

Personal Helpdesk for Outlook

Installation and Configuration

This guide will take to step by step on installing and configuring Personal Helpdesk in your Microsoft Outlook.

Page | 1

There are two different setups - one each for 32-bit Outlook and 64-bit Outlook
PersonalHelpdeskSetup_x86.zip (for 32-bit Outlook 2007, 2010, 2013, 2016, 2019)
PersonalHelpdeskSetup_x64.zip (for 64-bit Outlook 2010, 2013, 2016, 2019)

Requirements:

- .NET framework 4.5 or above
- Outlook 2007, 2010, 2013, 2016, 2019.
For Outlook 2007, you should have SP3.
- Exchange Accounts configured in Outlook (POP, IMAP or local PST can only be used for testing).

Help Manual:

For more references and helps on each feature, refer to the PDF Help Manual, which can be invoke from **Personal Helpdesk toolbar or ribbon > Settings > Help Topics**.

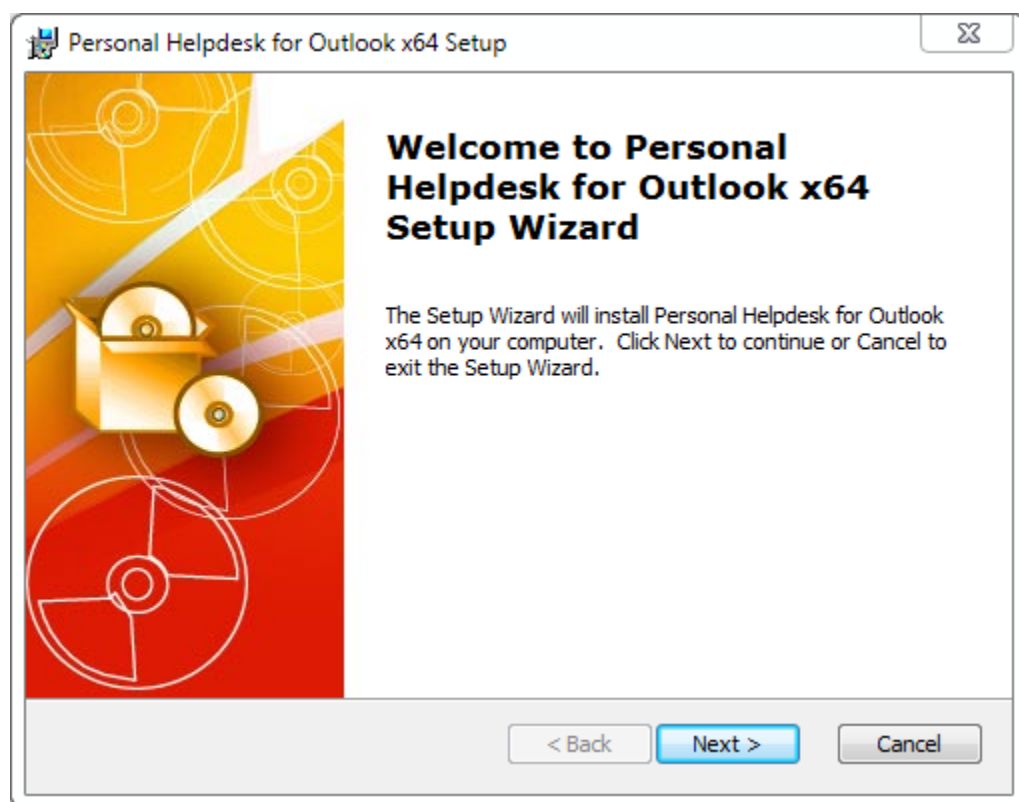
Or, you can also download the full PDF help manual directly from [this link](#).

There are two sections in this guide:

