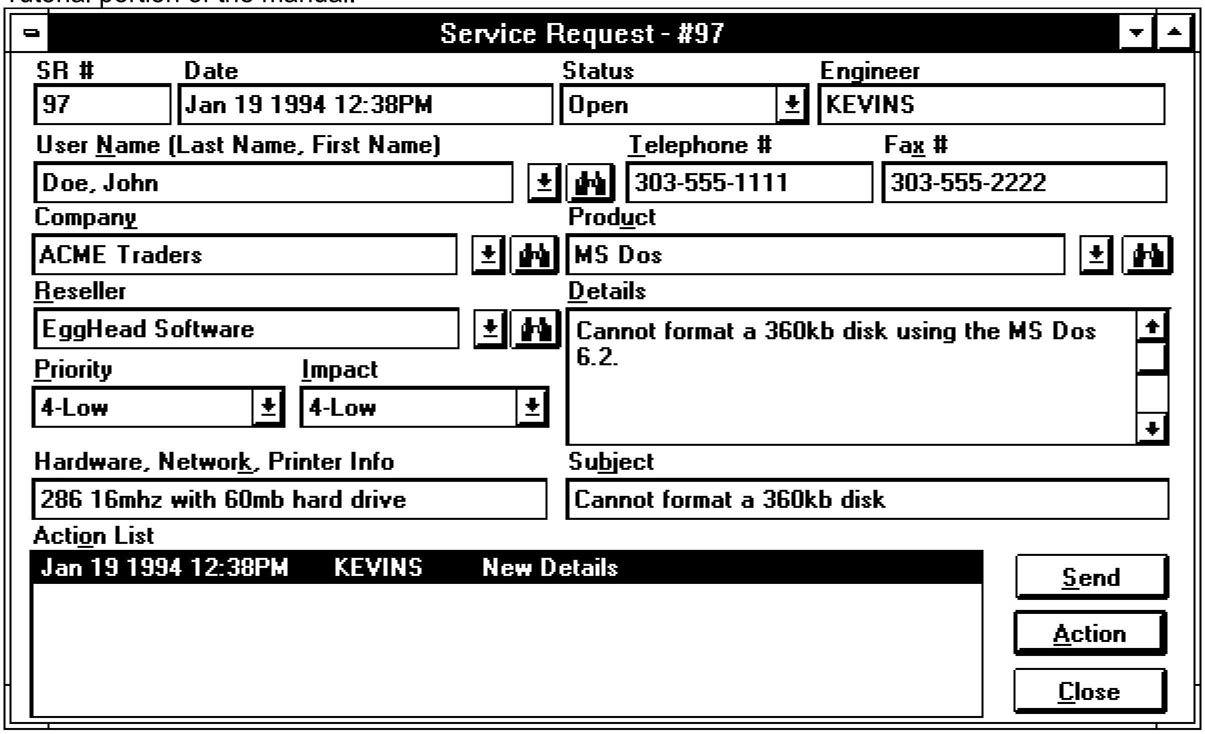
Open Search for Service Request Window

Searching for Service Requests

Service Request Window

This is a customizable form and could be different to the service Request window that appears when you connect to your Customer-One service. It could also appear by a different name. *Accelerator keys* for these fields can also vary.

For information regarding using the various options in this window, *see* the Help Desk section in the Tutorial portion of the manual.



Related Topics:

- Mandatory Fields
- User-Defined Fields
- Procedures

Mandatory Fields

Certain mandatory fields ("hard fields") appear on most service requests but do not have to appear in any specific order. **For example**, the customer name could also be called "User Name", "Client", etc. These fields are necessary for the successful operation of the help desk module.

SR#, Date/Time, Status, Responsible Staff Member

These are read-only fields which are automatically filled in by the Customer-One system.

For further information on these status fields, *see* the Service Request Status Information section.

Customer/User Name

This is the name of the customer who has requested help. When a service request is logged electronically by the customer, their name can be automatically inserted in the Customer Name field. This field can be entered in two different methods:

1. If a customer logs on and submits a service request, this field could be automatically filled-in with the customers name.
2. If an engineer or staff member fills in the service request on behalf of someone else, the name of the customer who is requesting help will be entered in the field.

