

# TechDirect for ProDeploy Client Suite

## User's Guide

## Notes, cautions, and warnings

 **NOTE:** A NOTE indicates important information that helps you make better use of your product.

 **CAUTION:** A CAUTION indicates either potential damage to hardware or loss of data and tells you how to avoid the problem.

 **WARNING:** A WARNING indicates a potential for property damage, personal injury, or death.

# Contents

<b>Chapter 1: Overview of ProDeploy Client Suite in TechDirect.....</b>	<b>5</b>
<b>Chapter 2: Accessing ProDeploy Client Suite in TechDirect.....</b>	<b>6</b>
<b>Chapter 3: Managing your customers.....</b>	<b>7</b>
<b>Chapter 4: Accessing your orders.....</b>	<b>8</b>
<b>Chapter 5: Managing your orders.....</b>	<b>9</b>
<b>Chapter 6: Submitting a profile.....</b>	<b>11</b>
<b>Chapter 7: Activities after profile submission.....</b>	<b>13</b>
<b>Chapter 8: Viewing order status details.....</b>	<b>14</b>
Order data.....	14
Build status.....	14
Deploy status.....	14
Build summary.....	15
Deploy summary.....	15
Delivery details.....	15
Installed system details.....	15
Data migration details.....	15
<b>Chapter 9: Overview of ProDeploy Client Suite services.....</b>	<b>16</b>
Build and Deploy categories.....	16
Build service features.....	16
Standard Asset Report.....	16
System BIOS or UEFI.....	16
System asset label.....	16
Ship box label.....	17
Export compliance.....	17
System image.....	17
Provisioning.....	18
Connected configuration.....	18
Online First Article.....	19
Additional services.....	19
Deploy service features.....	19
Deployment address.....	19
Deployment contact.....	19
Site instructions.....	20
Work instructions.....	20
Data migration.....	20

Installation packaging removal.....	20
Onsite application installation.....	20
Additional services.....	20
<b>Chapter 10: Managing files and reports.....</b>	<b>22</b>
<b>Chapter 11: Adding users and resetting passwords.....</b>	<b>23</b>
Add TechDirect users.....	23
Reset passwords.....	23
<b>Chapter 12: Getting support.....</b>	<b>24</b>
Contact Dell.....	24
Post deployment 30-days support for ProDeploy Plus purchases.....	24
Contact Dell by phone.....	24
Submit a service request.....	24
<b>Appendix A: ProDeploy Client Suite features.....</b>	<b>25</b>

# Overview of ProDeploy Client Suite in TechDirect

Dell's ProDeploy Client Suite offers a range of services that help you deploy PCs with greater speed and less effort. A key feature of this offer is TechDirect, a self-service portal where you can:

- Specify how you want your systems to be configured in the factory and deployed onsite.
- Track the status of your orders anywhere in the order process, from shipment to onsite installation.
- Reuse saved service details, so your next orders start faster.

The following sections of this document describe how to access TechDirect, provide your service requirements, and more. You will find useful information whether you are a customer or a Dell partner.

**Related topic:** [ProDeploy Client Suite features](#)

# Accessing ProDeploy Client Suite in TechDirect

## Option 1: Self-register in TechDirect

1. Go to <https://www.techdirect.dell.com>, and select the link for **ProDeploy Client Suite**.
2. On the **ProDeploy Client Suite** learning page, click **GET STARTED** to open a registration form and enter your contact information.
3.
  - If you are not a Dell partner, leave the default answer of **No** in the **Dell Technologies Partner** field. After you submit the form, the **My orders** page is displayed where you can create sample orders and get the *try before you buy* experience. Also, an email is sent to your registered email address with a link to set a password for your TechDirect account. After you set the password, you are prompted to complete additional registration information to enable access to all the features in TechDirect.
  - If you are a Dell partner, select **Yes** in the **Dell Technologies Partner** field to ensure that your account is given partner-specific features such as an option to add end-customers. After you submit the registration form, an email is sent to your registered email address with a link to set a password for your TechDirect account. After you set the password, the **ProDeploy Client Suite** home page is displayed, and you can start creating end-customer relationships. For more information, see [Managing your customers](#).

## Option 2: Place ProDeploy Client Suite orders

Alternatively, you can place ProDeploy Client Suite orders first. After your orders are placed, Dell automatically sends you an email containing a link directing you to TechDirect.

- If the email address on your orders is not part of an existing TechDirect account, Dell creates an account for you. In this case, the link in the notification email redirects you to a form to create a password for your new account. After you sign in, accept the site terms of use, and then select the **ProDeploy Client Suite** link. For security reasons, the link in the email expires after 24 hours. If the link expires, follow the [password resetting process](#) to complete registration.
- If the email address on your orders is part of an existing TechDirect account, the link redirects you to the **TechDirect** home page. Sign in with your TechDirect user credentials. From the **Dashboard**, select **Orders and Deployments**, and then select the **ProDeploy Client Suite** link.

