

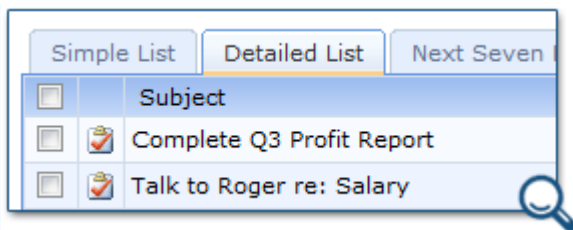
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Teamworking and task management

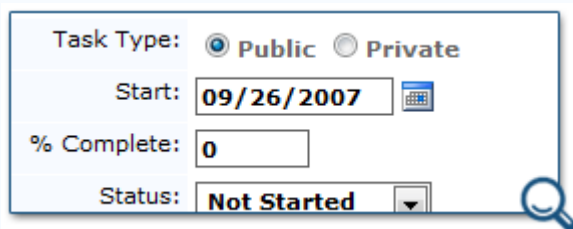
The **teamworking module** is available as part of all of our core support desk solutions. The module features task, contacts and appointment management, supporting both public and private items. This means that as well as your team keeping themselves organized, appointments and tasks can be assigned, shared and managed as a group.

Task management



Staff users can create public and private tasks. Private tasks can be seen only by the creator of the task, whereas public tasks can be seen and managed by anyone.

Task properties



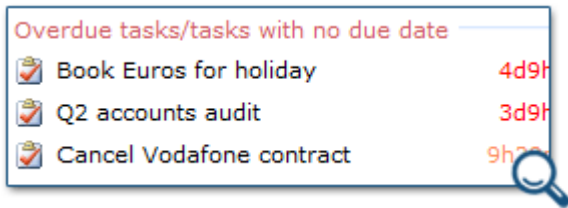
Tasks can be assigned to other users, have a start and due date, a completion field (%), a status, label and priority (with support for custom statuses, labels and priorities). A plain-text description field is also available, allowing you to add detailed notes and information to the task.

Custom fields can also be created to pre-define more specific data entry-points that you may wish to add to each task.

Task filtering

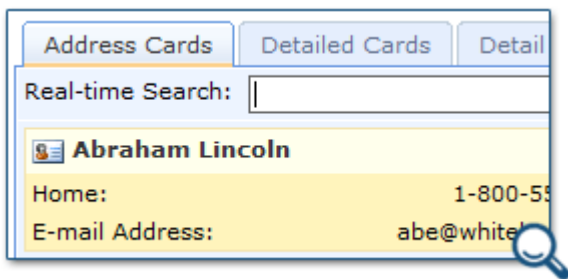
Tasks can be filtered and sorted into different lists: simple, detailed, upcoming, overdue and by assignment.

Staff dashboard task overview



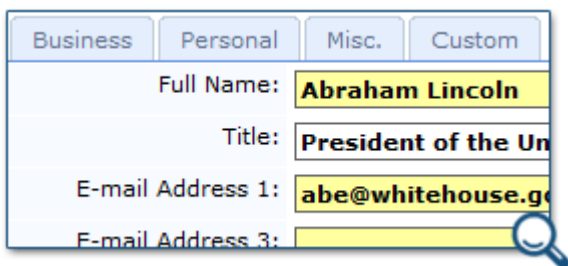
When staff users log into the staff control panel, they are presented with an overview of the upcoming and overdue tasks assigned to them.

Contact management



Much more than a simple address book, the contact management features of the teamworking module enable your team to file comprehensive information about business contacts, other organizations and sales leads.

Contact properties



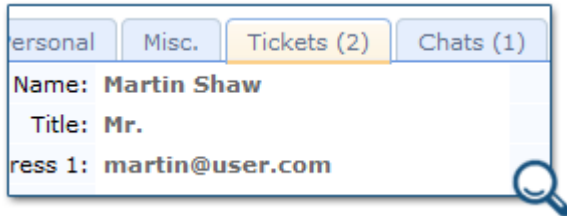
Staff users can create both public and private contacts. Fields for general contact information, business information and personal information are available for each contact.

Custom fields can also be created to pre-define more specific data entry-points that you may wish to add to each contact.

Integration with ticket creation (SupportSuite and eSupport)

When creating a ticket (effectively 'sending an e-mail'), the contacts database can be searched in real-time - allowing you to quickly retrieve an e-mail address from your contacts database.

Integration with ticket and chat history (SupportSuite and LiveResponse)



Personal Misc. Tickets (2) Chats (1)

Name: **Martin Shaw**
Title: **Mr.**
Address 1: **martin@user.com**

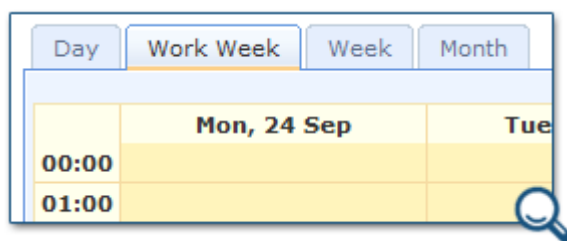
When viewing a contact entry, a tab for ticket history and live chat history is available where applicable. If the contact has ever created a ticket or initiated a live chat under an e-mail address recorded for that contact, the entries will be listed here.

