

**COMODO**  
Creating Trust Online®



# Comodo One

Software Version 3.37

## Service Desk Administrator Guide

Guide Version 4.20.032520

Comodo Security Solutions  
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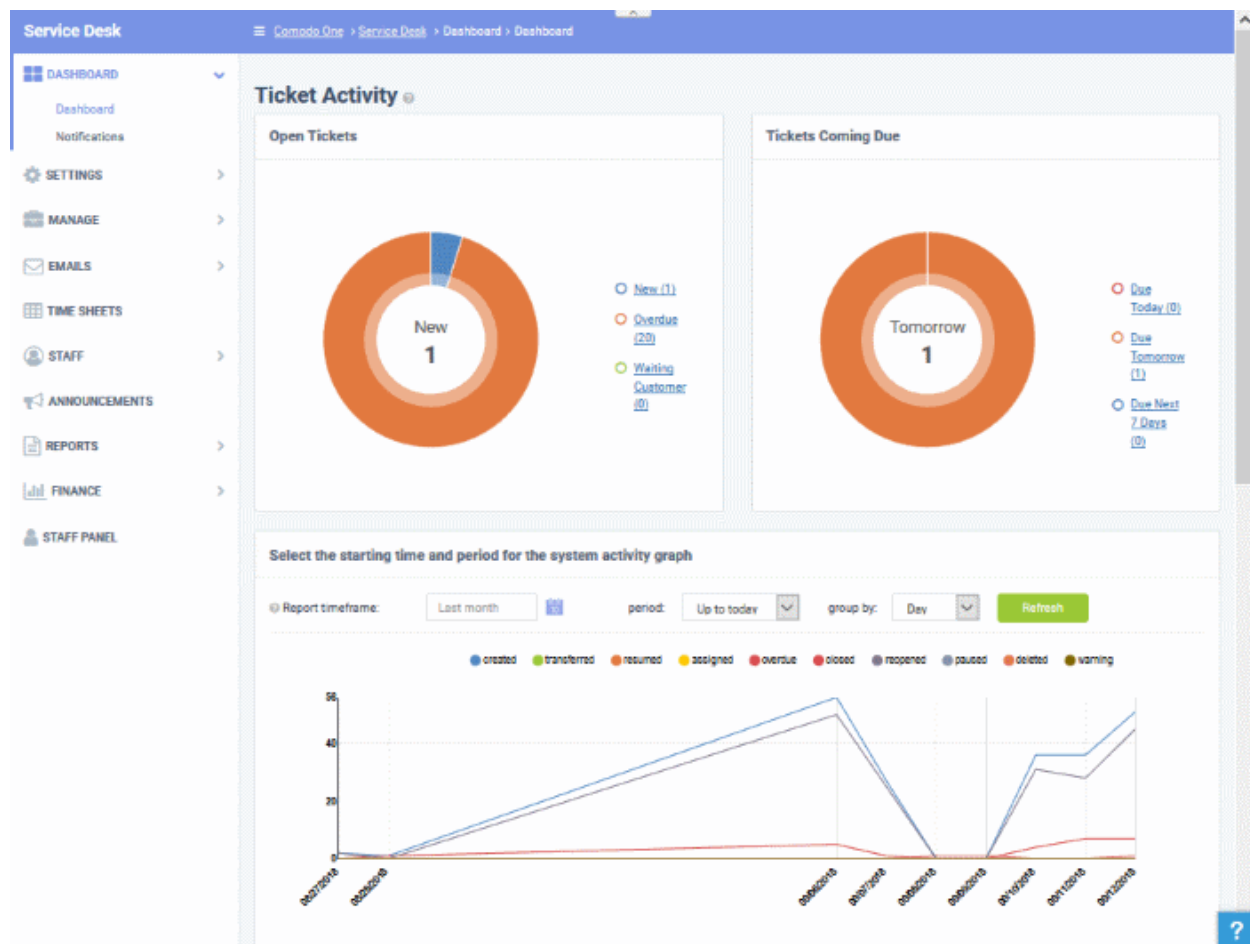
# 1 Introduction to Service Desk Module

Comodo Service Desk is a fully featured ticket management system which allows enterprises to implement strong and effective work-flows for internal and customer-facing support departments. The platform allows admins and support staff to track and respond to tickets raised by users, reassign tickets, generate reports, create projects and more.

The interface has two management consoles - the 'Admin Panel' and the 'Staff Panel'. Admins with appropriate permissions can access both panels.

**Admin Panel** - Allows admins to manage system settings, ticket settings, knowledgebase content, notifications, contracts and more. See [Service Desk Admin Panel](#) for more details.

**Staff Panel** - Allows support personnel and admins to manage tickets, generate reports, add and manage users, add and manage customers, reassign tickets, manage projects and more. See [Service Desk Staff Panel](#) for more details.



## Key Features:

- **Dashboard** - At-a-glance overview of ticket activity over time. The charts and tables on the dashboard allow you to quickly view the overall status of your operation. The dashboard also provides a starting point from which you can deep-dive into more detailed areas.
- **Customer Web Portal** - No account registration is required for users to submit tickets. **Service Desk** allows end-users to view their ticket thread by logging in with their email address and ticket number.
- **Ticket Creation** - Allows users to raise tickets in multiple ways - via email, over phone to an admin and web portal as a guest or as a registered user.
- **Service Level Agreements (SLA)** - Easily define service level agreements and configure ticket due dates

and warnings to match.

- **Ticket Categories** - Ticket Categories are topics which a user selects when submitting a support ticket. The category they select will help your team to identify the area with which they need assistance. Ticket categories can be used in custom forms to route tickets to a specific department.
- **Custom Forms and Fields** - Custom forms allow you to gather the precise data your support department needs from end-users in order to solve an issue. For example, a custom form that requests specific information can be assigned to a particular ticket category on your support home page.
- **Ticket Filters** - Create rules which ensure tickets matching certain criteria are assigned to specific departments/staff or have default actions applied to them. Ticket filter actions include reject ticket, auto-assign, canned response and more.
- **Ticket Assignment and Transfer** - Tickets can easily be reassigned to different departments and admin/staff members as required. Internal logs are created to keep track of ticket transfers.
- **Auto-Responder** - Configure automatic replies sent to user for new ticket creation. Personalize the auto-responders by inserting variables such as first name and more.
- **Knowledgebase** - Post solutions to frequently asked questions (FAQs) and create articles to solve problems. Knowledgebase items can be internal or publicly viewable and can help with ticket resolution times and can reduce the number of tickets submitted. Resolved tickets also can be posted in Knowledgebase and linked with ticket categories.
- **Projects** - Staff members can create Gantt charts to plan and track progress on company projects. Individual tasks and sub-tasks can be assigned completion percentages, time spent and billable time. Service desk tickets can also be bound to any task, meaning any updates in the ticket regarding completion, time-spent and billable time will be dynamically reflected in the parent task.
- **Time Sheets** - Time sheets allow administrators to evaluate the performance of the staff and track their working hours. Staff Members can create and submit time sheets in the 'My Time Sheets' interface of the staff panel. Admins can review and approve time sheets in the admin interface by clicking 'Staff > Time Sheets'.
- **Contracts** - MSP administrators can create service contracts with customers as required. Contracts allow you to define weekly, bi-weekly, monthly or annual subscription fees for services and to offer 'pre-paid hours' that will be covered by the subscription. Admins can also create and apply charging plans with custom rates for different service types.
- **Charging Plans** - Charging plans are templates that define custom hourly rates for specific service types or assets. Charging plans are applied to customer contracts. The rates in the plan are applied after any prepaid hours in the contract have been used up.

There are two types of charging plans:

- **Default Charging Plan** - A global plan that lets you define default hourly rates for different asset types. This rate will be charged if:
  - A customer does not have a contract
  - The contract with a customer does not include a charging plan
- **Custom Charging Plan** - Set different hourly rates for work on certain assets, or for providing support of a particular type (telephone, remote, on-site). The plan can then be assigned to contracts. Each custom charging plan includes:
  - Default hourly rate (mandatory) applied to sessions not covered by a variable rate
  - Variable Rates (optional) for specific types of work. Variable rates are implemented by constructing a conditional rule. Work which meets the criteria will be charged at the rate you set. For example, you might want to charge a different rate for on-site visits, or for work on a particular type of asset, or for work that exceeds a certain length of time.

## Guide Structure

This guide is intended to take you through the configuration and use of C1 - Service Desk and is broken down into the following main sections.

- **The Service Desk Module**

- **Quick Start**
- **Logging-in to the Service Desk Module**
- **Service Desk Admin Panel**
  - **Admin Panel Dashboard**
  - **Service Desk Configuration**
  - **Managing Service Desk Components**
  - **Managing Emails**
  - **Managing Time Sheets**
  - **Managing Staff**
  - **Managing Announcements**
  - **Generating Reports**
  - **Finance**
- **Service Desk Staff Panel**
  - **Staff Panel Dashboard**
  - **Managing Users and Organizations**
  - **Managing Tickets**
  - **Managing Knowledgebase**
  - **Managing Projects**
  - **Managing Staff Time Sheets**
  - **Managing Calendars**
- **Appendix 1 - Field Types in Custom Forms and Custom Lists**
- **Appendix 2 - Ticket Priorities**
- **Appendix 3 - How charging works in Service Desk**

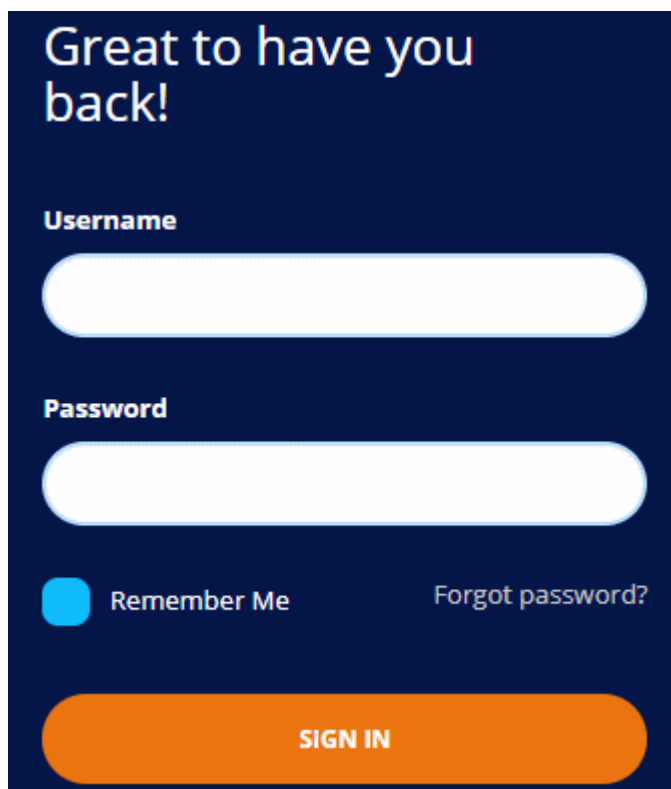
## 1.1 Quick Start

This tutorial explains how Comodo One administrators can configure Service Desk to manage their support ticketing infrastructure. The guide covers basic setup, user groups, staff, ticket routing, ticket categories, custom forms and the knowledge-base.

- **Step 1 - Login to the admin console**
- **Step 2 - Create new user roles (optional)**
- **Step 3 - Create new departments (optional)**
- **Step 4 - Add new support staff**
- **Step 5 - Add ticket categories**
- **Step 6 - Enroll users**
- **Step 7 - Create new customers and assign users to customers**
- **Step 8 - Create service contract for customers**
- **Step 9 - Manage tickets**
- **Step 10 - Manage the Knowledgebase**
- **Step 11 - Access control settings**
- **Step 12 - Configure auto-response emails**
- **Step 13 - View reports**

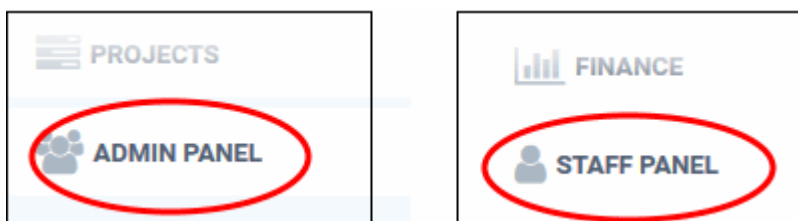
### **Step 1 - Login to the admin console**

To access the Service Desk Module, login to C1 with your user name and password at <https://one.comodo.com/app/login>



- Once logged-in, click 'Licensed Applications' at the top then 'Service Desk'

By default, Service Desk will open at 'Staff Panel' > 'Open Tickets'. You can switch between the staff panel and the admin panel by clicking the link at the bottom of the left menu:



Admins can also setup two-factor authentication of users for additional login security. See [Setting up Two-Factor Login Authentication](#) in the C1 admin guide for help with this.

## Step 2 - Create new user roles (optional)

Click 'Admin Panel' > 'Staff' > 'Roles'

- Roles determine the permissions and access rights that staff members have within the Service Desk interface.
- You can add new roles and change the role of a staff member at any time, so you may skip this step for now if required.
- However, before adding new support staff members, you may wish to create custom roles for them.

Service desk inherits three roles from Comodo One:

- Account Administrator
- Administrator
- Technician
- Staff members added through C1 are imported into Service Desk with the role assigned to them in C1. You

can change this role as required.

- You can assign one of the default 'Administrator' or 'Technician' roles to your new Service Desk staff.
- You can also create custom named roles with different permissions:

## **Create a new role**

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Roles'
- Click 'Add New Role' at the top:



Service Desk > Staff > Roles

## User Roles ?

[+ Add New Role](#) [Delete](#)

<input type="checkbox"/>	ROLE NAME <span>↕</span>	STATUS <span>↕</span>	MEMBERS <span>↕</span>	DEPARTMENTS <span>↕</span>
<input type="checkbox"/>	<a href="#">Account Admin</a>	Active	1	3
<input type="checkbox"/>	<a href="#">Admin</a>	Active	0	3
<input type="checkbox"/>	<a href="#">Technician</a>	Active	1	3
<input type="checkbox"/>	<a href="#">Admin for material approval</a>	Active	1	0

### Add New Role

**Role Information:** Disabled role will limit staff members access. Admins are exempted.

Name: \*

Status:  Active  Disabled ?

**Group Permissions:** Applies to all group members

**Admin Panel** **Staff Panel**

- Dashboard**
  - Dashboard
  - Notifications
- Settings**
  - Company
  - System
  - Tickets
  - Users
  - Emails
  - Access Control Settings
  - Knowledgebase
  - Autoresponder
  - Alerts & Notices
- Manage**
  - Ticket Categories
  - Ticket Filters
  - SLA Plans
  - API Keys
  - Pages
  - Forms
  - Lists
  - Assets
  - Materials
  - Charging
- Emails**
  - Emails
  - Banlist
  - Templates
  - Diagnostic
- Time Sheets**
- Staff**
  - Staff Members
  - Roles
  - Departments
  - Timesheet Templates
  - Material Approval
- Announcements**
- Reports**
- Finance**

Time Log  Cost

- Enter the name for your new role and specify the permissions that should apply to its members in the 'Admin Panel' and 'Staff Panel' tabs.
- The 'Department Access' section allows you choose which departments can be accessed by members with this role.
- Add admin notes if required then click 'Create Role' to add your new role
- The new role is listed in the 'User Role' interface and can be applied to new staff members at any time.

### Step 3 - Create new departments (optional)

Click 'Admin Panel' > 'Staff' > 'Departments'

- Service Desk ships with three default departments:
  - Maintenance
  - Support (default)
  - Sales
- All new staff are initially assigned to the default, 'Support' department. You can change the default department at anytime in 'System Settings & Preferences' ('Admin Panel' > 'Settings' > 'System')
  - Tickets are also assigned to the default department if they are not already routed to a different department. Tickets can be re-routed by a ticket category, by incoming email settings, or by ticket filter settings. See '**Ticket Settings and Options**' for more details.
- You can create additional departments based on your requirements. For example, a department called 'Computer Maintenance' could be populated with staff who have the required skill set to deal with such tickets. **Ticket Categories** and **Ticket Filters** can be configured to route new tickets to staff members in the appropriate department.

#### Create new departments

- Open the 'Admin Panel' (see last link on the left)
- Click 'Staff' > 'Departments' in the left-hand menu
- Click the 'Add New Department' link:

The screenshot shows the 'Add New Department' form in the Comodo One Service Desk. The breadcrumb trail at the top reads 'Comodo One > Service Desk > Staff > Departments'. The form title is 'Department'. Below the title is a section for 'Add New Department'. The form is organized into several sections:

- Department Information:**
  - Name: \* (text input)
  - Type:  Public  Private (Internal) (radio buttons)
  - SLA: (dropdown menu, currently showing '- System Default -')
  - Manager: (dropdown menu, currently showing '- None -')
  - Quote:  Enables or disables to open quote (checkbox)
  - Ticket Assignment:  Restrict ticket assignment to department members (checkbox)
- Outgoing Email Settings:**
  - Outgoing Email: (dropdown menu, currently showing '- System Default -')
  - Template Set: (dropdown menu, currently showing '- System Default -')
- Autoresponder Settings:**
  - New Ticket:  Disable for this Department (checkbox)
  - New Message:  Disable for this Department (checkbox)
  - Auto-Response Email: (dropdown menu, currently showing '- Department Email -')
- Alerts & Notices:**
  - Recipients: (dropdown menu, currently showing 'Department and Group members')
- Role Access:** Check all roles allowed to access this department.
  - Account Admin (1)
  - Admin (1)
  - Technician (2)
  - Technician Org 1 (2)
- Department Signature:** (empty text area)

At the bottom of the form, there are three buttons: 'Create Dept' (highlighted in green), 'Reset', and 'Cancel'.

- Create a label for your new department. This is the minimum required to create a department to which staff can be assigned. You can accept the rest of the default settings and properly configure the department later if you wish.

Select whether the department should be 'Public' or 'Private'.

**'Public'** - Users can submit support tickets to public departments. Users can view the assigned

department in the client portal.

'Private' - Users can submit support tickets to private departments, but cannot view the assigned department in the client portal. The department signature is not shown in email replies.

- **SLA** - Select the Service Level Agreement (SLA) for the tickets routed to this department.
- **Outgoing Email Settings** - Select the outgoing email address and email template set that should be used for this department's replies to users in response to their tickets. See **Email Addresses** and **Email Templates** to read more.
- **Autoresponder Settings** - Configure auto-response emails sent to users whose tickets are assigned to this department. See '**Autoresponder**' for more details.
- **Alerts & Notices** - Select the recipients to whom alerts are sent. See '**Alerts & Notices**' for more details.
- **Role Access** - Select the roles so that the staff with those roles can access the tickets assigned to the department, and to participate in departmental activity.

#### Step 4 - Add new support staff

The next step is to add new staff members. Staff are the personnel who will respond to support tickets from end-users.

- You can add staff in the Comodo One (C1) portal at <https://one.comodo.com/app/login>:
  - Click 'Management' > 'Staff' > '+ New Staff' in the Comodo One interface.
  - Staff created in C1 are available in Service Desk and all other C1 products (Endpoint Manager, Quote Manager etc).
- Staff created in C1 are assigned to the 'default department' in Service Desk. You can assign staff to different departments as required.
- There are two types of roles - Service Desk roles and Comodo One roles.
  - Staff will initially be given the same role in Service Desk as they have in C1.
  - You can change this role in Service Desk at any time.
  - The role you assign to them in Service Desk will not affect their role in C1.
- Click 'Management' > 'Staff' > '+ New Staff' in the Comodo One interface to get started:

The screenshot shows the Comodo One Management interface. At the top, the 'MANAGEMENT' menu is circled in red. Below it, the 'Staff' option in the dropdown menu is also circled in red. A red arrow points from the 'Staff' menu item to the 'Staff' breadcrumb in the navigation bar. The main content area shows the 'Staff' page with a '+ New Staff' button and a search bar. Below the search bar are action buttons for 'Edit', 'Delete', and 'Reset Two-Factor Authentication'. A table lists staff members with columns for Name, Email, Verified status, Role, and Two-Factor Authentication. The table contains five entries: ACME Corp (Admin), Road Runner (Admin), Wile E Coyote (Account Admin), Steam Ship (Technician), and Cheff (Technician). At the bottom of the table, there is a pagination control showing '1 - 5 of 5 items' and navigation buttons for '< Prev', '1', and 'Next >'.

Name	Email	Verified	Role	Two-Factor Authent...
ACME Corp	mmoxford@yahoo.com	✓	Admin	
Road Runner	ftinlizzie@yahoo.com	✓	Admin	
Wile E Coyote	coyoteewile@yahoo.co...	✓	Account Admin	
Steam Ship	ssgalia@yahoo.com	✓	Technician	
Cheff	sumeetdomestic@gm...	✓	Technician	

- Click 'New Staff' at the top.

Comodo One > Management > Staff

Staff + New Staff

[Edit](#) [Delete](#) [Reset Two-Factor Authentication](#)

Name	Email	Verified	Role	Two-Factor
ACME Corp	mmoxford@yahoo.com	✓	Admin	

**New Staff** ✕

**Name \***

**Email \***

**Role \***

Select Role...

Select Role...

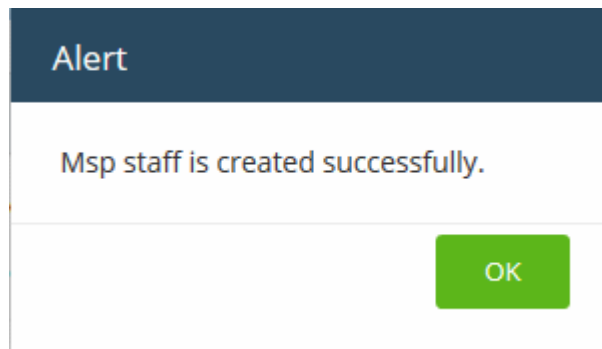
Admin

Technician

SD Role

**Note:** Staff with 'Admin' privileges can only be added by the account administrator.

- **Name** - First and last name admin/staff member.
- **Email** - The email address of the admin/staff member. The verification email for the admin/staff to activate their account will be sent to this email address.
- **Role** - Select the role of the admin/ staff from the drop down. You can always change this later if required.
- Click the 'Save' button.



- Click 'OK'

A confirmation mail is sent to the user containing an account verification link. Users will click the link to verify their account then create a Service Desk password.

### **Change staff role and department**

- Open the 'Admin panel' in Service Desk (see last link on the left)
- Click 'Staff' on the left then choose 'Staff Members'
- Click the name of the staff member.

Comodo One > Service Desk > Staff > Staff Members

## Staff Account

### Update Staff

**User Information**

Username: ssgalia@yahoo.com ⓘ

Staff Name: Steam Ship

Email Address: ssgalia@yahoo.com ⓘ

Role: Technician ▼

Department: System Default – ( Support ) ▼

Phone Number:  Ext

Mobile Number:

**Staff's Signature:** Optional signature used on outgoing emails. ⓘ

*Signature is made available as a choice, on ticket reply.*

The 'Update Staff' screen allows you to edit staff details:

- **Role** - Service Desk role, as inherited from Comodo One.
  - Select a new role if required from the drop-down.
  - Click 'Admin Panel' > 'Staff' > 'Roles' to view and configure roles.
- **Department** - The department to which the staff member belongs.
  - Staff members are initially added to the department set as 'System Default' in Service Desk.
  - Select a new department for the staff member if required.
  - Click 'Admin Panel' > 'Staff' > 'Departments' to view, add and edit departments.
- Click 'Save Changes' to update the staff member details.

### Step 5 - Add ticket categories



Click 'Admin Panel' > 'Manage' > 'Ticket Categories'

- Ticket categories are support topics that are presented to users so they can more easily choose the area with which they need help. For example, your portal might have a menu which says 'Please choose the area we can help you with', and offer categories such as 'Billing', 'Account Changes', 'Technical Support', and so forth.
- You can associate a ticket category with a custom form to gather more targeted information from a user. For example, you may need different information from a user if they need help with an account question than you would if they have a problem with their printer.
- Ticket categories can be used to route tickets to a particular department or staff member if required. You can also create custom auto-responders and thank-you pages based on the ticket category chosen by your user.

## **Add a new ticket category**

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Ticket Categories'
- Click 'Add New Category'

**Ticket Categories** ?

<input type="checkbox"/>	CATEGORY	STAGES	STATUS	TYPE
<input type="checkbox"/>	<a href="#">Access Issue</a>	1	Active	Public
<input type="checkbox"/>	<a href="#">Asset Issue</a>	1	Active	Public

---

**Add New Category**

**Category Information** ?

Category: \*  ?

Status: \*  Active  Disabled ?

Type: \*  Public  Private/Internal ?

Parent Category: \*  ?

---

**New ticket options**

Custom Form: \*  ?

Thank-you Page:  ?

Auto-response: \*  Disable new ticket auto-response ?

---

**Ticket Process Options**

Ticket Stages: \*  Enable ticket stage alerts ?

Stage Transfer Email: \*  ?

---

**Ticket stages**

**Stage 1:**

## Category information

- **Category:** Enter a unique name for the ticket category. This should be a support topic that you want to present to end-users for selection. For example, 'Billing Inquiries', 'Technical Support', 'Printer Issue', etc.
- **Status:** Choose whether the ticket category is active or not. Users and staff can only create tickets in active

help categories. You can change the status at any time in the 'Ticket Categories' screen:

- Click 'Admin Panel' > 'Manage' > 'Ticket Categories'
- Select a category using the check-boxes on the left
- Use the 'Enable/' 'Disable' buttons above the table to active or deactivate the category.
- **Type:** Choose whether the category is visible to end-users or only available to staff.
  - **Public** - The category is published to your customer-facing portal for users to select when they create a ticket. It is also available to staff to choose when they create a ticket.
  - **Private / Internal** - The category is only available to staff. Staff can choose this category when creating a ticket in the staff panel.
- **Parent Category:** (optional). Choose a master category for this topic. Choosing a parent means this category becomes a child, or sub-section, of the parent. For example, 'Hardware Issues' could be your parent category, and 'Printer Issues' your sub-category.

### New ticket options

- **Custom Form:** Choose the form that is presented to users if they pick this support category. Custom forms allow you to collect targeted information from a user about specific problems.

For example, the information you need to collect from a customer about a billing issue is likely to be different to the information you need for a printer issue.

- Click 'Admin Panel' > 'Manage' > 'Forms' to view, edit and create custom forms.
- See **Forms** if you want to learn more about forms
- **Thank-You Page:** Choose the confirmation page that users see after submitting a ticket in this category. The page is shown to guest users only.
  - See **Company profile and support portal settings** for help to customize your support portal pages.
- **Auto-response:** Choose whether to send a confirmation email to the user after they submit a ticket to this category. This setting over-rides global and department-level auto-responder settings.
  - See **Autoresponder Settings** for more.

### Ticket process options

- **Enable ticket stage alerts:** Sends a notification to the user when the ticket moves from one stage to the next. This setting only applies to **multi-stage tickets**.
- **Stage Transfer Email:** Select the template you want to use for the stage transfer email.
  - The item you select here is a template 'set' rather than just an individual mail.
  - You can view and edit the content of the individual mail as follows:
    - Click 'Admin Panel' > 'Emails' > 'Templates'
    - Click on 'Default Email Templates (System Default)'
    - Scroll to the 'End User Templates' section.
    - Click on the 'Ticket Stage Template'
    - Edit the content as required
- See **Email Templates** if you want more help with email templates.

### Ticket stages

- You can setup category tickets to have a single stage, or multiple stages. Multi-stage tickets let you create a 'step-by-step' process to resolve specific types of issue. Each stage defines the department, priority, SLA and assignee of the ticket.
- For example, an issue with your website might first go to the support department for verification then onto the web-dev dept. to deploy the fix. The ticket transitions to the appropriate department/staff member at the end of each stage.

Click the 'Stage' stripe to add/edit the following settings:

- **Stage Name:** Create a label for the ticket stage
- **Department:** The department to which the ticket is assigned at this stage.
- **Priority:** Severity of the ticket at this stage. The options are Low, Normal, High and Critical. Please note that staff attending to the ticket can change the priority. See **Appendix 2 - Ticket Priorities** for general guidance on priority levels.
- **SLA Plan:** The service level agreement which applies to the ticket at this stage.
- **Auto-assign To:** The staff member to whom the ticket should be assigned at this stage. The assignee can re-assign the ticket to another staff member if required.
- **Admin Notes:** Add comments about the category. These are internal and not visible in the client portal.

Click 'Add Stage', to create a new stage for the ticket category

- Click the 'Add Category' button to save the category

The ticket category will be visible in the support portal if it is 'Public' and users can select it at the time of ticket creation. Ticket categories that are 'Private' are visible to admins/staff members only. See '**Ticket Categories**' for more details.