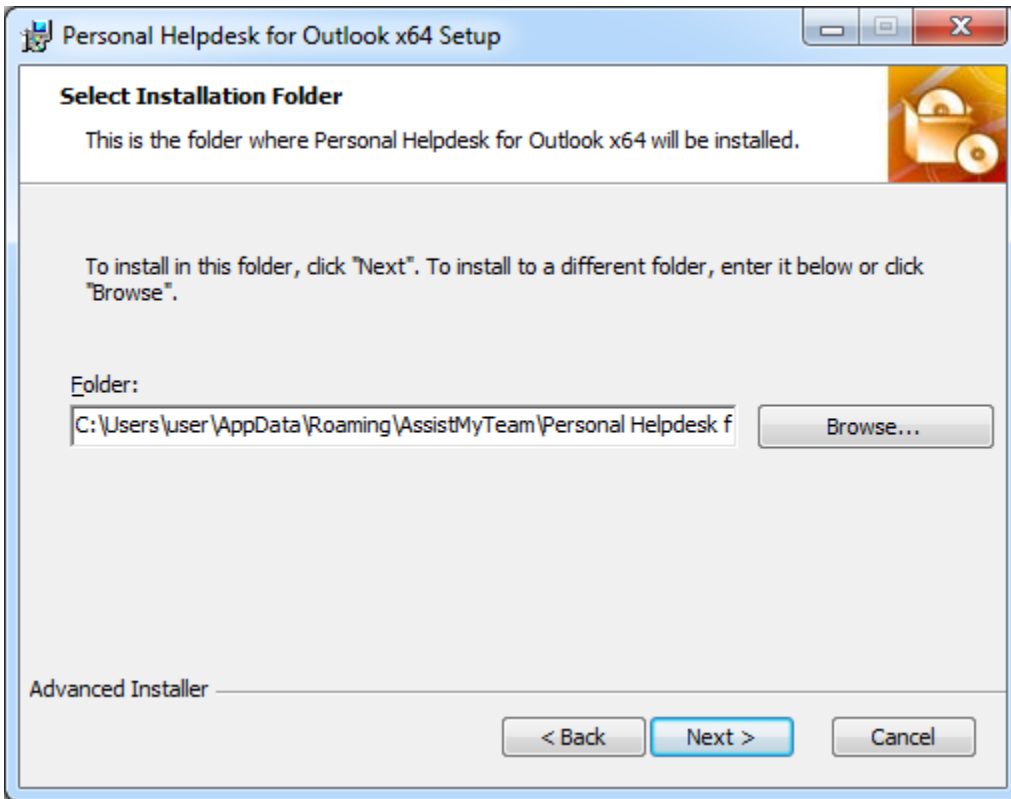
- a) **Installation**, b) **Outlook Folder Configuration**

a) Add-in Installation

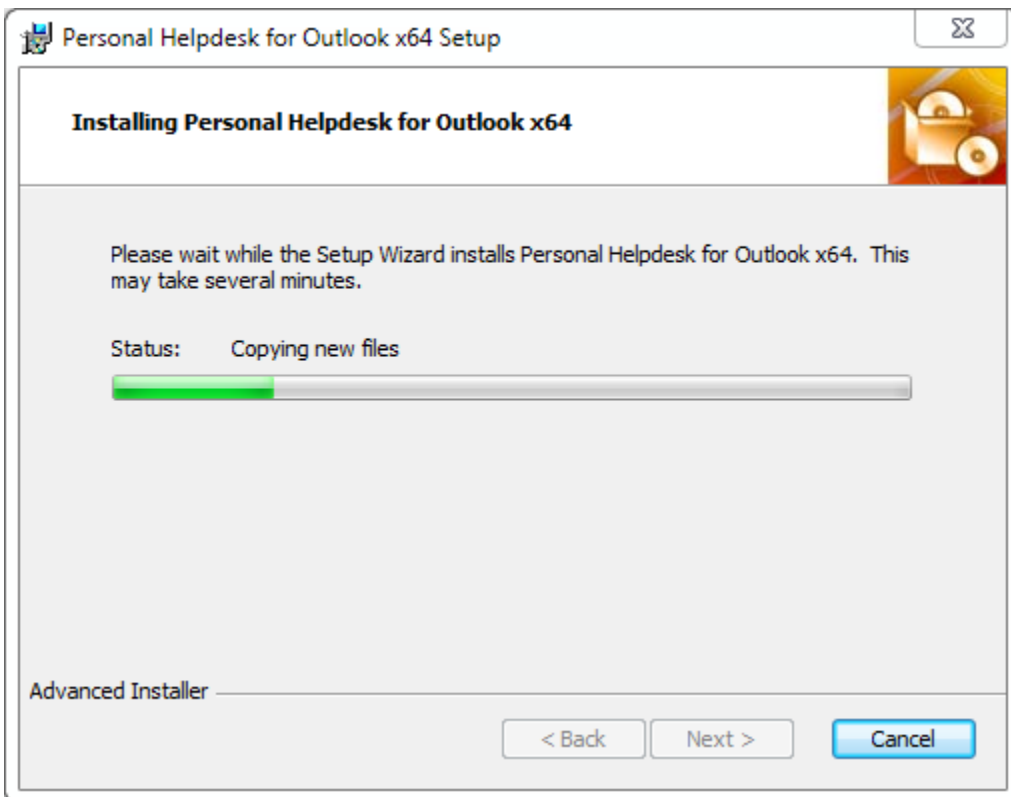
Step 1. Run the *PersonalHelpdeskSetup_xXX.exe* to start the installation. Click '**Next**' to Continue. If Outlook 2007 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.