This feature would be particularly useful when dealing with an end-user or customer on the phone - bring up the contact and have one-click access to their entire correspondence history.

Contacts filtering

Contacts can be filtered and mined in a number of ways, allowing you to work with a large contacts database. They can be filtered into an address book view, a detailed card view, detailed list view, a phone list and a company list. Quickly drill into the database using one-click alphabetical sorting, or search for contacts in real-time (search-as-you-type).

Calendar and appointment management

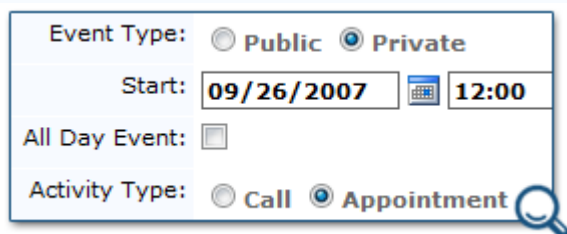


Day Work Week Week Month

	Mon, 24 Sep	Tue
00:00		
01:00		

All of our solutions feature robust appointment management and calendar utilities.

Appointment properties



Event Type: Public Private

Start:

All Day Event:

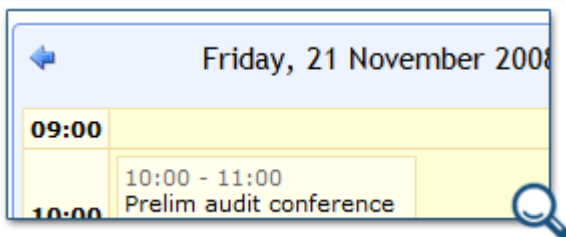
Activity Type: Call Appointment

Appointments can be made public or private, and can have statuses, priorities and labels (as well as user-defined statuses, priorities and labels). A start time, end time, category, location and all-day event flags are also supported.

Support for a description field enables you to file detailed information with the appointment entry.

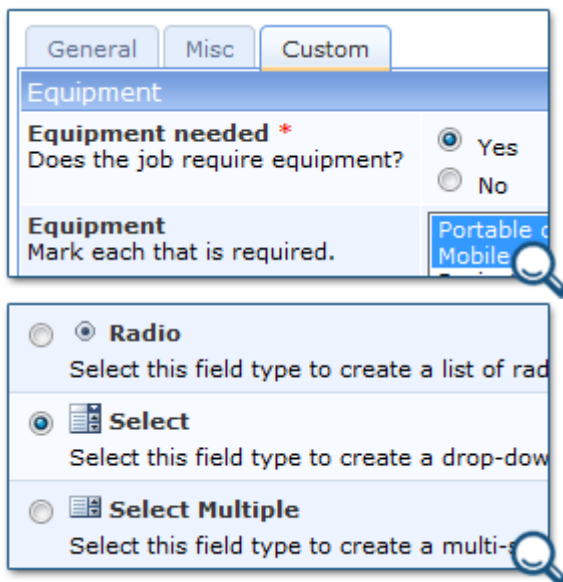
Custom fields can be created for appointments, allowing you to define special fields that can contain information specific to your organization's needs.

Staff dashboard appointments overview



When staff users log into the staff control panel of your support desk, as part of the dashboard they are presented with a daily overview of appointments.

Custom fields

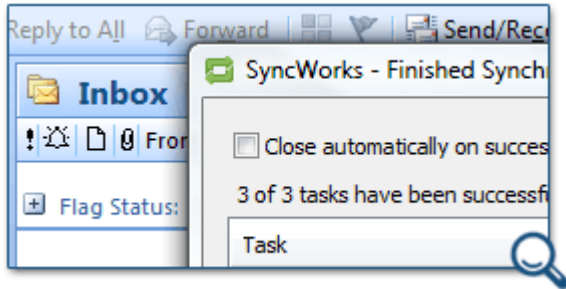


All of the teamworking areas (task, contact and appointment objects) support **custom fields**.

Defined by administrator users, custom fields allow you to define input fields to manage data that is vital to your organization. They feature a variety of field types (text fields, radio buttons, checkboxes, etc) and can enforce constraints on or validate data entry using the required field flag or validating input using regular expressions.

Custom fields are a powerful way to organize and constrain data and are supported throughout many areas of our solutions.

Synchronization with Microsoft Office Outlook



Kayako SyncWorks is an optional add-on that integrates with Microsoft Office Outlook. SyncWorks connects to your support desk and synchronizes tasks, appointments and contacts with Outlook. Items that you add in Outlook can be automatically sent to the support desk, and vice versa.

SyncWorks can synchronize between any number of computers and offers a high level of control over synchronization policies.

[Es gelten unsere AGB. Alle Angaben ohne Gewähr.](#)