## Step 6 - Enroll users

Click > 'Staff Panel' > 'Users' > 'User Directory'

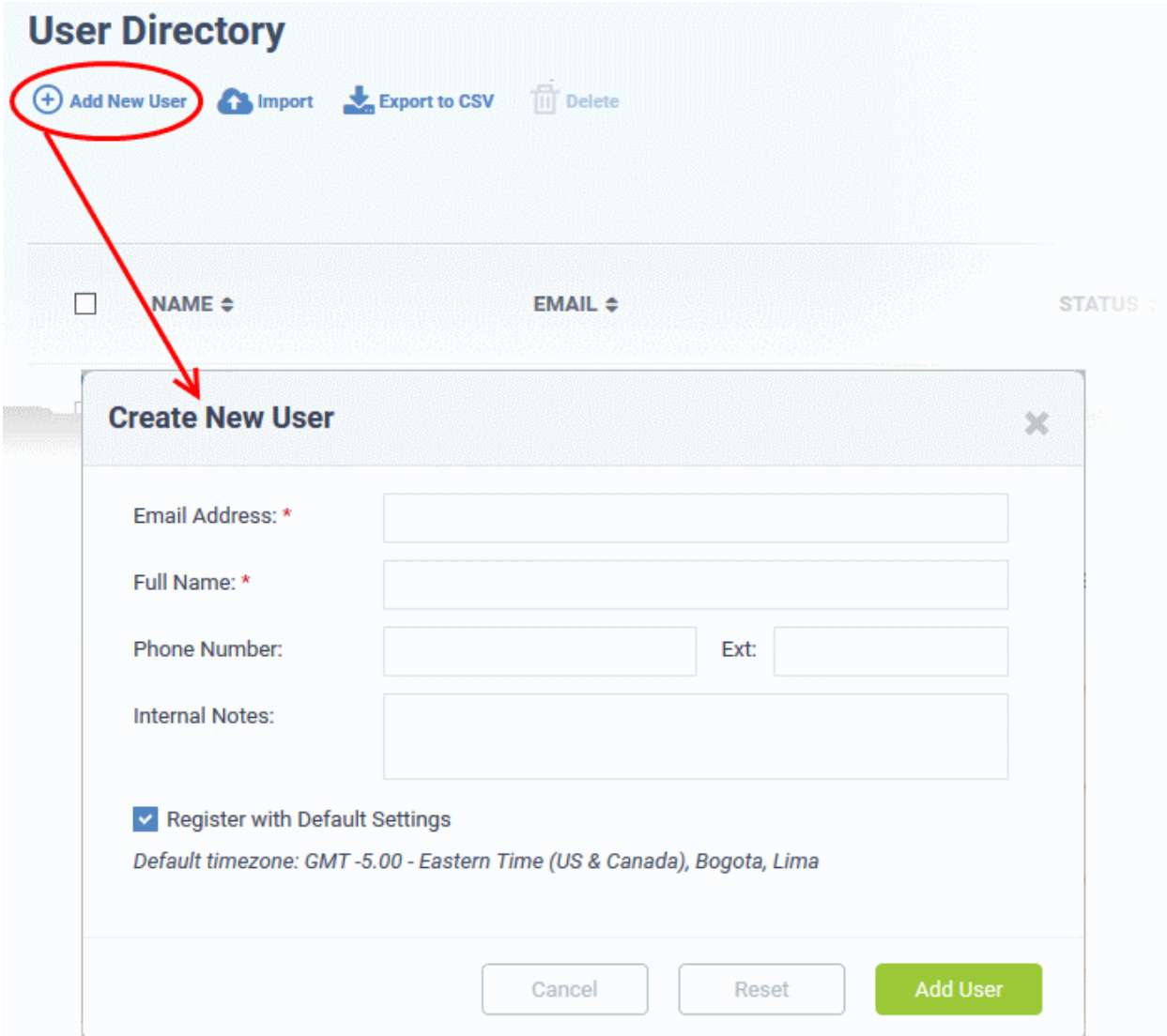
- 'Users' are the individuals who submit tickets to your support team. They can submit tickets via your support center, by email, or direct from an Endpoint Manager device.
- New users can self-enroll then submit tickets at your customer facing client portal
  - Your client portal URL has the format <https://company-name.servicedesk.comodo.com>.
  - Users that self-enroll will be sent an account activation mail
- Admins can also manually enroll new users:
  - Click 'Staff Panel' > 'Users' > 'User Directory' > 'Add New User' OR 'Import'
- All users, regardless of enrollment method, can be added to a customer as explained in **step 7**.
- You can set the default registration method for manually enrolled users in 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** for more details.

### Enroll new users

- You can add users individually or import them from a .csv file.
- Users must be registered in order for them to login Service Desk to create and track tickets.
- You can assign users to customers in the 'Customers' screen ('Staff Panel' > 'Users' > 'Customers').
  - **Add individual users**
  - **Import users from .csv**

### Add individual users

- Open the 'Staff Panel'
- Click 'Users' > 'User Directory'
- Click the 'Add New User' link:



**User Directory**

[+ Add New User](#) [Import](#) [Export to CSV](#) [Delete](#)

**NAME** **EMAIL** **STATUS**

**Create New User**

Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

Register with Default Settings  
*Default timezone: GMT -5.00 - Eastern Time (US & Canada), Bogota, Lima*

The fields available in the form shown above are fetched from the built-in contact information. Contact information can be configured in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See **Forms** for more details.

**Email Address:** Enter the email address of the user. After registration, this email address acts as their username to log into your support portal.

**Full Name:** Enter the user's first and last names.

**Phone Number:** Enter the user's contact number.

**Internal Notes:** Type any remarks you feel you need to add about the user.

**Register with Default Settings:** Enable to enroll the user with the default registration method. Disable to register with a different method.

- You can view/change the default registration method at 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** if you need more help with this.
- It may be 'Register users manually', 'Register users with an activation mail', or 'Register with a temporary password'.

Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

Default User Timezone: GMT 5.30 - India, Sri Lanka

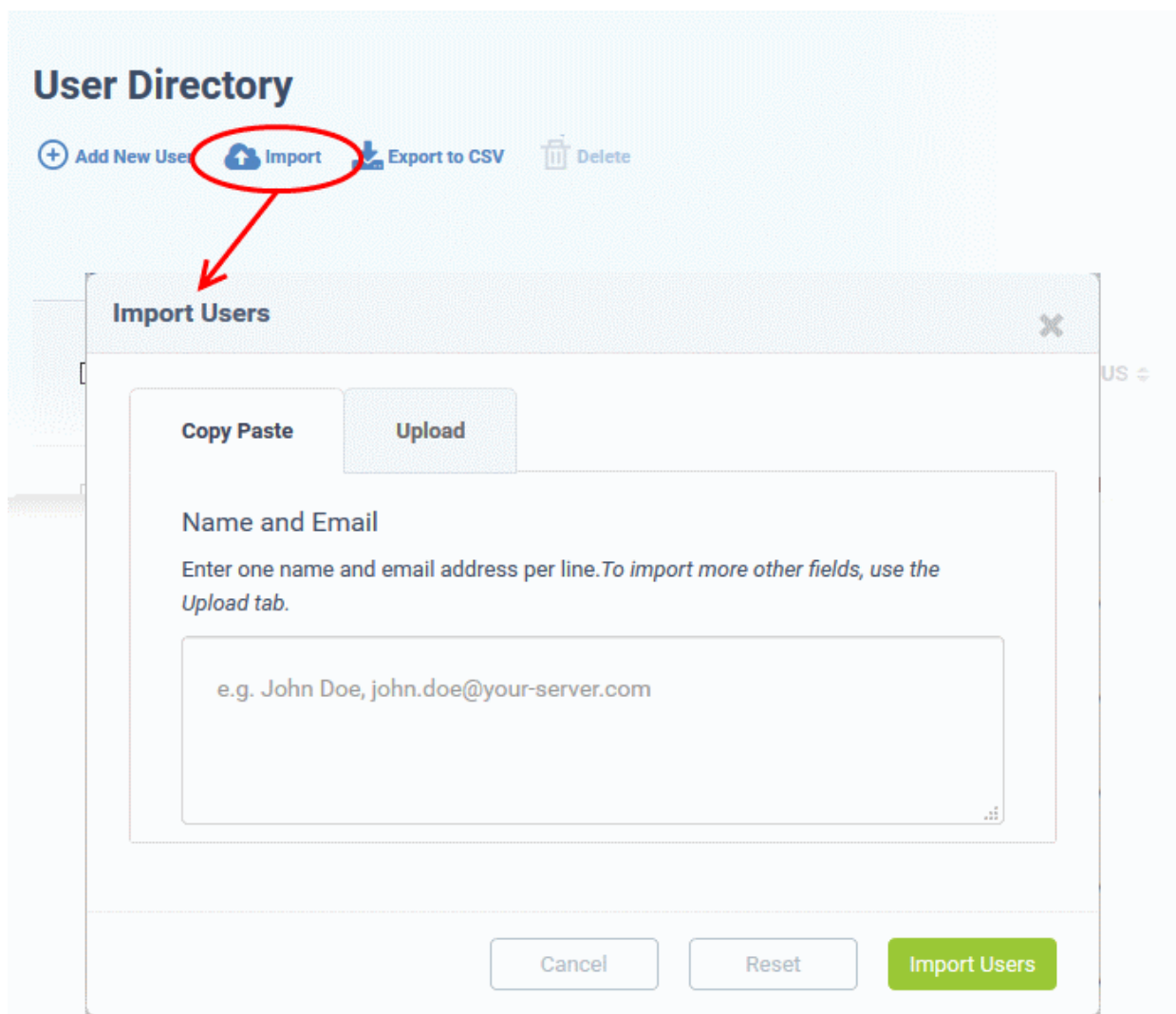
Cancel Reset Add User

- **Register users manually** - The user is initially added a guest and needs to be manually registered afterwards. You can register a guest as follows:
  - Click 'Users' > 'User Directory' > click on the name of the guest > Click the 'Register' button
  - See **Register a user** for more details.
- **Register with activation email** - The user is initially added as a guest and sent a mail which contains a link to register their account.
  - The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.
- **Register with a temporary password** - Create a temporary account password which registers the user immediately.
  - You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.
  - 'Require password change on first login' - Enable to force the user to create a new password after first login (recommended):
- **Default User Timezone** - Select the time zone to which the user belongs from the drop-down
- Click 'Add User'.

The user is added as a guest or registered user depending on the registration method. Once registered, you can manage their account and assign them to a customer company.

### Import users

- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users'
- Click 'Import' at the top



There are two ways to import users:

1. **Copy Paste** - Import users with name and email address only.

- Enter the user's full name, followed by a comma, then their email address.
- Add more users in subsequent lines.
- Click 'Import Users' to add the users as guests.

2. **Upload** - Import users from a .csv file. More details can be added about a user with this method.

- Create a .csv file of users that you want to import. The file should have the following column headers:  
  
Email,Name,Phone,Notes,"Customer ID (Optional)
- Each line should contain the contact information of a single user
- Save the .csv, then click 'Browse' to upload the file to Service Desk:

**Import Users**
✕

Copy Paste

Upload

**Import a CSV File**

*Use the columns shown in the table below. To add more fields, visit the Admin Panel -> Manage -> Forms -> Contact Information page to edit the available fields. Only fields with `variable` defined can be imported.*

[📄 Example CSV File](#)

Email	Name	Phone	Notes	Organization ID (Optional)
john.doe@your-server.com	John Doe			

Browse...
No file selected.

Cancel

Reset

Import Users

**Tip** : Click 'Example CSV File' to download a sample file.

Depending on your settings, imported users will be added as guests, or their account activation started.

You can configure default registration settings in 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** if you need further help with this.

### Step 7 - Create new customers and assign users to customers

- A customer is an organization, usually a company or business from whom you will accept tickets. 'Users' are the people who actually submit the tickets.
- You can assign users to a customer in the 'User Directory' interface.

There are two options to add a customer:

- **Create a customer in the Comodo One Interface** (preferred)

Customers added to C1 are fully managed, which means they are also available in other C1 modules (Endpoint Manager, CRM, Quote Manager etc.).

- Click 'Management' > 'Customer' > 'New Customer' to create a customer in C1.

- **Create a customer in Service Desk.**

Customers added directly to Service Desk are 'standalone' customers. They are not visible in C1 nor available to other C1 modules.



- Click 'Staff Panel', > 'Users' > 'Customers' > 'Add New Customer' to add a customer to Service Desk.

You can also create a new customer directly from a user's details screen.

## Add a new customer

- **Add a customer in the C1 interface**
- **Add a stand-alone customer in Service Desk**

## Add a customer in the C1 interface

**Note:** Only C1 MSP users can add multiple customers. C1 Enterprise users can add standalone customers in the SD interface.

- Log in at <https://one.comodo.com/app/login>.
- Click 'Management' > 'Customer'
- The interface shows any existing customers added to Comodo One:

The screenshot displays the Comodo One Management interface. At the top, the 'MANAGEMENT' menu is circled in red. Below it, the 'Customers' option in the dropdown menu is also circled in red. A red arrow points from the 'Customers' menu item to the 'Customers' page. The 'Customers' page features a '+ New Customer' button and a table of existing customers.

Name	Contact Email	Address	Postal Code	Description
ACME Corp	coyoteewile@yahoo.co...			Enterprise
Dithers Company	avantistude@gmail.com			Dithers Construction C...

- Click the 'New Customer' button:

The screenshot displays the Comodo One Service Desk Administrator interface. At the top, there is a navigation bar with the Comodo One MSP logo and menu items: APPLICATIONS, MANAGEMENT, REPORTS, and STORE. Below the navigation bar, the breadcrumb trail reads 'Comodo One > Management > Customers'. The main content area is titled 'Customers' and features a green '+ New Customer' button, which is circled in red. Below this button are 'Edit' and 'Delete' icons. A table lists customer records with columns for Name, Contact Email, Address, and Postal Code. Two records are visible: 'ACME Corp' with email 'coyoteewile@yahoo.co...' and 'Dithers Company' with email 'avantistude@gmail.com'. A red arrow points from the '+ New Customer' button to a modal window titled 'New Customer'. The modal contains five input fields: 'Name \*', 'Contact Email \*', 'Address \*', 'Postal Code \*', and 'Description'. At the bottom right of the modal are 'Cancel' and 'Save' buttons.

- Complete all mandatory fields then click 'Save'.
- Click the 'Customers' button in the main navigation to view your new customer.

### Add a standalone customer to Service Desk

- Click 'Staff Panel' > 'Users' > 'Customers'

- Click 'Add New Customer' at the top

The screenshot shows the 'Customers' management page in the Comodo One Service Desk. At the top, there is a navigation breadcrumb: 'Service Desk > Users > Customers'. Below this, the page title is 'Customers'. There are three main action buttons: '+ Add New Customer' (circled in red with a hand cursor), 'Export to CSV', and 'Delete'. A search bar is located on the right side of the page.

Below the buttons is a table with the following columns: CUSTOMER ID, NAME, USERS, and CREATED. One customer is listed with ID '1', name 'frontfork', and 1 user, created on '04/30/2018 1:55 pm'.

The 'Add New Customer' modal is open, showing a form with the following fields:

- Name:** \* (required)
- Web Domain:** \* (required)
- Address:**
- Phone:** and **Ext:** (extension)
- Website:**
- Internal Notes:**

At the bottom of the modal, there are three buttons: 'Cancel', 'Reset', and 'Add Customer' (highlighted in green).

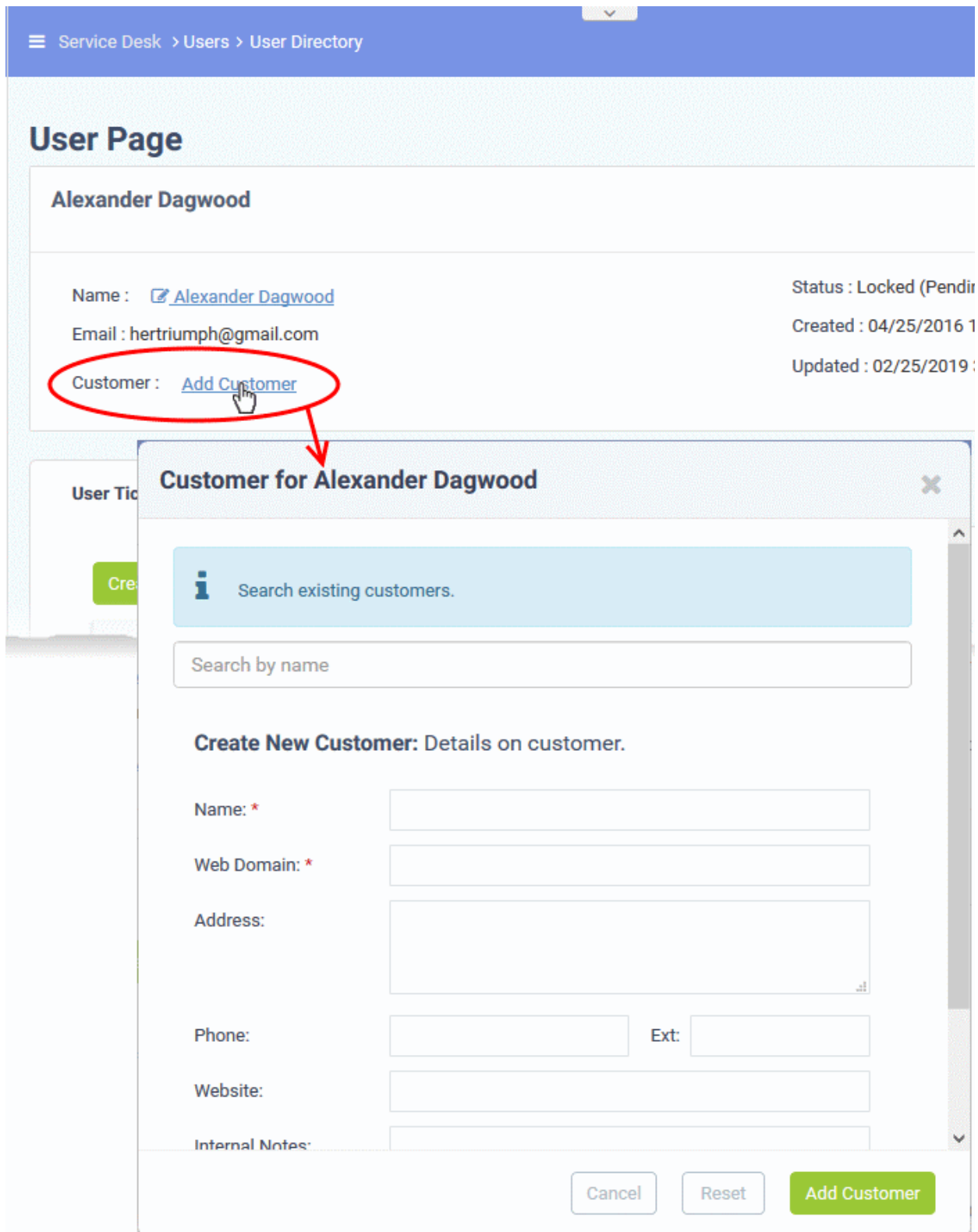
- **Name:** Enter a label for the customer company.
- **Web Domain:** Enter the name of the email domain used for employees of the company.
  - Service Desk creates two new users with email addresses in this domain - 'Monitor Agent' and 'Patch Management Agent'. These accounts are used to receive automatically generated tickets from Endpoint Manager.
  - They also assign to the customer any guests who submit tickets from an email at their domain.
- **Address and Phone:** Contact details of the company.
- **Website:** URL of the customer's public-facing / marketing website.

- **Internal Notes:** Enter any comments about the customer.
- Click 'Add Customer' after completing the form.

Staff can now configure customer settings, users and billing rates. See **'Manage Customers'** later in this guide for help with this.

## Assign users to a customer

- Open the 'Staff Panel'
- Click 'Users' > 'User Directory'
- Click on the name of a user to open their details page.
- Click the 'Add Customer ' link as shown:



You can assign the user to an existing customer or to a new customer


- **Add user to an existing customer** - Type the first few letters of the customer name in the search field. Select from the suggestions.

A confirmation appears after choosing the customer:

**Customer for Alexander Dagwood**

**i** Search existing customers.

Search by name

 **Dithers Construction Company**

---

**Customer Information**

Web Domain: dithercons.com

Address:

Phone:

Website:

**Continue**

- Click 'Continue'.

The user will be added to the customer.

- Alternatively, complete all fields to create a new customer, then click 'Add Customer':

**Customer for Alexander Dagwood** ✕

**i** Search existing customers.

Search by name

**Create New Customer: Details on customer.**

Name: \*

Web Domain: \*

Address:

Phone:  Ext:

Website:

Internal Notes:

- See **Manage Customers** if you need help to create a new customer.
- Click 'Add Customer'

The new customer and user are added to Service Desk.

### Step 8 - Create service contracts for customers

Click 'Admin Panel' > 'Finance' > 'Contracts'

**Contract** - An agreement between you and a customer which specifies the charges you will levy for your services over a billing cycle.

You can configure the following in a Service Desk contract:

- **Contract Fee** (optional). A fixed charge for a billing cycle (weekly, bi-weekly, monthly or annual). The contract fee is always charged on top of any charging plans and/or global asset rates.
- **Prepaid Hours** (optional). The number of hours your company will provide at no charge under the contract fee. You can set different pre-paid hours for each type of service (telephone, remote, on-site). If the time spent exceeds the pre-paid hours, then only the excess time is subject to charge.
- **Charging plan** (optional). A template you can add to a contract which lets you define custom hourly rates for your services. Charging plan rates are only applied after prepaid hours have been used. You can add the following to a charging plan:
  - **Default Hourly Rate** (mandatory). Hourly charge applied to work not covered by a variable rate.

- **Variable Rates** (optional). Special rates for specific types of work. For example, you might want to charge a different rate for on-site visits, or for work on a specific asset, or for work that exceeds a certain length of time.
- **Global Asset Rates** ('Admin Panel' > 'Manage' > 'Charging' > 'Default Charging') - While not part of a contract, per se, you should still consider global asset rates. Asset rates specify charges for work on items like workstations, servers, printers, routers etc. Global asset rates are only charged when prepaid hours and charging plans have been processed. For more details on global asset rates, see **Default Charging Plan** in **Manage Charging Plans**.
- See **Appendix 3 - How Charging Works in Service Desk** to read more on how charges are calculated for customers, based on contracts and charging plans.
- For more details on service contracts, see **'Manage Contracts'**.

#### **Create a contract:**

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Click 'Add Contract' at the top of the 'Contracts' interface




## New Contract


### General Information

Contract Name: \*

Customer: \*

Contract Details:

Start Date: \* ?  

End Date: \* ?  

### Contract Parameters

Fee: ?

Billing Period: ?  ▼

Unused Hours: ?  ▼

**Prepaid Hours will be calculated according to the number written on the field next to service types. ?**

Prepaid Hours:   Unlimited ?

Distribute prepaid hours to service types

Onsite:   Unlimited ?

Remote:   Unlimited ?

Telephone:   Unlimited ?

### Charging Method ?

Charging:  ▼  Not now




There are three main sections in the new contract form:

#### 1. General Information

- **Contract Name** - Label to identify the contract

- **Company** - The customer organization to whom the contract applies
- **Contract Details** - Brief description of the contract
- **Start Date** - The date from which the contract is effective
- **End Date** - The date the contract expires

## 2. Contract Parameters

**Fee** - A fixed charge billed to the customer for the services you provide. The billing cycle determines how often the fee is charged.

- This fee will always be charged, regardless of other charges in charging plans and global asset rates.
- You may wish to set a fee then use 'Prepaid Hours' to specify the amount of work that will be covered by the fee.
- If no fee is specified, then charges for service sessions are calculated from other parameters in the contract.

**Billing Period** - How often the total charges in the contract will be billed to the customer

- Weekly
- Bi-Weekly
- Monthly
- Yearly

**Unused Hours** - Choose whether or not any remaining pre-paid hours at the end of a billing cycle are carried over to the next cycle. Hours that are carried forward will be added to the pre-paid hours of the same service type in the next billing cycle.

**Prepaid Hours** - Hours worked by your staff during this period that will not be charged to the customer.

You have the option to spread prepaid hours over different services types - 'Onsite', 'Remote' and 'Telephone'.

**Unlimited** - You will not charge a fee for any hours worked by your staff on this service type.

**Prepaid Hours will be calculated according to the number written on the field next to service types. ?**

Prepaid Hours:   Unlimited ?

Distribute prepaid hours to service types

Onsite:   Unlimited ?

Remote:   Unlimited ?

Telephone:   Unlimited ?

- **Prepaid Hours** - Total hours you want to provide for the contract fee. Your customer can spend these hours on support of any type.
  - Unlimited - Provide support of any type for free for the full billing period
- OR
- **Distribute prepaid hours to service types** - Specify pre-paid hours for individual service types.
  - Unlimited - Provide support of a specific type for free for the full billing period

## 3. Charging Method

Specify a charging plan for the contract.

Charging plans are templates which let you specify custom hourly rates for your services.

- Click 'Admin Panel' > 'Manage' > 'Charging' to create a custom charging plan. See **Manage Charging Plans** if you need more help with this.

Charging plan rates are only applied after prepaid hours have been used.

- **Charging** - Select the plan you want to add to the contract from the drop-down.
- **Default Charging** - A plan which charges the global asset rates.
- **Not Now** - disable charging plans on this contract.

Click 'Save' to apply the contract to the customer.

## Step 9 - Manage tickets

Click 'Staff Panel' > 'Tickets' to view tickets sent in by users:

The screenshot displays the 'Open Tickets' interface. On the left, a sidebar lists navigation options: DASHBOARD, USERS, TICKETS (with sub-options: New Ticket, Open (315), My Tickets (3), Unassigned (312), Answered (0), Overdue (21), Closed (40), Paused (0), Materials, Scheduled (0)), KNOWLEDGEBASE, MY TIME SHEETS, CALENDARS, PROJECTS, and ADMIN PANEL. The main content area shows a table of open tickets with the following columns: TICKET, LAST UPDATE DATE, SUBJECT, FROM, PRIORITY, DEVICE NAME, ASSIGNED TO, and ORGANIZATION. The table contains 12 rows of ticket data, including ticket numbers like 355, 354, 285, 352, 351, 350, 349, 348, 347, 346, and 345. Above the table, there are search and filter options, including a search bar, 'Advanced Search', 'Show 25 records', and 'Customize Columns'.

- Use the menu on the left to filter tickets by status. Filters include 'Open', 'Answered', 'Unassigned', 'My tickets', 'Overdue', 'Closed' and 'Paused'. You can customize the columns shown in each view. See **'Manage Tickets'** to find out more.
- Click any ticket number to open the ticket's detail page.
- The details page lets you view ticket history, reply to the ticket, reassign it, add materials, and more.

Comodo One > Service Desk > Tickets > Open

**System going sluggish #765** OPEN Reporter: Greg Wonderland

Schedule Process Add Material Claim Edit Close Delete More

### Ticket Information

<b>Priority:</b>	Normal	<b>User:</b>	Greg Wonderland (5)
<b>Department:</b>	Maintenance	<b>Email:</b>	teleramabw@gmail.com
<b>Create Date:</b>	Tue, Feb 13 2018 4:50 pm	<b>Organization:</b>	Dithers Construction Company
<b>Device Name:</b>	-	<b>Phone:</b>	-
<b>Assigned To:</b>	Coyote	<b>Source:</b>	Web (182.74.23.22)
<b>SLA Plan:</b>	Default SLA (Active)	<b>Last Message:</b>	Tue, Feb 13 2018 4:50 pm
<b>Due Date:</b>		<b>Last Response:</b>	Wed, Feb 14 2018 2:39 pm
<b>Asset Type:</b>	Workstation	<b>Ticket Type:</b>	Problem
<b>Ticket Type Sub Cate...</b>	Slow	<b>First Reply:</b>	NaN.NaN.NaN 12:NaN am
<b>Category:</b>	Asset Issue / Report a Problem	<b>Last Update:</b>	10.04.2018 12:46 pm

- The structure of your tickets can be customized as required in 'Admin Panel' > 'Settings' > 'Tickets'. See '**Ticket Settings and Options**' for help with this.

## Step 10 - Manage Knowledgebase

The 'Knowledgebase' allows you to:

- Create a set of FAQs which will be shown on your support portal to help users find answers to common problems.
- Create FAQ categories. FAQs must be placed in a category. For example, you can create a category called 'Hardware' and place all hardware related FAQs in it.
- Create canned responses. Canned responses are pieces of text which can be quickly pasted into ticket replies.

