Welcome to the Dell TechDirect Training Module. Let’s jump right in.
At the end of this module, you will be able to:

- Understand the working knowledge of the Dell TechDirect portal
- Explain the difference between an Administrator role and a Technicians role
- Understand the features and functionality of this tool

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Introduction to the Dell TechDirect
Dell’s TechDirect was developed and designed for one purpose: to enhance the technician experience. The foundation of this redesign was to create a scalable self-service technician focused platform. This tool was designed for simplicity. TechDirect is simple, clean and has an intuitive user interface. This portal has consolidated both the DOSD parts dispatch and the Online Incident Management case creation into one user interface.

Let’s take a quick look at some of the enhancements added to this portal.
Dell TechDirect has added some enhancements from DOSD. "Some of the features that have been added include a Dell branded look and feel, a message center and a dashboard." Now let’s take a look at some added enhancements from the OLIM tool.
New features added to TechDirect are the ability to send dispatches from not only people representing Dell, but customers as well. "Now techs will have account-level profiles and the ability to send and receive messages. The product lines have been expanded to include Client and Enterprise, and now can be supported with not only ProSupport, but the basic (core) warranties as well. "Please take a minute to look at this comparison chart to get a better understanding of the differences between TechDirect and OLIM."
Dell has two primary user roles defined in the tool: technicians and administrators.

- Customer Technicians who will be troubleshooting in search of a resolution and/or seeking to perform their own dispatch of required parts.
- Administrators who will be managing some number of technicians as well as performing duties such as billing and supervision of workflow.
Let’s take some time to learn more about the features and the components of the Dashboard within TechDirect.
It is important to note how many languages this portal supports. Dell TechDirect supports English, Portuguese, Spanish, French, Italian, German, Arabic, Russian, Japanese, Korean, and both simplified and traditional Chinese. Let's take a closer look at how to set your language preferences.
You can change your language preference by clicking the language text in the upper left-hand corner of the user interface. Once clicked, you should see a drop-down of the supported languages. Click on your desired language to continue.
Now, let's take a closer look at the Dell TechDirect Dashboard. It's important to understand how the user can customize the graphical user interface to meet their specific needs.
When a user is in the Dell TechDirect Dashboard, they will be able to customize the interface to meet their specific needs. The first thing to point out is that you will be able to remove or add modules. You can do this by simply clicking on the "Add Modules" button. When this is done, a modal window will appear. Check or uncheck the desired modules and click on the "Update Button". It is also important to note that you can move the Dashboard modules around in the user interface. If you wish to reset the modules to their default configuration, you can either click the "Reset to Default" button in the Dashboard or the "Select Modules to Add" / "Remove" modal.
The “My Messages” module is an important tool allowing the user to receive important messages and alerts specifically related to their account. These messages can be configured to be forwarded to a user-defined email address.
When a user is in the Dell TechDirect Dashboard, they will be able to see important messages and alerts in the "My Messages" Module. As you can see, this module is locked and will not be able to be removed from the interface. The "My Messages" module will let you sort your messages alphabetically or by date. If you would like to do more than just sort your messages, click on the "Detailed View" icon and it will take you to the "My Messages" page. Here you will have expanded sort functions as well as the ability to delete selected messages. You will also see the sender's email address and have the ability to update the "Timestamp".
The "My Account" module states important user information like the user's email and role in the system. By clicking on the "My Account" link, you will be taken to the "My Account" page, where you can update the user's information.
When a user is in the Dell TechDirect Dashboard, they will be able to see important information about their profile in the "Account Summary" module. The user's role is defined as either a technician or an administrator. If the role is of an administrator, it will state how many technicians are associated with that account. The user's email associated with the account is also displayed. The user's password expiration date will also be displayed in this module. In order to make changes to the user's account information, the user must click on the "My Account" link in the lower right corner of the module. It is here, where the user can update personal, address and account information. The user can also update his or her email address and password.
The "Popular Links" module offers up invaluable links to tools and resources that help you get your job done.
The "Reports" module is another resource within Dell TechDirect that takes you to specific reporting tools.
Let's take some time to learn more about the features and components of the My Account page within TechDirect.
The first thing you should notice about the "My Account" page is the ability to edit the user's information. In order to change any current saved information, the user can click on any of the "Edit" links within the individual modules. For this example we are going to click on the "Personal Information" edit link. When clicked, a pop-up modal will appear. Make any necessary changes and click on the "Save" button to save your changes or click the "Close" button to exit the modal.