Problem Title/Description

This is where a brief description of the service request is entered. This same description is also displayed in the Help Desk list window.

Problem Details

This is where the details of the service request is entered. This is a multi-line text area where the main content of the service request is entered. Text will automatically wrap around at the end of the sentence.

Priority Level

Every service request is assigned a certain priority level when it is transmitted to the Customer-One service. There are 5 priority levels, ranging from 1 to 5 (1 being the most critical and 5 the least important). The descriptive names for the various priorities are defined by the Customer-One service you are connected to. The number of priorities used by a service can also vary. The service may elect to only use three priorities, i.e. 1 to 3.

Impact Level

Every service request gets assigned a certain impact level when it is transmitted to the Customer-One service. Impact levels typically refer to the impact, of the problem being reported, *on the customers operations.* There are 5 user-defined impact levels, ranging from 1 to 5 (1 being the highest impact and 5 the least impact). The descriptive names for the various impacts are defined by the Customer-One service you are connected to. The number of impact levels used by a service can also vary. The service may elect to only use three impacts, i.e. 1 to 3.

Action Details List

The Action Details list displays the various actions that have taken place regarding the service request. The actions are displayed in reverse date order (i.e. newest action first). By selecting an action from this list, the Problem Details window is updated with details of that action. If no actions have been entered for a service request, only the original service request details will be displayed.

User-Defined Fields

Depending on how the Customer-One service you are connected to is configured, there are a number of other fields that could appear on this form. In the **example** in this manual, the user-defined fields are:

- Company Name
- Telephone Number
- Fax Number
- Product Name
- Reseller
- Hardware

Procedures

Viewing an Existing Service Request

Open New Service Request Window

Adding a New Service Request while Off-Line

Submitting a New Service Request while On-Line

Viewing Details of a Service Request Action

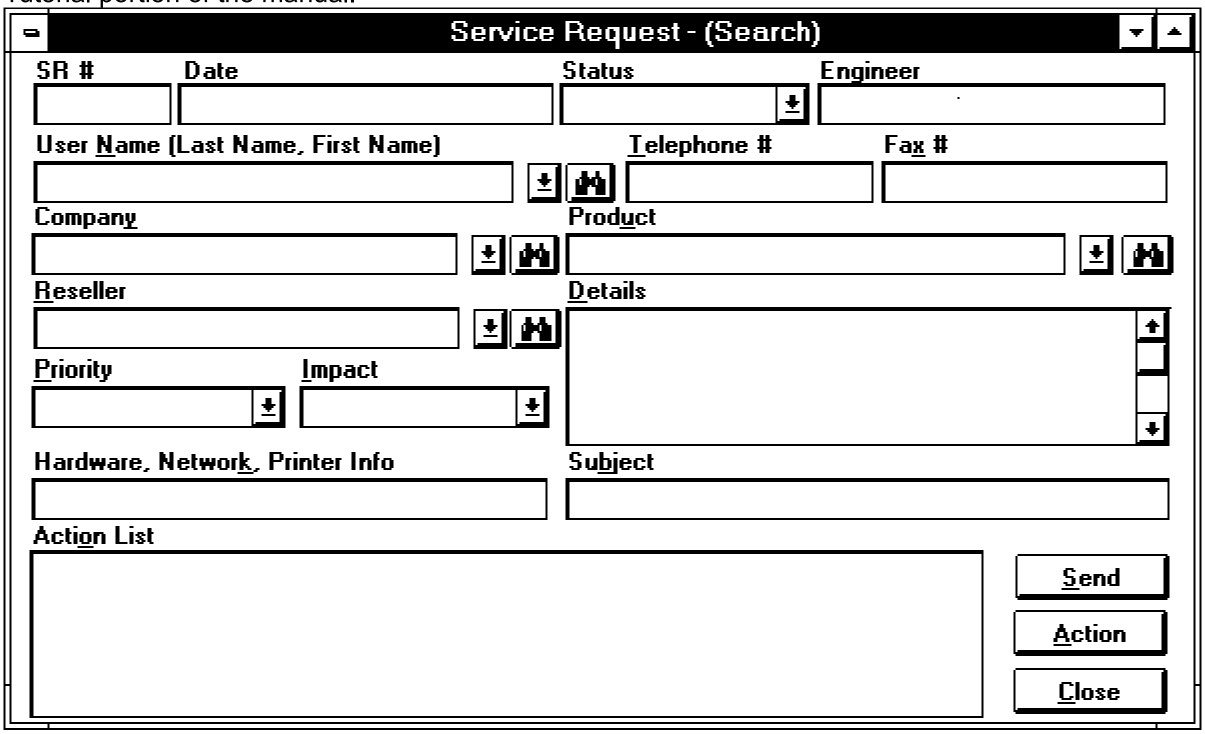
Entering a New Action on a Service Request

