ServiceLedger Getting Started Guides

Getting Started Right with ServiceLedger

Our primary goal and commitment is to ensure that you successfully install and deploy ServiceLedger in your organization. ServiceLedger provides many resources that can help you accomplish this goal. Most of the resources are available at no charge, and other resources are available at affordable rates. How much you want to do yourself or how much you want to hire ServiceLedger to do is your choice. Either way, we are here to help you in whatever way we can.

A Few Important Resources to Remember:

The following resources are some of the most important resources available to you. We strongly recommend that you take advantage of each of them and use them to your benefit. While ServiceLedger offers other resources that require personnel and oftentimes require to be scheduled, the following resources are available around the clock for free.

Online Getting Started Page:

The **Online Getting Started Page** is an excellent resource for new customers. This important website serves as a launching site to numerous resources available to you. You can reach the Online Getting Started Page directly from our website at www.serviceledger.com and clicking on the **Support** tab and then clicking on the **Getting Started** option on the page. You can reach it directly at http://www.serviceledger.com/gettingstarted.htm

Online Getting Started Guides:

The **Online Getting Started Guides** provide you with easy training on each manager (or module) of ServiceLedger to help you get up and running quickly. Each guide is designed to train you to become an expert on each manager of ServiceLedger. You can access the Online Getting Started Guides from the Getting Started Page or reach it directly at http://www.serviceledger.com/documentation.htm

Online Training Videos:

The Online Training Videos provide you with a visual learning experience via training videos you can download and watch on your computer at your convenience. Most customers feel the online training videos provide easy and quick learning of each manager of ServiceLedger without having to re-arrange their day to attend online training classes. You can access the Online Training Videos from the Getting Started Page or reach it directly at http://www.serviceledger.com/training_videos.htm

Online FAQ's:

The Online FAQ's is perhaps one of the most important resources available to you as it provides a personal service for your own unique needs and requirements. The purpose of the Online FAQ's is to provide a history of all solutions we provide for our customers dealing with unique situations for the benefit of all of our customers. From this resource, you can learn easy solutions and/or workarounds for different situations, needs or requirements. Additionally, it allows you the opportunity to correspond with a ServiceLedger Trainer if you are unable to find the solution you are looking for. You can access the Online FAQ's from the Getting Started Page or reach it directly at http://www.serviceledger.com/questions.htm

Online KnowledgeBase:

An Online KnowledgeBase is available to find quick answers to common support questions. This easy to use service allows you to enter search terms and let ServiceLedger provide you with responses that matches your search term inquiry. You can access the Online KnowledgeBase at http://support.serviceledger.com/kb/

Suggestions, Comments and/or Complaints:

Our focus is on you and the successful implementation of your ServiceLedger Service Management Software. If you have any suggestions on how we can improve, or any comments on the job we are doing, or any complaints about what we are doing wrong, we want to hear from you. Please email suggestions@serviceledger.com or email our Customer Service Manager directly at charles@serviceledger.com.

Starting with ServiceLedger 2007:

Starting with ServiceLedger 2007, access to all above resources can be found directly within ServiceLedger by clicking on **Help** from the file menu and the appropriate selection.

Installation:

The installation of ServiceLedger is a rather straight-forward and easy process. All documentation related to installing your software on your server and workstations, as well as installing the Tech Portal, Customer Portal or other software you purchased can be found at http://www.serviceledger.com/installinstructions.htm

In addition to the installation material available, ServiceLedger does provide free installation assistance on Monday, Wednesday and Fridays from 10 AM CST to 12 PM CST. It is highly recommended that you contact ServiceLedger Support by emailing support@serviceledger.com to schedule your installation during this time. *Note: The Installer will be installing multiple installations at one time via remote desktop support. You will need to install VNC on your server and workstations prior to the installation. Instructions on downloading and installing VNC can be found at* *http://support.serviceledger.com/download/documentation/vncinstall.pdf*

Empting Your Database:

Unless you work with a ServiceLedger Installer, you may have demo data in your database. It is highly recommended that you empty your database prior to use. This simple procedure only requires that your computer is connected to the Internet at the time you perform the procedure.

Click on **Administration | Administration** from the file menu to open the **Administration Window** and click on the **Database Administration** tab.

Click on the **Empty Database** button. For a moment it may seem that nothing is happening, however ServiceLedger is doing an automatic backup behind the scenes. The automatic backup is a safety precaution each time you perform an update in the event of any unexpected interruption with your Internet during the updating process.

Let the Updater run the update to empty your database and close the Updater when it is finished.