Click 'Staff Panel' > 'Knowledgebase' to open the interface.

Comodo One > Service Desk > Knowledgebase > FAQs

### Frequently Asked Questions

All Categories Search

All Categories  
All Organizations  
All Assets

Click on a category to add new FAQs or manage its existing FAQs.

[Check cat \(1\) - Public](#)

To publish an FAQ to the customer-facing web interface you need a public FAQ inside a public category:

1. Create an FAQ category.

- Individual FAQs must be assigned to a category.
  - Go to 'Staff Panel' > 'Knowledgebase' > 'Categories' to view and edit available categories.
  - If no suitable categories exist for your FAQ then you should create one.
  - Make sure the category type is set to 'Public'.
2. Create your FAQ
- Go to 'Staff Panel' > 'Knowledgebase' > 'FAQs' > Click the category to which you wish you add your FAQ
  - Click 'Add New FAQ' and write your FAQ into the form
  - Select 'Public' as the 'Listing Type'
  - Click 'Add FAQ' to publish to the customer portal.

See '[Manage Knowledgebase](#)' for further help.

### Step 11 - Access Control Settings

The 'Access Control Settings' interface lets you configure end-user authentication policy, system email templates and registration page templates.

To open the interface:

- Click 'Admin Panel' > 'Settings' > 'Access Control Settings'

For more details, see '[Access Control Settings](#)'.

### Step 12 - Configure auto-response emails

- 'Email Settings and Options' lets you select the default emails that will be sent as notifications to end-users. Click 'Admin Panel' > 'Settings' > 'Emails' to view this interface
- You can add and configure new emails in 'Admin Panel' > 'Emails' > 'Emails'

EMAIL	PRIORITY	DEPARTMENT	CREATED	LAST UPDATED
<a href="#">Comodo One &lt;sd-noreply@c1notifications.com &gt;</a>	Normal		08/27/2016	03/25/2017 2:47 pm

For more details, see **'Managing Emails'**.

### Step 13 - View reports

Click 'Admin Panel' > 'Reports' to open this interface

- The reports area lets you generate on-demand reports on a variety of topics.
- Reports can be exported to pdf or .csv and are available in the following categories:
  - Time Log
  - Tickets
  - Assets
  - Service Types
  - Department Tickets
  - Agents (admins/staff members)
  - Users
  - Resource Appointments

'Cost' and 'Contract' reports are available in a different area:

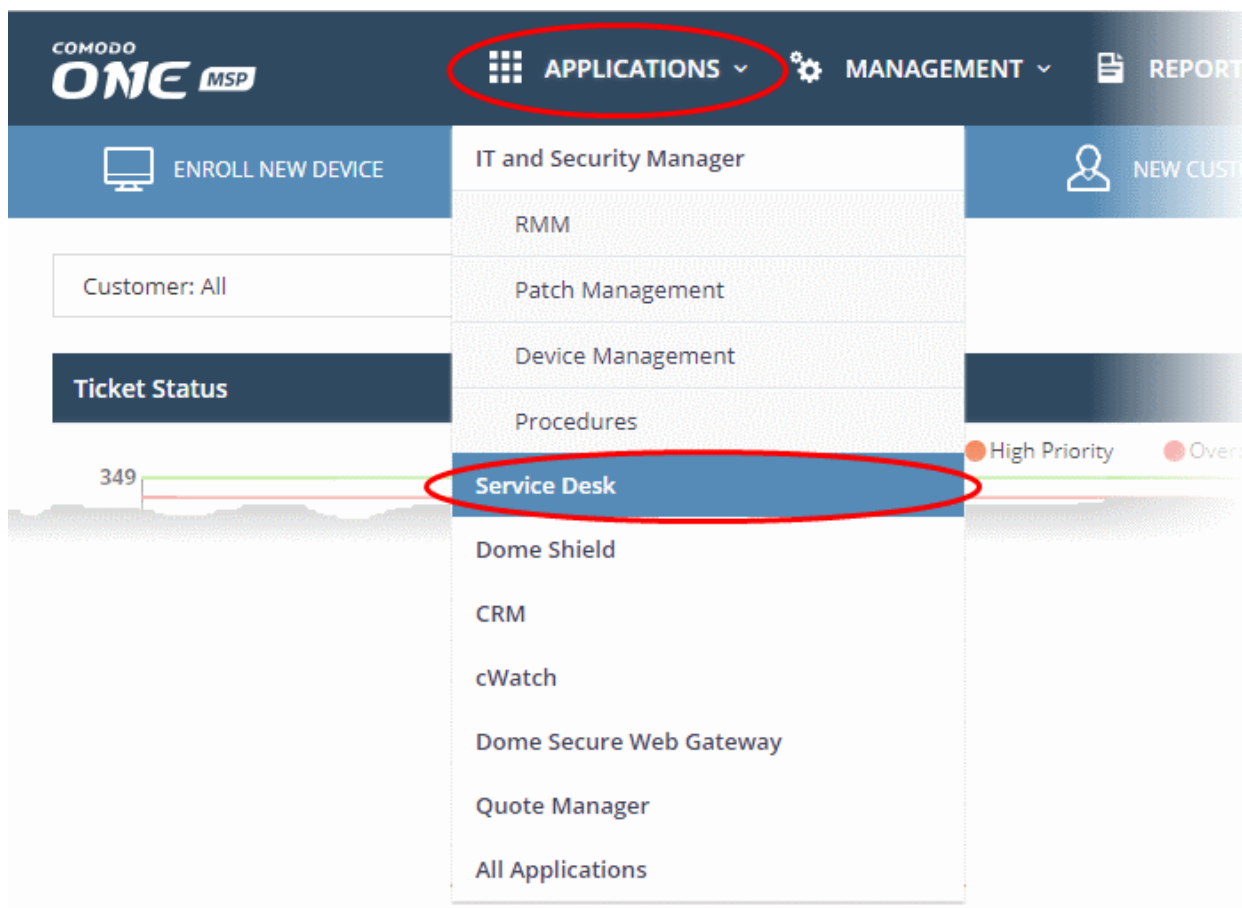
- Click 'Finance' > 'Cost' in the left-hand menu
- Select 'Cost by Customers' or 'Cost by Contracts' in 'Report Type' to generate the type of report you require.

Additional information:

- You can generate targeted reports by adding filters. Filters include date range, customer, department, agent, ticket status, asset type and much more.
- You can also set up scheduled reports which are automatically generated at a specific time and sent to recipients of your choice.

## 1.2 Login to the Service Desk Module

- First, login to Comodo One (C1) at <https://one.comodo.com/app/login>
- Click 'Applications' > 'Service Desk' in the C1 interface:



**Note 1:** Admins can also setup two-authentication of users for additional login security. This can be enabled in the Comodo One application through 'Management' > 'Account' > 'Account Security Details' tab. See [10.3.Setting up Two-Factor Login Authentication](#) in the C1 admin guide for help with this.

**Note 2:** You can also set Service Desk as your default page after you login to C1 at one.comodo.com.

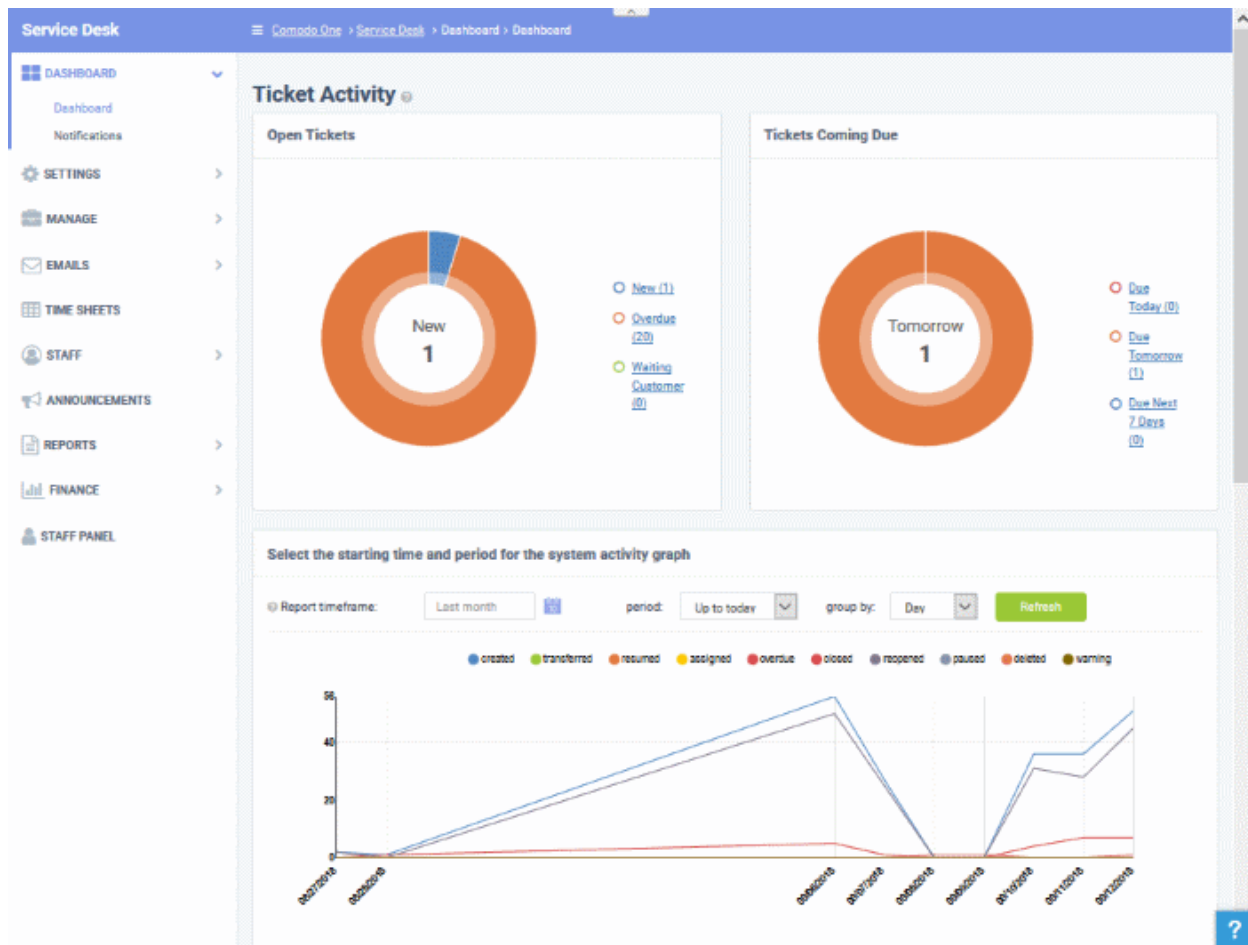
To set Service Desk as your default page:

- Open the C1 interface
- Click your username at top-right then click 'Settings'
- Select 'Set Service Desk as login Page' in the 'Comodo One Login Page' section
- Click 'Save changes'

## 2 Service Desk Admin Panel

The admin panel is Service Desk's command-and-control center, giving you an immediate overview of ticket statuses and letting you quickly configure settings, alerts, ticket categories, filters, reports, SLA plans and more.

**Note:** The admin panel is also available to staff members if they have the appropriate privileges. See [Staff Roles](#) for more details.





Once logged-in, administrators can navigate to different areas of the console by clicking the options on the left of the interface. Tool tips with guidance are available for most features.

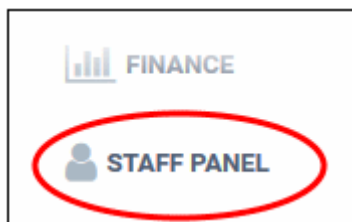
### Main Functional Areas

- **Dashboard** - A graphical summary of ticket activity. The dashboard shows tickets per-department and shows the statuses of tickets. The 'Notifications' screen displays alerts for new tickets and for ticket assignments. See [Admin Panel Dashboard](#) for more details.
- **Settings** - Configure settings for various components such as emails, tickets, knowledgebase, access, auto-responder, alerts & notices and more. See [Service Desk Configuration](#) for more details.
- **Manage** - Allows admins to manage ticket categories, filters, custom forms, site pages, SLAs, API keys, custom lists, assets and materials. See [Manage Service Desk Components](#) for more details.
- **Emails** - Manage auto-response mails that are sent to users and admins/staff members. Configure email blacklists and manage email templates. See [Manage Emails](#) for details.
- **Time Sheets** - Allows admins to review and approve or reject staff time sheets. Time sheets are completed by staff members and detail the amount of time they spent on particular tickets. See [Manage Time Sheets](#) for more details.
- **Staff** - Allows an administrator to manage staff members that provide support to users, create and manage Roles and Departments and assign staff members to them. See [Manage Staff](#) for more details.
- **Announcements** - Enables admins to manage announcement forms. Announcements are sent to staff members that are subscribed to announcements. See [Manage Announcements](#) for more details.
- **Reports** - Schedule and /or generate detailed reports for time log, cost, tickets, assets, queue, agents (admins/staff members) and users. See [Generate Reports](#) for more details.
- **Finance** - Allows the administrator to manage cost and contracts



Various interfaces display a tool tip button  beside the features. Clicking on this button will display the summarized help content regarding the feature. To close the screen, click the  button at top right or click anywhere in the screen.

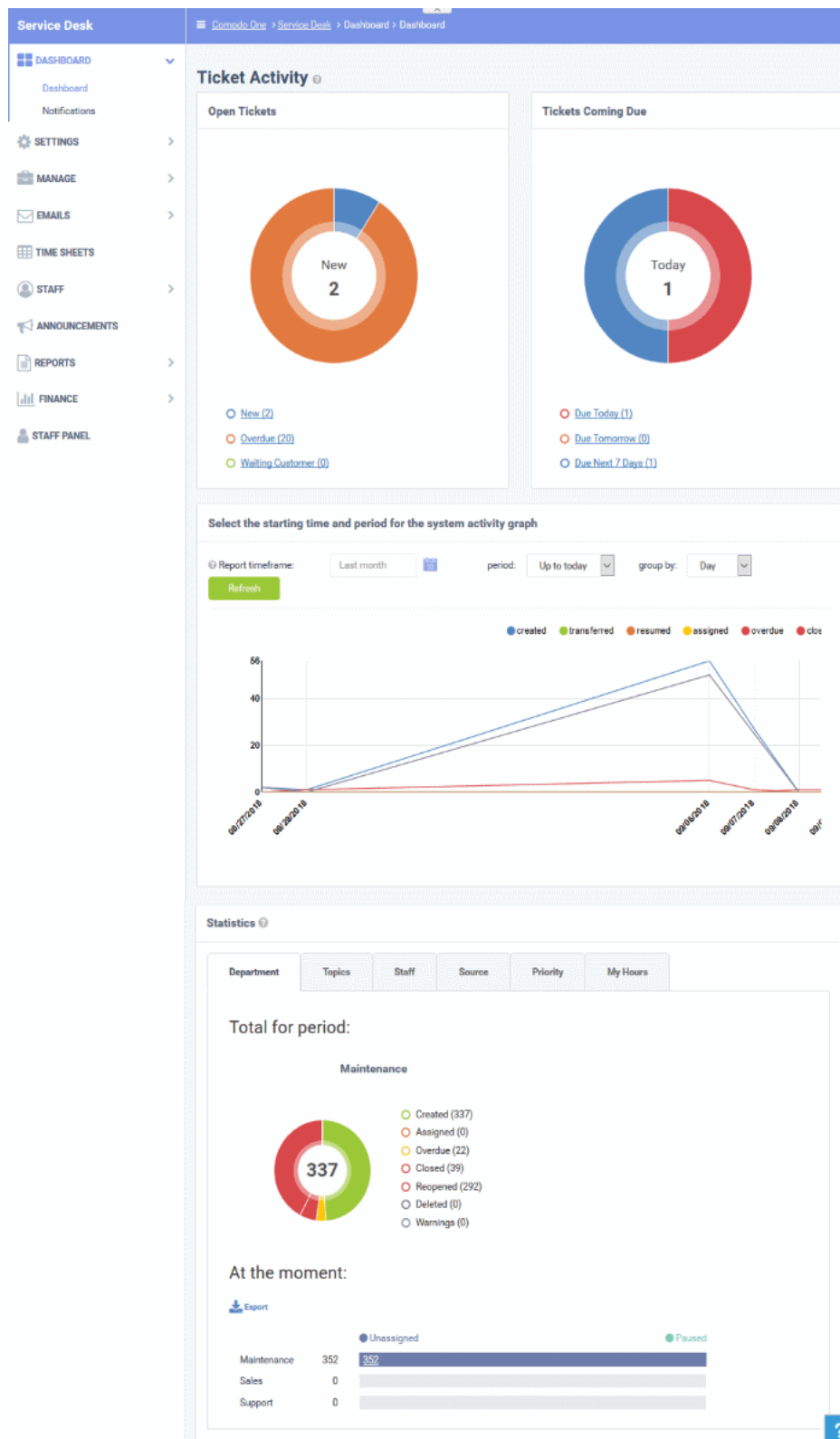
To toggle between the Admin Panel and Staff Panel, click the Panel tab on the left of the interface.



## 2.1 Admin Panel Dashboard

Click 'Admin Panel' > 'Dashboard'

The charts and graphs in the admin panel dashboard give you a heads-up on overall ticket activity on your account. The 'Statistics' section shows activity by department, ticket category, staff member and more. Admins can also view time spent on ticket related activities and a list of alerts and notifications sent to staff members.



Click the following links for more details:

- [View the Dashboard and Export Reports](#)
- [Alerts and Notifications](#)

## 2.1.1 View the Dashboard and Export Reports

Service Desk's powerful dashboard is the single pane of glass which allows you to easily monitor the status and progress of tickets in your account.

- The 'Admin' dashboard contains detailed statistics and charts about tickets for all clients.
- The 'Staff' dashboard shows similar information but only for clients assigned to the staff member.

**Service Desk**

- DASHBOARD**
  - Dashboard
  - Notifications
- SETTINGS
- MANAGE
- EMAILS
- TIME SHEETS
- STAFF
- ANNOUNCEMENTS
- REPORTS
- FINANCE
- STAFF PANEL

Comodo One > Service Desk > Dashboard > Dashboard

## Ticket Activity

### Open Tickets

**New 2**

- New (2)
- Overdue (20)
- Waiting Customer (0)

### Tickets Coming Due

**Today 1**

- Due Today (1)
- Due Tomorrow (0)
- Due Next 7 Days (1)

Select the starting time and period for the system activity graph

Report timeframe: Last month    period: Up to today    group by: Day

Refresh

### Statistics

Department: Topics Staff Source Priority My Hours

Total for period:

**Maintenance**

**337**

- Created (337)
- Assigned (0)
- Overdue (22)
- Closed (39)
- Reopened (292)
- Deleted (0)
- Warnings (0)

At the moment:

Export

Department	Unassigned	Paused
Maintenance	352	352
Sales	0	0
Support	0	0

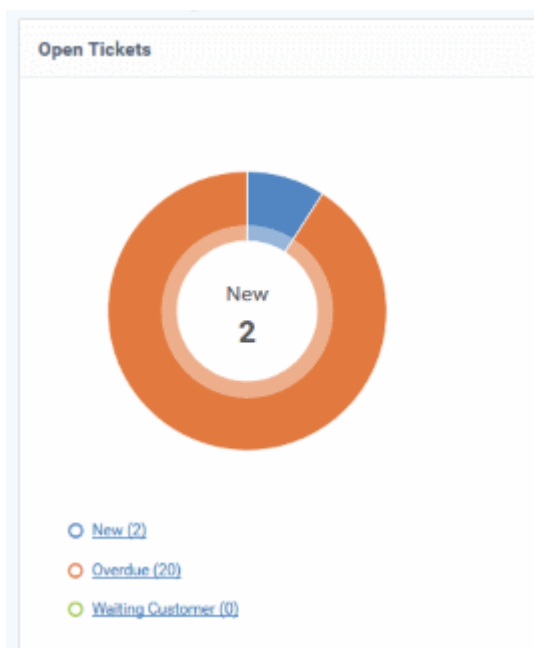
- To view the Admin Dashboard, click the 'Dashboard tab' in the Admin Panel.

## Ticket Activity

The upper pane of this section shows the total open tickets, a summary of pending tickets, and the number of tickets that are due shortly. The system activity graph shows daily, weekly and monthly ticket activity. The lower pane contains charts showing tickets by status, department, ticket category and more.

## Open Tickets

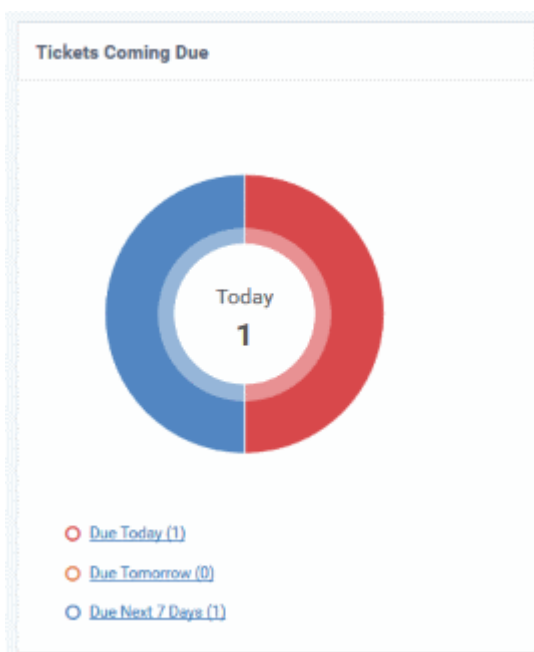
The total number of unresolved tickets. The pie chart breaks this down into tickets that are yet to be attended (new), overdue and awaiting customer response.



- Place your mouse on a sector to see the number of tickets in each category.

## Ticket Coming Due

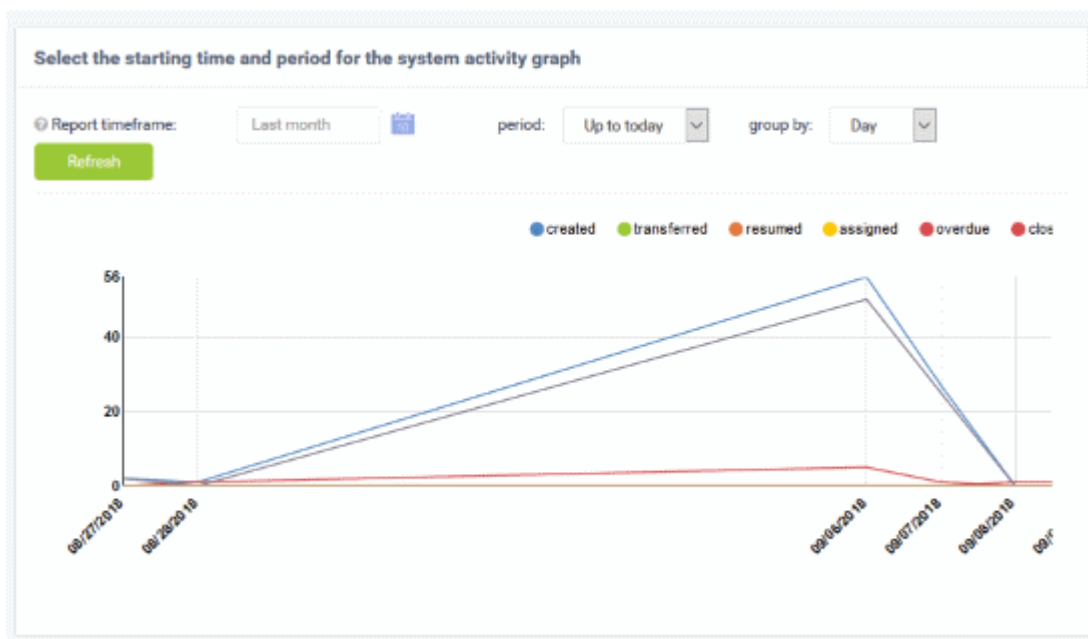
A heads up on tickets that are due in the near future:



- Place your mouse on a sector to see the number of tickets in each category.

## Ticket Activity - History

Line chart which shows a break-down of ticket statuses in your customers over-time. For example, the chart shows how many tickets have a status of 'closed', 're-opened' or 'assigned' at various points in time. You can select which statuses are shown by clicking on the legend above the graph.

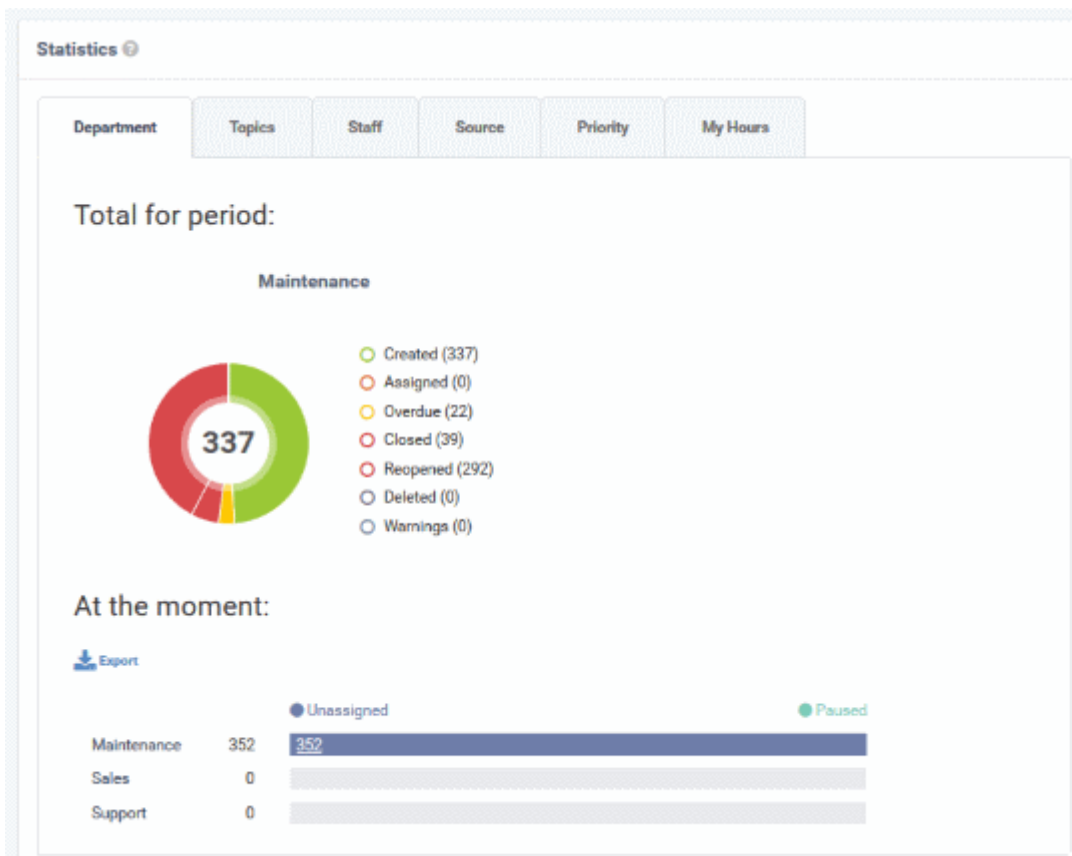


By default, the graph shows details for the previous 30 days. Use the 'Report timeframe' options to change the time-period. Click 'Refresh' to implement your changes.