Closing a Service Request

Search for Service Request Window

The Search window is essentially *the same window* as the Service Request window with the exception of the window title, which displays the following additional text " - (Search).   However, all the fields can be used to search for service requests.

For information regarding using the various options in this window, *see* the Help Desk section in the Tutorial portion of the manual.



Related Topics:

Procedures

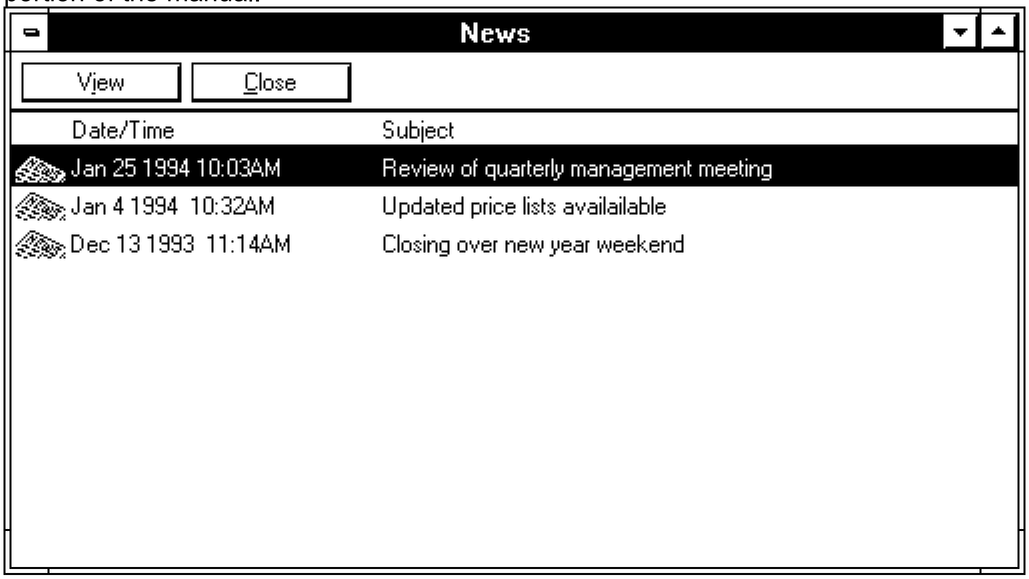
Procedures

Open Search for Service Request Window

Searching for Service Requests

News Window

For information regarding using the various options in this window, *see* the News section in the Tutorial portion of the manual.



Related Topics:

- List Columns
- Buttons
- Procedures

List Columns

The News list window displays the following information:

Date/Time	Date and time the news item was submitted.
Subject	Brief description on the subject or title of the news item.

Buttons

View Button

This button will open the Read News window and allow you to view the highlighted news item. The Enter key will also allow you to read a news item.

Close Button

This button will close the News list window. The Escape (Esc) key will also close this window.

Procedures

Open News List Window

View News List

Reading a News Item

Read News Window

For information regarding using the various options in this window, *see* the News section in the Tutorial portion of the manual.

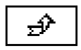
Related Topics:

Buttons
Procedures

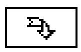
Buttons

Close Button

This button will close the news list window.   The Escape (Esc) key will also close this window.