## Option 3: Dell Partner-initiated accounts

If you are purchasing through a Dell partner, it is recommended that you wait for your partner to set up an account for you. After your account is set up, Dell sends an email with a link that redirects you to TechDirect. At that point, log in or finish your account setup as described in option 2.

After you are logged into TechDirect, on the **ProDeploy Client Suite** home page, select your partner's name from the **Select account** list. You can then view the orders that are placed with this partner. Within the **Select account** list, select **My Orders** to view the orders that you placed directly with Dell.

**Related topic:** If others in your company need access to TechDirect or if they are going to be email contacts on future orders for your account, you may add them as users in TechDirect. See [Add TechDirect users](#).

# Managing your customers

If you are a Dell Technologies partner, you can set up an end customer and assign orders to your customers.

## Set up an end customer before placing orders

1. From the **ProDeploy Client Suite** home page in TechDirect, on the **Orders** tab, expand the **Select account** list.
2. Select **New Customer**.
3. Click **START** on the **Create a sample order** card.

A series of forms is displayed where you can provide your customer details such as customer contact, company information, and access level. Follow the prompts to complete this information. The access level definitions are:

- **No Access:** Select this option if you want to complete ProDeploy Client Suite activities in TechDirect for your customer's orders, and do not want your customer to have access to the orders in TechDirect.
- **Read-Only:** Select this option if you want to complete ProDeploy Client Suite activities in TechDirect for your customer's orders, and want your customer to be able to view their orders.
- **Read/Write (Full):** Select this option if you want your customer to complete ProDeploy Client Suite activities in TechDirect.

After you have completed this process, select your customer by name from the **Select account** list to manage their service requirements. If your customer is set for **Read/Write** access or **Read-Only** access, an email is sent to the primary contact with a link to access TechDirect. For more information, see [Accessing ProDeploy Client Suite in TechDirect](#).

## Assign orders to your customers

As a Dell partner, if you have placed orders for your customer, these orders remain on hold in your TechDirect account until you assign them to your customer.

1. Go to the **ProDeploy Client Suite** home page in TechDirect.
2. On the **Unassigned orders** tab, expand the **Select account** list.
3. Select **New Customer** or select your customer by name from the list, if you have already created a customer relationship.
4. Click **Manage unassigned orders**. Any unassigned orders are displayed.
5. Select the orders that you want to assign, and then click **NEXT**.

Follow the prompts to complete the order assignment. In the case of a new customer, you are taken through a series of screens to enter the end customer information as described in the [Set up an end customer before placing orders](#) topic. Repeat these steps to assign orders to different end customers as necessary.

As order assignments are complete, if the end customer is set for **Read/Write** access or **Read-Only** access, an email is sent to the primary contact with a link to access TechDirect. For more information, see [Accessing ProDeploy Client Suite in TechDirect](#).

## Accessing your orders

TechDirect enables you to provide service requirements and track the status of your ProDeploy Client Suite orders. To access these features, go to the **ProDeploy Client Suite** home page. See [Accessing ProDeploy Client Suite in TechDirect](#).

First, you may need to select a relationship.

- If you have placed all your orders directly with Dell or have not yet placed any orders, you do not need to select a relationship. Go to the next step.
- If you are a Dell partner, and want to work on your customer's orders, select your customer's name from the **Select account** list. If you want to work on your own orders, select **My Orders** from the **Select account** list. If you have not set up a customer in TechDirect or do not find any orders that are associated with a customer, see [Managing your customers](#).
- If you have placed your orders through a Dell partner, select your partner's name from the **Select account** list to work on the orders that you have placed through them. If you want to work on orders that you have placed with Dell directly, select **My Orders** from the **Select account** list. If you do not see your partner's name, inquire with your partner about establishing a relationship in TechDirect. You and your partner may need to discuss this process with your Dell Engagement Manager.

At this point, select one of following options to get started.

### Manage orders

Click **START** on the **Manage orders** card. The **My orders** page is displayed. You can view your orders and start or resume service selections. See [Managing your orders](#) for more details.

If you have new orders, a **GET STARTED** link is displayed. Select this link to directly access the service selection process. See [Submitting a profile](#) for more details.

### Create a sample order

A sample order allows you to learn about ProDeploy Client features and save service details before placing real orders. You can reuse the saved details with real orders to simplify the service setup process. Saving your requirements in this way is called pre-order configuration, or preconfigure for short.

Perform the following steps to create a sample order. If your goal is learning only, the sample order data need not be accurate. If your goal is to reuse your service selections with real orders, you should enter data that reflects your planned orders; for example, select the actual system model that you intend to order.

