Administrator Guide – v3.x

5/1/2018

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Visit our website

TREK is an ever-changing rapidly evolving tool. It is under constant development and improvement. With that, this guide can quickly become out of date with some of the features. Make sure you visit the website http://trek.decisiondigital.com before using upgraded versions. You are also welcome to contact tech support at the information listed at the end of this guide and we can help you out. TREK is designed for you so any feedback, good or bad, is always appreciated.

Standards used in this guide

	Important information or use caution step.
A Rick Tip	Information that can make your use of TREK or Tigerpaw better, faster, stronger from Rick.
`Special Font`	Web address, email, file name, folder, or code.
Bold	User input item
Boxed Type	Button or menu choice.

About TREK

TREK is an acronym for the *Tigerpaw Resource Kit*. TREK is a lightweight companion product, built to work exclusively with Tigerpaw Software's CRM/PSA system. By performing a series of automatic profiling and housekeeping tasks, TREK enhances your Tigerpaw experience, rewarding you with new capabilities, efficiency and effectiveness.

What you need to run TREK[i]

- TREK connects to your existing Tigerpaw SQL database with a lightweight agent that installs on your existing Microsoft SQL server. TREK is a server-based Windows service and is compatible with Microsoft Windows Server 2012 R2 or higher.
- Prior to running TREK for the first time against your live database, do a few test-runs against your Tigerpaw Archive database, just to be sure.

Helpful Links

Accessing TREK

How to create a Tigerpaw Archive Database[1]

Using the Tigerpaw Group Explorer[2]

Installation

TREK uses the Microsoft *Click To Run* deployment system for simplified installation. *Click To Run* keeps TREK completely self-contained. This means that TREK does not use any shared components or create version conflicts.

1. Extract downloaded folder
2. Run setup.exe using Run As Administrator
3. Follow the onscreen instructions

[1] http://userguide.tigerpawsoftware.com/Tigerpaw/14.1/_TSIGuide.htm#page/UserGuide/CreateanArchiveDatabase.htm
[2] http://userguide.tigerpawsoftware.com/Tigerpaw/14.1/_TSIGuide.htm#page/UserGuide/GroupExplorer.htm

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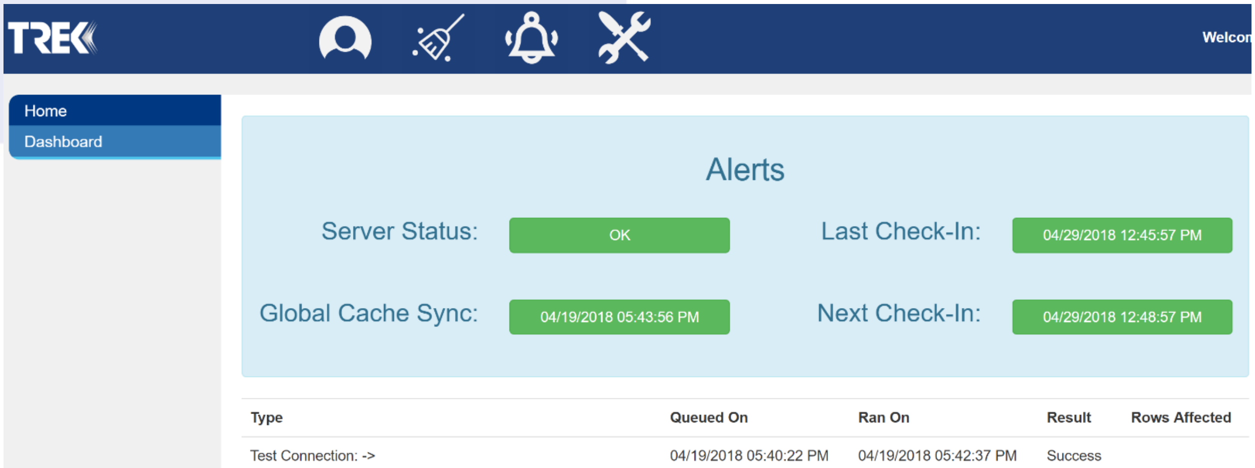
The Dashboard



After you've gone to the TREK website and logged in, you will be greeted by the TREK dashboard. Here you can quickly see the operational and connection status of TREK as it relates to your database. It also contains a running log of previously performed activities. Green of course is good:

Server Status: This badge indicates the operational status of the TREK web servers

Global Cache Sync: This badge indicates the last sync of data from your database

Last Check-In: This badge indicates the last communication with your database

Next Check-In: This badge indicates the next communication from your database

A Rick Tip

Clicking the TREK icon from anywhere will take you back to the status dashboard

Navigation

Dashboard Profiling Housekeep Alerts Settings

Each section of TREK performs a specific set of tasks:

Dashboard: Clicking the TREK icon takes you back to the status dashboard

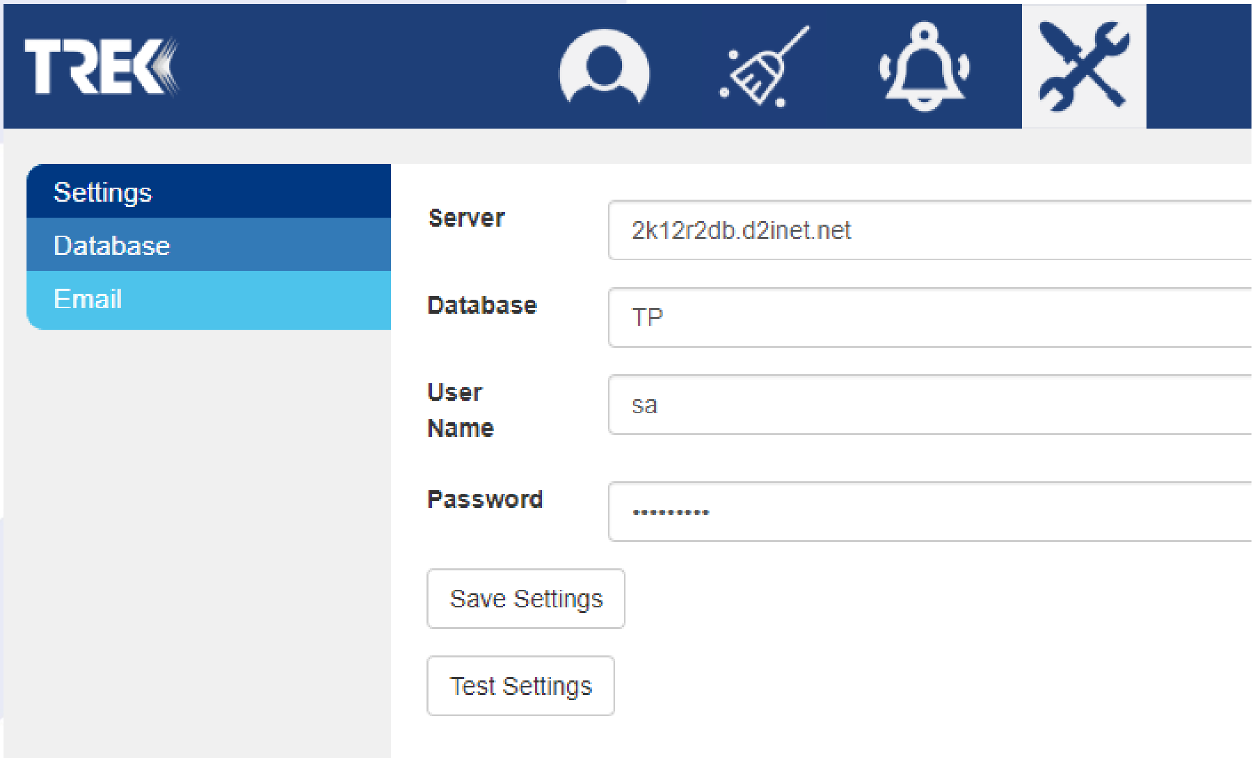
Profiling: This section controls the automatic profiling features of TREK. These include account groups, sales revenue and no service order activity

Housekeeping: This section gives you the ability to make globally locate, merge, remove and deactivate over thirty different drop-downs, statuses and types. It also allows you to deactivate price book items and accounts.

Alerts: This section controls the automatic calendar invites and pre-appointment reminders

Settings: This section controls the database connection used by TREK to connect to your Tigerpaw database

Set Database Connection



Upon initial launch, head on over to the configuration icon and enter your database connection information:

1. Enter your SQL server name or use the lookup button
2. Enter your Tigerpaw database name
3. Enter your SQL admin **user** (*not Windows*) account (usually '**sa**')
4. Enter your SQL admin **password** (*not Windows*)
5. Choose Test Settings to test the database connection
6. Choose Save Settings to save the settings