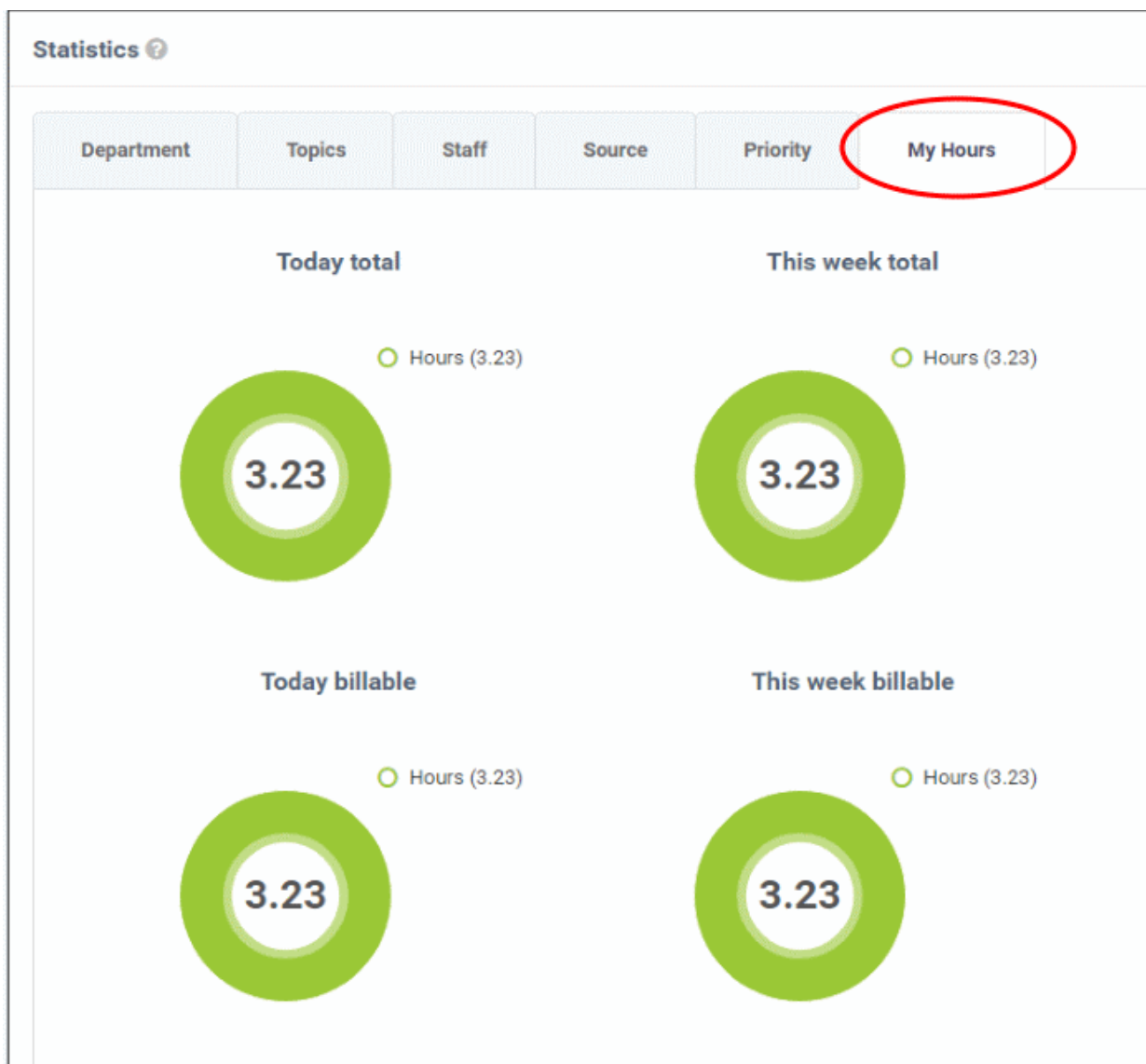
## Statistics

The statistics area shows details about for the full period since you started using Service Desk. You can view statistics based on 'Department', 'Ticket Category', 'Staff', 'Ticket Generation Source' and 'Priority'.

The 'At the moment' graph at the bottom shows the number of tickets that are unassigned and paused depending on the parameter selected. For example, if 'Source' is selected, the graph will display the number of tickets that are unassigned and paused for each ticket source type. Sources include 'Email', 'Phone' and 'Other'.



- 'Overdue' - tickets that have passed the grace period for a particular Service Level Agreement (SLA) plan.
- 'Warnings' - tickets that are configured to trigger warnings for a particular SLA plan.
- The 'My Hours' tab shows stats on time spent on tickets by the currently logged-in administrator.



### Exporting Statistics to a CSV file

Click the 'Export' button at the bottom of the interface to download the 'Statistics' file in CSV format. This file can be opened with applications such as Microsoft Excel or Open Office Calc. Please note this option is not available for 'My Hours' statistics.

## 2.1.2 View Alerts & Notifications

The 'Alerts & Notifications' interface shows alerts that were sent when a new ticket was created or assigned to a staff member. Alerts are sent to users and agents if so configured in 'Settings' > 'Alerts & Notices'.

- To view details of alerts sent, click 'Dashboard' on the left then 'Notifications' in the Admin Panel



The screenshot displays the 'Alerts & Notifications' page in the Comodo One Service Desk. The left-hand navigation menu includes 'DASHBOARD' and 'Notifications', both of which are circled in red. The main content area features a filter section with the following fields:

- From:** 09/01/2018
- To:** 09/14/2018
- Agent:** - All Agents -
- Type:** - All -
- Search:** [Button]
- Show records:** 25 records

Below the filter section is a table of notifications:

TYPE	RECEIPT	TIME
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:20 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:21 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:22 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:25 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:25 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:26 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:27 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:31 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:31 am
New Ticket Alert	frontfork <herculespopular22@gmail.com>	07/16/2018 10:33 am

Clicking any column header sorts the item based on the alphabetical order of the entries in that column. You can filter the items based on the period, staff and alert types.

- To filter the alerts based on the period, select the period by choosing the dates from the 'From' and 'To' fields.
- To filter the alerts based on the staff, select the staff from the Agent drop-down
- To filter the alerts based on the type, choose the type from the 'Type' drop-down.

The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100 records per page.

## 2.2 Service Desk Configuration

The 'Settings' tab lets you configure system settings, tickets, emails, access control, the knowledgebase, alerts and company profile.

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Settings'

The screenshot displays the 'Service Desk' interface. On the left, a navigation sidebar is visible with the 'SETTINGS' menu item highlighted in a red box. The main content area is titled 'C1 Service Desk' and shows 'System Settings & Preferences'. Under 'General Settings', there are several configuration fields: 'Helpdesk Status' (radio buttons for Online and Offline), 'Helpdesk URL' (text input), 'Helpdesk Name/Title' (text input), 'Default Department' (text input), 'Default Page Size' (text input), 'Default Log Level' (text input), 'Default Name Formatting' (text input), and 'Default Currency' (text input). Below this is the 'Date and Time Options' section, which includes a 'Time Format' field.

Click the following links to find out more about each category:

- [Configure Company Profile](#)
- [Service Desk System Settings](#)
- [Ticket Settings and Options](#)
- [User Registration Settings](#)
- [Email Settings and Options](#)
- [Access Control Settings](#)
- [Knowledge Base Settings and Options](#)
- [Autoresponder Settings](#)

- **Configure Alerts and Notices**
- **Configure Two Factor Authentication**

## 2.2.1 Company profile and support portal settings

Click 'Admin Panel' > 'Settings' > 'Company'.

- The company profile area contains details about your organization and lets you customize your support portal
- Your support portal is the site where your users can submit and track tickets or read your support content. The URL of your portal is <https://<your company name>.servicedesk.comodo.com>
- You can brand the support portal with your own logos and web page content.

### **Add company profile information and customize your support portal**

- Open the admin panel (see the last link on the left)
- Click 'Settings' > 'Company'

The screenshot displays the 'Company Profile' settings page in the Comodo One Service Desk Administrator. The left-hand navigation menu includes sections for DASHBOARD, SETTINGS (highlighted with a red circle), MANAGE, EMAILS, TIME SHEETS, STAFF, ANNOUNCEMENTS, and REPORTS. The main content area is titled 'Company Profile' and is divided into several sections:

- Basic Information:** This section contains a heading 'Company Information: Details available in email templates' and four input fields: 'Company Name: \*' (filled with 'Frontfork Services'), 'Website:' (filled with 'frontforkservices.com'), 'Phone Number:' (filled with '0987654321'), and 'Address:' (filled with 'Gandhi road, Kanchipuram.').
- Site Pages:** This section includes a heading 'To edit or add new pages go to [Manage > Site Pages](#)' and three dropdown menus: 'Landing Page: \*' (set to 'Landing'), 'Offline Page: \*' (set to 'Offline'), and 'Default Thank-You Page: \*' (set to 'Thank You').
- Logos:** This section features a 'System Default Logo' which is a rectangular box containing the text 'SUPPORT CENTER' in large bold letters and 'Support Ticket System' below it. Below this is an option to 'Use a custom logo' with a 'Browse...' button and the text 'No file selected.' and 'Upload a new logo:'.

At the bottom of the page, there are two buttons: 'Save Changes' (in green) and 'Reset Changes' (in white).

## Basic Information

- **Company Name:** The name of your organization
- **Website:** The URL of your corporate/marketing website
- **Phone Number:** Your company's contact number
- **Address:** The physical/postal address of your company
- **Company Email:** Provide the company's contact email address.

**Note:** The default field labels explained in this section. You can change the labels in the forms interface.

- Click 'Admin Panel' > 'Manage' > 'Forms' then open the 'Company Information' form to edit its labels.

You can also modify the number of fields shown in the company information area.

See **Forms** for information.

## Site Pages

- This area lets you customize the pages on your support portal. This portal is where users can submit tickets to you or your support team.
- Service Desk ships with a default landing, offline, and thank-you pages.
- You can customize these pages at 'Admin Panel' > 'Manage' > 'Pages'.
- See **Client Portal Pages** if you need help with this.

### Choose site pages

- Select the pages you want to use on your portal from the drop-down menus:

The screenshot shows the 'Site Pages' configuration page. At the top, it says 'To edit or add new pages go to [Manage > Site Pages](#)'. Below this, there are three rows of configuration options, each with a label, a red asterisk, a drop-down menu, and a help icon (question mark):

- Landing Page:** \* Landing
- Offline Page:** \* Offline
- Default Thank-You Page:** \* Thank You

- **Landing Page:** The 'home page' of your site.
- **Offline Page:** The page shown when the support site is not available.
  - Click 'Admin Panel' > 'Settings' > 'System' to switch your support portal online or offline.
  - See **Service Desk System Settings** to read more about system settings
- **Default Thank-You Page:** The page that is shown after a user submits a ticket.

**Note:** You can manage the pages shown in your support portal as follows:

- Click 'Admin Panel' > 'Manage' > 'Pages' to add more pages.
- Click a page to edit its content and settings.

See **Client Portal Pages** for more information.

## Logos

- The logo is the banner shown at the top-left of your support portal:

## SUPPORT CENTER

Support Ticket System

Guest User | [Sign In](#)

[Support Center Home](#)
 [Open A New Ticket](#)
 [Check Ticket Status](#)

### Welcome to the Support Center

In order to streamline support requests and better serve you, we utilize a support ticket system. Every support request is assigned a unique ticket number which you can use to track the progress and responses online. For your reference we provide complete archives and history of all your support requests. A valid email address is required to submit a ticket.

**Open A New Ticket**

Please provide as much detail as possible so we can best assist you. To update a previously submitted ticket, please login.

**Open A New Ticket**

**Check Ticket Status**

We provide archives and history of all your current and past support requests complete with responses.

**Check Ticket Status**

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- You can use the system default logo or upload your own company logo.
- Logo requirements:
  - Format - gif, jpg or png.
  - Dimensions - 817 px X 170 px.
- Click the browse button, select your image then click 'Open'.

Click 'Save Changes'.

## 2.2.2 Service Desk System Settings

- Click 'Admin Panel' > 'Settings' > 'System'
- The system settings area lets you configure your support page, the default department to which tickets are routed, your business hours, and more.

### System Settings

- Open the admin panel (see the last link on the left)
- Click 'Settings' > 'System'

## C1 Service Desk

### System Settings & Preferences

#### General Settings:

Helpdesk Status:  Online  Offline ?

Helpdesk URL: \*  ?

Helpdesk Name/Title: \*  ?

Default Department: \*  ?

Default Page Size:  ?

Default Log Level:  ?

Default Name Formatting:  ?

Default Currency:  ?

#### Date and Time Options: ?

Time Format: \*  ? 01:25 AM

Date Format: \*  10/05/2018

Date & Time Format: \*  10/05/2018 1:25 am

Day, Date & Time Format: \*  Fri, Oct 5 2018 1:25am

#### Business hours: ?

Monday	From: <input type="text" value="07:00"/>	To: <input type="text" value="17:00"/>
Tuesday	From: <input type="text" value="07:00"/>	To: <input type="text" value="17:00"/>
Wednesday	From: <input type="text" value="07:00"/>	To: <input type="text" value="17:00"/>
Thursday	From: <input type="text" value="07:00"/>	To: <input type="text" value="17:00"/>
Friday	From: <input type="text" value="07:00"/>	To: <input type="text" value="17:00"/>
Saturday	From: <input type="text" value="07:00"/>	To: <input type="text" value="17:00"/>
Sunday	From: <input type="text" value="07:00"/>	To: <input type="text" value="17:00"/>

Save Changes

Reset Changes

## General Settings

- **Helpdesk Status:** Put your customer facing support portal online or offline.
- **Helpdesk URL:** States the URL of your support portal. This was created at setup and is included in support emails to direct users to your help desk. They can submit tickets and read FAQs/knowledgebase articles at your help desk.
- **Helpdesk Name/Title:** The 'title' of your support site. This will appear as the label of your site in your user's browser and bookmarks.
- **Default Department:** Choose the default department for new tickets and staff members.
  - Tickets are assigned to the default department if they are not explicitly assigned to a different department. Tickets can be routed to a department by the ticket category, by email settings, or by a ticket filter. See **Ticket Settings and Options** and **Departments** for more details.
  - New staff that you add via Comodo One are assigned to the default department. You can change their department in 'Admin Panel' > 'Staff' > 'Staff Members'. See **Update a staff member** in **Staff Members** for more details.
- **Default Page Size:** Choose the number of tickets shown per page in the tickets screen ('Staff Panel' > 'Tickets'). Staff can also customize this for their own account in 'My Preferences'. See **My Profile** for more details.
- **Default Log Level:** Choose the minimum issue severity that should be recorded in the system log. The options are 'Debug', 'Warn', and 'Error'. 'Debug' is the lowest severity and 'Error' is the highest. Choose 'Debug' to log all issues. Note - admins cannot view the system log in Service Desk. Please contact your account manager if you need to view the log.
- **Default Name Formatting:** Choose the format used for people's names throughout the system. Email templates will use this format unless a different format is specified in a variable. See **Email Templates** for more details.
- **Default Currency:** Choose the currency you want to use in your Service Desk deployment. This currency will be used in contracts, charging plans, and for assets / materials added to a ticket.
  - **Contracts** - Click 'Staff Panel' > 'Contracts'. See **Manage Contracts** to learn more.
  - **Charging plans** - Click 'Admin Panel' > 'Manage' > 'Charging'. See **Manage Charging Plans** to learn more.
  - **Materials** - Click 'Admin Panel' > 'Manage' > 'Materials'. See **Manage Materials and Expense Items** to learn more
  - **Assets** - Click 'Admin Panel' > 'Manage' > 'Assets'. See **View and Manage Asset Types** to learn more

## Date and Time Options

Service Desk adheres to the time zone set in the Comodo One console.

- Open C1 > click your username at top-right > click 'Settings' > 'Change Local Settings'
- See <https://help.comodo.com/topic-289-1-716-8485-Configuring-C1-Settings.html> if you need more help.

## Business Hours

Enter the start and end times of your working day, for every weekday that your company works. For example, '09.00' to '17.30'.

These business hours are used in service level agreement (SLA) time calculations.

- For example, say an SLA defines issue resolution time as 12 hours, and your business hours are set at 8.00 AM - 4.00 PM, Monday - Friday.
- If a ticket is submitted on a Sunday, the SLA will start counting on Monday morning at 8.00 AM and will count until 12 pm Tuesday. If the issue is not solved by Tuesday 12 pm then you have breached the SLA.
- See **Service Level Agreements** for more details.



Click 'Save Changes' to apply your updates.

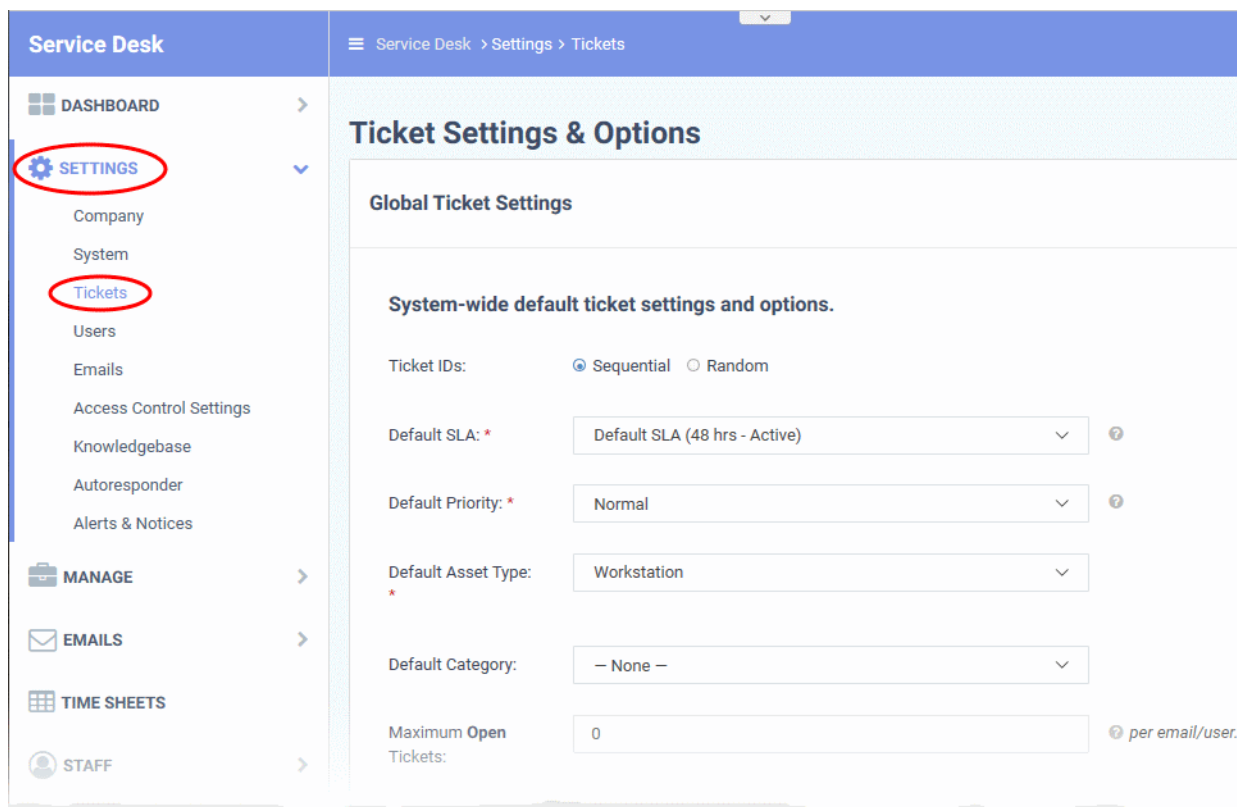
## 2.2.3 Ticket Settings and Options

Click 'Admin Panel' > 'Settings' > 'Tickets'

- Global settings are the default settings for support tickets submitted to your organization.
- These settings apply to all tickets unless superseded by a department or ticket category setting.

Ticket settings and options

- Click 'Admin Panel' > 'Settings' > 'Tickets'



The interface has four areas:

- **System-wide default ticket settings and options**
- **Time Settings (global)**
- **Attachments**
- **Accepted File Types**

### System-Wide Default Ticket Settings and Options

### Global Ticket Settings

**System-wide default ticket settings and options.**

Ticket IDs:  Sequential  Random

Default SLA: \*  ?

Default Priority: \*  ?

Default Asset Type: \*

Default Category:

Maximum Open Tickets:  ? *per email/user.*

Agent Collision Avoidance Duration:  ? *minutes*

Human Verification:  Enable CAPTCHA on new web tickets. ?

Claim on Response:  Enable ?

Assigned Tickets:  Exclude assigned tickets from open queue. ?

Answered Tickets:  Exclude answered tickets from open queue. ?

Staff Identity Masking:  Hide staff's name on responses. ?

Enable HTML Ticket Thread:  Enable rich text in ticket thread and autoresponse emails. ?

Allow Client Updates:  Allow clients to update ticket details via the web portal

Auto-close Overdue Tickets Timeout:  × ? *hours*

Auto-close resolution:

- **Ticket IDs:** Select whether ticket numbers are sequential (consecutive) or randomly generated.

- **Default SLA:** Choose the service level agreement (SLA) that applies to tickets IF no custom SLA applies. You can apply a custom SLA to a ticket category, multi-stage ticket, or department. The SLA determines how long a ticket can remain open before it is overdue. See **Service Level Agreements** for more details.
- **Default Priority:** Choose the default severity level for tickets that have not been assigned a priority level by the **department** or **ticket category**. For example, 'Low', 'Normal', 'High' or 'Critical'. See **Appendix 2 - Ticket Priorities** if you need general advice on priority levels.
- **Default Asset Type:** Assets are the type of item that the ticket concerns. For example, 'workstation', 'printer', 'router' etc. You can manage assets and specify asset rates at at 'Admin Panel' > 'Manage' > 'Assets'. Choose the default asset for new tickets. The user can change the asset type when creating a new ticket.
- **Default Category:** The help topic that is assigned to a new ticket if the user does not select a category. See **Ticket Categories** to read more on help topics.
- **Maximum Open Tickets:** The highest number of tickets that a user is allowed to have open at once. Once the maximum is reached, users cannot create new tickets until an existing ticket is closed. Enter '0' for unlimited open tickets.
- **Agent Collision Avoidance Duration:** Enter the maximum length of time an agent (staff member) is allowed to lock a ticket. Other staff cannot edit locked tickets. Enter '0' to disable the ability to lock tickets.
- **Human Verification:** If selected, a CAPTCHA is shown on your support portal for the user to complete. This verifies that the ticket is created by a human and not a bot.
- **Claim on Response:** If enabled, new tickets are auto-assigned to the agent that first responds to it. Note - reopened tickets are always assigned to the most recent respondent.
- **Assigned Tickets:** If enabled, tickets that assigned to staff are hidden in 'Open' tickets.
- **Answered Tickets:** If enabled, tickets with staff responses are placed in the 'Answered' tickets queue. If disabled, they are shown in the 'Open' tickets queue.
- **Staff Identity Masking:** If enabled, the ticket does not include the name of staff who work on the ticket.
- **Enable HTML Ticket Thread:** HTML lets users and staff use different fonts, colors and even images in their messages. The thread uses plain text if you don't enable this option.
- **Allow Client Updates:** If enabled, users can use the web portal to update their ticket.
- **Auto-close Overdue Tickets Timeout:** The number of hours that overdue tickets are kept open after their due-date. Overdue tickets are auto-closed after this grace period expires. Enter '0' to disable the feature, so overdue tickets are never auto-closed.
- **Auto-close resolution** - Type a message that explains the ticket was automatically closed because it was overdue.
  - This message is shown in the ticket thread and in the ticket details screen.

### Time Settings (Global Setting)

### Time Settings (Global Setting)

Charge Interval: \*  minutes

Time for threads:  Enable time to threads (available to staff assigned to the ticket)

Manual time entry :  Enable manual time entry

Manual time entry by other staff:  Enable work time entry for other staff members

Round billable time:  Calculate billable time without rounding  
 Round each billable time separately

- **Charge Interval:** The minimum number of minutes that can be added to billable time on a ticket. Fractions of this unit are always rounded up.
  - For example, if you enter '1' and staff work on a ticket for 17 minutes and 34 seconds, then the system records 18 minutes. If you enter '10' and staff work on a ticket for 14 minutes and 16 seconds, then the system records 20 minutes.
  - Note - Charge interval is only relevant **IF** you enable 'Round each billable time separately'. It has no effect if you enable 'Calculate billable time without rounding' instead.
- **Time for threads:** Enable a time-counter which starts/resumes when staff work on a ticket. The timer starts when staff open the ticket and stops when they close the session. Staff can manually pause and resume the counter.
- **Manual time entry:** Allow staff to add time to the ticket. This can be used to record 'away-from-system' work when the staff member did not have the ticket open. For example, on-site visits, etc.
- **Manual time entry by other staff:** Allow staff other than the person to whom the ticket is assigned to add their time spent to a ticket.
- **Round billable time:**
  - **Calculate billable time without rounding** - Billable time is a simple total of all time spent on a ticket, including seconds. For example, if a ticket has three work-sessions which last 17:34, 3:25 and 1:45 respectively, then the total is 22 minutes and 44 seconds.
  - **Round each billable time separately** - Service Desk rounds-up the time spent in each session to the unit in the 'Charge Interval' box. Each session is rounded up before the total is calculated. Total billable time is the sum of all individual sessions.

For example, if your change interval is '1', and a ticket has three work-sessions which last 17:34, 3:25 and 1:45 respectively, then the total is 24 minutes (18m + 4m + 2m).

## Attachments

**Attachments:** Size and max. uploads setting mainly apply to web tickets.

Allow Attachments:  Allow Attachments (Global Setting)

Emailed/API Attachments:  Accept emailed/API attachments.

Online/Web Attachments:  Allow web upload  Limit to authenticated users only. (User must be logged in to upload files)

Max. User File Uploads:  (Number of files the user is allowed to upload simultaneously)

Max. Staff File Uploads:  (Number of files the staff is allowed to upload simultaneously)

Maximum File Size:

Ticket Response Files:  Email attachments to the user ?

- **Allow Attachments:** Users and staff are permitted to upload attachments to tickets.
- **Emailed/API Attachments:** Choose whether users can attach files to email tickets or tickets created over API.
  - Service Desk can automatically create tickets from emails sent to your support email address. See **Email Addresses** for help to do this.
- **Online/Web Attachments:** Choose whether users can attach files to tickets that they created in your online portal.
- **Max. User File Uploads:** Set the max. number of files a user can to attach to a ticket.
- **Max. Staff File Uploads:** Set the max. number of files a staff member can to attach to a ticket.
- **Maximum File Size:** Set the upper size limit of individual attachments.
- **Ticket Response Files:** If enabled, any attachments that staff add to a ticket response are included in the email to the user.

## Accepted File Types

**Accepted File Types:** Limit the type of files users are allowed to submit.

Enter allowed file extensions separated by a comma. e.g. .doc, .pdf. To accept all files enter wildcard .\* i.e dotStar (NOT Recommended)

- Specify which types of file your users are allowed to add as attachments. Each extension should be separated by a comma.

Click the 'Save Changes' for your settings to take effect.

## 2.2.4 User Registration Settings

Click 'Admin Panel' > 'Settings' > 'Users'

- 'Users' are the individuals who submit tickets to your support team. They can submit tickets via your support center, by email, or direct from an Endpoint Manager device.
- Global user settings let you choose the default method for registering users. You can register accounts manually, via activation mail, or with a temporary password.
- The setting you choose here only applies if you enable 'Register with default settings' in the 'Create New User' screen.
  - Click 'Staff Panel' > 'User Directory' > 'Add New User' to see the 'Create New User' screen.
  - If you disable 'Register with default settings' then you can choose the registration method on a per-case basis.
  - See **Add Users** in **Manage Users** section for more on the 'Create New User' screen.
- The setting above only applies to users that you manually add, or import from CSV. This setting does not apply to:
  - Users who register themselves by signing up at the web portal. These users always receive an activation email.
  - Users who are added as guests because they submitted a ticket from a managed device. These users need to be registered manually. See **Register a User** in **Manage Users** section if you need help with this.

### Default user registration settings

- Open the admin panel (see the last link on the left)
- Click 'Settings' > 'Users'

The screenshot displays the 'Service Desk' admin interface. On the left sidebar, the 'SETTINGS' menu item is circled in red, and the 'Users' sub-menu item is also circled in red. The main content area is titled 'User Settings & Options' and contains the following sections:

- Global User Settings**
- User Registration Settings** (with a help icon):
  - Register users manually
  - Register with activation email
  - Register with a temporary password
- Default User Timezone:** GMT 5:30 - Asia/Calcutta (with a dropdown arrow)
- Buttons:** 'Save Changes' (green) and 'Reset Changes' (grey)

- **Register users manually** - Register by selecting a user in the 'User Directory' area and clicking the 'Register' button. See **Register a user** for more details.
- **Register with activation email** - An enrollment mail is sent to new users with an account activation link. The link takes the user to your support web portal to create a password. Once registered, the user will be able to login to your support portal to manage/view their tickets.
- **Register with a temporary password** - Enter a temporary password for the new user (as shown below)

## Create New User ✕

Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

Register with Default Settings

Default timezone: GMT 5.30 - India, Sri Lanka

Temp. Password:

Confirm Password:

Password Change:  Require password change on first login

Once registered, you should communicate the URL of your web-portal and the password to the user. The user can login to the portal using their email as user name and the password you sent. If 'Require password change...' is enabled, the user will be asked to set a new password immediately.

- **Default User Timezone** - Choose the time zone of the target user.
- Click 'Save changes' for your settings to take effect.

## 2.2.5 Email Settings and Options

- Click 'Admin Panel' > 'Settings' > Emails'
- The 'Email Settings & Options' interface lets you configure overall settings for system emails.
- Please note these global email settings can be overridden by settings at the department level.