From the "My Account" page you can also manage technicians, customers, branches, addresses, incoming and outgoing payments, documents and certifications.
Dell’s TechDirect Administrators may define technicians with different capabilities to meet the need of their company. This information can be added here at the Manage Technicians page. It is also important to point out that contact information details and language preferences are required to identify these technicians in the tool.

Technicians may also be aligned with branch locations. The technician’s role can be configured to closely match the capability of the individual technician.

You can also see certifications associated with the users’ account on this page.

Let’s explore the user interface in greater detail.
When on the "Manage Technicians" page, you will have the ability to add technicians to an administrators' account or edit an existing technicians' account. To add a technician, click the "Add Technician" button. When clicked, you are taken to the "Add/Edit Technician" page. Please fill in the technician's details, including a valid email address, first and last name, work phone, and language preference. By choosing "yes" from the drop-down menu under address book, this will enable the technician to add, edit or delete their own address. Next, you will select the role or roles associated with the technician and their "Status" within the tool. To continue, click next. You will be taken to the "User Group (Branch) Information" step. Please select a home branch from the drop-down menu. Each technician must be assigned to a "Home Branch." You can add additional branches if you would like. When you are finished, click next. At this step, please review the information and click "Submit" to complete this process. Click the "Close" button to be returned to the main page.
As a Third-party Maintainer, we’ll need contact information for each of the customers supported. You will add these customers on the Manage Customer page. On this page, you not only have the ability to add customers, but you can edit existing customer information.

It is important to note, that you must enter at least one customer to be an active Third-party Maintainer.

Let’s explore the user interface in greater detail.
When on the “Manage Customers” page, you will have the ability to add customers or edit an existing customer’s account. You also have various sorting tools to organize your customers. In the interface, you can sort by company name, service tag, Dell customer number, status, or anniversary date. There is also a “Search Table” field for searching and the ability to change how many customers can be seen.

To add a customer, click the “Add Customer” button. This will take you to the “Add/Edit Customer” page. It is important to note that, clicking on the “Edit” link for a specific customer will take you to the “Add/Edit Customer” page as well. The first step to adding a customer is filling in the customer details. After filling out this information, the next step is filling in the primary contact information. When finished, please click the “Next” button. Please review the customer information and click the “Submit” button to complete the process. You can now either add another customer or click the “Close” button to return to the main page.
You will need to manage branches on the “Manage Branches” page. On this page, you not only have the ability to add branches, but you can edit existing branch information.

It is important to note, that each Technician must be assigned to one Branch. This will be their Home Branch.

Let’s explore the user interface in greater detail.
When on the "Manage Branches" page, you will have the ability to add branches or edit an existing branch data. You also have various sorting tools to organize your branches. In the interface, you can sort by branch name, branch address, or branch phone number. There is also a "Search Table" field for searching and the ability to change how many customers can be populated.

To add a branch, click the "Add Branch" button. This will take you to the "Add Branch" pop-up modal. The first step to adding a branch is filling in the branch details. After filling out this information, you would click the "Save" button to finish the process.

Follow this same process when editing an existing branch location.
The "Manage Address Book" page will help the user add and edit addresses. Let's explore the user interface in greater detail.
When on the "Manage Address Book" page, you will have the ability to add addresses or edit existing address data. You also have various sorting tools to organize and search already saved addresses. In the interface, you can sort by address name or identifier, by address or branch name. There is also a "Search Table" field for searching, and this page has the ability to change how many addresses can be populated.

To add an address, click the "Add Address" button. This will take you to the "Add Address" pop-up modal. The first step to adding a branch is filling in the address details. Under Permissions, you can either check "Account Address" or "Personal Address". After filling out this information, you would click the "Save" button to finish the process.

Follow this same process when editing an existing branch location.
You can track incoming and outgoing payments, as well as the payment history, on the "Payments" page.

Let's explore the user interface in greater detail.
On the "Payment" page, you can see all payments associated with your account. The incoming payments tab is set to default and your remittance payments can be seen when you enter this page. You can sort these payments by Invoice, Status Description, date and total payment. It is important to note that invoices for a given month are created on the last business day of that month and that the total amount includes the work order total cost along with the adjustment total and the tax total.

To view outgoing payments please click on the "Money Out" tab. You can sort these enrollment and renewal payments to dell by the associated payment code, by date, by status, by total fee, currency, description, PO number and Dell order number.