You now will have an empty database and are ready to get started setting up your company. The **Getting Started with the Administration Manager** documentation will assist you in getting ServiceLedger setup.
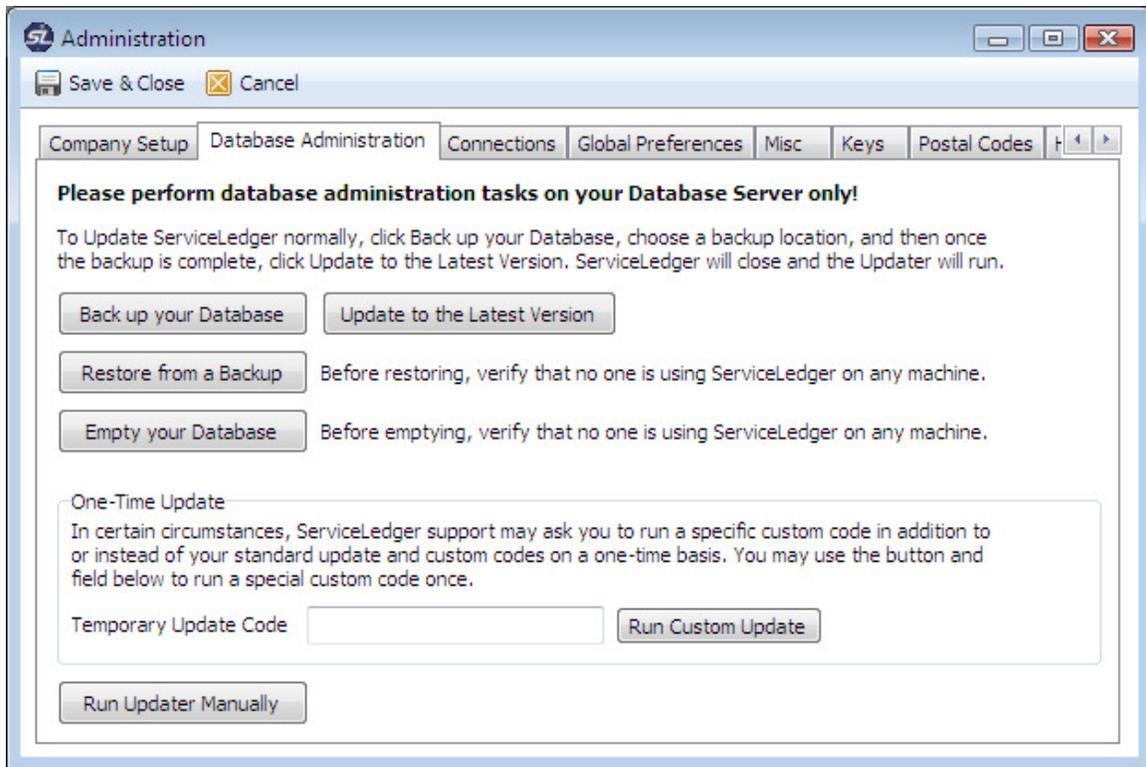
Registering Your Software:

Within 30 Days after you install the software, you will need to register the software. Your registration code is provided by ServiceLedger Support. The registration code is tied to your **Company Name** and **MAC Address**. It is recommended that you email ServiceLedger Support at support@serviceledger.com to obtain your registration code due to the length of the registration key generated.

ServiceLedger Support will require the following:

- **Company Name** as defined in ServiceLedger Registration.
- **MAC Address** as defined in the drop-down in ServiceLedger Registration.

Entering Your Registration Code:

ServiceLedger will provide you with a registration code matched to your
Company Name and **MAC Address**. Additionally, the registration code will
license the users and techs (if you have purchased the tech portal). You will need
to enter the information exactly as provided by ServiceLedger Support in order
for the registration code to be active for your installation.

Registration Code Doesn't Match:

If you have any problems with your registration code, or receive an error that it
doesn't match your installation, please contact ServiceLedger Support for
assistance. A couple of troubleshooting steps before you call include:

- Be sure the **Company Name** is correct.
- Be sure the **MAC Address** matches the address you provided.
- Be sure the **Licensed Users** and **Licensed Techs** is exactly as support
  provided.

Updating Your Installation:

An important procedure you should run weekly is an installation update. This
procedure will update your installation with any new updates or fixes that
ServiceLedger has made available. Due to security concerns with automated
updates, as well as the prevention of auto updates with anti-virus or firewall
software, ServiceLedger requires that you run this simple procedure manually. It
only takes a few minutes to perform.