1. On the **ProDeploy Client Suite** page, click **START** on the **Create a sample order** card.  
The **Create Sample Orders** page is displayed.
2. Select a ProDeploy Client Suite service level, and then click **Continue**.
3. Select a country/region, and then click **Continue**.
4. Select a product family, model, and quantity of systems that you plan to order, and then click **Continue**.
  - To add more systems, click the **+Add another system** option.
  - To delete a system, click the delete icon beside that entry.
5. Select desired add-ons.
6. Click **Create**.  
The **My orders** page displays the sample order.
7. Click the **+Add sample order** option to create additional orders, and repeat steps 2, 3, 4, 5, and 6.

On the **My orders** page, start or resume service selections. See [Managing your orders](#).



# Managing your orders

On the **My orders** page (see [Accessing your orders](#)), the following features enable you to view your ProDeploy Client Suite orders, select services, and track status.

## New orders

The **New orders** card displays the number of orders for which no services are selected. If you have any such order, click **Start adding services** to begin service selections. See [Submitting a profile](#) for more details.

If your orders have different service features, for example, if you have both ProDeploy and ProDeploy Plus orders, then after you click **Start adding services**, an **Order groups** page is displayed with a card for each group of orders. Click a card to select services for those orders. Click **View sample orders** to work on any sample orders you may have created.

## Orders need build details

The **Orders need build details** card displays the number of orders that need Build service inputs and have not been submitted to Dell. If you have such orders, click **Resume** to continue service selections. See [Submitting a profile](#) for more details.

If your orders have different Build profiles, a **Build profiles** page is displayed with a card for each profile after you click **Resume**. Click a card to select services for those orders. Click **View sample orders** to work on any sample orders you may have created.

## Orders need deploy details

The **Orders need deploy details** card displays the number of orders that need Deploy service inputs and have not been submitted to Dell. If you have such orders, click **Resume** to continue service selections. See [Submitting a profile](#) for more details.

If your orders have different service features, Ship To addresses, or Deploy profiles, a **Deploy profiles** page is displayed with a card for each unique group of orders, after you click **Resume**. Click a card to select services for those orders. Click **View sample orders** to work on any sample orders you may have created.

## Build tab

The **Build** tab displays all your ProDeploy Client orders including any sample orders. Key data is listed for each order, for example, order number, model, service level, Ship To address, quantity, and Build status. You can distinguish sample orders by the word **Sample** in the **Ship To** field.

The Build status value represents your order's current status with respect to [System Build service](#). The Build status changes over time as your order progresses. Select the order number hyperlink of any order to access a consolidated view of the order's status details across all services and downstream activity. See [Viewing order status details](#) for a description of each possible Build status.

## Deploy tab

The **Deploy** tab displays all your orders with ProDeploy or ProDeploy Plus service level including any sample orders. Key data is listed for each order, for example, order number, model, service level, shipping address, deploy address, quantity, and deploy status. You can distinguish sample orders by the word **Sample** in the **Ship To** field.

The Deploy status value represents your order's current status with respect to [Onsite Installation service](#). The Deploy status changes over time as your order progresses. Select the order number hyperlink of any order to access a consolidated view of the order's status details across all services and downstream activity. See [Viewing order status details](#) for a description of each possible Deploy status.

## View by Real orders

The **view by Real orders** option filters your order list to show only real ProDeploy Client orders placed with Dell Sales. If you have any real orders, this view is selected by default.

## View by Sample orders

The **view by Sample orders** option filters the order list to show only sample orders created in TechDirect. If your account only contains sample orders, this view is selected by default.

Within this view, you can create a new sample order by selecting **+Add sample order**. See [Create a sample order](#) for more details. You can also remove unneeded sample orders from your account by selecting the checkbox next to the orders you want to archive, then selecting **Archive**; when prompted, select **Archive** again to confirm. Do not worry about losing your work. Build profiles submitted with archived samples orders remain available for reuse.

## Search

If you are looking for a particular order and you have many orders, the **Search** feature helps you to search by order number or a keyword. Also, the order table has features to sort and search within a column, to show more orders on the current page, and to go to additional order pages within the table.

## Options

Select the **Options** menu to access secondary features. Secondary features are **Files** and **Reports**. For more information, see [Managing files and reports](#).

# Submitting a profile

Your service requirements are collected in a profile, a feature for organizing groups of related requirements. Profiles have two categories reflecting different contexts of your ProDeploy Client Suite services:

- **Build:** Services that are applied to your systems during the factory build process, before shipment.
- **Deploy:** Services performed onsite as part of the system installation process.

## Services selection

1. From the **My orders** page (see [Managing your orders](#)) or **Order details** page (see [Viewing order status details](#)), click **Start** or **Resume** for whichever context you want to address, **Build** or **Deploy**.

 **NOTE:** A Deploy context is only applicable to ProDeploy and ProDeploy Plus orders.

If you have orders with different service features or other unique attributes, you see a page that displays a card for each group of orders with unique features. Click a card to select services for those orders. Click **View sample orders** to work on any sample orders you may have created. See [Managing your orders](#) for more information.

The **Build or Deploy services selection** page is displayed. The card at the top of the page has reference information about your order(s). Available service options are also displayed. For more information about ProDeploy Client suite services, see [Overview of ProDeploy Client Suite services](#).