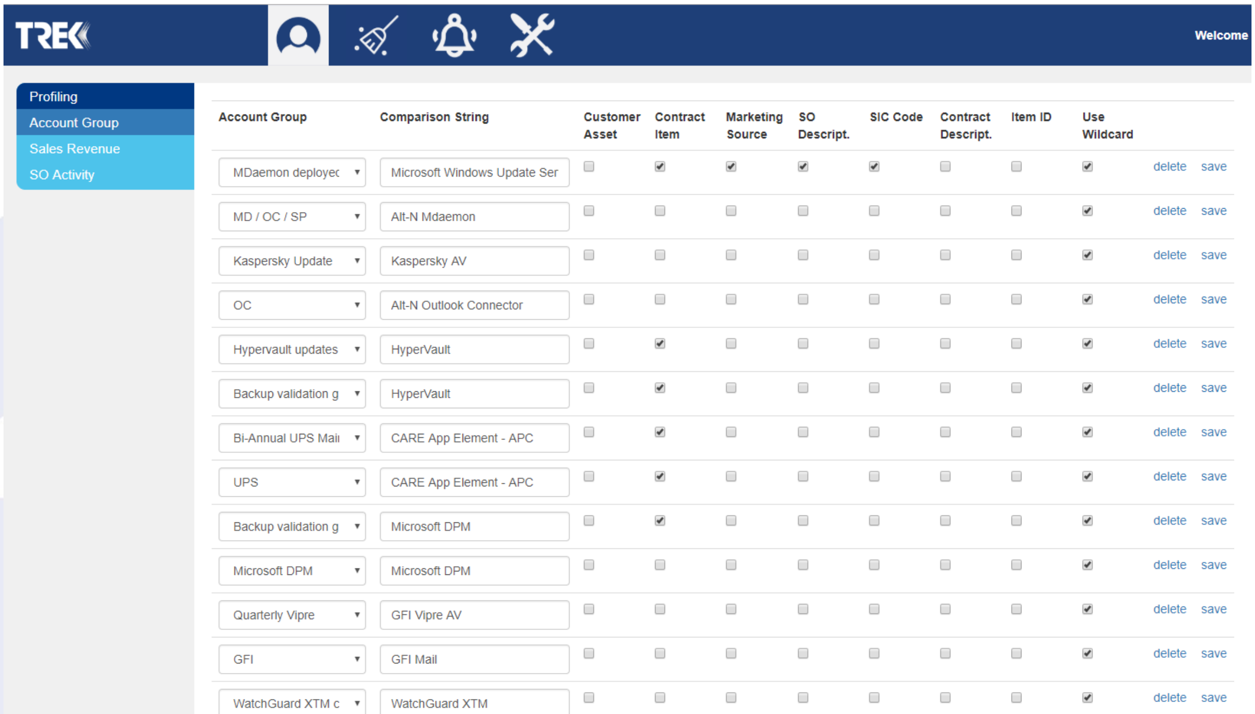
Once you save the settings, sit back and let TREK contact your server and build the initial data cache. There is a lot of data to grab so please be patient.

You can monitor the progress by clicking the TREK icon and going back to the main dashboard page.

The Profiler Explained

Prepare yourself to be wowed by one of the greatest features in TREK: our profiling engine. The Profiler examines your Tigerpaw database every 24 hours and performs a variety of automatic profiling tasks based on rules that you build. The Profiler enables many manual Tigerpaw features to become fully automatic with timely and relevant information just a click away.

Account Group Profiler



Account Group	Comparison String	Customer Asset	Contract Item	Marketing Source	SO Descript.	SIC Code	Contract Descript.	Item ID	Use Wildcard		
MDaemon deployec	Microsoft Windows Update Ser	☐	☑	☑	☑	☑	☐	☐	☑	delete	save
MD / OC / SP	Alt-N Mdaemon	☐	☐	☐	☐	☐	☐	☐	☑	delete	save
Kaspersky Update	Kaspersky AV	☐	☐	☐	☐	☐	☐	☐	☑	delete	save
OC	Alt-N Outlook Connector	☐	☐	☐	☐	☐	☐	☐	☑	delete	save
Hypervault updates	HyperVault	☐	☑	☐	☐	☐	☐	☐	☑	delete	save
Backup validation g	HyperVault	☐	☑	☐	☐	☐	☐	☐	☑	delete	save
Bi-Annual UPS Mai	CARE App Element - APC	☐	☑	☐	☐	☐	☐	☐	☑	delete	save
UPS	CARE App Element - APC	☐	☑	☐	☐	☐	☐	☐	☑	delete	save
Backup validation g	Microsoft DPM	☐	☑	☐	☐	☐	☐	☐	☑	delete	save
Microsoft DPM	Microsoft DPM	☐	☐	☐	☐	☐	☐	☐	☑	delete	save
Quarterly Vipre	GFI Vipre AV	☐	☐	☐	☐	☐	☐	☐	☑	delete	save
GFI	GFI Mail	☐	☐	☐	☐	☐	☐	☐	☑	delete	save
WatchGuard XTM c	WatchGuard XTM	☐	☐	☐	☐	☐	☐	☐	☑	delete	save

The TREK profiler is a very powerful tool that automatically builds your Tigerpaw Account Groups based on rules you create. Once built, you can use the Tigerpaw Group Explorer[3] to perform so many cool things. For example, suppose you wish to locate and group all customers that have purchase Microsoft Exchange 2010 or a certain POS system. Or you want to group all customers who fall under a certain managed service or maintenance program. The possibilities are endless. Here is what we do. Using the rule you create (called a comparison string) we run this rule against all of your customers. If we find a match, we add that customer to the group you've defined.

You can also use wildcards in your rules. Using our previous example, suppose you wish to create an account group for all customer that have purchased **Microsoft Exchange**

[3]http://userguide.tigerpawsoftware.com/Tigerpaw/14.1/_TSIGuide.htm#page/UserGuide/GroupExplorer.htm

and not just a specific version. With wildcard enabled, and a rule titled '**Microsoft Exchange**,' all customer assets that contain Microsoft Exchange (e.g. Microsoft Exchange 2010, Microsoft Exchange 2013 etc.) will get automatically added to the Microsoft Exchange group.