Previous Button 

This button is represented by an *up-arrow* icon. This button will retrieve the previous news item from the news list.   If there are no previous news items, the button will be dimmed.   Short-cut for previous news item is Alt+<.

Next Button 

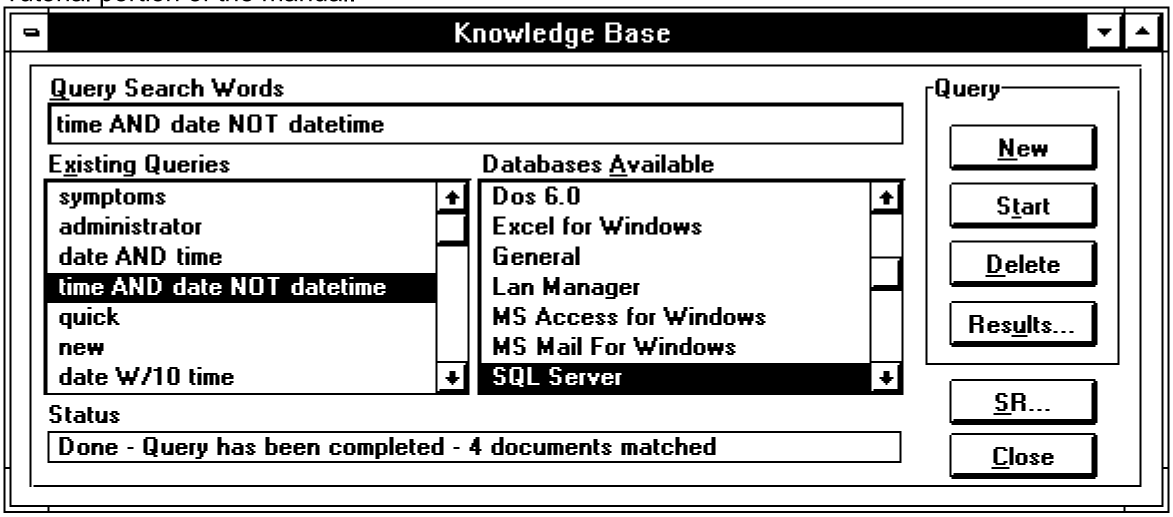
This button is represented by an *down-arrow* icon. This button retrieve the next news item from the news list.   If there are no news items ahead, the button will be dimmed.   Short-cut for next news item is Alt+>.

Procedures

Reading a News Item

Knowledge Base Query Window

For information regarding using the various options in this window, *see* the Knowledge Base section in the Tutorial portion of the manual.



Related Topics:

- Fields
- Buttons
- Procedures

Fields

Query Search Words

Enter any words to search for. Words can be anywhere in the text of the documents being searched.

Existing Queries

This list box contains a list of all previous queries. Any query can be selected and run again.

Databases Available

This list box contains a list of all available database collections you can execute query searches against.

Status

The status field is a read-only field and will display messages regarding the status of a knowledge base query. Messages will be displayed advising if a query was matched and will display the *number of* knowledge base items found that match your query.

Buttons

New Button

This button will allow you to submit a new *query.* Pressing this button will first clear the existing query (from the Query Search Words field), allowing you to enter a new query.

Start Button

Press this button after a query has been entered in the Query Search Words field to start a query search. Once a search has been started, it will be saved and added to the Existing Queries list.

A database collection has to be selected for this button to function.

Delete Button

This button will delete the query highlighted in the Existing Queries list.

Results... Button

Once a query is complete, and knowledge base items have be matched, this button will open the Queries list window so that you can view the files that match your search.

SR... Button

This button allows you to open the default *Service Request* window. Usually, if a solution to a problem cannot be found in the knowledge base, it is time to submit a service request for assistance.

Close Button

This button will close the Knowledge Base query window. The Escape (Esc) key will also close this window.