2. Review the service descriptions, select the services you want, and then click **Next**.

- If you have existing Build profiles from previous orders, you see a drop-down menu by default. Open the menu to pick an existing profile and review its contents, then select **Next** or **Add and continue** to reuse it. If you prefer to create a new profile, disable the **Use the same details as a previous order** toggle.
- If you have multiple orders, TechDirect groups them for your convenience, so you can apply the same selections to all at once. In such case, a **Manage orders** option is displayed in the order card near the top of the page. If you want some orders to have different selections, you can remove them from the current group. For example, for Build services, you might want a subset of the orders to have a different system image or BIOS settings; for Deploy services, you might want some orders to be installed at different locations. Select **Manage orders** to view your orders, select the ones that you want to remove, then select **Remove** and confirm when prompted. The removed orders become available for a new profile.

## Workspace

1. If any of your service selections require specific details, the **Build or Deploy workspace** page is displayed. It displays one or more forms based on your selections. The **Order** card at the top of the page includes an editable profile name and a progress bar to indicate the percentage of forms completed. Further below, a left-hand pane displays the name of each required form and a right-hand pane displays the currently selected form. For example, if you selected BIOS service, you see a form to select your preferred BIOS settings.

- If you have multiple orders and you want some orders to have different selections, use the **Manage orders** option to remove a subset of orders, so they can get a separate profile. If you want different selections for different units of a single order, discuss options with your Dell Engagement Manager.
- If you want to change your service selections, select the **Build- or Deploy services selection** navigation link in the breadcrumb that appears above the workspace page title.
- If your service selections do not require details, the **Ready to send to Dell** page is displayed.

2. Complete each form. If there are any previously saved forms that match your orders, an option to select an existing form is displayed. You can give new forms a personal name to easily identify them for later reuse. To learn more about these forms, see [Overview of ProDeploy Client Suite services](#). At any time, click the **SAVE** and **SAVE and NEXT** buttons to save progress or advance to the next form. The progress bar in the order card updates dynamically as you complete each form.

A message is displayed after you have completed enough details to submit.

3. Click **REVIEW and SUBMIT** to proceed.

## Ready to send to Dell

1. After you select **REVIEW and SUBMIT** from the **Workspace** page, the **Ready to send to Dell** page is displayed. It displays a summary of your service details and the ProDeploy Client Suite terms and conditions. You also see a link to the [File Transfer Application](#) if you have selected a service that requires a file upload, for example, System imaging.


2. Review your service details and read the terms. If you want to modify your service details, select the **Modify** link that appears above your profile summary. If you are ready to submit, select the **I agree to all the Terms and Conditions** check box, and then click **Submit**.


At this point, Dell begins the process of implementing your services. You must submit a Build profile and a Deploy profile for ProDeploy and ProDeploy Plus orders. For information about downstream activities and how to track your order's progress, see [Activities after profile submission](#) and [Viewing order status details](#).

Alternatively, if you want someone else in your organization to submit on your behalf, use the **Assign signatory** option.

1. Enable the **Assign signatory** toggle.
2. Enter the name and email of the person who will submit the profile for you.
3. Click **REQUEST**, and then click **SEND**.

The target person receives an email with a link to review and submit the selection.

 **NOTE:** The link in the email expires in 96 hours. If the link expires, you can send the request again.


 **NOTE:** Orders in a profile cannot be fulfilled until the external signatory submits the profile.

# Activities after profile submission

**Related topics:** [Viewing order status details](#)

## Provide your system image

If you opted to provide a system image, ensure that you send it using the [File Transfer Application](#) tool that is presented during profile completion. After you submit the build details, you receive an email reminding you to send the system image.

 **NOTE:** Your orders cannot be released for factory build until your image is received.

## Real orders

The following activities occur after submitting your profile for real orders:

For [System Build services](#): Dell validates your requirements, creates fulfillment instructions, and then releases your orders to the factory to enable system build and shipment.

For [Onsite Deploy services](#): Your Dell Engagement Manager contacts you to set up a deployment plan, then schedules the installation.

You can monitor status of downstream activities. From the **My Orders** page, select the **Build** tab or **Deploy** tab and click the order's status label or the order number hyperlink to view order status details. See [Viewing order status details](#).

## Sample orders

After you submit a Build profile for a sample order, a **Request a quote** form is displayed. If your goal is to reuse your sample selections with real orders, complete the form, and then click **REQUEST QUOTE**. Dell uses this information to find the best resource to contact you to discuss next steps.

If you do not want to request a quote, click **CANCEL**. You may have submitted a sample profile simply to learn about the service options and/or the workflow within TechDirect. To request quote for a sample order later, from the **My orders** page, select the order number hyperlink, and then select the **Request quote** option.