Using the Account Group Profiler

1. Begin by creating account groups in Tigerpaw. This can be handled using the Group Explorer or Master Tables.
2. Open TREK and go to the Profiling tab.
3. Click the Account Group drop down and choose one of your account groups
4. In the Comparison String box, type in the title or phrase to be used for the search
5. Next, enable the check boxes for the places you wish to search
    - Customer Assets: TREK will match and assign accounts based on customer assets
    - Contract Items: TREK will match and assign account based on active customer contracts
    - Marketing Source: TREK will match and assign account based on the marketing source selected under account
    - SO Description: TREK will match and assign account based on a certain SO brief description.
    - SIC Code: TREK will match and assign account based on the SIC code selected under the account
    - Contract Description: TREK will match and assign account based on a cerain contract description
    - Item ID: TREK will match and assign account based on a certain price book item ID.
    - Use Wildcard: TREK will search for items that contain the comparison string in addition to being an exact match.
6. Press the Save button and you will see the rule added to the Current Group Assignment Details grid.
7. Repeat the process to create other rules

Once you've created your profile rules, TREK will add the profiling to the next polling period and will setup the rule to auto-run every 24 hours thereafter.

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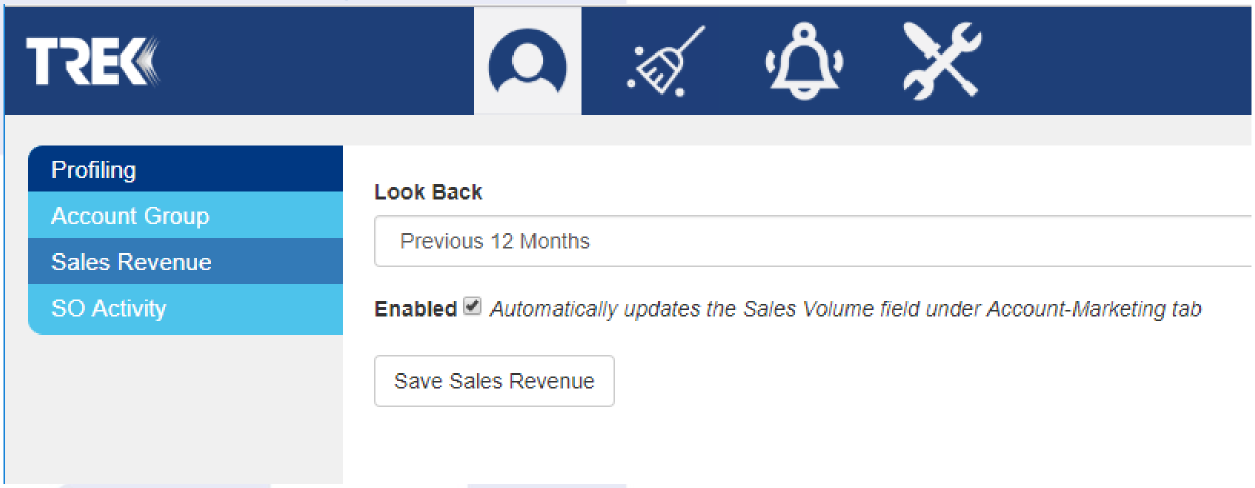
Sales Revenue Profiling



Enable this feature and TREK will automatically calculate the total sales revenue for all accounts and save the amount in the Sales Revenue field within the account. TREK will automatically update this amount every 24 hours so you always have the most up-to-date amount. Choose from either the current calendar year or the trailing twelve months.

Use Sales Revenue Profiler

1. Choose from either the current calendar year or the trailing twelve months
2. Click the Enable checkbox
3. Click Save Sales Revenue

A Rick Tip

Add the Sales Revenue field to your active account matrix view and you can now see the running revenue of all active accounts without actually opening the account.

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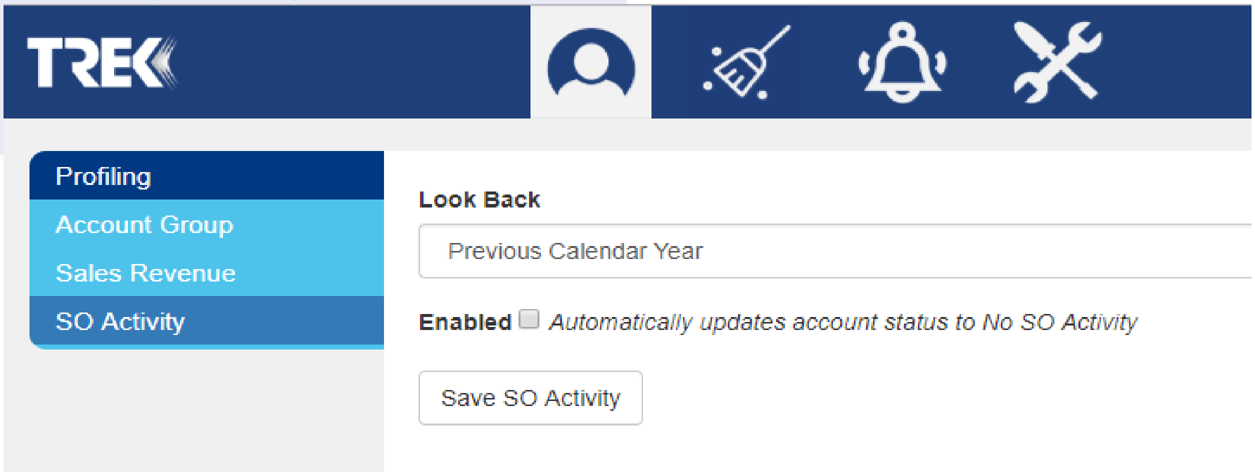
SO Activity Profiling



Enable this feature and TREK will automatically locate the active accounts with no service order activity and change the account status to "No SO Activity." TREK will automatically profile your accounts every 24 hours so you will always know who isn't contacting you for service.