### Configure Service Desk Email Settings

- Click 'Admin Panel' > 'Settings' > 'Emails'

### Email Settings

- **Default Template Set:** Service Desk allows administrators to create and manage different email template sets for different customers, with each set consisting of templates for different types of email messages sent for various ticket activities. See **Email Templates** for more details. Administrators can choose which template set has to be used by default, from the Default Template Set drop-down. Please note that departments can be assigned a different email template set. See **Departments** for more details. See **Email Templates** about how to add/modify email templates.
- **Default System Email:** Select the default outgoing email address from which the emails are sent. Please note that departments can configure a different email address. See **Departments** for more details. See **Email Addresses** about how to add/modify email addresses.
- **Default Alert Email:** Select the default email address from which Alerts & Notices are sent to the admins/staff members. See **Email Addresses** about how to add/modify email addresses.
- **Admin's Email Address:** Enter the administrator's email address to which the System Errors and New Tickets alerts are sent. Please note this should be enabled in Alerts & Notices screen. See **Configuring Alerts and Notices** for more details.

### Incoming Emails

- **Email Fetching:** Enabling this checkbox will allow IMAP/POP polling for configured and enabled Mail Boxes. See **Email Addresses** about how to enable fetching email via IMAP or POP.
- **Strip Quoted Reply:** If enabled, all previous correspondences in the email will be removed. If this feature is disabled, then the next setting Reply Separator Tag will be relevant.
- **Reply Separator Tag:** This is relevant only if the above Strip Quoted Reply is disabled. The text '---reply above this line---' will be displayed between the quoted original message and the reply. You can edit the separator line text in the text box.
- **Emailed Tickets Priority:** If enabled, tickets sent over email will have their priority set by the sender's email client.'
- **Accept All Emails:** If enabled, tickets can be raised by unregistered users also.
- **Accept Email Collaborators:** If enabled, email participants are included in the 'To' and 'CC' fields as ticket collaborators. Staff members can also add collaborator manually when viewing a ticket. See **Managing Tickets** for more details.

### Outgoing Emails

- **Default MTA:** Select the mail address whose Mail Transfer Agent (MTA) settings should apply to outgoing emails that do not have an SMTP setting.

Click the 'Save Changes' button to apply your changes.

## 2.2.6 Access Control Settings

The 'Access Control Settings' interface allows admins to configure the password policy for staff members, authentication settings for end users, and email templates for 'Forgot My Password' links. You can also configure settings for user account registration, staff account registration and banners for log-in pages.

- Open the Admin Panel
- Click 'Settings' on the left then 'Access Control Settings'



## Access

### Configure Access to this Help Desk

#### End User Authentication Settings

Registration Required:  Require registration and login to create tickets ?




Registration Method:  ?

User Excessive Logins:  failed login attempt(s) allowed before a  minute lock-out is enforced.



User Session Timeout:  ?

Client Quick Access:  Require email verification on "Check Ticket Status" page ?




#### Authentication and Registration Templates

-  **Staff Members**  
This template defines the email sent to Staff who select the **Forgot My Password** link on the Staff Control Panel Log In page. *(Last Updated 05/21/2018 10:09 am)*
-  **Clients**  
This template defines the email sent to Clients who select the **Forgot My Password** link on the Client Log In page. *(Last Updated 05/21/2018 10:09 am)*
-  **Guest Ticket Access**  
This template defines the notification for Clients that an access link was sent to their email *(Last Updated 05/21/2018 10:09 am)*


#### Sign-In Pages

-  **Staff Login Banner**  
This is the initial message and banner shown on the Staff Log in page *(Last Updated 05/21/2018 10:09 am)*
-  **Client Sign-In Page**  
This composes the header on the Client Log In page *(Last Updated 05/21/2018 10:09 am)*

#### User Account Registration

-  **Please Confirm Email Address Page**  
This templates defines the page shown to Clients after completing the registration form *(Last Updated 05/21/2018 10:09 am)*
-  **Confirmation Email**  
This template defines the email sent to Clients when their account has been created in the Client Portal or by an Agent on their behalf *(Last Updated 05/21/2018 10:09 am)*
-  **Account Confirmed Page**  
This template defines the content displayed after Clients successfully register by confirming their account *(Last Updated 05/21/2018 10:09 am)*

#### Staff Account Registration

-  **Staff Welcome Email**  
This template defines the initial email (optional) sent to Agents when an account is created on their behalf. *(Last Updated 05/21/2018 10:09 am)*

Save Changes

Reset Changes

Click the following links for more details on each category:

- [End User Authentication Settings](#)
- [Authentication and Registration Templates](#)
- [Sign-In Pages](#)
- [User Account Registration](#)
- [Staff Account Registration](#)

## End User Authentication Settings

### End User Authentication Settings

Registration Required:  Require registration and login to create tickets ?

Registration Method: Public – Anyone can register ?

User Excessive Logins: 4 failed login attempt(s) allowed before a 2 minute lock-out is enforced.

User Session Timeout: 30 ?

Client Quick Access:  Require email verification on "Check Ticket Status" page ?

- **Registration Required** and **Registration Method** are used together to configure how users register and access the web portal of your help desk. The following table summarizes how the two settings work together:

Registration Required	Registration Method	Result
No	Public	Registration is not required to create support tickets. Registration is, however, available and encouraged.
Yes	Public	Users must register to create support tickets.
No	Private	Anyone can create a ticket. Only staff members can register accounts.
Yes	Private	Users can only submit tickets after registering. Registration is by invitation only.
No	Disabled	No one can register for an account, but anyone can




Registration Required	Registration Method	Result
		create a ticket.
Yes	Disabled	Users must register to submit tickets, but registration is disabled. Effectively disables new tickets via the web portal.

- **User Excessive Logins:** Select the number of times a failed logins attempts is allowed for users from the first option. If the number of failed login attempts exceeds this number, the user account will be temporarily locked. You can specify the lockout period by choosing it from the second drop-down.
- **User Session Timeout:** Enter the maximum idle time in minutes before a user is required to log in again. Enter 0 if no timeout is required.
- **Client Quick Access:** If disabled, the users can immediately access their tickets via the 'Check Ticket Status' login page. If enabled, users will be required to receive an email and follow a link in the mail to view the ticket. Disabling email verification might allow third parties (e.g. ticket collaborators) to impersonate the ticket owner).

## Authentication and Registration Templates

This section allows admins to edit the templates of emails that are sent to staff members and clients. You can also edit the template of the mail sent to guests to access their tickets.

### Authentication and Registration Templates

- 
**Staff Members**  
 This template defines the email sent to Staff who select the **Forgot My Password** link on the Staff Control Panel Log In page. *(Last Updated 05/21/2018 10:09 am)*
- 
**Clients**  
 This template defines the email sent to Clients who select the **Forgot My Password** link on the Client Log In page. *(Last Updated 05/21/2018 10:09 am)*
- 
**Guest Ticket Access**  
 This template defines the notification for Clients that an access link was sent to their email *(Last Updated 05/21/2018 10:09 am)*

### Staff Members

- Click the 'Staff Members' link to edit the template of the forgotten password mail sent to staff:

### Manage Content – C1 Service Desk Staff Password Reset ✕

C1 Service Desk Staff Password Reset

**Hi %`{staff.name.first}`,**

A password reset request has been submitted on your behalf for the helpdesk at %`{url}`.

If you feel that this has been done in error, delete and disregard this email. Your account is still secure and no one has been given access to it. It is not locked.

This template defines the email sent to Staff who select the **Forgot My Password** link on the Staff Control Panel Log In page.

Reset Cancel Save Changes

- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

#### Clients

- Click the 'Clients' link, to edit the template of the forgotten password mail sent to clients:

## Manage Content — `%{company.name}` Help Desk Access ✕

`%{company.name}` Help Desk Access

**Hi `%{user.name.first}`,**

A password reset request has been submitted on your behalf for the helpdesk at `%{url}`.

If you feel that this has been done in error, delete and disregard this email.  
Your account is still secure and no one has been given access to it. It is not

This template defines the email sent to Clients who select the **Forgot My Password** link on the Client Log In page.

Reset
Cancel
Save Changes

- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

### Guest Ticket Access

- Click the 'Guest Ticket Access' link, to edit the template of email notification that is sent to clients with access link to their tickets,

## Manage Content — Ticket [`#%{ticket.number}`] Access Link ✕

Ticket [`#%{ticket.number}`] Access Link

**Hi `%{recipient.name.first}`,**

An access link request for ticket `#%{ticket.number}` has been submitted on your behalf for the helpdesk at `%{url}`.

Follow the link below to check the status of the ticket `#%{ticket.number}`.

This template defines the notification for Clients that an access link was sent to their email. The ticket number and email address trigger the access link.



Reset
Cancel
Save Changes

- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

## Sign-In Pages

This section allows administrators to edit the message and banner displayed on the staff member's Log In page and Client Sign-In page.

### Sign-In Pages

-  **Staff Login Banner**  
This is the initial message and banner shown on the Staff Log In page (Last Updated 05/21/2018 10:09 am)
-  **Client Sign-In Page**  
This composes the header on the Client Log In page (Last Updated 05/21/2018 10:09 am)

### Staff Login Banner

- Click the 'Staff Login Banner' link, to edit the message shown on the 'Staff Log In' page

### Manage Content – Authentication Required ✕

This is the initial message and banner shown on the Staff Log In page. The first input field refers to the red-formatted text that appears at the top. The latter textarea is for the banner content which should serve as a disclaimer.

- Edit the message as required. The text entered in the first field appears as red text at the top. The text area serves for the banner content.
- Click 'Save Changes' for the changes to take effect.

### Client Sign-In Page

Click the 'Client Sign-In Page' link, to edit the header shown on the Client Log In' page

### Manage Content – Sign in to %{company.name} ✕

Sign in to %{company.name}

To better serve you, we encourage our Clients to register for an account.




This composes the header on the Client Log In page. It can be useful to inform your Clients about your log in and registration policies.

- Edit the message as required. The text entered in the first field appears as blue text below the menu bar. The text area serves for providing other information.
- Click 'Save Changes' for the changes to take effect.

### User Account Registration

This section allows you to edit the email templates that are sent to users for confirming their email address, account creation and account confirmed emails.

#### User Account Registration

-  **Please Confirm Email Address Page**  
This templates defines the page shown to Clients after completing the registration form (Last Updated 05/21/2018 10:09 am)
-  **Confirmation Email**  
This template defines the email sent to Clients when their account has been created in the Client Portal or by an Agent on their behalf (Last Updated 05/21/2018 10:09 am)
-  **Account Confirmed Page**  
This template defines the content displayed after Clients successfully register by confirming their account (Last Updated 05/21/2018 10:09 am)

### Confirm Email Address Page

Click the 'Please Confirm Email Address Page' link, to edit the template of email that is sent to users after completing the registration form.

### Manage Content – Account registration ✕

Account registration

**Thanks for registering for an account.**

We've just sent you an email to the address you entered. Please follow the link in the email to confirm your account and gain access to your tickets.

This templates defines the page shown to Clients after completing the registration form. The template should mention that the system is sending them an email confirmation link and what is the next step in the registration process.

- Edit the message as required. Make sure to mention that the C1 Service Desk system is sending them a confirmation email link and the next steps for completing the registration process.
- Click 'Save Changes' for the changes to take effect.

#### Confirmation Email

- Click the 'Confirmation Email' link, to edit the template of email that is sent to users after their account has been created.



**Manage Content – Welcome to {company.name}** ✕

Welcome to {company.name}

**Hi {recipient.name.first},**

We've created an account for you at our help desk at {url}.

Please follow the link below to confirm your account and gain access to your tickets.

This template defines the email sent to Clients when their account has been created in the Client Portal or by an Agent on their behalf. This email serves as an email address verification. Please use {link} somewhere in the body.

- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

#### Account Confirmed Page

- Click the 'Account Confirmed Page' link, to edit the template of email that is sent to users after their account has been successfully registered.

**Manage Content – Account Confirmed!** ✕

Account Confirmed!

**Thanks for registering for an account.**

You've confirmed your email address and successfully activated your account. You may proceed to open a new ticket or manage existing tickets.

*Your friendly support center*

This template defines the content displayed after Clients successfully register by confirming their account. This page should inform the user that registration is complete and that the Client can now submit a ticket or access existing tickets.

- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

## Staff Account Registration

This section allows administrators to edit the email template that is sent to Staff Members whose account is created by an administrator. This welcome email is optional and is configured in the 'Staff Members' page. See **Staff Members** for more details.

**Staff Account Registration**

**Staff Welcome Email**

This template defines the initial email (optional) sent to Agents when an account is created on their behalf. (Last Updated 09/19/2016 12:53 pm)

- Click the 'Staff Welcome Email' link, to edit the template of welcome email that is sent to staff members after their account has been successfully created by an administrator

**Manage Content – Welcome to C1 Service Desk** ✕

Welcome to C1 Service Desk

**Hi %{recipient.name.first},**

We've created an account for you at our help desk at %{url}.

Please follow the link below to confirm your account and gain access to your tickets.

This template defines the initial email (optional) sent to Agents when an account is created on their behalf.

- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.
  - Click 'Save Changes' at the bottom of the screen for the access control settings to take effect.

## 2.2.7 Knowledge Base Settings and Options

- Click 'Admin Panel' > 'Settings' > 'Knowledgebase'

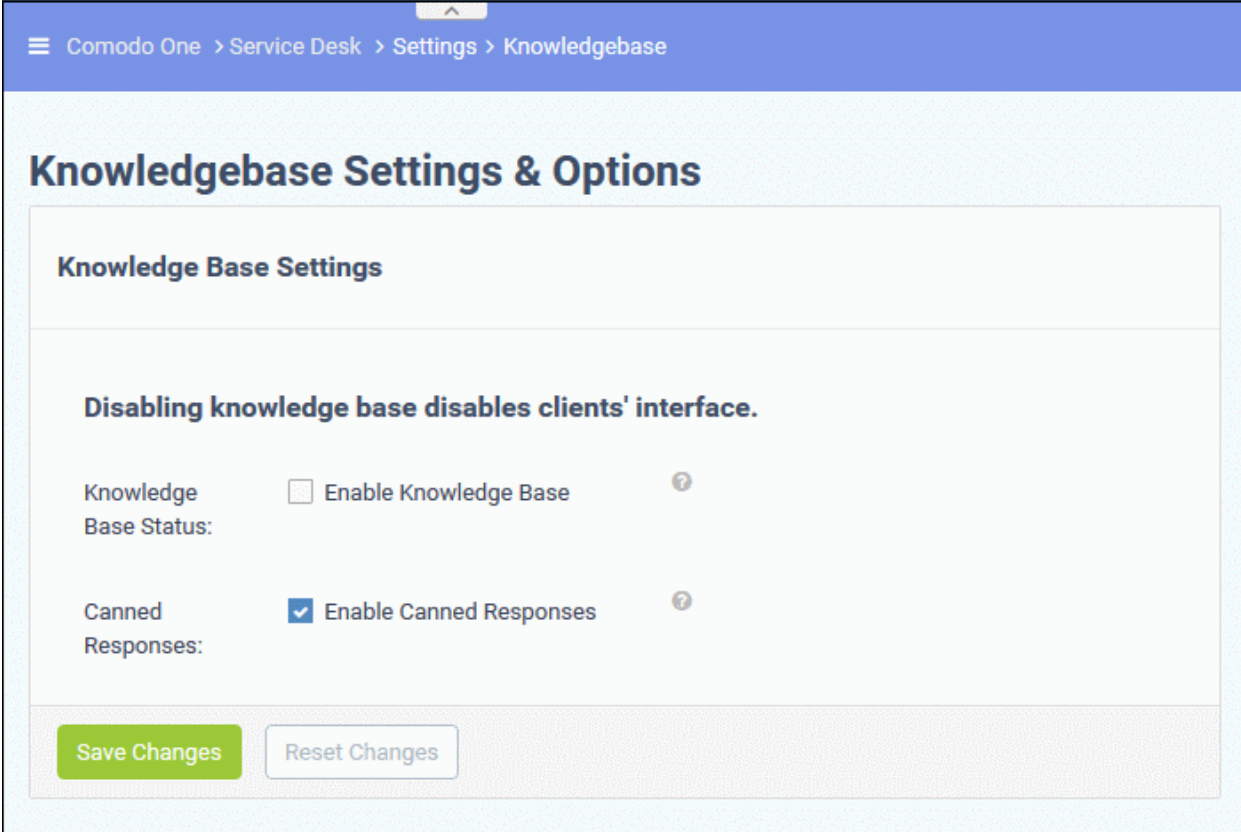
Admins and staff can create FAQs which can be published in the client portal for end-users.

FAQs help end-users find answers for frequently encountered problems. Apart from improving your customer service, this also means support staff can prioritize their time more effectively.

- FAQs can be made available for everyone, or only to admin/staff members. See **Managing Knowledgebase** for a description on how create FAQs.
- The settings in this interface determine whether or not the 'Knowledgebase' tab will be available in the user web portal.
- Administrators can also configure whether 'Canned Responses' should be made available.

### To configure knowledge-base settings

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Settings' on the left then 'Knowledgebase'



Comodo One > Service Desk > Settings > Knowledgebase

## Knowledgebase Settings & Options

### Knowledge Base Settings

**Disabling knowledge base disables clients' interface.**

Knowledge Base Status:  Enable Knowledge Base ?

Canned Responses:  Enable Canned Responses ?

[Save Changes](#) [Reset Changes](#)

- **Knowledge Base Status:** Makes FAQs available under the 'Knowledgebase' tab in the client portal. See [Managing Knowledgebase](#) for help to create categories and FAQs.
- **Canned Responses:** If enabled, admins and staff can use canned responses when replying to tickets. See [Canned Responses](#) for more details.
  - Click 'Save Changes' to apply your changes.

**Note:** Any setting/change you make in this interface will be added to Comodo One audit logs. You can view audit logs in the C1 portal ('Management' > 'Audit Logs'). See <https://help.comodo.com/topic-289-1-716-12456-View-Audit-Logs.html> for more details.

## 2.2.8 Autoresponder Settings

Click 'Admin Panel' > 'Settings' > 'Autoresponder'

- An autoresponder is an email which is automatically sent to users immediately after certain events. For example, autoresponders are sent to users after they submit a ticket to confirm receipt of their request.
- You can also send out autoresponders when staff create a new ticket, when a new reply is posted to a ticket, and when a user exceeds the maximum number of open tickets.
- The 'Autoresponder Settings' interface lets you choose global autoresponder settings
- You can also choose autoresponder settings for specific **ticket categories**, **departments** or **email addresses**. Category / department / email settings override the global setting.
- You can view and edit the content of autoresponders at 'Admin Panel' > 'Emails' > 'Templates'.
  - See [Email Templates](#) for help to create and manage email templates.

### Configure global autoresponder settings

- Open the admin panel (see the last link on the left)
- Click 'Settings' > 'Autoresponder'

The screenshot shows the 'Autoresponder Settings' page in the Comodo One Service Desk Admin Panel. The breadcrumb trail is 'Service Desk > Settings > Autoresponder'. The left sidebar contains a navigation menu with 'SETTINGS' and 'Autoresponder' highlighted with red circles. The main content area is titled 'Autoresponder Settings' and includes a sub-section 'Autoresponder Setting' with the following settings:

- Global setting - can be disabled at department or email level.**
- New Ticket:**  Ticket Owner
- New Ticket by Staff:**  Ticket Owner
- New Message:**
  - Submitter: Send receipt confirmation
  - Participants: Send new activity notice
- Overlimit Notice:**  Ticket Submitter

At the bottom of the settings area, there are two buttons: 'Save Changes' (green) and 'Reset Changes' (grey).

- **New Ticket:** A confirmation email is sent to users immediately after they submit a new ticket. This might be over-ridden by category specific responder settings.
  - See [Ticket Categories](#) to read more about categories.
- **New Ticket by Staff:** A confirmation email is sent to users after a staff-member creates a ticket on their behalf. Note - staff have the option to disable the responder when creating the ticket.
  - See [Create a new ticket on behalf of a user](#) for more on this.
- **New Message** - Emails sent out when a new comment/reply is posted to a ticket.
  - **Submitter:** Send receipt confirmation - A confirmation mail is sent to the person who posted the reply.
  - **Participants:** Send new activity notice - All collaborators on the ticket receive email notification of the new post.
- **Overlimit Notice:** Notifies the user that their ticket was rejected because they already have the maximum number of open tickets. You can set the max. number at 'Admin Panel' > 'Settings' > 'Tickets'.
  - See [Ticket Settings and Options](#) if you want to read more about ticket settings.

Click 'Save Changes' for your settings to take effect.

## 2.2.9 Configure Alerts and Notices

Click 'Admin Panel' > 'Settings' > 'Alerts & Notices'

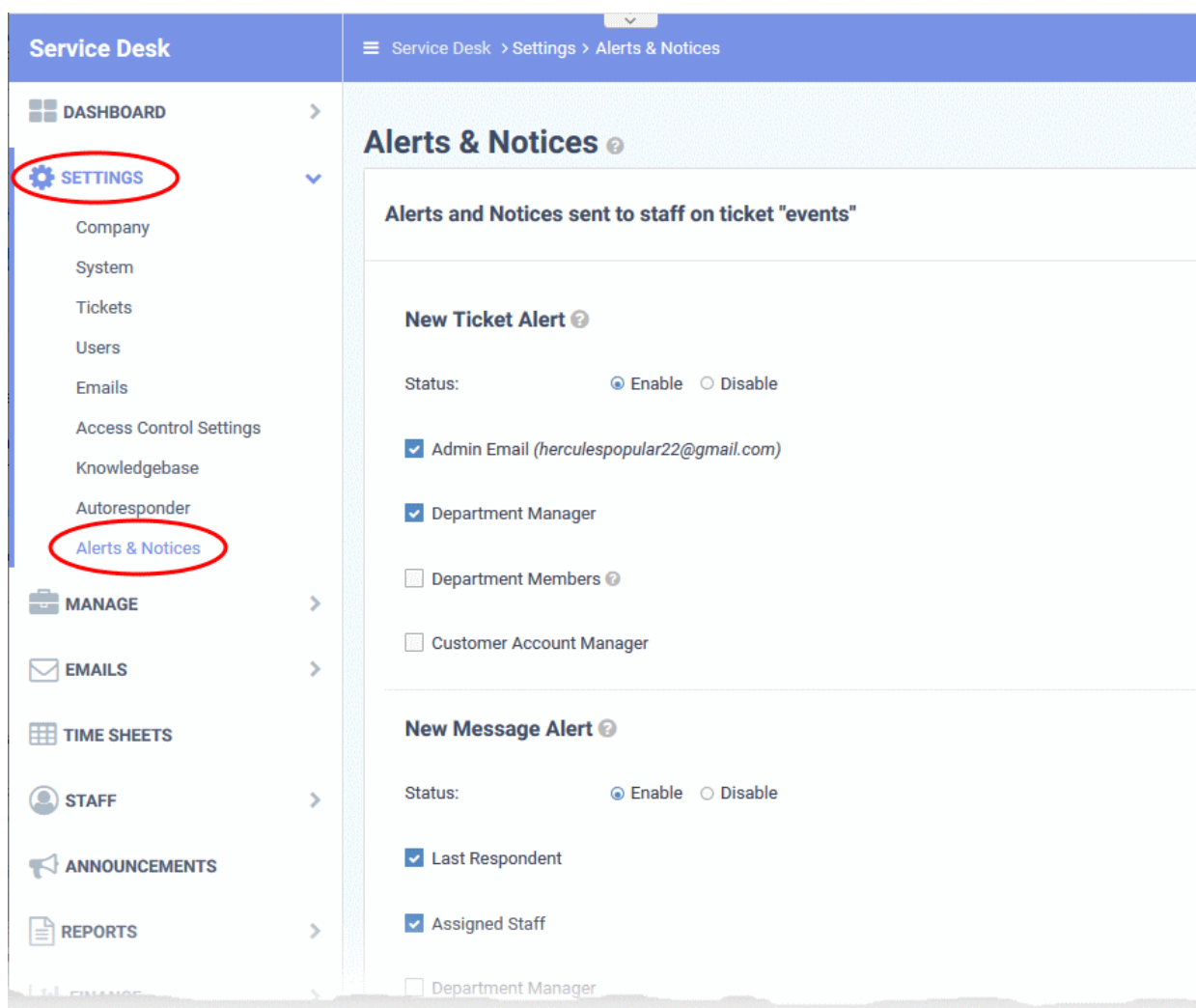
- Alert emails can be sent to users and staff after various events occur. Example events include when a new ticket is created, when a ticket is overdue, and when a new internal note is added.
- Service Desk uses a system of 'template sets' to house the content of these alerts. Click 'Admin Panel' > 'Emails' > 'Templates' to manage existing templates.
- Each set includes templates for a wide variety of alerts. Simply click the template name to edit its contents.

- Templates can include dynamic variables like 'ticket number' and 'assigned staff'. Click the 'Supported variables' link at the top-right of the editor to view the variables you can use.
- See **Email Templates** for help to create email template sets

**Note:** Any setting/change you make in this interface will be added to Comodo One audit logs. You can view audit logs in the C1 portal ('Management' > 'Audit Logs').

## Setup alerts and notices

- Open the admin panel (see the last link on the left)
- Click 'Settings' > 'Alerts & Notices'



- Use the 'Enable' / 'Disable' options to activate or deactivate an alert
- Use the check boxes to select the recipients of the alert

You can enable / disable alerts emails and select recipients for the following events:

- **New Ticket Alert:** Alerts are sent to the selected recipients when a new ticket is created.  
Note - New ticket alerts are not sent if the ticket was auto-assigned by a category or filter.
  - See **Ticket Categories** for help to make a category assign tickets to staff.
  - See **Ticket Filters** for help to make filters assign tickets to staff.
- **New Message Alert:** Alerts are sent to recipients when the user posts a new comment to the ticket.
- **New Internal Note Alert:** Alerts are sent to recipients when a new remark is added to a ticket.

- **Ticket Close Alert:** Alerts are sent to recipients when a ticket is closed.
  - **Notify For:** Choose whether to send alerts for all closed tickets, or only for tickets closed by a rule in a ticket filter.
- **Ticket Assignment Alert:** Alerts are sent to staff when a new ticket is assigned to him/her.
- **Ticket Transfer Alert:** Alerts are sent to recipients when a ticket is transferred from one department to another.
- **Overdue Ticket Alert:** Alerts are sent to recipients when a ticket passes its due date, as per the service level agreement (SLA) associated with the ticket. Please also see **Service Level Agreements**.
- **System Alerts:** Alerts are sent to the admin for database errors and/or failed login attempt alerts.
  - The default admin email is set in 'Admin Panel' > 'Settings' > 'Emails'.
  - See **Emails Settings and Options** if you need help with this.
- Click 'Save Changes' at the bottom of the screen for your changes to take effect.

## 2.2.10 Configure Two Factor Authentication

Two-factor authentication increases security by requiring staff to present additional verification before they can login to Service Desk. Once setup, staff will need to enter a unique verification code in addition to their regular login credentials.

- Two factor authentication can be activated in Comodo One at 'Management' > 'Account Security Details'.
- See **Setup Two-Factor Authentication** in the C1 guide for help with this.

## 2.3 Manage Service Desk Components

Click 'Admin Panel' > 'Manage'

- The 'Manage' section lets you configure various important Service Desk settings:

The screenshot shows the 'Service Desk' interface. The left sidebar contains a 'MANAGE' menu with the following items: Ticket Categories (selected), Ticket Filters, SLA Plans, API Keys, Pages, Forms, Lists, Assets, Materials, and Charging. The main content area is titled 'Ticket Categories' and includes a breadcrumb trail: Service Desk > Manage > Ticket Categories. Below the title are action buttons: '+ Add New Category', 'Enable', 'Disable', and 'Delete'. A table lists the following categories:

<input type="checkbox"/>	CATEGORY	STAGES	STATUS	TYPE
<input type="checkbox"/>	<a href="#">Access Issue</a>	1	Active	Public
<input type="checkbox"/>	<a href="#">Asset Issue</a>	1	Active	Public
<input type="checkbox"/>	<a href="#">Feedback</a>	1	Active	Public
<input type="checkbox"/>	<a href="#">General Inquiry</a>	1	Active	Public
<input checked="" type="checkbox"/>	<a href="#">Power Issue</a>	2	Active	Public
<input type="checkbox"/>	<a href="#">Report a Problem</a>	1	Active	Public

At the bottom of the table, there are navigation controls: '<< Prev' and '1'.