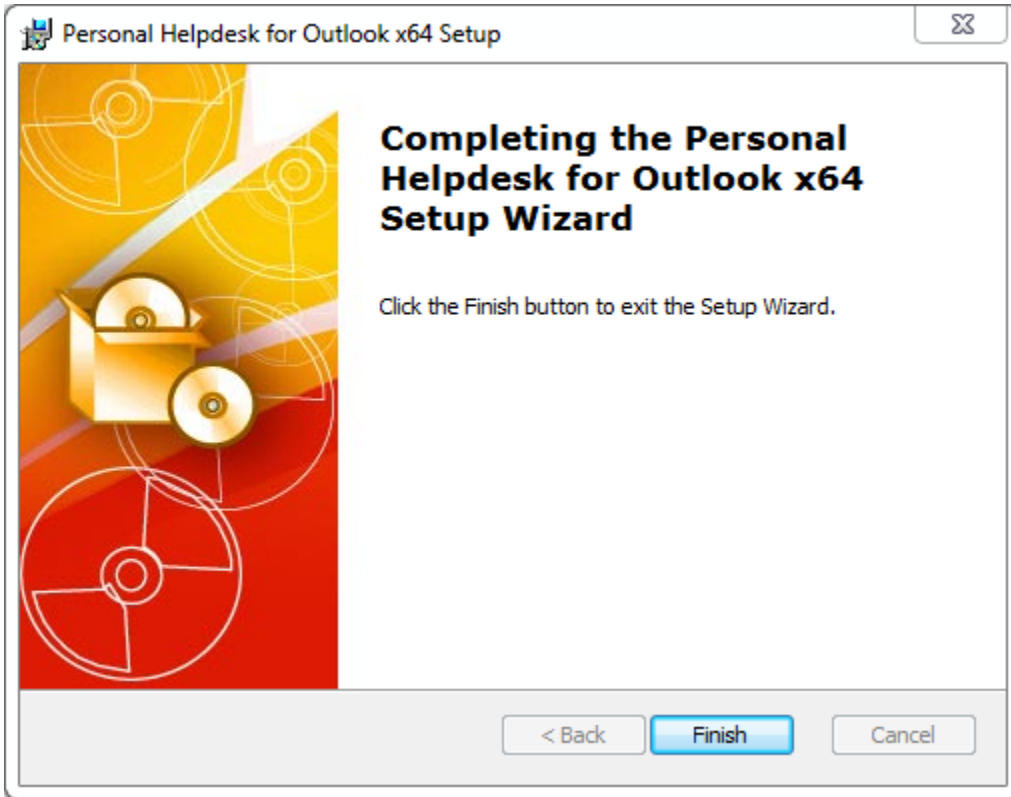
Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your application data folder)



Step 3. It just takes a few minutes to complete the whole copying process

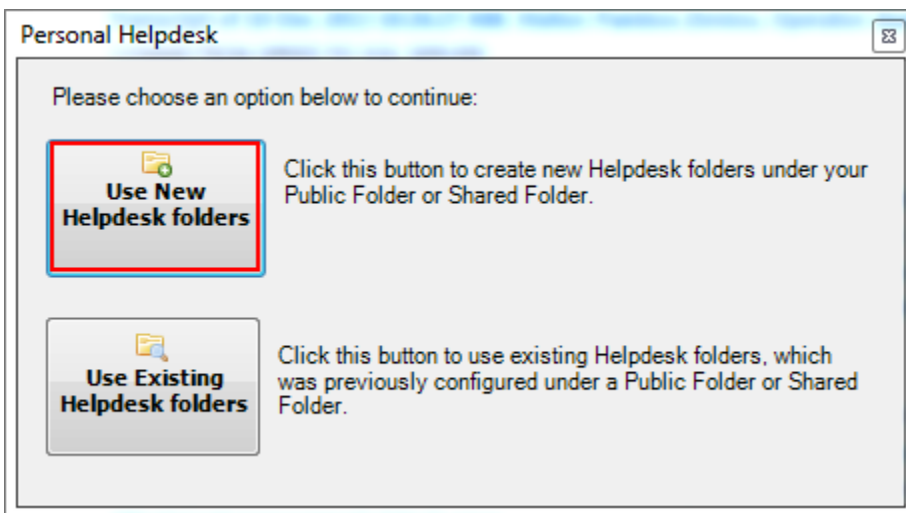


Step 4. Click 'Finish'. This ends the files installation process in your system.