Use SO Activity Profiler

1. Choose from either the current calendar year or the trailing twelve months
2. Click the Enable checkbox
3. Click Save Sales Revenue

A Rick Tip

Create a matrix view that filters on the account type No SO Activity and stay on top of your inactive accounts in one view

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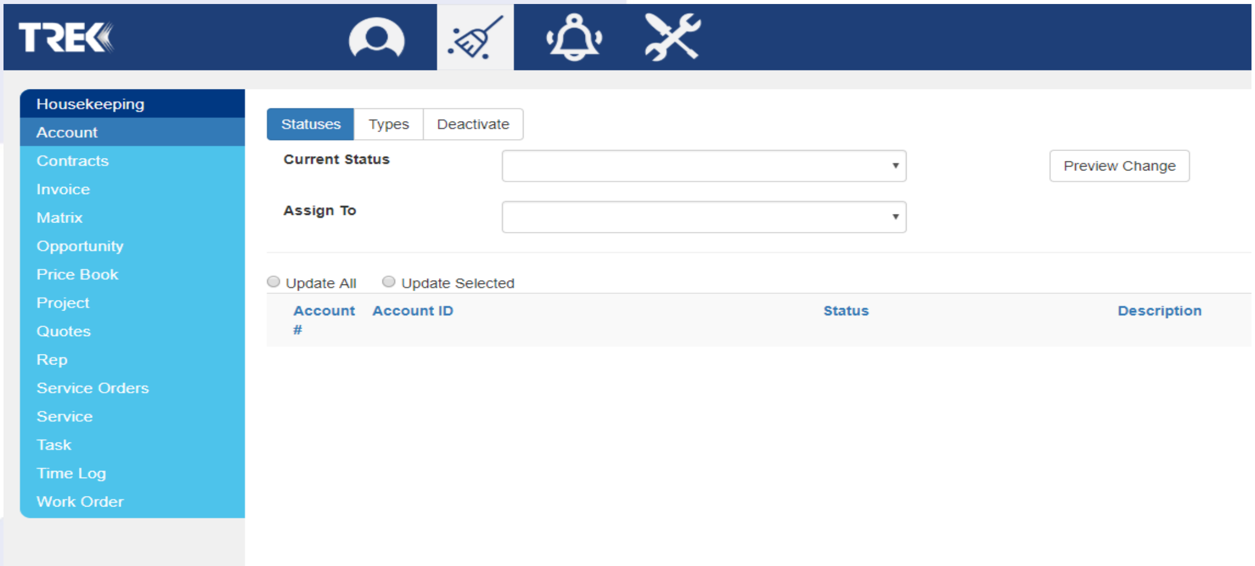
Housekeeping Explained



The housekeeping section allows you to locate all the occurrences of different items within the Tigerpaw database and change, merge, and remove the items. For example, you can retire old or unused task actions, time log reasons, or service order types. You can also repair service order brief descriptions that perhaps don't conform to a certain naming convention or standard. Or remove a corrupted matrix view.

Ever wanted to clean up old, inactive accounts. Not an easy task. TREK will locate, preview, and deactivate an entire list of accounts…all at once. See TREK reviews the journal for each Tigerpaw account and determines which ones meet your selection criteria. It even gives you the ability to ignore system entries. Why is this important? Because it is common for companies to try and win back old accounts via email campaigns or other workflow activities. And doing so updates the account journal…even though the account has not purchased or engaged you for support in a long, long time. Leave this checkbox disabled to ignore system entries and find those accounts that have truly been inactive.

Same is true for old and unused parts in the price book. TREK will check your parts and determine the last time they were last sold or ordered, giving you a list of the ones that meet your criteria and allowing you to deactivate them with the click of a mouse.

With over thirty different items to choose, TREK gives you safe and unprecedented control over your Tigerpaw settings and data.

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Houskeeping Choices

Safely locate, merge, remove or deactivate:

Accounts
- Types
- Statuses
- Mass-deactivation of old/unused accounts

Contract
- Statuses

Invoice
- Remove deposit amount from posted invoice
- Reassign Rep to Credit on posted invoices

Matrix
- Remove corrupt Matrix views

Opportunities
- Close Reasons
- Sources
- Stages
- Statuses
- Types

Price Book
- Categories | Sub Categories
- Statuses
- Mass-deactivation of old/unused parts
- Find all places where a part was used.