Procedures

Opening the Knowledge Base Window

Executing an Existing Knowledge Base Query

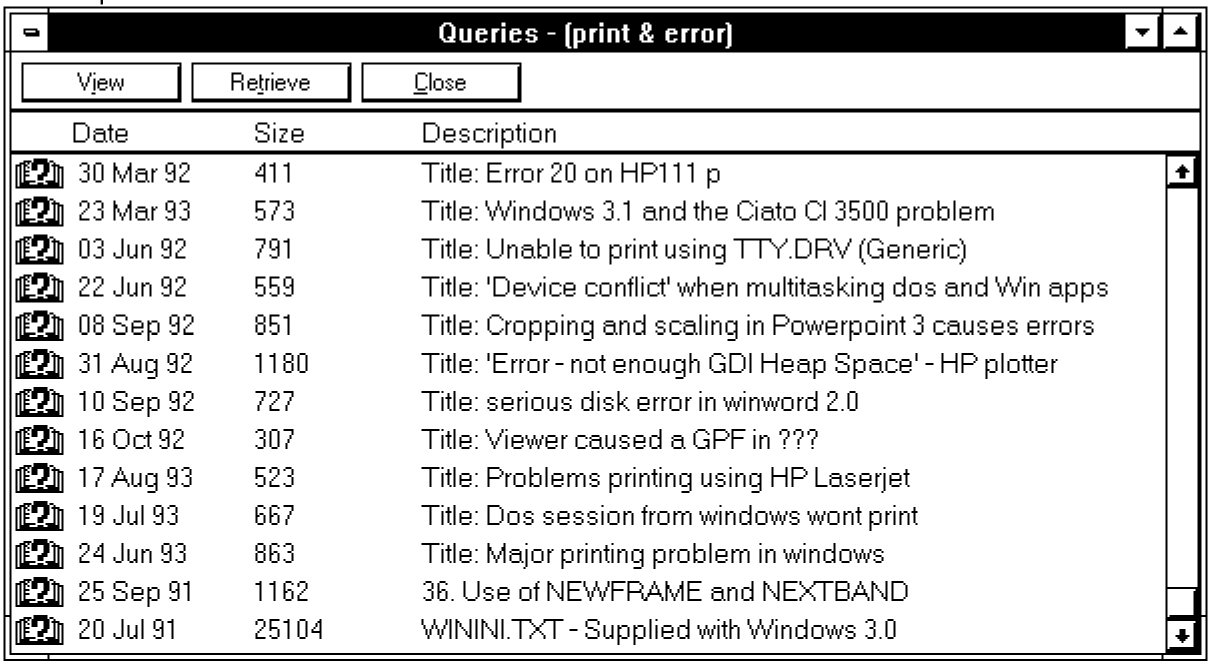
Executing a New Knowledge Base Query

Deleting an Existing Knowledge Base Query

Displaying Query Results

Queries Window

For information regarding using the various options in this window, *see* the Knowledge Base section in the Tutorial portion of the manual.



Related Topics:

- List Columns
- Buttons
- Procedures

List Columns

The queries list window displays the following information:

Date/Time	Date and time the knowledge base item was submitted
Size	Size (in bytes) of the knowledge base item (file)
Description	Brief description on the knowledge base item

Buttons

View Button

This button opens the Query window and allows you to view the highlighted knowledge base item. The Enter key will also allow you to read a knowledge base item.

Retrieve Button

This button will allow you to retrieve the *highlighted* knowledge base item and save it to disk. This button will open the Save As window.

Close Button

This button will close the Queries list window. The Escape (Esc) key will also close this window.