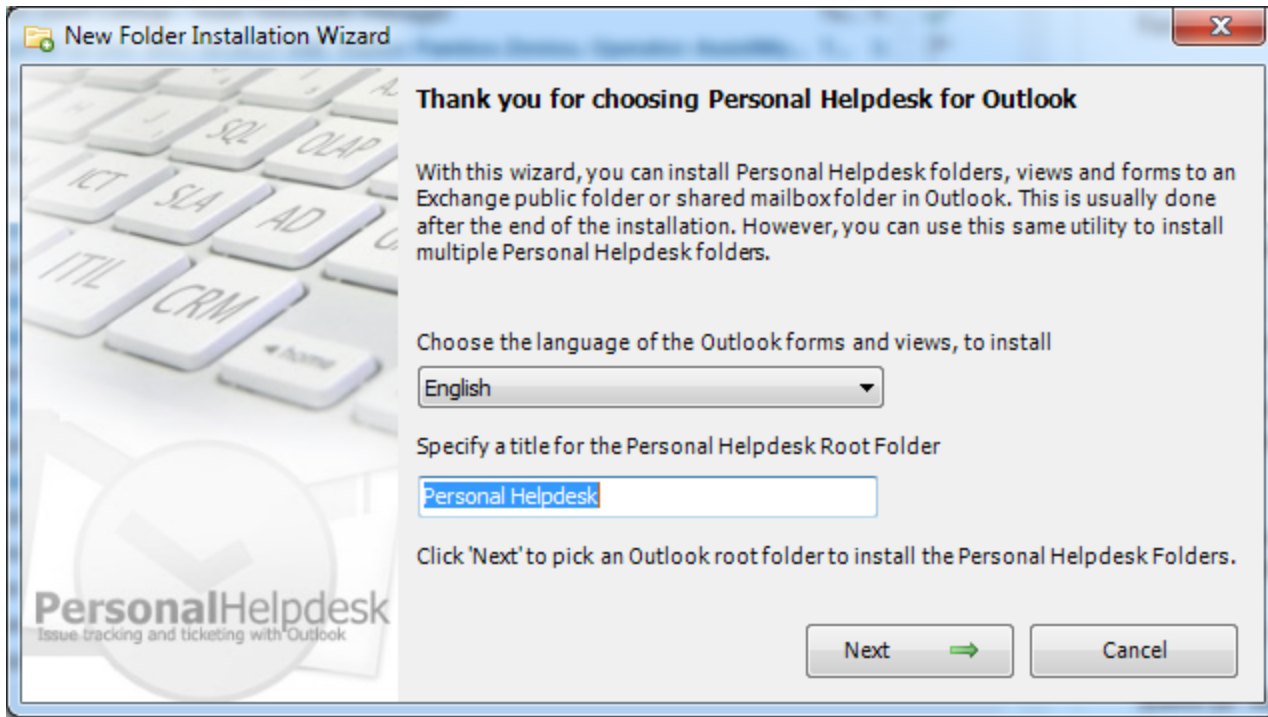
Installation steps in Outlook

Step 5. Start Outlook (restart if it was already running during the files installation). As soon as Outlook is loaded, you will be prompted with the following dialog box, offering you two choices:



Click the first button 'Use New Helpdesk Folders' to create/copy new Personal Helpdesk folders (*i.e.*, *Ongoing Cases*, *Resolved Cases*, *KB*, *Schedules and History*) from the template PST file. These folders are special as they contain customized fields, views and forms specific to Personal Helpdesk.