Project
- Statuses

Quotes
- Statuses
- Types

Reps
- Statuses

Service Orders
- Brief Descriptions
- Service Order Priorities
- Service Order Types
- Service Order Zones

Service
- Service Boards

Task
- Tasks Actions
- Locate and clear incomplete tasks assigned to inactive reps

Time Log Reasons

Work Order Statuses

Using Houskeeping Items

1. Click the Housekeeping icon
2. From the left-side list, choose the area you wish to modify
3. Across the top, choose the item you wish to change
4. From the Current Value drop down, choose the current value you wish to swap
5. From the New Value drop down, choose the new value
6. Press to Preview preview change or Commit to commit the change

For service order brief description swaps, you can type in your current value, including a wildcard "" or use the drop down*

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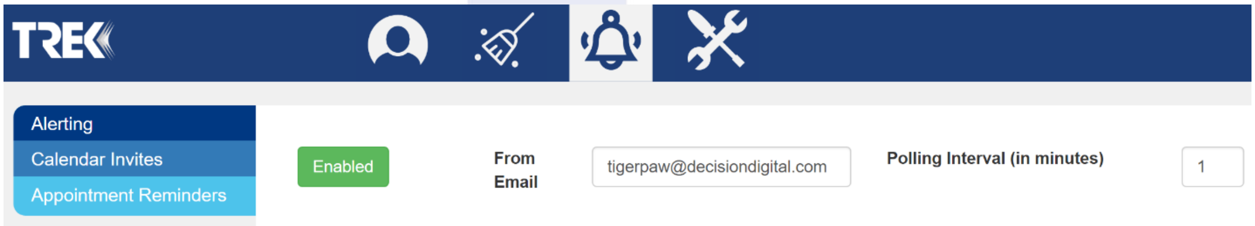
Alerts Explained

TREK's alerting system is an automatic email system that enhances your ability to integrate Tigerpaw scheduled tasks into any calendar system as well as gently remind customers of upcoming appointments.



Calendar Invites

So, you want your Tigerpaw tasks to appear in your calendar and you don't use Microsoft Exchange? Try turning on TREK's *Calendar Invite* feature. Each time a task is created in Tigerpaw, TREK will automatically create a calendar invite and email it to the person for whom the task has been created. These invites are 100% compatible with every calendar system. That's right! With one click, your Tigerpaw tasks go directly into your Google Calendar, Apple iCAL, Microsoft Exchange, Microsoft Outlook, Outlook Anywhere, Android, Windows Mobile, and iOS.

Using Calendar Invites

1. Click the Disabled button until it changes to Enabled
2. Set your polling interval (1 to 5 minutes)
3. Save settings

The email server settings must be programmed for this feature to operate. They are located in the Settings-Email section

A Rick Tip

Want to invite other people? Easy. Just open the calendar invite and add attendees.

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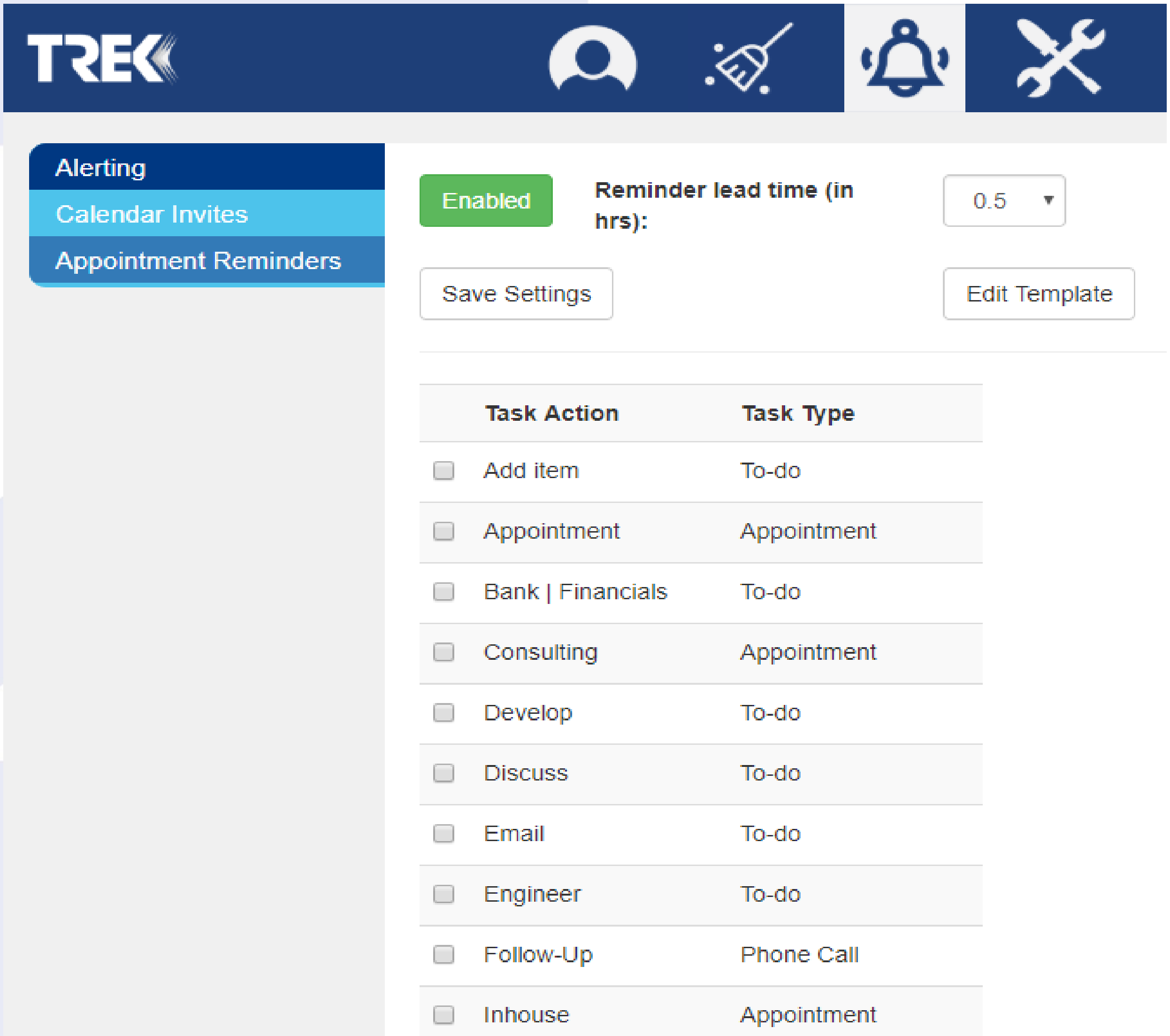
Appointment Reminders