You can also search for payments on both tabs, "Money In" or "Money Out." To view the payment history click the "View Payment History" link. Here, you can view your payment history by time duration or filter by Payment In – Remittance and Payment Out Enrollment. There is functionality built in allowing you to export your payment history to an Excel spreadsheet.
You can track and view your associated documents on the "Documents" page. Let's explore the user interface in greater detail.
On the “Documents” page, you will see all documents associated with your account. Here you sort your documents or click on the document to view it. You also have the option of searching the table by clicking in the “Search Table” form.
Let's take some time to learn more about the features and components of the "My Services" page within TechDirect.
Here, on the "My Services" page, customer technicians can dispatch parts on their own and for additional fees, the customer can receive remittance payments for their labor. Customer technicians also have the ability to submit cases to Dell Tech Support online with troubleshooting information. There are two major sections under the "My Services" page; Dispatch and Tech Support.

Let's explore these features in more detail.
Welcome to the Dell TechDirect Dispatch Summary page. This is going to be the main landing page when reviewing or sending out dispatches. The main table on this page will show all active dispatches associated with the user’s account.

Let’s explore the user interface in more detail.
Here, on the “Dispatch Summary” page, customer technicians can see all of their active dispatches in the main table. You may search for specific tag information by clicking on the “Search Table” form or search by work order code, status, serial number, customer name, description, timestamp or dispatch number by clicking on the drop-down form. You can also sort dispatches by clicking the drop-down form below the “Column Preferences” link. You will also have the ability to change your column preferences by clicking on the “Column Preferences” link. Change your preferences by either checking or unchecking on the specific table column feature and reorder them. You will finish this step by either clicking the “Save” button or clicking the “Reset” button. You can also export all associated dispatches by clicking on the “Export” Button.
The "Dell TechDirect Dispatch Summary" page will also let you view the dispatch summary and create a new dispatch.

Let’s look at these features in more detail.
To view the dispatch history, click on the "View History" link. Click on the "View By" drop down to select your time parameter.

Once back on the "Dispatch Summary" page, click on the "Create Dispatch" button to start the Create Dispatch process. Once clicked, a pop-up modal will appear and you will start to enter the information regarding this dispatch. Please follow the steps. It is important to note that all information is correct.

Let's start by verifying the work order information is correct. Next, you will fill in the dispatch information. This section lets you add unique identifier, such as an internal ticket number. If there is more than one entitlement associated with the service tag you entered, you will be able to add additional information to your dispatch. Next fill in the troubleshooting information. Please include both the symptom(s) and all troubleshooting performed to help identify the failed component and add any supported documents if needed by clicking on the "Add Attachment" link. The next step in this process is to input the customer's contact information and shipping address. When finished, click next. In the available parts step please select the right part and quantity to be shipped. Please review all dispatch information and click the "Submit Request" button to continue in the process. If you need to edit any of the data, you can do it here.
The "TechDirect" "Tech Support Summary" page provides a table of your active Tech Support cases within Dell Technical Support. You will have different options to search for and display information regarding your cases.

Let's look at this page in greater detail.
Here on the "Tech Support Summary" page, you will see a table of all of your associated Tech Support Cases. This table provides your cases defaulted by case number. You can change your sort preferences by clicking on the "Column Preferences" link. To change your sorting preference, you can drag and drop to reorder the columns. If you wanted to sort by title, drag the "Title" modal above the "Case Number" modal and hit save. You can also uncheck columns to hide them.

Remember, there are a maximum of seven columns you can display.

To view a case, please click on the specific case, highlighted in blue. Here you can reference the specific incident information, contact information and service location information. Once finished, click the "OK" button to return to the main Tech Support Summary Page.

Like the "Dispatch Summary" page, you will also have the ability to export your cases out to Excel.
The "Dell TechDirect" Support Summary page will also let you create a new case.

Let's look at creating a new case in more detail.
To begin this process, click on the "Create New Case" button. It is important to note that you must have a service tag ready in order to begin creating a case. Please input the specific service number into the "Service Tag" form and click the "Submit" button.

First, you will select all required incident information from the drop-down menus including incident type, operating system type, and severity level. Here, you can also type the customer's tracking ID.

Next, you will fill out the incident information. It is important that you enter as much detail as possible. This will help the tech support team resolve your issue more quickly. Here you can also attach any related documents that will support this case.

Please click the "Next" button to move on to the "Contact Information" step.

Here you will populate both the contact information and the service location information. The service location refers to the location where the system resides. Click "Next" to proceed to the next step. Please review the information and click the "Submit" button to confirm and complete the process.
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