Click the following links to find out more about each component:

- **Ticket Categories:** Ticket categories are help topics that you present to end-users on your support portal. The categories let users select the area with which they need help. Example categories you could create are 'Billing support', 'Account problems', 'Workstation issues' etc. You can route tickets to a particular department or staff member based on the category chosen. See [Ticket Categories](#) for help with this area.
- **Ticket Filters:** Ticket filters are rules which implement specific actions on tickets if certain criteria are met. See [Ticket Filters](#) for more details.
- **SLA Plans:** Service Level Agreement (SLA) plans define the period before which a ticket should be attended and closed. Administrators can also configure warning level alerts if a SLA is breached. See [Service Level Agreements](#) for more details.
- **API Keys:** C1 applications like Endpoint Manager and CRM can automatically submit tickets to Service Desk when certain events happen. API keys are used to authenticate the legitimacy of these 'auto-submitted' tickets. See [API Keys](#) for more details.
- **Pages:** Manage the pages which appear on your customer-facing support portal. See [Client Portal Pages](#) for more details.
- **Forms:** Forms are used in various Service Desk interfaces to collect information from end-users, customers and your company. For example, the contact form collects a new user's name, email address and phone number. See [Forms](#) for more details.
- **Lists:** Lists are used to populate drop-down menus on a form. For example, if your form asks a user their operating system, then the list contains items like 'Windows', 'Linux', 'Mac OS', 'iOS', 'Chrome OS', etc. See [Custom Lists](#) for more details.
- **Assets:** An asset is an item or service that staff add to a ticket. You can charge specific rates for work done



on certain assets. For example, a 'Printer' may be one of your assets. You could charge a different rate for work done on printers than you would, say, for work on a server.

- **Materials:** Add and manage materials like components, consumables and/or other expense types for adding to tickets.
- **Charging:** Charging plans let you define your default hourly rate for support work. You can also set up variable rates for work on specific assets, or work of a specific type (remote, on-site, telephone). You can create multiple charging plans and apply them to different customer contracts as required. See **Manage Charging Plans** for more details.

### 2.3.1 Ticket Categories

Click 'Admin Panel' > 'Manage' > 'Ticket Categories'

- Ticket categories are support topics that are presented to users so they can more easily choose the area with which they need help. For example, your portal might have a menu which says 'Please choose the area we can help you with', and offer categories such as 'Billing', 'Account Changes', 'Technical Support', and so forth.
- You can associate a ticket category with a custom form to gather more targeted information from a user. For example, you may need different information from a user if they need help with an account question than you would if they have a problem with their printer.
- Ticket categories can be used to route tickets to a particular department or staff member if required. You can also create custom auto-responders and thank-you pages based on the ticket category chosen by your user.

#### Ticket Categories

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Ticket Categories'

The screenshot shows the 'Ticket Categories' management page in the Service Desk. The left sidebar has 'MANAGE' circled in red. The main content area shows a table of categories. The 'Over heating' category is selected and highlighted in blue.

<input type="checkbox"/>	CATEGORY ↕	STAGES	STATUS	TYPE	PRIORITY	DEPARTMENT	LAST UPDATED
<input type="checkbox"/>	<a href="#">Access Issue</a>	1	Active	Public			05/21/2018 10:09 am
<input type="checkbox"/>	<a href="#">Asset Issue</a>	1	Active	Public			05/21/2018 10:09 am
<input type="checkbox"/>	<a href="#">Feedback</a>	1	Active	Public			05/21/2018 10:09 am
<input type="checkbox"/>	<a href="#">General Inquiry</a>	1	Active	Public			05/21/2018 10:09 am
<input checked="" type="checkbox"/>	<a href="#">Over heating</a>	1	Active	Public	Normal	Support	02/06/2020 1:33 pm
<input type="checkbox"/>	<a href="#">Report a Problem</a>	1	Active	Public			05/21/2018 10:09 am

- **Category** - The name of the help topic. These topics are presented to end-users so that they may choose the area with which they need help. The topics you create depend on the support services you offer. Example categories you could consider are 'General Inquiry', 'Billing Issue', 'Server Problem', 'Internet connection issue', 'Report a bug', etc.
  - Click on the name of a category to **edit it**.
- **Stages** - The number of steps in tickets which belong to the category. A ticket may have multiple steps if it needs to pass from one department/staff member to the next.
- **Status** - Shows whether the help topic is active or inactive. Users and staff can only create tickets in active

help topics.

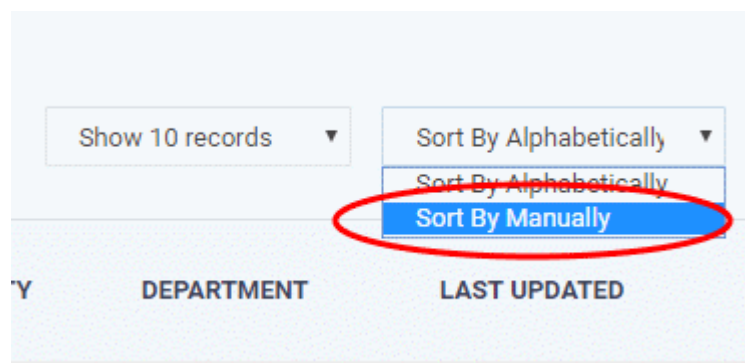
- **Type** - Shows whether the help topic is public or private:
  - Public - Available to both end users and staff. End users can select the help topic when creating a ticket at your support portal. Staff can pick the topic when they create a ticket on behalf of a user.
  - Private / Internal - The topic is only available only to staff. Staff can choose this topic when creating or editing a ticket.
- **Priority** - The urgency level of tickets in this category. See **Appendix 2 - Ticket Priorities** if you'd like some general advice on ticket priorities.
- **Department** - The department assigned to tickets in this category.
- **Last Updated** - The date and time the category was most recently updated.

The interface lets you:

- **Add a new ticket category**
- **Enable / disable a ticket category**
- **Edit a ticket category**
- **Remove a ticket category**

### Sort items

The default sorting mode is 'Alphabetically'. Manual sorting allows you to drag and re-order the rows as required:



### Add a new ticket category

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Ticket Categories'
- Click 'Add New Category'

**Ticket Categories** ?

<input type="checkbox"/>	CATEGORY	STAGES	STATUS	TYPE
<input type="checkbox"/>	<a href="#">Access Issue</a>	1	Active	Public
<input type="checkbox"/>	<a href="#">Asset Issue</a>	1	Active	Public

---

**Add New Category**

**Category Information** ?

Category: \*  ?

Status: \*  Active  Disabled ?

Type: \*  Public  Private/Internal ?

Parent Category: \*  ?

---

**New ticket options**

Custom Form: \*  ?

Thank-you Page:  ?

Auto-response: \*  Disable new ticket auto-response ?

---

**Ticket Process Options**

Ticket Stages: \*  Enable ticket stage alerts ?

Stage Transfer Email: \*  ?

---

**Ticket stages**

**Stage 1:**

## Category information

- **Category:** Enter a unique name for the ticket category. This should be a support topic that you want to present to end-users for selection. For example, 'Billing Inquiries', 'Technical Support', 'Printer Issue', etc.
- **Status:** Choose whether the ticket category is active or not. Users and staff can only create tickets in active

help categories. You can change the status at any time in the 'Ticket Categories' screen:

- Click 'Admin Panel' > 'Manage' > 'Ticket Categories'
- Select a category using the check-boxes on the left
- Use the 'Enable/' 'Disable' buttons above the table to active or deactivate the category.
- **Type:** Choose whether the category is visible to end-users or only available to staff.
  - **Public** - The category is published to your customer-facing portal for users to select when they create a ticket. It is also available to staff to choose when they create a ticket.
  - **Private / Internal** - The category is only available to staff. Staff can choose this category when creating a ticket in the staff panel.
- **Parent Category:** (optional). Choose a master category for this topic. Choosing a parent means this category becomes a child, or sub-section, of the parent. For example, 'Hardware Issues' could be your parent category, and 'Printer Issues' your sub-category.

### New ticket options

- **Custom Form:** Choose the form that is presented to users if they pick this support category. Custom forms allow you to collect targeted information from a user about specific problems.

For example, the information you need to collect from a customer about a billing issue is likely to be different to the information you need for a printer issue.

- Click 'Admin Panel' > 'Manage' > 'Forms' to view, edit and create custom forms.
- See **Forms** if you want to learn more about forms
- **Thank-You Page:** Choose the confirmation page that users see after submitting a ticket in this category. The page is shown to guest users only.
  - See **Company profile and support portal settings** for help to customize your support portal pages.
- **Auto-response:** Choose whether to send a confirmation email to the user after they submit a ticket to this category. This setting over-rides global and department-level auto-responder settings.
  - See **Autoresponder Settings** for more.

### Ticket process options

- **Enable ticket stage alerts:** Sends a notification to the user when the ticket moves from one stage to the next. This setting only applies to **multi-stage tickets**.
- **Stage Transfer Email:** Select the template you want to use for the stage transfer email.
  - The item you select here is a template 'set' rather than just an individual mail.
  - You can view and edit the content of the individual mail as follows:
    - Click 'Admin Panel' > 'Emails' > 'Templates'
    - Click on 'Default Email Templates (System Default)'
    - Scroll to the 'End User Templates' section.
    - Click on the 'Ticket Stage Template'
    - Edit the content as required
- See **Email Templates** if you want more help with email templates.

### Ticket stages

- You can setup category tickets to have a single stage, or multiple stages. Multi-stage tickets let you create a 'step-by-step' process to resolve specific types of issue. Each stage defines the department, priority, SLA and assignee of the ticket.
- For example, an issue with your website might first go to the support department for verification then onto the web-dev dept. to deploy the fix. The ticket transitions to the appropriate department/staff member at the end of each stage.

Click the 'Stage' stripe to add/edit the following settings:

- **Stage Name:** Create a label for the ticket stage
- **Department:** The department to which the ticket is assigned at this stage.
- **Priority:** Severity of the ticket at this stage. The options are Low, Normal, High and Critical. Please note that staff attending to the ticket can change the priority. See **Appendix 2 - Ticket Priorities** for general guidance on priority levels.
- **SLA Plan:** The service level agreement which applies to the ticket at this stage.
- **Auto-assign To:** The staff member to whom the ticket should be assigned at this stage. The assignee can re-assign the ticket to another staff member if required.
- **Admin Notes:** Add comments about the category. These are internal and not visible in the client portal.

Click 'Add Stage', to create a new stage for the ticket category

- Click the 'Add Category' button to save the category

### Enable / disable a ticket category

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Ticket Categories'
- Select the ticket category you want to activate / deactivate
- Click 'Enable' or 'Disable' at the top:

The screenshot shows the 'Ticket Categories' management page. At the top, there are navigation links: 'Service Desk > Manage > Ticket Categories'. Below the navigation is the title 'Ticket Categories' and a toolbar with buttons: '+ Add New Category', 'Enable', 'Disable', and 'Delete'. The 'Disable' button is circled in red. Below the toolbar is a table with columns: 'CATEGORY', 'STAGES', 'STATUS', 'TYPE', and 'PRIORITY'. The table contains five rows of categories: 'Report a Problem', 'Over heating', 'General Inquiry', and 'Feedback'. The 'Over heating' row is selected. A red arrow points from the 'Disable' button to a 'Please Confirm' dialog box. The dialog box contains the text: 'Are you sure want to **disable** selected categories?' and 'Please confirm to continue.' At the bottom of the dialog are two buttons: 'No, Cancel' and 'Yes, Do it!'.

<input type="checkbox"/>	CATEGORY	STAGES	STATUS	TYPE	PRIORITY
<input type="checkbox"/>	<a href="#">Report a Problem</a>	1	Active	Public	
<input checked="" type="checkbox"/>	<a href="#">Over heating</a>	1	Active	Public	Normal
<input type="checkbox"/>	<a href="#">General Inquiry</a>	1	Active	Public	
<input type="checkbox"/>	<a href="#">Feedback</a>	1	Active	Public	

- Click 'Yes, Do it!' to confirm your action

## Edit a ticket category

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Ticket Categories'
- Click on the name of the ticket category you want to edit.

### Update Category

---

#### Category Information ?

Category: \*  ?

Status: \*  Active  Disabled ?

Type: \*  Public  Private/Internal ?

Parent Category: \*  ?

---

#### New ticket options

Custom Form: \*  ?

Thank-you Page:  ?

Auto-response: \*  Disable new ticket auto-response ?

---

#### Ticket Process Options

Ticket Stages: \*  Enable ticket stage alerts ?

Stage Transfer Email: \*  ?

---

#### Ticket stages

Stage 1: Give troubleshooting instructions

Stage 2: Site Visit [Delete](#)

- Edit the settings as required
- The update process is similar to adding a new category. See **above** for descriptions of the various settings.
- Click 'Save Changes' for your modifications to take effect

### Remove a ticket category

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Ticket Categories'
- Select the categories you want to remove and click 'Delete' at the top:

The screenshot shows the 'Ticket Categories' management interface. At the top, there are buttons for '+ Add New Category', 'Enable', 'Disable', and 'Delete'. The 'Delete' button is circled in red. Below this is a table with columns: CATEGORY, STAGES, STATUS, TYPE, and PRIORITY. The 'Over heating' category is selected with a checkmark. A 'Please Confirm' dialog box is open, asking for confirmation to delete the selected categories. The dialog text reads: 'Are you sure you want to DELETE selected categories? Deleted topics CANNOT be recovered. Please confirm to continue.' There are two buttons at the bottom: 'No, Cancel' and 'Yes, Do it!'.

- Click 'Yes, Do it!' to confirm removal.

## 2.3.2 Ticket Filters

Click 'Admin Panel' > 'Manage' > 'Ticket Filters'

- Ticket filters are rules which implement specific actions on tickets if certain criteria are met.
- Actions include routing tickets to a specific department/admin/staff member, sending an auto-response, closing/rejecting a ticket, changing the ticket owner, and more.
- Once saved and made active, the filter is applied to all new tickets received by your organization.

- You can create multiple filters and prioritize them with the 'execution order' setting. Filters with a higher execution order take precedence in the event of a conflict.

Example filters you can create:

- Identify tickets with device names starting with 'Desktop'. Change the users on those tickets to a specific user. For example, to the network admin.
- Assign tickets that were auto-created by Endpoint Manager to a particular staff member.

See the following for more help:

- Open the filter interface**
- Create a new filter**
- Activate / deactivate a filter**
- Edit a filter**
- Remove a filter**

## Open the ticket filters interface

- Open the 'Admin Panel' (see the last link on the left)
- Click 'Manage' > 'Ticket Filters'

The screenshot shows the 'Service Desk' Admin Panel. The left sidebar contains a 'MANAGE' menu item, which is circled in red. Below it, 'Ticket Filters' is also circled in red. The main content area displays a table of ticket filters. At the top of the table, there are buttons for 'Add New Filter', 'Enable', 'Disable', and 'Delete', along with a 'Show 25 records' dropdown. The table has the following columns: NAME, STATUS, ORDER, RULES, TARGET, DATE ADDED, and LAST UPDATED. Three filters are listed: 'Issues with overheating problems' (Active, Order 5, 1 rule, Any target, Date Added: 02/11/2020 12:29 pm, Last Updated: 02/11/2020 12:29 pm), 'Printer problems' (Active, Order 10, 1 rule, Any target, Date Added: 02/11/2020 12:30 pm, Last Updated: 02/11/2020 12:30 pm), and 'Network connectivity' (Active, Order 3, 1 rule, Any target, Date Added: 02/11/2020 12:32 pm, Last Updated: 02/11/2020 12:32 pm). At the bottom of the table, there are navigation links for 'Prev' and 'Next'.

- Name** - The label of the ticket filter
- Status** - Whether the filter is enabled or disabled
- Order** - The priority that the filter is executed
- Rules** - The number of rules in the filter
- Target** - The channel over which the ticket is received. You can select 'Any', or pick a specific channel like 'Email', 'Web' or 'API'.
- Date Added** - Date and time the filter was created
- Last Updated** - Date and time the filter was most recently edited.

Click on a column header to sort the items in ascending/descending order.



The ticket filters interface lets you:

- **Create a new filter**
- **Activate / Deactivate a filter**
- **Edit a filter**
- **Remove a filter**

## Create a new filter

- Open the 'Admin Panel' (See the last link on the left)
- Click 'Manage' > 'Ticket Filters'
- Click 'Add New Filter'

Service Desk > Manage > Ticket Filters

<input type="checkbox"/>	NAME ↕	STATUS ↕	ORDER ↕	RULES ↕	TARGET ↕
<input checked="" type="checkbox"/>	<a href="#">Issues with overheating problems</a>	Active	5	1	Any
<input type="checkbox"/>	<a href="#">Printer problems</a>	Active	10	1	Any
<input type="checkbox"/>	<a href="#">Network connectivity</a>	Active	3	1	Any

### Add New Filter

**Category Information:** Filters are executed based on execution order. Filter can target specific ticket source.

Filter Name: \*

Execution Order: \*  (1...99)  Stop processing further on match! ?

Filter Status: \*  Active  Disabled

Target Channel: \*  ?

**Filter Rules:** Rules are applied based on the criteria. ?

Rules Matching  Match  Match Any (case-insensitive comparison) ? [Add New Rule](#)

Criteria: \* All

**Filter Actions:** Can be overridden by other filters depending on processing order.

The new filter form contains the following sections:

- **Category information**
- **Filter rules**

- **Filter actions**
- **Admin notes**

## Category information

- **Filter Name:** Enter a unique label for the filter. The name should identify the purpose of the filter.
- **Execution Order:** The priority of the filter. The lower the number, the higher the priority.
  - Filters are prioritized according to their execution order. If a ticket meets the conditions of multiple filters, and these conditions conflict with each other, then the filter with the higher execution order is implemented.
  - Stop processing further on match! - Service Desk will apply the actions in this filter when it finds a ticket which meets its conditions, then ignore any other filters which match the ticket.

For example, say you have two filters which state different actions for tickets received from 'example@example.com':

Filter A - IF user / email address EQUALS 'example@example.com', THEN assign to 'Maintenance' dept.  
Execution order = 1

Filter B - IF user / email address EQUALS 'example@example.com', THEN send 'Canned response'.  
Execution order = 2

Actions are applied in this order to the tickets received from 'example@example.com':

1. The ticket is assigned to 'Maintenance' dept
2. A canned response is sent

If 'Stop processing further on match!' is enabled in filter A then the ticket is assigned to maintenance, but the canned response is not sent.

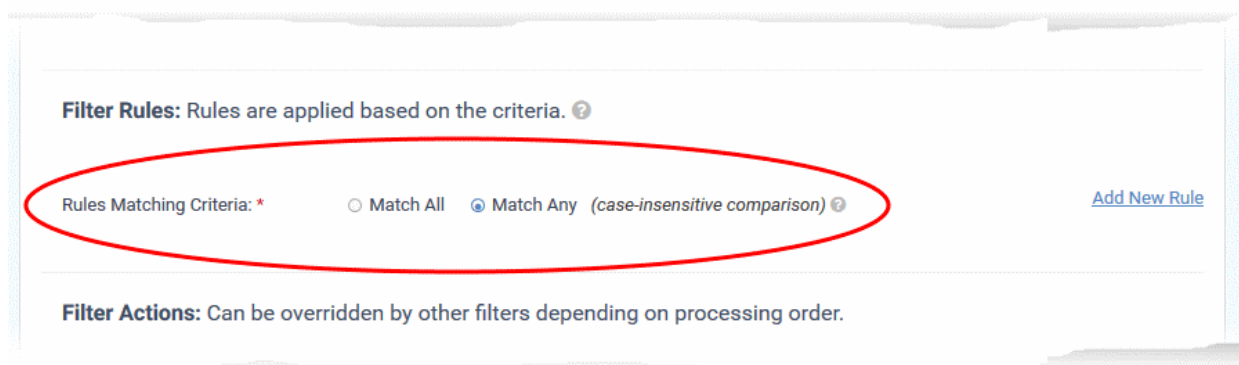
- **Filter Status:** Select whether you want the filter to be active or inactive by default. You can change the filter status at anytime using the 'Enable'/'Disable' buttons in the ticket filter screen. See **Activate / deactivate filters** for help with this.
- **Target Channel:** The method by which you received the ticket. For example, over email, via the service desk support website, over the phone, or auto-generated by Endpoint Manager. Service Desk will only apply the rule to tickets received over this channel.

## Filter rules

- Each rule has a search condition and a search criteria.
- You can add multiple rules to a filter, and choose to apply the filter if all rules are met, or if any one of the rules is met.

**Match All** - Applies the filter if every rule is met

**Match Any** - Applies the filter if any single rule is met



## Add rules

- Click 'Add New Rule' on the left

**Filter Rules:** Rules are applied based on the criteria. ?

Rules Matching Criteria: \*  Match All  Match Any (case-insensitive comparison) ?

– Select One -  – Select One -   (clear)

**Filter Actions:** Can be overridden by other filters depending on processing order.

- Define a search rule in the following format:  
 <Search Parameter> <operator> <Search Criteria>
- First drop-down - Choose the search parameter. For example, you can search for tickets from specific email addresses or domains, or by their priority level or category.
- Second drop-down - Choose the operator (Equal, Not Equal, Starts With, etc)
- Third drop-down - Type the search term in the text field. What you type here depends on the search parameter you picked in the first drop-down. For example, it could be an email address, customer name, user, ticket category etc.
- For example, the rule in the following screenshot will catch all tickets which contain a 'Device Name' that starts with 'DESKTOP':

**Filter Rules:** Rules are applied based on the criteria. ?

Rules Matching Criteria: \*  Match All  Match Any (case-insensitive comparison) ? [Add New Rule](#)

Ticket / Device Name  Starts With  DESKTOP (clear)

**Filter Actions:** Can be overridden by other filters depending on processing order.

- Repeat the process to add more rules to the filter

## Filter actions

Actions are the processes you want to implement when a ticket meets the conditions of the filter.

Criteria: \* All

**Filter Actions:** Can be overridden by other filters depending on processing order.

Reject Ticket:  Reject Ticket ?

Reply-To Email:  Use Reply-To Email (if available)?

Ticket auto-response:  Disable auto-response. ?

Canned Response:  ?

Department: \*  ?

Priority: \*  ?

SLA Plan: \*  ?

Auto Close:  Auto Close ?

Auto Change User:  ?

Auto-assign To:  ?

Category:  ?

Admin Notes: Int...

The available actions are:

- **Reject Ticket:** The ticket is not accepted and not added to Service Desk. Your support team will not work on it.
- **Reply-To Email:** An automatic response is sent to the email address from which the ticket was generated. This applies only if the ticket source is 'Email'.
- **Ticket auto-response:** If selected, auto-response mails are disabled. The setting here overrides the auto-response setting of the department to which the ticket is assigned.
  - See [Autoresponder Settings](#) to read more on this.
- **Canned Response:** Automatically send a preset reply to the user.
  - See [Canned Responses](#) to read more about this
- **Department:** Assign the ticket to a particular department.
- **Priority:** Assign a certain priority level to the ticket. The options are Low, Normal, High and Critical.
  - See [Appendix 2 - Ticket Priorities](#) read more on this
- **SLA Plan:** Apply a preset service level agreement to the ticket.
  - See [Service Level Agreements \(SLA\)](#) for help to view and manage SLAs
- **Auto Close:** Closes the ticket. The status of the ticket changes to 'Closed' in the 'Tickets' interface.
- **Auto Change User:** Set the ticket owner to a specific user. All further correspondence will be with the new user.

- **Auto-assign To:** Assign the ticket to a particular staff member or admin.
- **Category:** Place the ticket into a certain help topic.
  - See **Ticket Categories** to read more on help topics.

## Admin notes

- Add any comments you have about the filter.

Click the 'Add Filter' button at the bottom to save your new filter.

## Activate / Deactivate a filter

You can enable or disable a filter at anytime from the 'Ticket Filters' interface

- Open the 'Admin Panel' (See the last link on the left)
- Click 'Manage' > 'Ticket Filters'
- Select the filters
- Use the 'Enable' or 'Disable' links at the top to switch the filter between 'Active' and 'Inactive' states

The screenshot shows the 'Ticket Filters' interface. At the top, there are navigation links: 'Service Desk > Manage > Ticket Filters'. Below this, there are four buttons: 'Add New Filter', 'Enable', 'Disable', and 'Delete'. The 'Enable' and 'Disable' buttons are circled in red. Below the buttons is a table with the following columns: 'NAME', 'STATUS', 'ORDER', 'RULES', and 'TARGET'.

<input type="checkbox"/>	NAME ↕	STATUS ↕	ORDER ↕	RULES ↕	TARGET ↕
<input checked="" type="checkbox"/>	<a href="#">Issues with overheating problems</a>	Active	5	1	Any
<input type="checkbox"/>	<a href="#">Printer problems</a>	Active	10	1	Any
<input type="checkbox"/>	<a href="#">Network connectivity</a>	Active	3	1	Any
<input type="checkbox"/>	<a href="#">Desktop issues</a>	Passive	6	1	Any

The screenshot shows a 'Please Confirm' dialog box. The title is 'Please Confirm' and there is a close button (X) in the top right corner. The main text asks: 'Are you sure want to **disable** selected filters?' followed by 'Please confirm to continue.' At the bottom, there are two buttons: 'No, Cancel' and 'Yes, Do it!'.

- Click 'Yes, Do it!' to confirm your selection

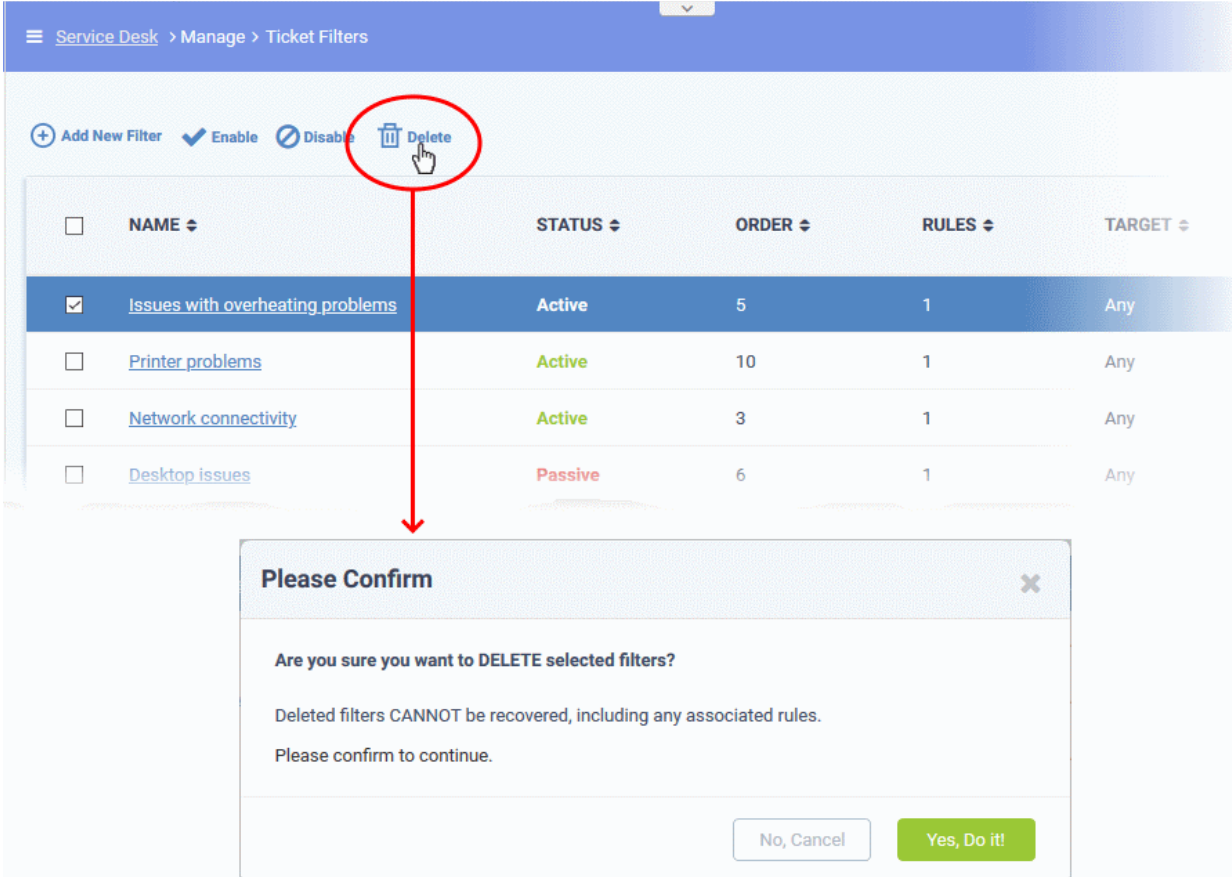
## Edit a filter

- Open the 'Admin Panel' (See the last link on the left)
- Click 'Manage' > 'Ticket Filters'
- Click on a ticket filter name in the list.