What if Tigerpaw could automatically email the contact person on a service order, say one hour before the tech was scheduled to arrive or call? TREK does. We call them *Reminder Alerts*. Simply create a task against the service order with a start date/time and end date/time and TREK will send a reminder email prior to the that appointment anywhere from 30 minutes to 24 hours prior to the appointment. And you can choose which task types and actions will send reminder alerts . For example, you may wish to send a reminder alert for onsite appointments but not for phone calls. Place a checkmark next to all the actions and types you wish to provide alerts and TREK will take care of the rest.

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Using Appointment Reminders

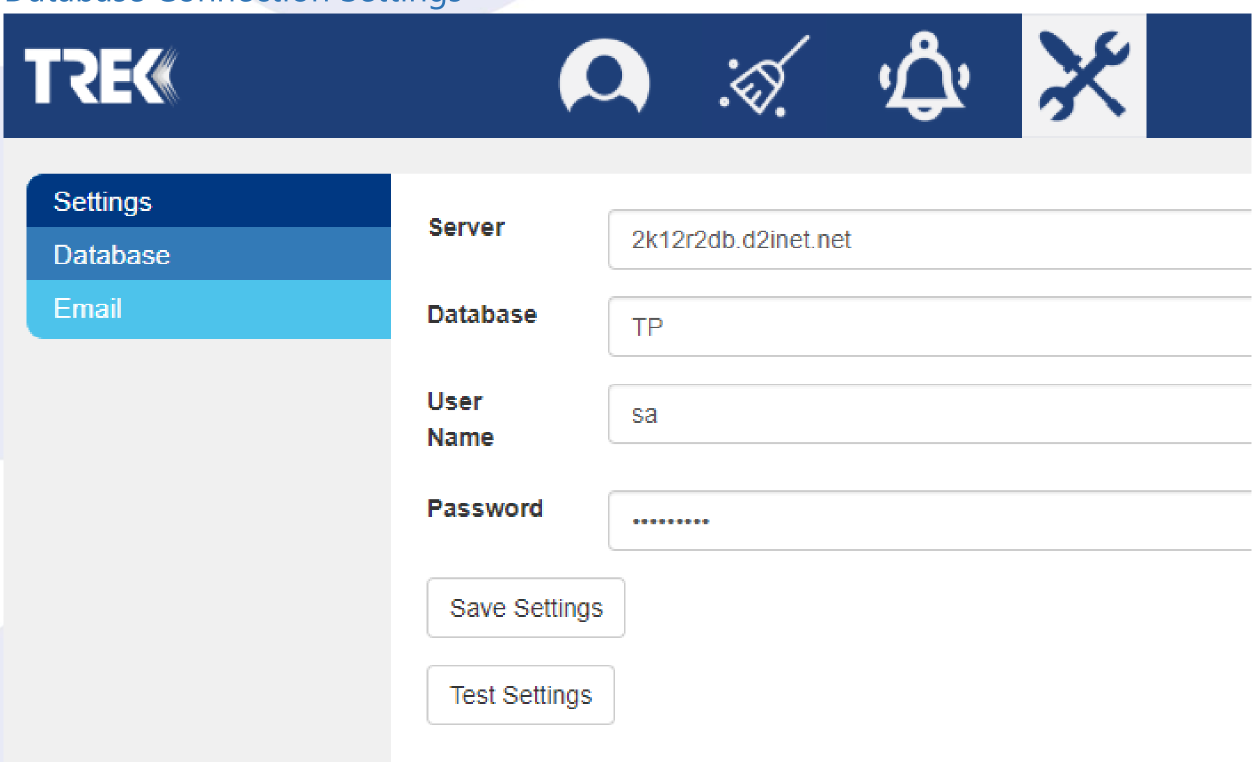
1. Click the Disabled button until it changes to Enabled
2. Set your polling interval (30 minutes to 24 hours)
3. Place checkmarks next to the task actions that will trigger reminder alerts
4. Click Edit Template button to customize the reminder email sent to your customers
5. Click Save Settings to save your settings

TREK will automatically email the contact on a service order, prior to the tech arriving, based on the interval you choose. Yes, it is THAT easy!