From the **Administration Window**, click on the **Update to the Latest Version** button or from **Help** under the file menu click on **Update**. *Note: For network installations, this can only be performed from the server.*

Let ServiceLedger run the update and close the Updater when it is completed. When prompted to update new installation files after you re-launch ServiceLedger, click **Yes** and let the installation update. ServiceLedger will close after the update and then you can re-launch to open ServiceLedger.
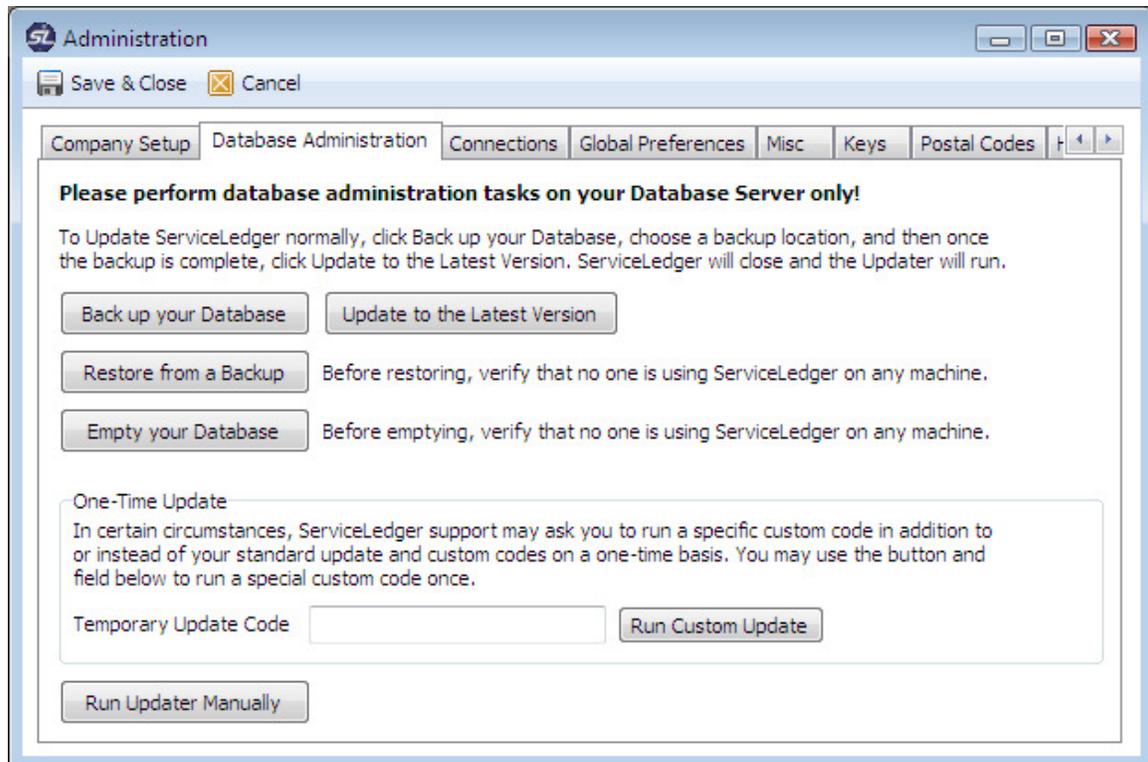
Running Custom Update Codes:

If you are working with support directly, or otherwise have been provided with a custom update code, enter the update code in the **Temporary Custom Code** field and click the **Run Custom Update** code to update your application. Customers with customizations, custom reports or custom options may have a custom update code, however most customers do not. If you have a custom update code, it will generally consist of your company name in some variation.

Support may have you run custom update codes for support issues. You should not re-run custom update codes for support issues again unless under the direction of ServiceLedger Support. *Note: This does not apply to a custom update code provided to you for customizations, custom reports or custom options.*

Getting Started:

The **Getting Started Guides** are your best resource in getting started with ServiceLedger. It is recommended that you take advantage of these free resources and read the documentation or watch the training videos before you start to use ServiceLedger. Most support issues that are called in are oftentimes related to lack of understanding or lack of training on ServiceLedger and getting familiar with ServiceLedger by taking advantage of these resources will minimize, if not eliminate, the need for many of the support issues we deal with daily.

Each guide gives you guidance on a particular manager (or module) including benefits of using the manager, why you should consider it, and how to set it up. If you should have any questions on any manager after you read the documentation, view the training videos and access the FAQ's or KnowledgeBase, you can contact questions@serviceledger.com. This free service allows you to correspond with a ServiceLedger Trainer to help you get the most out of your ServiceLedger investment.

Support:

Support is one of the most important components of your purchase of ServiceLedger. Technical support is available Monday through Friday from 9:00 AM CST to 5:00 PM CST. You can access support via phone or email depending upon your support plan.

- ServiceLedger Support by Phone – Call 940.497.2834 ext. 2
- ServiceLedger Support by Email – Email support@serviceledger.com

ServiceLedger Support is available to assist you with your technical support issues only. ServiceLedger Support cannot provide training, consulting or any other service that is not directly related to a support issue. ServiceLedger strongly recommends that you take advantage of all other resources available to you for your non-technical support questions and/or issues.

I Am Having A Problem – What Do I Do?

If you have a problem and have taken advantage of all resources available to you and still do not have a solution, please contact our Customer Service Manager at charles@serviceledger.com. Please do not wait or hesitate to contact him on any issue that you believe needs to be resolved ASAP.