# Viewing order status details


To view detailed status information of a particular order:

1. Go to the **ProDeploy Client Suite** home page. See [Accessing ProDeploy Client Suite in TechDirect](#).
2. Click **Manage orders**. The **My orders** page is displayed.
3. Find the order of interest. If you have many orders, you can use the search feature and search by order number or a keyword.
4. Select the order number hyperlink.

The **Order details** page is displayed with the following features depending on the service level of your order.

## Order data

You can see your order number, model, units, service level, PO#, Profile ID, order date, and Ship To address.

 **NOTE:** Your Profile ID, also known as SI or system integration number, can be used when ordering new systems for faster processing.

## Build status

You can see chronological status milestones for your [Build services](#). Your order's current status is highlighted. You may see a link to start or resume service requirements or to view details of the current status. The following tables explain each status.

**Table 1. Build status for real orders**


Status name	Description
<b>Get started</b>	Waiting for you to start creating your system build profile.
<b>Action needed</b>	A build profile has been started, but has not been submitted to Dell.
<b>Signature pending</b>	A request has been sent to your organization to sign your build profile.
<b>In progress</b>	Your build profile has been submitted to Dell and is being processed.
<b>Shipped</b>	Your order has completed the factory build process and has been shipped.
<b>Delivered</b>	Systems on the order have been delivered.

**Table 2. Build status for sample orders**

Status name	Description
<b>Get started</b>	Waiting for you to start creating your system build profile for a sample order.
<b>Action needed</b>	A build profile for your sample order has been started, but has not been submitted.
<b>Signature pending</b>	A request has been sent to your organization to sign your build profile.
<b>Inputs complete</b>	The build profile for your sample order is complete.
<b>Quote requested</b>	A quote has been requested for your sample order.

## Deploy status

You can see chronological status milestones for your [Deploy services](#). Your order's current status is highlighted. You may see a link to start or resume service requirements or to view details of the current status. The following tables explain each status.

 **NOTE:** Deploy status is only shown for orders with ProDeploy and ProDeploy Plus service levels.

**Table 3. Deploy status for real orders**

Status name	Description
<b>Get started</b>	Waiting for you to start creating your system deploy profile.
<b>Action needed</b>	A deploy profile has been started, but has not been submitted to Dell.
<b>Signature pending</b>	A request has been sent to your organization to sign your deploy profile.
<b>Planning</b>	Your deploy profile has been submitted to Dell and is being processed.
<b>Scheduled</b>	Your onsite deployment has been scheduled.
<b>Complete</b>	Onsite deployment is complete.

**Table 4. Deploy status for sample orders**

Status name	Description
<b>Get started</b>	Waiting for you to start creating your system deploy profile for a sample order.
<b>Action needed</b>	A deploy profile for your sample order has been started, but has not been submitted.
<b>Signature pending</b>	A request has been sent to your organization to sign your deploy profile.
<b>Inputs complete</b>	The deploy profile for your sample order is complete.

## Build summary

Build summary displays your system build service selections. You may see an option to start or resume service selections.

## Deploy summary

Deploy summary displays your onsite installation service selections. You may see an option to start or resume service selections.

## Delivery details

Delivery details display your system's shipping information from the carrier such as carrier name, waybill number, and physical address.

## Installed system details

Installed system details display basic information about systems that were installed by Dell such as Service Tag and model.

## Data migration details

Data migration details display information about data migration activity from your old to new system such as old and new system name, start and end date, and data size.

# Overview of ProDeploy Client Suite services

Learn about the different ProDeploy Client Suite service features you may see in TechDirect.

## Build and Deploy categories

ProDeploy Client Suite features are categorized as follows:

- **Build:** Services that are applied to your systems during the factory build process, before they are shipped.
- **Deploy:** Services that are performed onsite as part of the system installation process.

## Build service features

The following are system build features that you may see in TechDirect depending on your ProDeploy Client Suite service level.

### Standard Asset Report

#### What is Standard Asset Report (SAR)?

A Standard Asset Report contains information about your orders that can help you catalog your inventory such as order number, manufacture date, and processor speed. The ProDeploy service includes a Standard Asset Report, which is emailed to the address provided with the order when your systems ship.

#### Do I need this service?

The choice is yours. Dell does not send reports by default. If you want a report for inventory purposes, you can opt for this service.

### System BIOS or UEFI

#### What is system BIOS?

BIOS (Basic Input/Output System), or for newer systems UEFI (Unified Extensible Firmware Interface), is the firmware that manages the hardware devices on your system. It includes customizable settings such as boot order and screen brightness.

#### Do I need to provide BIOS settings?

Your systems ship with the default firmware settings optimized for each system model. If that meets your needs, skip this service. Alternatively, if your organization requires specific settings, you can provide them using the form.

#### How do I provide BIOS settings?

You do not need to specify every setting, only the ones that are important to you. By default, the form shows settings that are commonly configured. A link to view a complete list of all available settings is also available. Browse the categories or use the search box to find settings that you want to customize.