The 'Update Filter' screen lets you edit the filter configuration as required. The update procedure is same as explained **above**.

### Remove a filter

- Open the 'Admin Panel' (See the last link on the left)
- Click 'Manage' > 'Ticket Filters'
- Select the check box beside the ticket filters that you want to remove
- Click the 'Delete' link at the top



The screenshot shows the 'Service Desk > Manage > Ticket Filters' interface. At the top, there are buttons for '+ Add New Filter', 'Enable', 'Disable', and 'Delete'. The 'Delete' button is circled in red. Below this is a table of filters:

<input type="checkbox"/>	NAME ↕	STATUS ↕	ORDER ↕	RULES ↕	TARGET ↕
<input checked="" type="checkbox"/>	Issues with overheating problems	Active	5	1	Any
<input type="checkbox"/>	Printer problems	Active	10	1	Any
<input type="checkbox"/>	Network connectivity	Active	3	1	Any
<input type="checkbox"/>	Desktop issues	Passive	6	1	Any

A confirmation dialog box titled 'Please Confirm' is open, asking: 'Are you sure you want to DELETE selected filters? Deleted filters CANNOT be recovered, including any associated rules. Please confirm to continue.' The dialog has two buttons: 'No, Cancel' and 'Yes, Do it!'.

- Click 'Yes, Do it!' to confirm removal

## 2.3.3 Service Level Agreements (SLA)

Click 'Admin Panel' > 'Manage' > 'SLA Plans'

- Service Level Agreement (SLA) plans are an agreement between you and your customer. They define the length of time before a first response must be sent on a ticket, and the length of time by which the ticket must be closed.
- The system default SLA is applied to all tickets unless you apply a custom SLA. You can apply custom a custom SLA to a ticket category, a ticket stage, or a department.
- You can apply an SLA to a particular customer by creating a ticket filter ('Admin Panel' > 'Manage' > 'Ticket Filters').
- Admins can set alerts if the SLA plan is breached.

### Open the SLA interface

- Click 'Admin Panel' > 'Manage' > 'SLA Plans'



Comodo One > Service Desk > Manage > SLA Plans

### Service Level Agreements

+ Add New SLA Plan   ✓ Enable   ⏸ Disable   🗑 Delete   Show 10 records ▼

NAME ↕	STATUS ↕	GRACE PERIOD (HRS) ↕	DATE ADDED ↕	LAST UPDATED ↕
<a href="#">Default SLA</a>	Active	48	03/04/2016 5:21 pm	03/04/2016 5:21 pm
<a href="#">SLA for Others</a>	Active	36	01/04/2017 4:12 pm	01/04/2017 4:12 pm

« Prev   1   Next »

### Column Headers

- **Name:** The name of the SLA. For example, you could name plans after the customer to whom they apply.
- **Status:** Indicates whether the SLA is enabled or disabled. Only active plans have an effect on tickets.
- **Grace Period:** Shows how long a ticket can remain open before it is marked as overdue. Your team should aim to close tickets within this time period.
- **Date Added:** The date on which the SLA was created.
- **Last Updated:** The date and time the SLA was most recently updated.

Select an SLA plan and click 'Enable' or 'Disable' at the top to make it active/inactive.

### Add a new SLA

- Click 'Admin Panel' > 'Manage' > 'SLA Plans'
- Click 'Add New SLA Plan' at the top:

The screenshot displays the 'Service Level Agreements' management interface. At the top, there is a navigation bar with 'Comodo One > Service Desk > Manage > SLA Plans'. Below this, the 'Service Level Agreements' section contains a '+ Add New SLA Plan' button (circled in red), 'Enable', 'Disable', and 'Delete' icons, and a 'Show 10 records' dropdown. The main form is titled 'Service Level Agreement' and 'Add New SLA Plan'. It includes the following fields and options:

- Tickets are marked overdue on grace period violation.**
- Name:** A text input field.
- Grace Period:** A text input field with '( in hours )' and a help icon.
- Status:** Radio buttons for 'Active' (selected) and 'Disabled'.
- Transient:** A checkbox for 'SLA can be overridden on ticket transfer or help topic change'.
- Overdue and Warning Alerts:** A checkbox for 'Disable overdue and warning alerts notices. (Override global setting)'.
- Event:** A dropdown menu with 'Close' selected.
- Warning Level:** A link labeled 'Add Warning Level'.
- Breach action:** A dropdown menu with 'Trigger an email to queue/agent manager' selected.
- Hours of Operation:** A dropdown menu with 'Full support' selected.
- Admin Notes:** A section for 'Internal notes' with a help icon.

At the bottom of the form are three buttons: 'Add Plan' (green), 'Reset', and 'Cancel'.

- **Name:** Enter a unique label for the SLA. For example, you could name it after the customer to whom it applies.
- **Grace Period:** Enter the max. length of time a ticket can remain open before it is marked 'Overdue'. The timer starts from the moment the ticket was submitted.
- **Status:** Activate or deactivate the SLA. Inactive plans have no effect on tickets.
- **Transient:** Transient plans are overridden if the ticket is transferred to a department or category with a different SLA. This includes by the default/system SLA.
- **Overdue and Warning Alerts:** If enabled, you will not get overdue and warning alerts for tickets that breach the SLA.
- **Event:** Choose whether internal alerts are sent if certain actions are not taken by the end of the grace period.
  - First Response - An alert is sent to admins/staff if a ticket is not replied to within the grace period.
  - Close - An alert is sent to admins/staff if a ticket is not closed within the grace period.
- **Warning Level:** Warning levels let you generate alerts before the grace period ends. You can set as many alerts as required. Click 'Add Warning Level' to get started:



Event: *	Close
Warning Level:	<a href="#">Add Warning Level</a>
Breach action:	Trigger an email to queue/agent manager

- **Level** - Enter the % of the grace period that must elapse before the alert is sent. For example, if the grace period is 48 hours and you enter 25% here, then an alert is sent after 12 hours.
- **Action** - Choose whether to send an email or an SMS to the admin, or increase the ticket's priority level.

Warning Level:	<a href="#">Add Warning Level</a>
Level (%):	25
Action	<ul style="list-style-type: none"> <li>Trigger an email to queue/agent manager</li> <li style="background-color: #007bff; color: white;">Trigger an email to queue/agent manager</li> <li>Trigger an SMS to queue/agent manager, defined numbers</li> <li>Increase the priority</li> </ul>
Breach action:	Trigger an email to queue/agent manager

- **Breach Action:** Select the action to be taken if the ticket is not closed in time.
- **Hours of Operation:** Choose 'Full Support' and 'Business Hours'.
  - **Full Support** - Your support team is considered available to work on the ticket 24 hours per day.
  - **Business Hours** - Support is available during your business hours. You can define your business hours in **Settings > System > Business hours**.

For example, say your SLA specifies a 'Grace Period' of 12 hours, and your business hours are 9 AM - 5 PM, Mon-Fri. If a ticket is submitted on a Sunday, the SLA will start counting on Monday morning at 9 AM (for 8 hours) and continue on Tuesday (for max. 4 hours). The SLA is breached if the issue is not solved by Tuesday 12 PM.

### Admin Notes

Add any notes related to the SLA Plan for internal purpose.

- Click the 'Add Plan' button to save your new plan.

### Edit an SLA plan

- Open the 'Admin Panel' (see the last link on the left)
- Click 'Manage' > 'SLA Plans'
- Click on the SLA Plan name in the list.

The Update SLA Plan screen will be displayed. The update procedure is same as explained above while **adding** a new SLA Plan.

### Delete an SLA plan

- Open the 'Admin Panel' (see the last link on the left)
- Click 'Manage' > 'SLA Plans'
- Select the SLA Plan that you want to delete from the list, click the 'Delete' button at the top of the screen

and confirm it.

## 2.3.4 API Keys

Click 'Admin Panel' > 'Manage' > 'API Keys'

- Comodo One (C1) contains several modules that help IT managers to keep their organization's computers running smoothly. Some of the modules like Endpoint Manager (EM) are capable of automatically sending tickets to Service Desk via API.
- You can integrate Service Desk to your own applications through API. Once integrated, you can submit and manage tickets using your own interfaces.
- Service Desk requires API keys to authenticate C1 modules and custom applications that submit tickets.
- Administrators need to specify the IP addresses from which these applications can access Service Desk.
- Service Desk auto-generates API keys for these IP addresses to authenticate access requests.

The 'API Keys' interface lets administrators create and manage keys used to communicate with external devices that access Service Desk.

### Open the 'API Keys' interface

- Open the 'Admin Panel' (see the last link on the left)
- Click 'Manage' > 'API Keys'

API KEY	IP ADDR.	STATUS	DATE ADDED	LAST UPDATED
8080EBDD4942D7B8C6E0AB6F0D55814F	127.0.0.1	Active	03/04/2016 5:21 pm	03/04/2016 5:21 pm

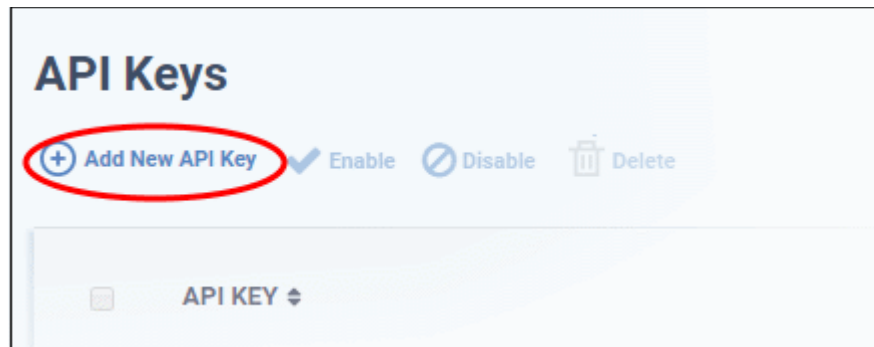
- **API Key:** The key generated for the IP address shown in the 2nd column
- **IP Addr:** IP address of the endpoint or network for which the key was generated
- **Status:** Indicates whether the key is enabled or disabled
- **Date Added:** The date on which the key was generated
- **Last Updated:** Time and date that the key was most recently edited.

Select an API key click the 'Enable' or 'Disable' link at the top, to make it active or inactive.

- Click a column header to sort items in ascending/descending order
- The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page.

### Generate a new API key

- Open the 'Admin Panel' (see the last link on the left)
- Click 'Manage' > 'API Keys'
- Click 'Add New API Key' at the top



### API Key ⓘ

#### Add New API Key

API Key is auto-generated. Delete and re-add to change the key.

Status: \*  Active  Disabled

IP Address: \*

**Services:** Check applicable API services enabled for the key.

Can Create Tickets (XML/JSON/EMAIL)

Can Execute Cron

**Admin Notes:** Internal notes.

- **Status:** Activate or disable the key. Service desk will not accept connections from disabled keys.
- **IP Address:** Enter the IP address of the connecting client. A single API key can be shared by a group of clients by entering the '%' symbol at the end. For example, 10.10.0.% will cover all clients in the subnet 10.10.0.0/24.
- **Can Create Tickets (XML/JSON/EMAIL):** If enabled, clients can create and submit tickets using XML/JSON scripts.
- **Can Execute Cron:** If enabled, Service Desk allows external schedulers to run (Linux crontab) for various tasks. The external scheduler can only be set by system administrators at the time of Service Desk installation.
- **Admin Notes:** Add any additional informational about the key. For example, you could use this space to leave configuration notes.
- Click 'Add Key' to save the key and make it available for selection

### Edit an API Key

- Open the 'Admin Panel' (see the last link on the left)
- Click 'Manage' > 'API Keys'
- Click a key in the list.
- This will open the update key screen. The configuration is the same as that for **adding** a new API Key.

### Delete API Keys

- Select the key(s) that you want to delete then click the trash can icon above the table.

## 2.3.5 Client Portal Pages

Click 'Admin Panel' > 'Settings' > 'System'.

The client portal, or helpdesk, is the website that your users visit to submit tickets or read your support content. The portal is automatically created when you sign-up for a Comodo One account.

- The URL of your portal is <https://<your company name>.servicedesk.comodo.com>. For example, <https://acme.comodo.servicedesk.com>.
- You can enable or disable the portal at 'Admin Panel' > 'Settings' > 'System'. See **Service Desk System Settings** if you need more help with these settings.
- You can add knowledge articles and FAQs to the portal to build a repository of information to deal with common issues. You can also add custom forms to more effectively route tickets to the correct department. See **Configure Your Support Center Page** if you want help with this.
- The 'Site Pages' area lets you view and manage the content of your portal. There are four types of pages:
  - **Landing Page**: Home page of your customer support center.
  - **Offline Page**: Displayed when the service center is not available.
  - **Thank You Page**: The page that is displayed after a user submits a ticket.
  - **Other**: Pages that can be used for general content.
- Service Desk ships with one page of default content in each of the 'Landing', 'Offline' and 'Thank you' page types. You can edit these pages and also create multiple versions of each type. However, only one page of each type can be live at any time. This is configured in the **Settings > Company Profile** screen.

### Site Pages

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Pages'

The screenshot displays the 'Service Desk' interface. On the left, a sidebar contains navigation options: DASHBOARD, SETTINGS, MANAGE (circled in red), and EMAILS. Under 'MANAGE', there are sub-options: Ticket Categories, Ticket Filters, SLA Plans, API Keys, Pages (circled in red), Forms, Lists, Assets, Materials, and Charging. The main content area is titled 'Site Pages' and includes a '+ Add New Page' button, 'Enable', 'Disable', and 'Delete' actions, and a 'Show 25 records' dropdown. Below this is a table with the following data:

<input type="checkbox"/>	NAME ↕	STATUS ↕	TYPE ↕	DATE ADDED ↕	LAST UPDATED ↕
<input type="checkbox"/>	<a href="#">Landing</a>	Landing	Active (in-use)	04/30/2018 1:55 pm	04/30/2018 1:55 pm
<input type="checkbox"/>	<a href="#">Thank You</a>	Thank-you	Active (in-use)	04/30/2018 1:55 pm	04/30/2018 1:55 pm
<input type="checkbox"/>	<a href="#">Offline</a>	Offline	Active (in-use)	04/30/2018 1:55 pm	04/30/2018 1:55 pm
<input checked="" type="checkbox"/>	<a href="#">Landing_second</a>	Landing	Passive	02/18/2020 1:15 pm	02/18/2020 1:15 pm

At the bottom of the table, there are navigation controls: '<< Prev', a page number '1', and 'Next >>'.

- Click on any column header to sort the items in ascending/descending order of entries in that column.

## Column Headers

- **Name:** The label of the page
  - Click the name of a page to view or edit it.
- **Type:** The webpage on the support portal for which the content from this page is used. Possible values are: Landing, Thank-You, Offline and Other.
- **Status:** Whether the page is active or disabled
  - Select a page and click the 'Enable' or 'Disable' link at the top to activate or deactivate it
- **Date Added:** The date on which the page was added
- **Last Updated:** The date and time the page was edited and updated

The interface lets you:

- **Add a new site page**
- **Edit a site page**
- **Remove a page**

## Add a new site page

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Pages'
- Click 'Add New Page'

Service Desk > Manage >

## Site Pages ?

[+ Add New Page](#)  Enable  Disable  Delete Show 25 records

<input type="checkbox"/>	NAME	STATUS	TYPE	DATE ADDED	LAST UPDATED
<input type="checkbox"/>	<a href="#">Landing</a>	Landing	Active (in-use)	04/30/2018 1:55 pm	04/30/2018 1:55 pm

### Add New Page

**Page information**

Name: \*

Type: \* – Select Page Type –  ?

Status: \*  Active  Disabled

**Page body:** Ticket variables are only supported in thank-you pages. \*

**Admin Notes** Internal notes.

## Page Information

- **Name:** Enter a unique label for the page
- **Type:** Select the support portal page for which this content is intended. The options are landing page, offline page, thank-you page and other.
- **Status:** Choose whether to activate or deactivate the page

## Page Body

- Paste the content for page in the rich text editor. Please note that ticket variables are only supported in the 'Thank-you' pages.

## Admin Notes

- Add any comments related to the page for internal reference.
- Click 'Add Page' to save the page.

## View or edit a site page

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Pages'
- Click the site page in the list.

## Site Pages ?

[+ Add New Page](#)
[✓ Enable](#)
[⊘ Disable](#)
[🗑 Delete](#)
Show 25 records v

	NAME ↕	STATUS ↕	TYPE ↕	DATE ADDED ↕	LAST UPDATED ↕
<input type="checkbox"/>	<a href="#">Landing</a>	Landing	Active <i>(in-use)</i>	04/30/2018 1:55 pm	04/30/2018 1:55 pm
<input type="checkbox"/>	<a href="#">Thank You</a>	Thank-you	Active <i>(in-use)</i>	04/30/2018 1:55 pm	04/30/2018 1:55 pm
<input type="checkbox"/>	<a href="#">Offline</a>	Offline	Active <i>(in-use)</i>	04/30/2018 1:55 pm	04/30/2018 1:55 pm

### Update Page

#### Page information

Name: \*

Type: \* Landing page ?

Status: \*  Active  Disabled

**Page body:** Ticket variables are only supported in thank-you pages. \*

<> | Aa | B | I | U | A | A | S | | | | | | | | | | | | | | |

## Welcome to the Support Center

In order to streamline support requests and better serve you, we utilize a support ticket system. Every support request is assigned a unique ticket number which you can use to track the progress and responses online. For your reference we provide complete archives and history of all your support requests. A valid email address is required to submit a ticket.

**Admin Notes** Internal notes.

The Landing Page refers to the content of the Customer Portal's initial view. The template modifies the content seen above the two links **Open a New Ticket** and **Check Ticket Status**.

Save Changes
Reset
Cancel

- The update procedure is similar to adding a new page. See **above** for more details.
- Click 'Save Changes' for your modifications to take effect.

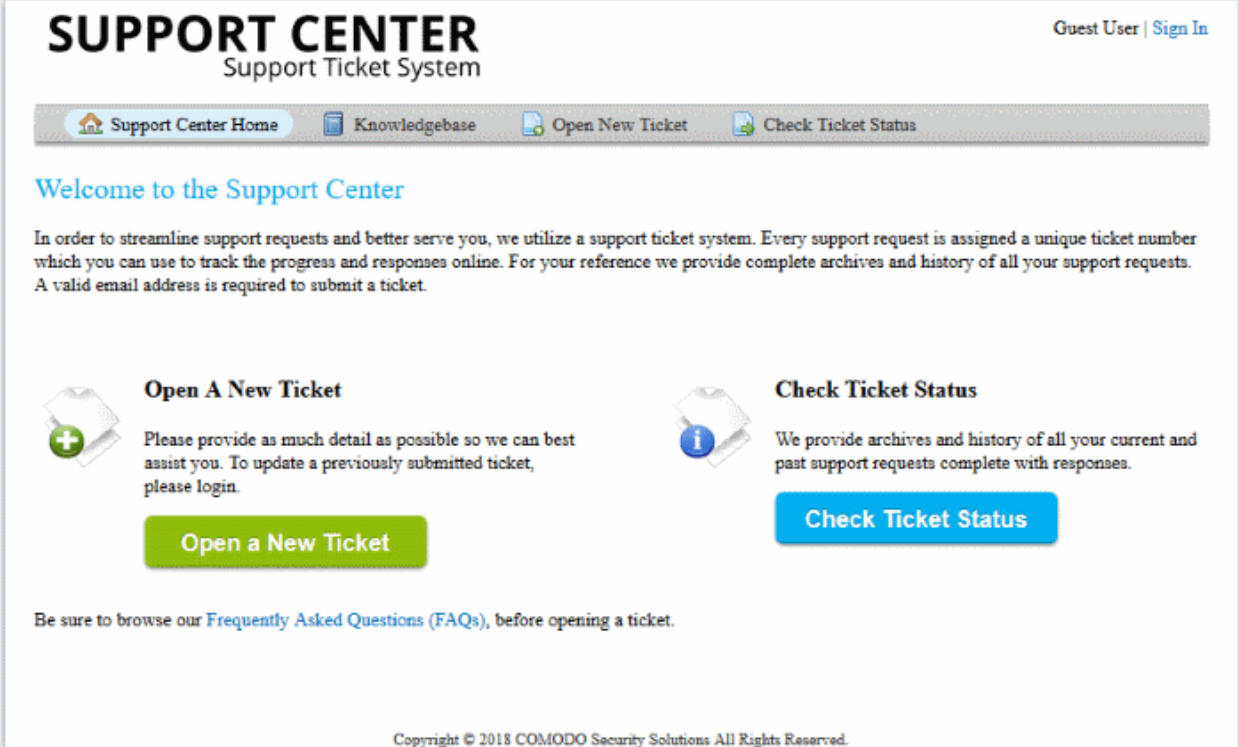
### Remove a site page



- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Pages'
- Select the page that you want to delete from the list
- Click 'Delete' and confirm the deletion in the 'Confirmation' dialog.
- Please note that pages that are active and being used (displays as Active (in-use)) cannot be deleted.

### 2.3.5.1 Configure Your Support Center Page

- Your support center page allows end-users to submit tickets, track tickets and read your support content.
- This page will be automatically created once you sign-up for a Comodo One account. The URL of the page is: <https://<your company name>.servicedesk.comodo.com>




**SUPPORT CENTER**  
Support Ticket System

Guest User | [Sign In](#)

[Support Center Home](#) [Knowledgebase](#) [Open New Ticket](#) [Check Ticket Status](#)

### Welcome to the Support Center


In order to streamline support requests and better serve you, we utilize a support ticket system. Every support request is assigned a unique ticket number which you can use to track the progress and responses online. For your reference we provide complete archives and history of all your support requests. A valid email address is required to submit a ticket.



**Open A New Ticket**

Please provide as much detail as possible so we can best assist you. To update a previously submitted ticket, please login.

[Open a New Ticket](#)



**Check Ticket Status**

We provide archives and history of all your current and past support requests complete with responses.

[Check Ticket Status](#)

Be sure to browse our [Frequently Asked Questions \(FAQs\)](#), before opening a ticket.

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- **Open and customize your Support Center home page**
- **Create knowledge-base articles and FAQs (optional)**
- **Create ticket categories and ticket stages to route tickets to the appropriate departments (optional)**
- **Create custom forms to gather information which is essential to answer a request (optional)**
- **Create canned responses so staff can quickly answer common questions (optional)**
- **Create custom 'Offline' and 'Thank you' pages (optional)**

### Open and Customize your Support Center home page

- You can view your support center page at <https://<your company name>.servicedesk.comodo.com>
- If required, you can find your company name as follows:
  - **In C1** - Click 'Management' > 'Account'
  - **In Service Desk** - Click 'Admin Panel' > 'Settings' > 'Company'.

Please note, only the first word from your company name is used in the URL. For example, if your company name is 'Acme Corp', then your URL will be <https://acme.servicedesk.comodo.com>

The support center page has three tabs, 'Support Center Home', 'Open New Ticket' and 'Check Ticket Status' by

default. The Knowledgebase tab will be available depending on the settings configured by the administrator.

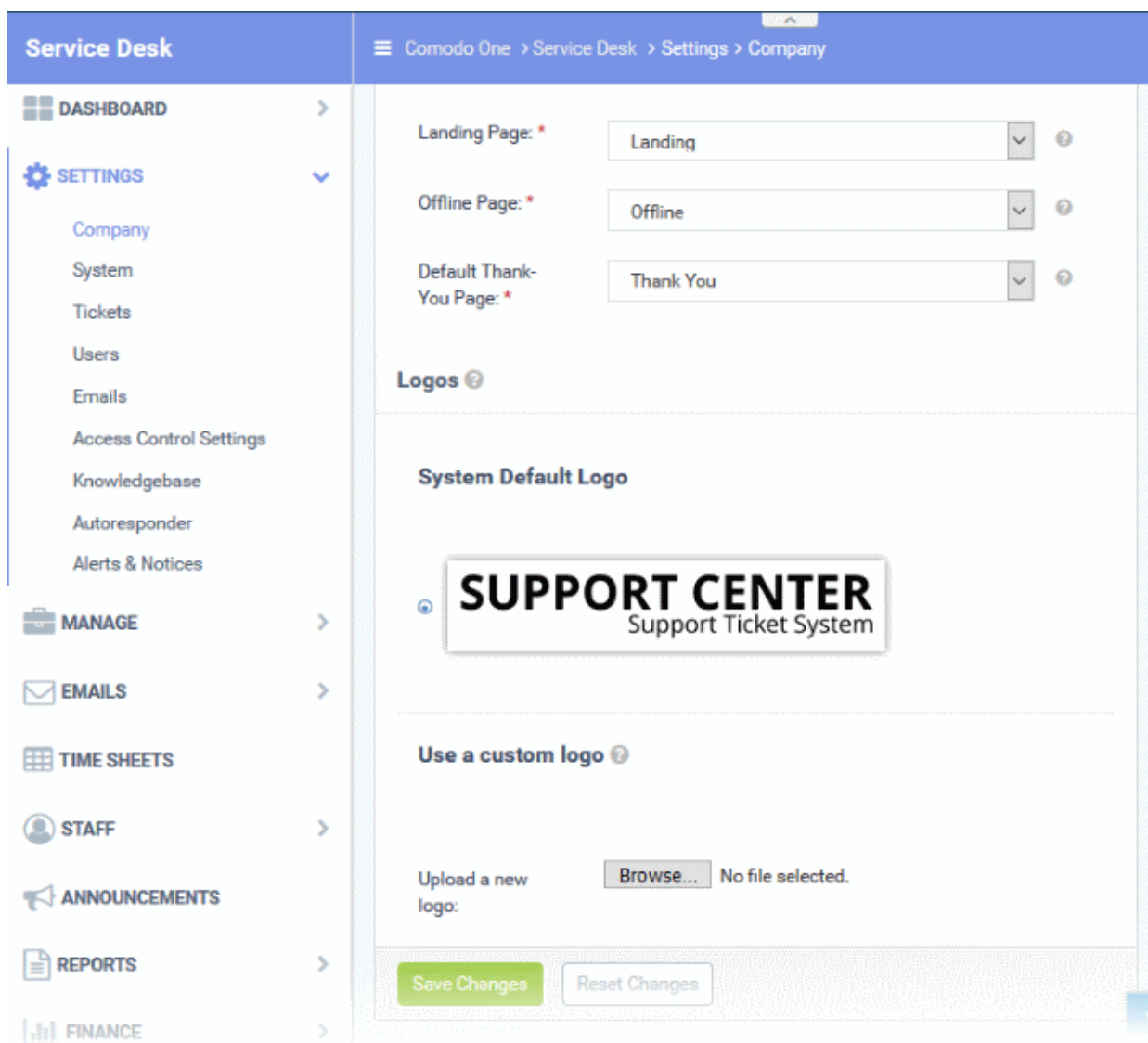
- **Support Center Home** - Displayed by default when a user opens the support center. It contains links for users to create new tickets and view the progress of existing tickets.
- **Knowledgebase** - Allows users to read frequently asked questions (FAQs) on the area which they need help. FAQs can help users to find solutions for common issues before generating a ticket.
- **Open New Ticket** - Allows users to create new support tickets
- **Tickets** - Lets users view the details and progress of their tickets

You can customize the company logo and the content displayed on the 'Home' page.

## Company Logo

The default logo shown on the page simply says 'Support Center - Support Ticket System'. You can replace it with your company logo as follows:

- Click 'Admin Panel'
- Click 'Settings' > 'Company'
- Scroll down to the 'Logos' section
- Choose 'Use a custom logo'
- Click 'Browse...' then locate and upload the image file you wish to use
- Click 'Save Changes' for your settings to take effect



See [Configure Company Profile](#) if you need more help with this.

### Welcome Message

The default welcome content on the home page explains how end-users can use the portal to submit and track tickets. You can customize this content by creating a new 'Landing Page'.