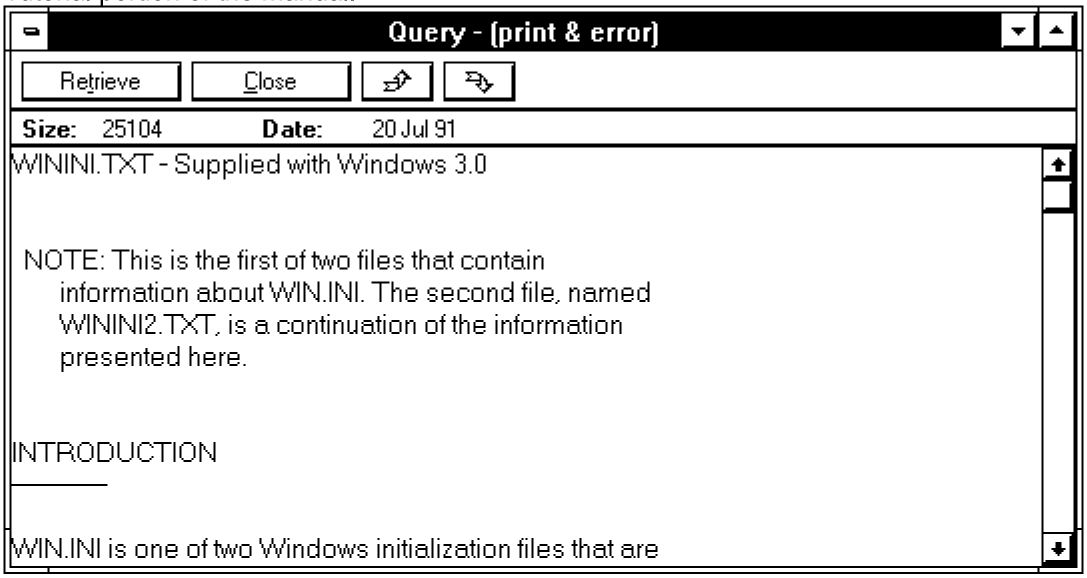
Procedures

Reading a Knowledge Base Query Result

Saving a Knowledge Base Query

Query Window

For information regarding using the various options in this window, *see* the Knowledge Base section in the Tutorial portion of the manual.



Related Topics:

- Titles
- Buttons
- Procedures

Titles

The Query window displays the following information at the top of the window:

Size	Size (in bytes) of the knowledge base item
Date	Date the knowledge base item was received at the Customer-One server

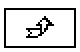
Buttons

Retrieve Button

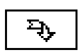
This button will allow you to retrieve the highlighted knowledge base item and save it to disk. *See* your Microsoft Windows manual for further information on saving files.

Close Button

This button will close the Query window. The Escape (Esc) key will also close this window.

Previous Button 

This button is represented by an *up-arrow* icon. This button will retrieve the previous knowledge base item from the Queries list window. If there are no previous knowledge base items, the button will be *dimmed.* Short-cut for previous knowledge base item is Alt+<.

Next Button 

This button is represented by a *down-arrow* icon. This button will retrieve the next knowledge base item from the Queries list window. If there are no knowledge base items ahead, the button will be dimmed. Short-cut for next knowledge base item is Alt+>.

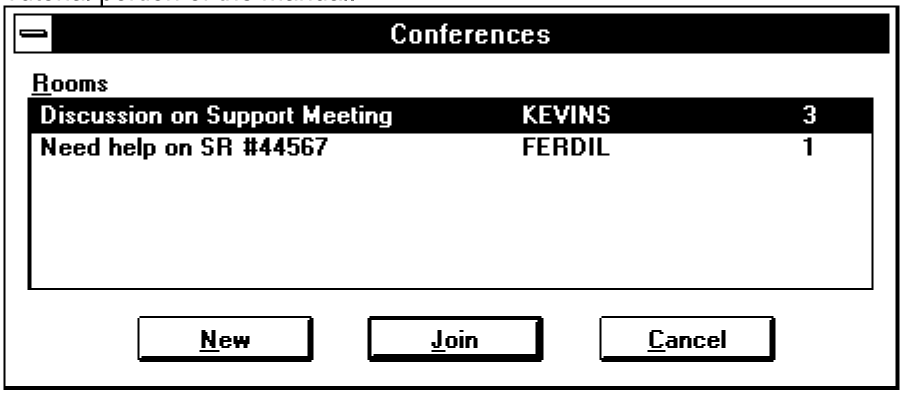
Procedures

Reading a Knowledge Base Query Result

Saving a Knowledge Base Query

Conferences List Window

For information regarding using the various options in this window, *see* the Conference section in the Tutorial portion of the manual.