As you find settings that you want to customize, select the desired values and click **ADD** beside the group of settings. The added settings appear in the **Selected Custom Settings** section. After you have configured the settings that are important to you, you can review them and remove any that you do not want to keep.

### System asset label

#### What is system asset label?

A system asset label is a sticker placed on your Dell system with information to help your company catalog inventory. Label information can include details such as order number, manufacture date, and processor speed.



### Do I need a system asset label?

The choice is yours. Dell does not place labels by default. If you want a label for inventory purposes, opt for this service and complete the form to provide your requirements.

### How do I provide system asset label settings?

If you want a system label, use the form to select from a list of predefined templates or design your own. If you opt to design your own, you are presented with three sections within which you can place your requirements. Use the **Label type** section to select your label size and color, the **Label Content** section to select customizable data fields including a logo option, and the **Label Placement** section to select the label location.

**NOTE:** Standard label placement varies by system, including a top placement on laptops. To configure labels and choose their location, select the **Use an online form** option to create a custom label and specify placement options, and follow the steps.

## Ship box label

### What is ship box label?

A ship box label is a custom sticker placed on your shipping box with system specific information, order specific information, or both, that helps you receive, identify, and track your assets.

### Do I need a ship box label?

The choice is yours. Dell does not place labels by default. If you want a ship box label for inventory purposes, opt for this service, and complete the form to provide your requirements.

**NOTE:** Ship box labels are larger than system asset labels and may be placed at any location on the shipping box.

## Export compliance

**NOTE:** For orders that include Provisioning, System Image or Connected Configuration services, you must complete the export compliance form.

### What is export compliance?

Use the export compliance form to certify that any software installed as part of your ProDeploy Client Suite services complies with the regulations that govern the export of software from one country to another.

### Do I need to provide export certification?

If you have opted to provide your own system image or to use Dell's Connected Configuration services, export certification is required to ensure that the software packages you provide to Dell can be shipped internationally as required by Dell's fulfillment process.

### How do I provide export certification?

Read the standard terms and select one of the following options:

- Select **I agree to the Standard Export Terms** if your software meets the standard terms and you are authorized to agree.
- Select **I prefer to download the Standard Export Terms** if you want an outside resource to review the terms and email your response to Dell. If you select this option, the page displays a link to download a PDF file that contains the Standard export terms and the Dell Trade Compliance email address. You must download the PDF, have an authorized user complete it, and then send the completed form to the designated email address.
- Select **I wish to view the Detailed Export Terms** if your image does not meet the standard terms. In this case, the page displays the Detailed Export Terms. Read the terms to continue. If you agree to the terms, select the **I agree** option. A form is displayed on which you can provide details for each software title in your image that uses elevated encryption.

## System image

**NOTE:** This service is available for ProDeploy and ProDeploy Plus orders, but may be purchased separately and combined with an order that contains basic ProDeploy Client Suite services.

### What is system image?

An operating system image is a file that represents a snapshot of the operating system, applications, and data that you want

installed on your systems in the factory. You can create system images using Dell's ImageAssist software, or any other imaging software available in the market for WIM and ghost images.

### **Do I need to provide a system image?**

Your systems ship with a default operating system and drivers. If that meets your needs, accept the default options. Alternatively, Dell can apply a clean operating system load, also known as a generic image, or can install your own system image during the fulfillment process to reduce the software installation steps during onsite deployment: you need to provide some details about the image and upload the file.

### **How do I provide a new system image?**

When creating a new system image form in TechDirect, you must select the type of image you want to use. A **Help** link is available with explanation of different types of images. Answer the questions on the form.

If you choose to create a Static or Dynamic Dell ImageAssist image, you are provided with an option to download Dell's ImageAssist tool. For information about the operating systems and recommended frameworks that support ImageAssist, see the *ImageAssist Static User's Guide For Single Platform* or the *ImageAssist Dynamic User's Guide For Multiple Platforms* at [Dell.com/ServiceabilityTools](https://Dell.com/ServiceabilityTools).


For Dynamic and SCCM/MDT options, information about the required imaging tools and instructions for creating your image are displayed.

If you have not yet created your image or it was not created as instructed, you should stop working on the form, create the image offline, and then resume your work in TechDirect to complete the form.

After you are ready to send your system image to Dell, use Dell's [File Transfer Application](#).

If you choose to provide your own system image, it must be received and processed before your orders can be released for factory build.

## Provisioning

 **NOTE:** This service is available for ProDeploy and ProDeploy Plus orders, but may be purchased separately and can be combined with an order that contains basic ProDeploy Client Suite services.

### **What is provisioning?**


Software-based services that help automate the tasks to set up a computer device. For example, tasks such as connecting to domains, granting privileges, and software installation.

### **Do I need provisioning?**

If you would like to systematically install applications and system management files on your systems, provisioning is a good option for you.


### **How do I provide provisioning details?**

If you have a supported provisioning solution, Dell can preload your systems management files in the factory to reduce desktide provisioning time. You need to provide a few specifications and upload your provisioning files to Dell. To get started, choose **Dell Provisioning for VMware® Workspace ONE** and complete the required forms.