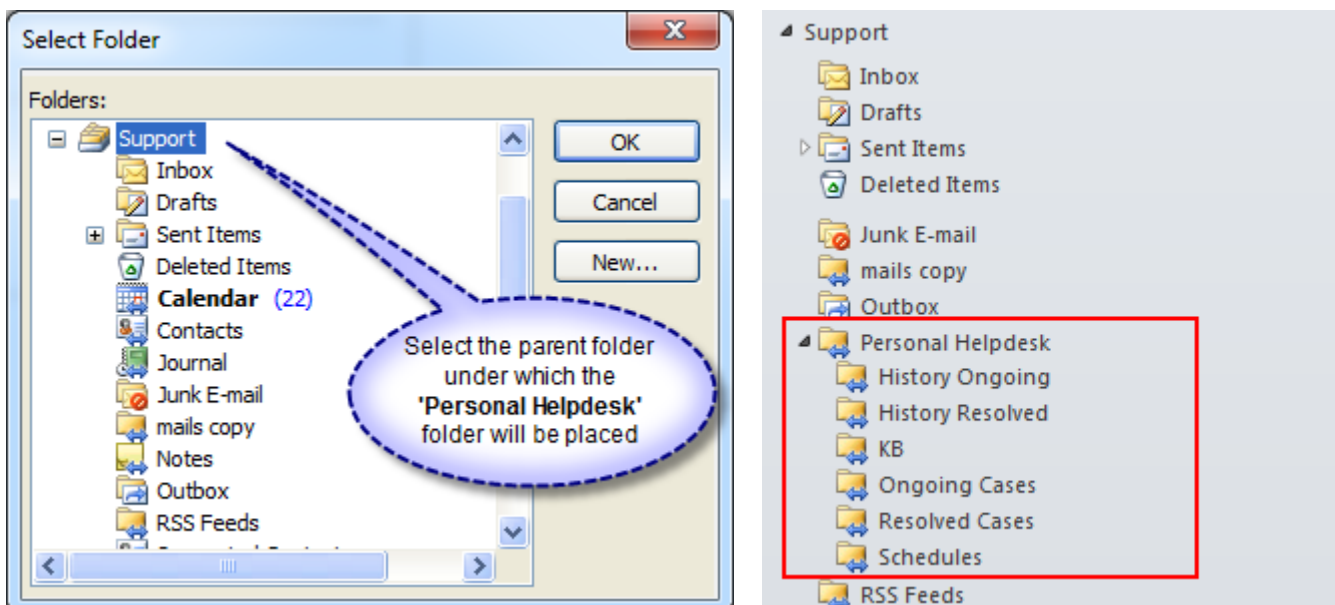
Step 6. A folders Installation Wizard dialog (as seen below) enables you to customize the name of the parent Personal Helpdesk folder that will be created. By default, it has a title of 'Personal Helpdesk'.



Further, you can choose the language specific Outlook forms and Views to install. The following languages are supported:

- Danish
- Dutch
- Finnish
- French
- English (default)
- Espanol
- German
- Norwegian
- Swedish
- Portuguese

Step 7. Clicking 'Next' button would enable you to select an Outlook parent folder where the specified Personal Helpdesk root folder would be created. If Microsoft Outlook is not already opened, it would be started automatically. The tool would then copy Personal Helpdesk subfolders, forms & designs, views etc. from the Personal Helpdesk PST template file. It would look like the followings layout:



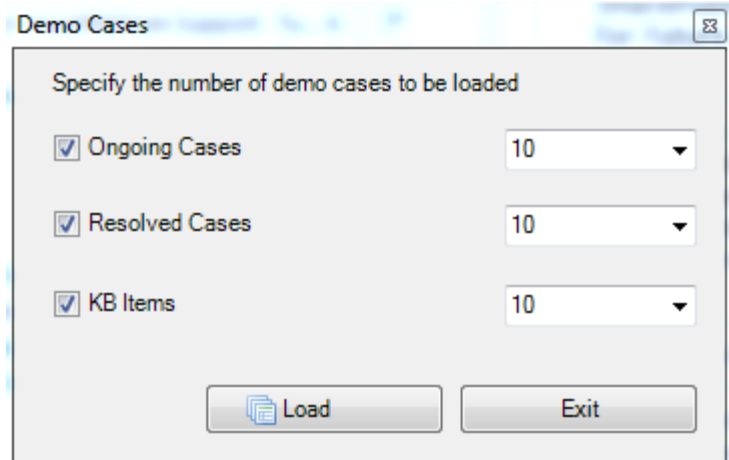
NOTE: When you start Outlook, if you are not prompted for the option to copy a new Personal Helpdesk folder, or choose existing one, then most likely, there might be remnants of earlier installation. In such scenario, go to

Outlook > Personal Helpdesk Manager menu and click ‘Copy a New Personal Helpdesk folder’. That will manually invoke the wizard tool for copying a new Personal Helpdesk folder to your Outlook

The installation and configuration in your Outlook is performed successfully. You can now choose to load the demo samples from **Outlook > Personal Helpdesk toolbar > Settings menu > Demo Cases**.