Related Topics:

- Column Titles
- Buttons
- Procedures

Column Titles

The following information is displayed in the Conferences list window:

Subject	Subject or title of the conferences in progress.
Login ID	Login ID of the user who initiated the conference.
Number	Number of users presently participating in the conference.

Buttons

New Button

This button will allow you to start a new conference.

Join Button

This button will allow you to join a conference currently in progress. *Highlight* a conference in the Rooms list and press the Join button (pressing the Enter key, or double-clicking on the highlighted conference with the mouse will also work).

Cancel Button

This button will close the conference list window. The Escape (Esc) key will also close this window.

Procedures

Open Conference Window

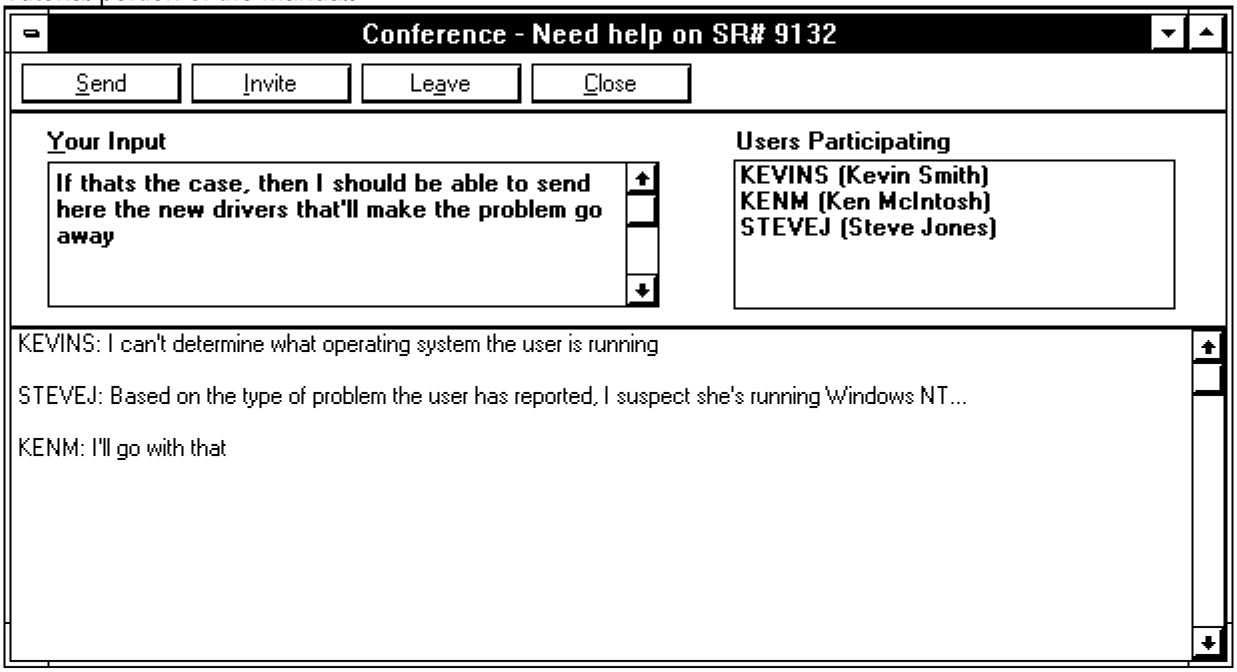
Starting a New Conference

Joining an Existing Conference

Participating in a Conference

Conference Window

For information regarding using the various options in this window, *see* the Conference section in the Tutorial portion of the manual.



Related Topics:

- Fields
- Buttons
- Procedures

Fields

Your Input

This is where you enter your conversation input. Once you have completed your sentence, press the Send button to transmit your input to the other users participating in the conference. Once sent, your input will be displayed in the Conversation area of the window.

Users Participating

This is a read-only list that displays all the users presently on-line with this conversation.

Conversation Detail Area

This field is located below the Your Input field. This is where the conversation text is displayed for all users who are participating in this conference.