Settings Explained

The settings section controls the connection to your Tigerpaw database as well as the connection to your email server.

Database Connection Settings



The Database Connection section controls the database that TREK will access and perform. Please refer to the section titled Setting Database Connection for use instructions.

Server: This is your SQL server name (eg SERVERNAME or SERVERNAME\SQLEXPRESS)

Database: This is you're your Tigerpaw database name (either live or archive)

Username: A SQL account with admin access to your Tigerpaw database

Password: Password for your SQL account with admin access to your Tigerpaw database.

Using the database connection settings

1. Enter your SQL server name or use the lookup button
2. Enter your Tigerpaw database name
3. Enter your SQL admin **user** (*not Windows*) account (usually '**sa**')
4. Enter your SQL admin **password** (*not Windows*)
5. Choose Test Settings to test the database connection
6. Choose Save Settings to save the settings

Once you save the settings, sit back and let TREK contact your server and build the initial data cache. There is a lot of data to grab so please be patient.

Initially run TREK against your archive database versus your live one. This is a good practice, especially in the beginning, to test the changes you are looking to make, without altering your real database.

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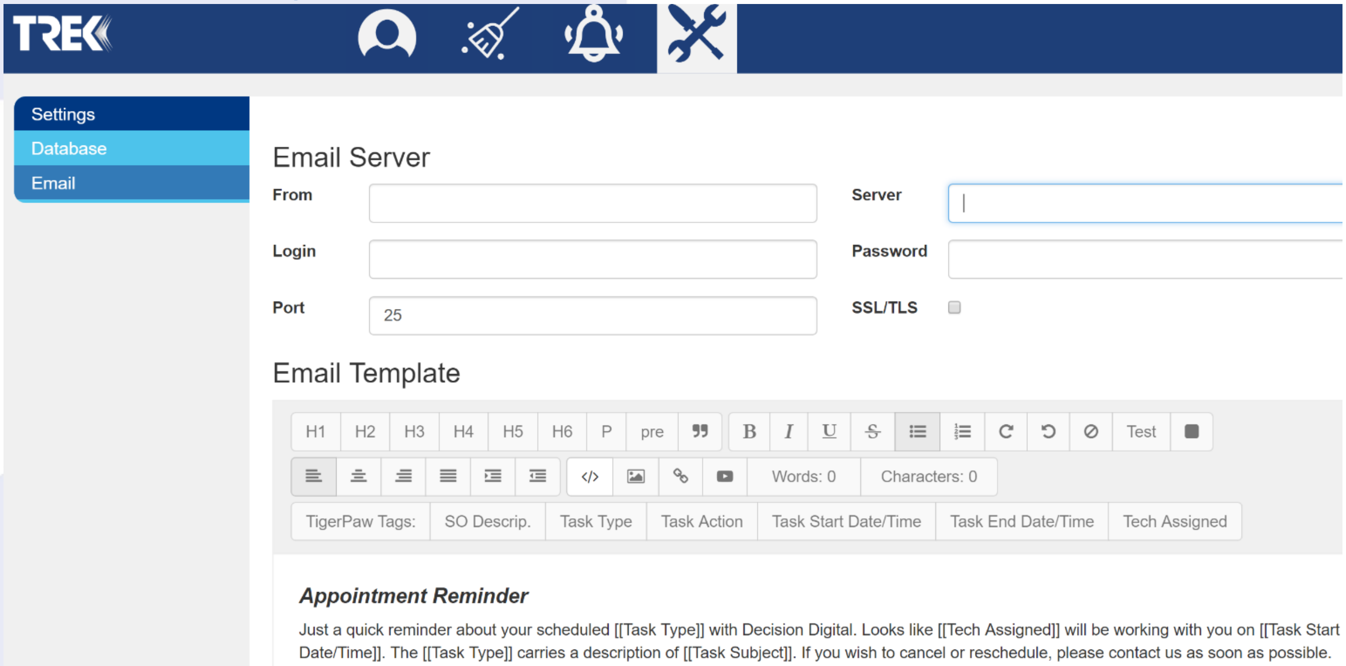
Email Server Settings



The Email Settings allows you to customize the email message being sent via the Reminder Alerts and Calendar Invites (detailed in previous section). The full featured compose toolbars and token set allows you to embed additional task information directly into your custom emails.

From: Address that will appear as the sender for outbound emails

Server: the fully qualified server name for your email server

Login: If your server requires SMTP authentication, enter the account username here

Password: The password that matches the username for SMTP authentication account

Port: The port number used by your mail server (eg 25, 465, 589, 993)

SSL/TLS: If your server requires these protocols, enable this checkbox

Use the embedded tokens to dynamically add task specific information such as date, time, task type and the tech assigned.

A Rick Tip

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Using Email Template

1. Click the Email Settings tab
2. Create your custom email template
3. Click the Test Email Settings button to check your email server settings
4. Click the Save Settings to save your settings

Technical Support

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