 **NOTE:** This service requires a Workspace ONE license. If you do not have one, contact your Dell Engagement Manager.

 **NOTE:** Delay in providing your provisioning files impacts your order ship date.

## Connected configuration

 **NOTE:** This service is available for ProDeploy Plus orders only.

### **What is connected configuration?**

Dell's connected configuration service enables you to keep an instance of your Microsoft SCCM or MDT image inside our Dell facilities. You can store and maintain your image through a secure connection and complete configuration tasks traditionally performed when the system is present on your network. These tasks include adding users to Active Directory and domain join. In addition, you can change BIOS settings, partition your hard drive, and add third-party software, so that your systems arrive ready to use out of the box.

### **Do I need this service?**

The choice is yours. If you use SCCM or MDT and would like to remotely configure your Dell systems before they ship, Dell can

work with you to set up a distribution point inside our facilities. A Dell specialist will engage with you to discuss all the steps, including the testing process.

**NOTE:** The setup process may last a few weeks and your orders will not be released until setup is complete.

## Online First Article

**NOTE:** This service may not be available for certain Dell systems.

**NOTE:** If you choose **VMware Workspace ONE** as a provisioning solution, this service is not available.

### What is Online First Article (OFA)?

OFA is a service that enables you to remotely connect to a live system configured with your system image and BIOS settings, so that you can identify and resolve any concerns before your orders ship.

### Do I need this service?

The choice is yours. If you opt for this service, Dell notifies you with login details after your OFA is ready for review.

**NOTE:** This service adds time to the system ship date because Dell must set up the test system and then wait for your audit before releasing your orders to the factory. It is important that you complete your audit in a timely manner to avoid shipping delays.

## Additional services

### What are additional services?

These are services that are not part of ProDeploy Client Suite, but may be purchased separately and combined with ProDeploy Client Suite orders. In some cases, these services may be product-specific.

### Do I need this service?

The choice is yours. We encourage you to discuss any service needs that are not met by ProDeploy Client Suite with your Dell service and sales representatives.

### How do I set up this service?

After aligning your needs with your Dell service and sales representatives, a simple form is made available in your workspace. The form includes a free text box and a file upload option to type or attach your customized requirements.

## Deploy service features

The following are deploy service features that you may see in TechDirect depending on your ProDeploy Client Suite service level.

## Deployment address

### What is deployment address?

The physical location where you want your systems to be set up.

### Do I need to provide a deployment address?

A deployment address is required if you have opted to use onsite deployment services.

Dell ships your systems to the address on the order. You are responsible to ensure that the systems are present at the deployment location.

A separate deploy profile is required for each deployment location.

## Deployment contact

### What is a deployment contact?

The person who should be contacted to coordinate onsite deployment activities at the designated location.

### Do I need to provide a deployment contact?

A deployment contact is required if you have opted to use onsite deployment services.

## Site instructions

### What are site instructions?

Site instructions are the instructions that the onsite technician should know about the deployment site, for example, instructions for parking and building access.

### Do I need to provide site instructions?

Site instructions are required if you have opted to use onsite deployment services to ensure that the onsite technician understands the requirements of the deployment site.

## Work instructions


### What are work instructions?

Work instructions describe what you want the onsite technician to do during system setup. The form includes credentials for accessing your network, a review of the standard instructions, and options to provide any additional steps that you require.

### Do I need to provide work instructions?

Work instructions are required if you have opted to use onsite deployment services to ensure that the onsite technician has the necessary access and understands how you want your systems to be deployed.

## Data migration

 **NOTE:** This service is available for ProDeploy Plus orders only.


### What is data migration?

The onsite technician migrates data and personalized system settings from your legacy systems to your new systems based on your requirements. Dell uses the Dell Migration Tool to migrate data from legacy systems to new systems.

### Do I need this service?

The choice is yours. If you opt to use this service, ensure that your legacy systems are present at the deployment location.

## Installation packaging removal

 **NOTE:** This service is available when purchased as an add-on service with ProDeploy or ProDeploy Plus orders.


### What is installation packaging removal?

The onsite technician moves the system packaging material and cleans up the deployment area.

### Do I need this service?

The choice is yours.

## Onsite application installation

 **NOTE:** This service is available when purchased as an add-on service with ProDeploy or ProDeploy Plus orders.

### What is onsite application installation?

The onsite technician installs up to three software applications as part of your deployment service.

### Do I need this service?

The choice is yours. Ensure that the source software and licenses are present at the deployment location.

## Additional services

### What are additional services?

Services that are not part of ProDeploy Client Suite, but may be purchased separately and combined with ProDeploy Client Suite orders. In some cases, these services may be product-specific.

**Do I need this service?**

The choice is yours. We encourage you to discuss any service needs that are not met by ProDeploy Client Suite with your Dell service and sales representatives.