Buttons

Send Button

Once you have completed your sentence, press the Send button to transmit your input to the other users participating in the conference. Once sent, your input can be viewed in the Conversation detail area of the window.

Invite Button

This button opens the Users Online window and will allow you to invite other on-line users to join this conference.

This will only display other users who are presently on-line with the Customer-One service.

Leave Button

This button will allow you to leave the conference. You will always be prompted for confirmation prior to leaving. At this point, press the Yes button to leave the conference, or the No button to remain in the conference. Leaving a conference will not close the Conference window, but leave it open, although you will not be able to view any new conversations that take place after you leave.

Close Button

This button will close the conference window. The Escape (Esc) key will also close this window.

Procedures

Open Conference Window

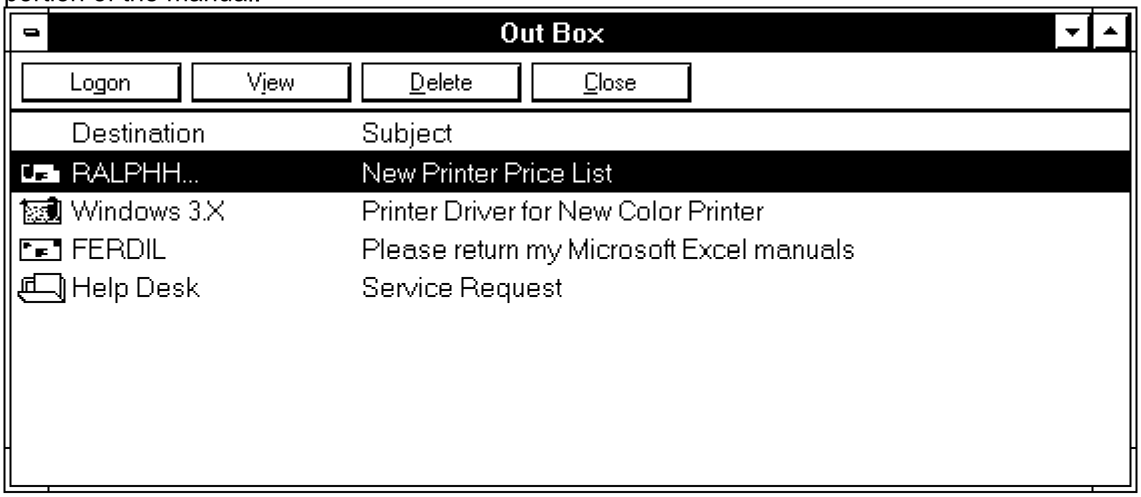
Starting a New Conference

Joining an Existing Conference

Participating in a Conference

Out Box Window

For information regarding using the various options in this window, *see* the Out Box section in the Tutorial portion of the manual.



Related Topics:

- List Columns
- Buttons
- Procedures

List Columns

The following information is displayed in the Out Box list window:

Icon	An icon representing the type of item placed in the Out Box. *See* the relevant section (Write Mail, Write Message or Service Request) for more information on what these icons represent.
Destination	For mail items, this would be the login ID of the user the mail is being sent to. For folder messages, this would be the destination folder (and section) the message is being sent to. For service requests, this would be Help Desk.
Subject	A brief description of the subject or title of the item being sent.

Buttons

Logon Button

This button will open the Connection (Logon) window, allowing you to connect to the Customer-One service. Once valid logon is achieved, all Out Box items will be transmitted.

View Button

This button will allow you to view and edit an Out Box item. Pressing this button will open the relevant window (i.e. Write Mail, Write Message or Service Request). Pressing the Enter key , or double-clicking on the out box item will also open the relevant window.

Delete Button

This button will allow you to delete an out box item. You will be prompted with a confirm delete dialog if the menu item Options and Confirm Delete and Esc is checked. The Delete (Del) key will also allow you to delete an out box item.

Close Button

This button will close the Out Box window. The Escape (Esc) key will also close this window.

Procedures

Opening the Out Box

Selecting a Default Service

Submitting Items Off-Line

Deleting Out Box Items

Edit Out Box Items

Sending Out Box Items