You can specify the number of sample ticket items to be created for Ongoing Cases/Resolved Cases as well as KB articles.

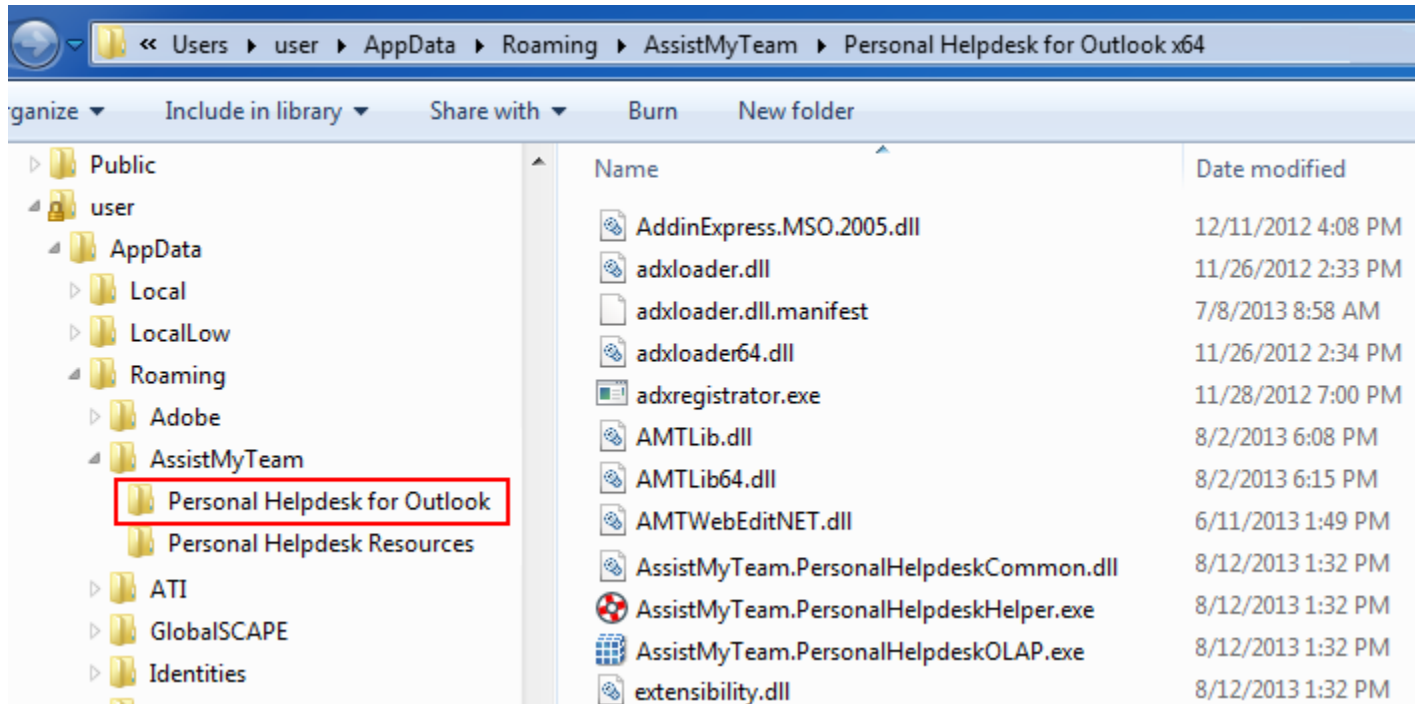
Loading the demo cases will also load a sample data/configuration under Callers List, Assets List, and Problems List etc. You can of course delete these sample cases and data later on when you want to use for your live support.



The screenshot below lists all the files that are installed on the system.

The add-in files are targeted under current user’s **application data** folder.

E.g. C:\Users\[USER]\AppData\Roaming\AssistMyTeam\Personal Helpdesk for Outlook (x64 or x86)



Template PSTs/Forms/Web Access files under current user’s **application data** folder.

E.g. C:\Users\[USER]\AppData\Roaming\AssistMyTeam\Personal Helpdesk Resources