**How do I setup this service?**

After aligning your needs with your Dell service and sales representatives, a simple form is made available in your workspace. The form includes a free text box and a file upload option to type or attach your customized requirements.

## Managing files and reports

Your ProDeploy Client Suite services may need supporting documents and other files.

To manage such files:

1. Go to the **ProDeploy Client Suite** home page in TechDirect. For information about accessing **ProDeploy Client Suite** home page, see [Accessing ProDeploy Client Suite in TechDirect](#).
2. Select **Manage orders**.

The **My orders** page is displayed.

3. From the **Options** menu, select **Files & Reports**.

The **Files and Reports** page is displayed.

On the **Files and Reports** page, you can access the following features:

- **Upload files**—In the **Upload Files Or Reports** section, use the **UPLOAD FILE OR REPORT** option to upload files. You can categorize your file, provide a name and description, and browse to the local file for upload. Keep your browser window open while the file is uploading. A message is displayed when the upload is complete. At that point, click **SAVE PROGRESS** and then click **MARK AS COMPLETE** to finish.
- **View and download files**—In the **Uploaded Files and Reports** section, a list of uploaded files is displayed. Each row displays details such as the name and type of the file. The file name is hyperlinked. Click the link to download the file.
- **Request a Standard Asset Report**—The online Standard Asset Report feature is currently unavailable. It will be reinstated in a future product update. Emailed reports are available if you placed ProDeploy Client Suite orders and opted to receive Standard Asset Reports.

# Adding users and resetting passwords

## Add TechDirect users

You can add other users in your organization such as a procurement team to your TechDirect account so they can use ProDeploy Client Suite, or to automatically associate the orders placed with their email addresses with your account.

1. Log in to your TechDirect account with administrative privileges.
2. Go to **Utilities > Administrator Control Panel**.
3. Select the **Technicians** tab, and click **ADD TECHNICIAN**.
4. Enter the user's information and follow the prompts to review and submit.


An email is sent to the user with login information.

## Reset passwords

If you have forgotten your TechDirect login details, you can reset your password. The password reset process can also be used to complete registration if you have lost the original registration email containing your login details.

1. On the TechDirect home page, click **Sign in**.
2. Click **Forgot your password?**
3. Enter the primary email address registered with your TechDirect account, and then click **Reset Password**.

An email with a link to reset your password is sent to the primary email address. Click the link and follow the prompts to enter the new password and submit.

 **NOTE:** The password reset link expires after 24 hours. If the link expires, repeat the process to get a new password reset email.

## Getting support

### Contact Dell

If you need help at any point during the ProDeploy Client Suite service delivery process, click the **Contact Us** link in the TechDirect portal to email us your questions. In the form, enter your contact details, the relevant subject, and your comments. Your Dell Engagement Manager or a support specialist replies by email or calls you to discuss your concerns.

### Post deployment 30-days support for ProDeploy Plus purchases

ProDeploy Plus service includes 30 days of post-deployment support besides any services that are covered in your system warranty.

### Contact Dell by phone

1. Find the Express Service Code (ESC) for the system.
2. Go to <https://www.dell.com/support> and click the **Contact Us** link to find the appropriate phone number based on your region.
3. When prompted by the automated telephone system, enter your ESC to route the call to the appropriate Technical Support team.

### Submit a service request

1. Log in to <https://www.techdirect.dell.com>.
2. On the **Dashboard** page, from the **Services** menu, select **Technical Support**.
3. Select the **Create New Service Request** link, enter the details, and submit.

The Dell Technical Support team contacts you to resolve the issue.



# ProDeploy Client Suite features

The following tables summarize the features that are available with each ProDeploy Client Suite offer at different stages.

**Table 5. ProDeploy Client Suite features that are available before deployment**

Features	Basic Deployment	ProDeploy	ProDeploy Plus
Single point of contact for project management	✓	✓	✓
TechDirect portal for configuration details and updates	✓	✓	✓
Deployment engineer develops implementation plan	-	✓	✓
Dell Technology Service Manager engagement via ProSupport Plus	-	-	✓

**Table 6. ProDeploy Client Suite features that are available during deployment**

Features	Basic Deployment	ProDeploy	ProDeploy Plus
Connected Configuration	-	-	✓
Provisioning for VMware Workspace ONE	Add-on	✓	✓
Load an image: WIM, Ghost, ISO, or ImageAssist	Add-on	✓	✓
Configure BIOS settings	✓	✓	✓
Apply asset tag and shipping box label	✓	✓	✓
Standard asset reports	✓	✓	✓
Onsite installation of client system available 24x7	-	✓	✓
Project documentation with knowledge transfer	-	✓	✓
User settings and data migrated to new systems	-	-	✓

**Table 7. ProDeploy Client Suite features that are available after deployment**

Features	Basic Deployment	ProDeploy	ProDeploy Plus
30 days post-deployment support	-	-	✓
Training credits for Dell Technologies Education Services	-	-	✓