To create the new page content:

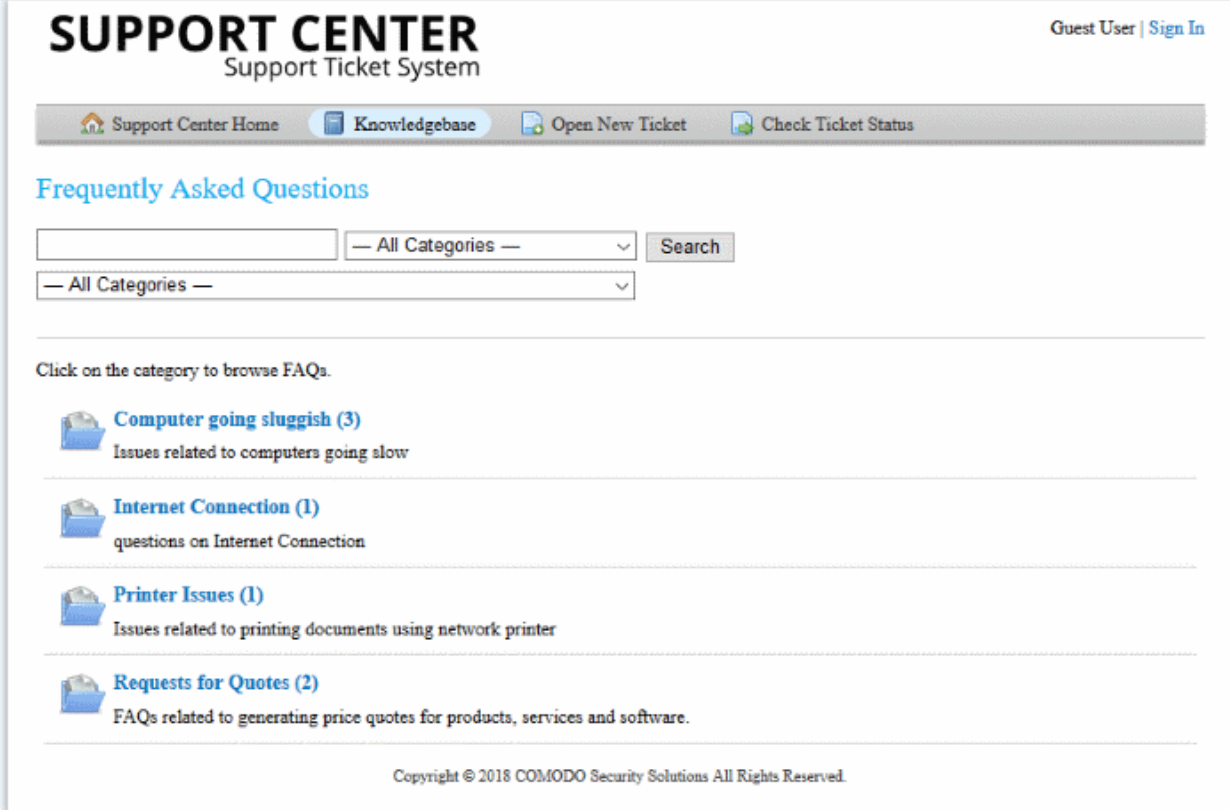
- Click 'Admin Panel'
- Click 'Manage' > 'Pages'
- Create a name for your page and select 'Landing Page' as the type. The landing page determines the content shown on the support desk 'Home' page.
- Select 'Active' as the status then enter your new content in the 'Page Body' field.
- Click 'Add Page' to save the page.

To apply the new content to the portal:

- Click 'Settings' > 'Company'
- Scroll down to the 'Site Pages' section
- Choose your new page in the 'Landing Page' drop-down
- Click 'Save Changes' at the bottom to put the content live
- You can follow a similar process to modify the content of the 'Offline' and 'Thank-You' pages.

### Create knowledge-base articles and FAQs (Optional)

- The 'Knowledgebase' tab contains FAQs intended to help users find answers to common issues.
- FAQs are a good source of first-line support and can also reduce staff workload:



**SUPPORT CENTER**  
Support Ticket System

Guest User | [Sign In](#)





[Support Center Home](#) [Knowledgebase](#) [Open New Ticket](#) [Check Ticket Status](#)

### Frequently Asked Questions

— All Categories —

— All Categories —

Click on the category to browse FAQs.

-  **Computer going sluggish (3)**  
Issues related to computers going slow
-  **Internet Connection (1)**  
questions on Internet Connection
-  **Printer Issues (1)**  
Issues related to printing documents using network printer
-  **Requests for Quotes (2)**  
FAQs related to generating price quotes for products, services and software.

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- You must first create an FAQ category then add individual FAQs to the category. For example, the category 'Internet Connectivity' may contain the FAQs 'How do I connect through a proxy server' and 'I can't connect to the internet'.
- **To create a category:**

- Click 'Staff Panel' > 'Knowledgebase' > 'Categories'
  - Click 'Add New Category'
  - Create the category name and description. Choose whether it should be a public or private category and select to whom the FAQ should be visible
  - Click 'Add'.
- Once you have created your categories, you can add individual FAQ's in two ways:
    - **From A Ticket** - Staff can add tickets which they have successfully answered as knowledgebase entries.
      - Click 'Staff Panel' > 'Tickets' > 'Open' (or one of the other ticket categories)
      - Locate and open the ticket you wish to add as an FAQ
      - Click 'More' > 'Create KB Entry'
      - Select the category under which the FAQ should be placed.
      - Specify whether the FAQ should be internal or external.
      - Click 'Add FAQ'
      - Once saved, the entire ticket, including all replies and solutions will be posted as an FAQ
    - **From the Staff Panel** - Staff can manually add FAQs to categories as follows:
      - Click 'Staff Panel' > 'Knowledgebase' > 'FAQs'
      - Click on the appropriate FAQ category from the list in the lower half of the page
      - Click 'Add New FAQ'
      - Type the question label, select 'Public' or 'Internal' and type the answer (if you choose 'Internal' the FAQ will not be available for end-users)
      - Upload attachments and select related issues if required
      - Click 'Add FAQ'

The rest of the info in this step contains more help to create categories and individual FAQs:

### **Create and manage categories**

- Open the 'Staff Panel'
- Click 'Knowledgebase' > 'Categories'
- Click 'Add New Category'

## FAQ Categories ?

+ Add New Category
Make Public
Make Internal
Show 25 record
Search...

	NAME	TYPE	FAQS	LAST UPDATED
<input type="checkbox"/>	<a href="#">Asset Issue</a>	Internal	0	09/17/2018 4:33 pm

### FAQ Category

#### Add New Category

*Category information*

**Category Type :**  Public (publish)  Private (internal)

**Visible for role :**  All  Only Selected

Role

**Visible for Customer :**  All  Only Selected

Customer

Category Description: Summary of the category.

*Internal Notes*

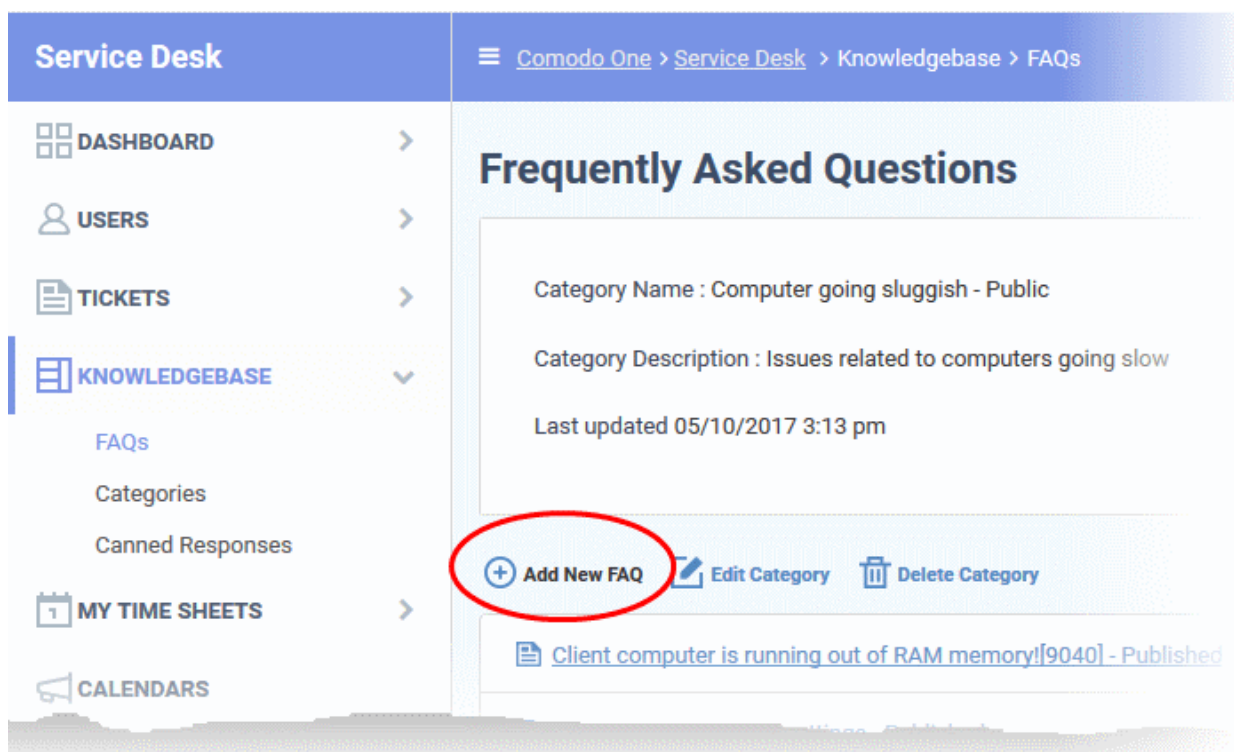
Add    Reset    Cancel

- **Category Type:** Choose 'Public' for the FAQs added under this category to be available in the support center page.
- **Visible for Role:** Specify which staff roles can view the FAQs in the category. Select 'All' to let staff with any role view them.
- **Visible for Customer:** Specify which customer's users are allowed to view the FAQs in the category. Select 'All' to allow users from any company to view them.

- **Category Name:** Enter a short, descriptive name for the FAQ category.
- **Category Description:** Enter a brief description for the category.
- **Internal Notes:** Add notes that can be viewed by staff and admins.
- Click the 'Add' button to save the category.
- Repeat the process to add more categories.

## To add FAQs in a category

- Open the 'Staff Panel'
- Click 'Knowledgebase' > 'FAQs'
- Click the name of the category to which you want add a FAQ.
- Click on 'Add New FAQ'



The 'Add New FAQ' screen will be displayed.

Comodo One > Service Desk

## FAQ

### Add New FAQ

---

**Question**

**Category Listing:** *FAQ category the question belongs to.*

Computer going sluggish (Public)

Listing Type:  Public (publish)  Internal (private)

**Answer**

<> | | Aa | B | I | U | | | | | | | | | |

**Attachments** (optional) Select files to upload.

Browse... No file selected.

---

**Help Topics:** *Check all help topics related to this FAQ.*

- Access Issue
- Access to Sharepoint
- Assemble and test web server
- General Inquiry
- Report a Problem
- Screen Blinking

---

**Internal Notes:**

Add FAQ
Reset
Cancel

- **Question:** Enter the question label. For example, 'How do I change my account password?'
- **Category Listing:** By default the category chosen from the 'Settings > FAQs' page will be

selected. If you want to change the category, choose the new category from the drop-down

- **Listing Type:** Choose 'Public', for the FAQ to be visible to the users in the support center page.
  - **Answer :** Enter the solution for the question in the text field.
  - **Attachments:** Click 'Browse' to add attachments to the FAQ. Attachments you add here will be available for download from the support center page.
  - **Categories:** Select ticket categories that should be listed as 'related' in the FAQ. This will also help users to locate the FAQ if they search by ticket category in the support center page.
  - **Internal Notes:** Add internal notes, if any, for the FAQ. This will be visible only to the staff and the administrators.
- Click the 'Add FAQ' button at the bottom.

The FAQ entry will be added and published. It will be listed under the respective category in the support portal.

- Repeat the process for adding more FAQ entries.

### Create ticket categories and ticket stages to route tickets to the appropriate departments (Optional)

- 'Ticket Categories' are help topics which end-users can select when creating a ticket.
- Ticket categories are placed at the ticket creation stage and are usually prefixed with statements like 'Please choose the type of support you need:'
- For example, you might have ticket categories called 'Billing', 'Technical Support', 'Account Changes', etc.

Ticket categories can help your business to:

- Route tickets to the appropriate department and staff
- Choose which form is shown to the end-user. You can create custom forms to collect information specific to a certain request type. See later if you want help with this.
- Choose the service level agreement (SLA)
- Set the priority of the ticket
- Set which auto-responder and thank-you pages are shown after ticket creation
- You can also set certain ticket categories to generate multi-stage tickets, where two or more steps must be completed by your company before the ticket is resolved.

#### To add a Ticket Category

- Open the 'Admin Panel'
- Click 'Manage' > 'Ticket Categories'

The list of available 'Ticket Categories' will be displayed.

- Click 'Add New Category'



**Ticket Categories** ?

+ Add New Category Enable Disable Delete

CATEGORY	STAGES	STATUS	TYPE
<a href="#">Access Issue</a>	1	Active	Public
<a href="#">Asset Issue</a>	1	Active	Public

**Add New Category**

**Category Information** ?

Category: \*

Status: \*  Active  Disabled ?

Type: \*  Public  Private/Internal ?

Parent Category: \*

**New ticket options**

Custom Form: \*

Thank-you Page:

Auto-response: \*  Disable new ticket auto-response ?

**Ticket Process Options**

Ticket Stages: \*  Enable ticket stage alerts ?

Stage Transfer Email: \*

**Ticket stages**

Stage 1:

+ Add Stage

Add Category Reset Cancel

### Category Information

- **Category:** Enter a unique name for the ticket category. This should be a support 'topic' that you want to present to end-users for selection. For example, 'Billing Inquiries', 'Technical Support' etc.
- **Status:** Select whether the ticket category should be active or not. Only active ticket categories will be available for selection. You can change the status at any time using the 'Enable'/'Disable' links in the 'Category' interface.
- **Type:** Choose 'Public' to make the ticket category available for selection on the support center page

- **Parent Category:** (optional). Choose a master category for this topic. Choosing a parent category means this category becomes a child of the parent.

## New Ticket Options

- **Custom Form:** Select the form that should be shown to users if they select this category. You can do this even after creating the ticket category. Custom forms are explained later in this section in **Create custom forms to gather information which is essential to answer a request (optional)**.
- **Thank-You Page:** Choose the confirmation page that will be shown after submitting a ticket with this category. Thank-you pages are shown to guest users only. See **Client Portal Pages** if you need help to configure client portal pages.
- **Auto-response:** Determines whether an automatic email should be sent to the user. This setting overrides the auto-responder settings for the selected **Department** and **global Autoresponder** settings.

## Ticket Process Options

- **Ticket Stages:** If enabled, a notification mail is sent to the end-user when the ticket proceeds from one stage to the next. Applies only to multi-stage tickets.
  - View/edit the default ticket stage email - Click 'Admin Panel' > 'Emails' > 'Templates' > click 'Default Email Templates (System Default)' > scroll down to the 'End User' section.
- **Stage Transfer Email:** Select the template you want to use for the stage transfer notification.
  - The item you select here is a template 'set' rather than just an individual mail.
  - To create a custom stage transfer email, you must first create a template set then edit the transfer mail within that set.
  - The new set can also house all your other custom mail templates.
  - You can create new template sets in 'Admin Panel' > 'Emails' > 'Templates'.
  - See **Email Templates** if you need more help.

## Ticket Stages

- Ticket stages allow you to set up a 'step-by-step' process to resolve tickets of a particular category.
- Each stage lets you define the department, priority, SLA and person that the ticket is assigned to. This allows you to transition the ticket to the appropriate staff/dept. at each stage of its life-cycle.
- You can also configure ticket categories to close a ticket with a single stage, to be backwards compatible with previous versions.

By default, each ticket category has at least one stage. The stage attributes allow you to:

- Route ticket to departments like maintenance, sales or support
- Change the priority to low, normal, high or critical.
- Redefine SLA plan
- Auto-Assign to staff / agent
- Click the 'Stage Number' stripe to add/edit the following parameters:

**Ticket stages**

Stage 1:

Stage Name: \*

Department: – System Default – ▼ ?

Priority: – System Default – ▼ ?

SLA Plan: – Department's Default – ▼ ?

Auto-assign To: – Unassigned – ▼ ?

---

**Admin Notes:** Internal notes about the category.

- **Stage name:** Enter a label for the stage. For example, 'Issue Evaluation' or 'QA & Testing'.
  - **Department:** Select the department that the ticket should be routed to at this stage in its lifecycle.
  - **Priority:** Select the priority level for tickets with this ticket category. Options are Low, Normal, High and Critical.
  - **SLA Plan:** Select the service level agreement associated with tickets on this category. See **Service Level Agreements (SLA)** for more details on SLAs
  - **Auto-assign To:** Select the staff member or team that the ticket should be assigned to at this stage. Please note the assignments configured in **Ticket Details** will override this setting.
  - **Admin Notes:** Add any notes related to the ticket category for internal purpose. This will not be visible in the client portal.
- Click 'Add Stage' to create another step for the ticket category

**Note:** The stages are listed under 'Ticket Workflow' in the 'Ticket Details' interface. On completion of a stage by the technician attending to it, the technician should click the 'Complete' button beside the stage.

**Ticket workflow:**

NAME	STATUS	ACTION
Stage 1: Generate Quote	Completed	
Stage 2: Generate Purchase Order	In Progress	<span style="border: 2px solid red; border-radius: 50%; padding: 2px 10px;">✔ Complete</span> <span style="background-color: #4a7ebb; color: white; padding: 2px 10px; margin-left: 10px;">↺ Revert stage</span>
Stage 3: Delivery of the Asset	Not Started	
Stage 4: Installation on premises	Not Started	
Stage 5: Demo	Not Started	

The ticket will be automatically assigned to the Department/Staff member of the next stage. See **Ticket Details** for more details.

- Click the 'Add Category' button at the bottom of the screen for the settings done in the page to take effect.

See the section **Ticket Categories** for more details.

### Create Custom Forms to gather information which is essential to answer a request (optional)

- You can configure service desk to show a custom form to users when they select a specific ticket category.
- You can modify the fields on a custom form to collect the exact information that your team will need to answer questions on a certain category.
- You can create custom forms in the 'Forms' interface and associate them with ticket categories in the 'Category' interface.

#### Create a custom form

- Open the 'Admin Panel'
- Click 'Manage' > 'Forms'

The list of available 'Built-in' and 'Custom' forms will be displayed.

- Click on 'Add New Custom Form'

## Custom Forms ?

	BUILT-IN FORMS ⇅	LAST UPDATED
	<a href="#">Contact Information</a>	04/30/2018 1:55 pm
	<a href="#">Ticket Details</a>	04/30/2018 1:55 pm
	<a href="#">Company Information</a>	04/30/2018 1:55 pm
	<a href="#">Customer Information</a>	04/30/2018 1:55 pm

<< Prev      1      Next >>

Add New Custom Form
 Delete
Show 25 records

<input type="checkbox"/>	CUSTOM FORMS ⇅	LAST UPDATED ⇅
<input type="checkbox"/>	<a href="#">Asset Information</a>	04/30/2018 1:55 pm
<input type="checkbox"/>	<a href="#">Troubleshooting</a>	02/21/2019 11:18 am
<input type="checkbox"/>	<a href="#">Count</a>	02/26/2019 1:34 pm

The 'Add new custom form section' interface will appear to create a form with required form fields:

**Add new custom form section**

---

**Custom forms are used to allow custom data to be associated with tickets**

Title: \*  ?

Instructions:  ?

---

**Form Fields fields available for ticket information**

SORT ?	LABEL ?	TYPE ?	INTERNAL ?	REQUIRED ?	VARIABLE ?	DELETE ?
↕	<input type="text"/>	Short Answer ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
↕	<input type="text"/>	Short Answer ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
↕	<input type="text"/>	Short Answer ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
↕	<input type="text"/>	Short Answer ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	

---

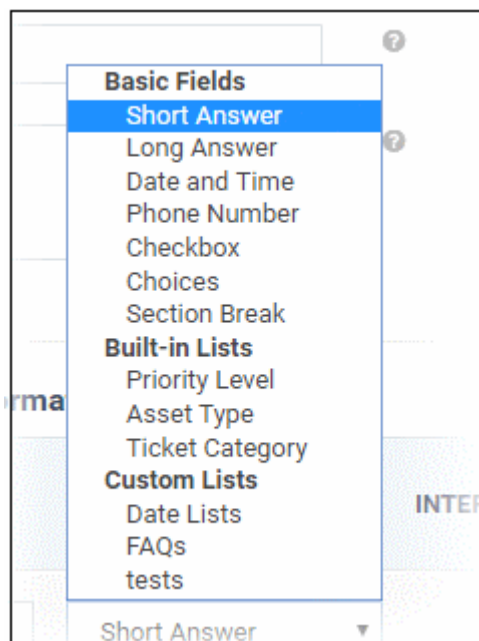
**Internal Notes: be liberal, they're internal**

Add Form
Reset
Cancel

- **Title:** Enter a label for the form. This will be displayed as the section title of the form in the 'Open a New Ticket' interface of the Support Center page.
- **Instructions:** Enter instructions to be shown to the user for filling the details in the form.

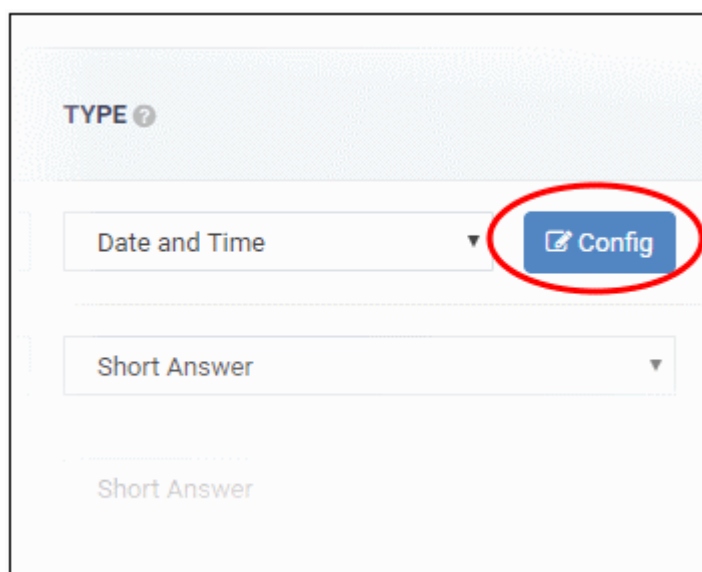
The list of fields to be included in the form is displayed as a table. Enter the details for each form field one-by-one as described below:

- **Sort:** Drag and drop to sort the field rows that will be displayed in the same order in the client portal for the ticket
- **Label:** Enter the name of the field label that will be displayed in the 'Open a New Ticket' interface
- **Type:** Select the type of input expected from the user. The options available are short answer, long answer, date and time, phone number, checkbox, choices and section break. In addition, you can select from built-in lists and custom lists. See **Appendix 1 - Field Types in Custom Forms and Custom Lists** for more details on field types.



- **Internal:** Leave this option unselected for the form field to be available in the the 'Open a New Ticket' interface of the support center page.
- **Required:** If selected, the field is marked as mandatory. The ticket cannot be saved or submitted until valid data is entered/selected for the field.
- **Variable:** Enter the variable name for the field data that can be used in email templates for sending automated messages. For example if you use the variable name 'model' for the Model Number field, then the variable `#{model}` can be used in email templates for fetching the values entered in this field. See **'Email Templates'** for more details.
- **Delete:** To delete a field from the form, select the check box and click the 'Save Changes' button at the bottom to remove the selected form.
- Click 'Add Form' to save the form

After saving the form, the configuration option for each one of the form fields will be available.





- Clicking on the 'Config' button beside a form field will display the properties screen for the selected field. This property screen depends on the type of form parameter chosen. For example, the property screen for Date is shown below:

**Field Configuration – Date**

Time:  Show time selection with date picker

Timezone Aware:  Show date/time relative to user's timezone

Earliest:    
Earliest date selectable

Latest:  

Allow Future Dates:  Allow entries into the future

Help Text:   
Help text shown with the field

**Save** Reset Cancel

- Configure the field as required and click 'Save'

Repeat the process for configuring each field

- Click 'Save Form'

The form will be now available for associating with a ticket category.

- Repeat the process to add more custom forms.

#### To associate a custom form to a ticket category

- Open the 'Admin Panel'
- Click 'Manage' > 'Ticket Categories'

The list of available 'Ticket Categories' will be displayed.

- Click the ticket category to which you want to add a custom form
- Choose the custom form to be associated with the ticket category from the 'Custom Form' drop-down under 'New Ticket Options'

## New ticket options

Custom Form: \*

– Use Parent Form –



Thank-you Page:

– None –

– Use Parent Form –

Asset Information

Nickname

Phone Number

Troubleshooting FAQ

Username



Auto-response: \*

## Ticket stages

- Click 'Save Changes'

The selected form will be displayed along with the standard 'Built-in' form in the 'Add a New Ticket' interface of the support center page, when the user chooses the ticket category.



# SUPPORT CENTER

Support Ticket System

Blondie Dagwood | [Profile](#) | [Tickets \(11\)](#) - [Sign Out](#)

---

Support Center Home
 Knowledgebase
 Open New Ticket
 Tickets (11)

---

## Open a New Ticket

Please fill in the form below to open a new ticket.

Help Topic:  \*

---

Email:

Client:

---

### Nickname

*Enter the nickname of the user*

Nick Name:

*Enter your nickname here*

---

### Ticket Details

*Please Describe Your Issue*

Issue Summary:  \*

<> |

Details on the reason(s) for opening the ticket.

---

Attachments:  No file chosen

The data entered in these fields by the user will be displayed to the technician attending to the ticket, in the **Ticket Details** interface. Getting granular details specific to the issue type helps technicians to quickly diagnose the issue and resolve it.

### Create canned responses so staff can quickly answer common questions (optional)

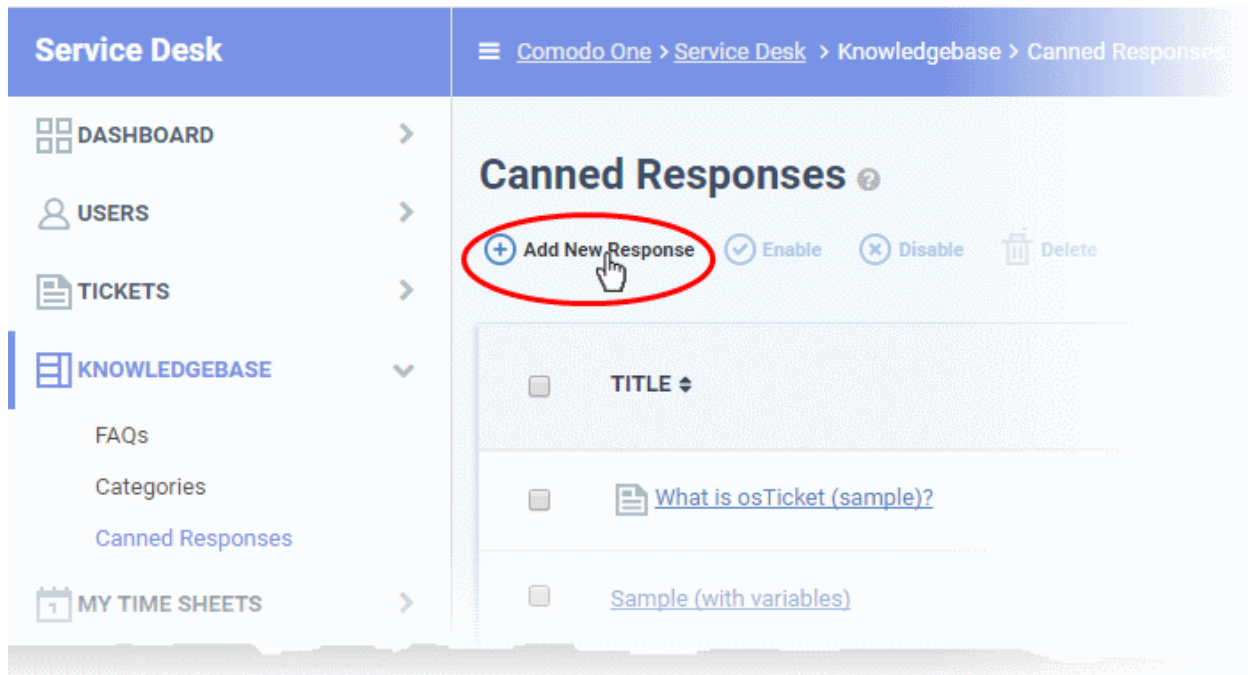
- Canned responses are pre-defined messages which can be used in reply to user support requests.
- Staff can quickly insert these messages as answers to common or routine issues when replying to a ticket.
- Service Desk allows admins and staff to create a repository of canned responses.
- You can also insert variables like user name and ticket number so that canned responses will contain values pertinent to each ticket.

### To add and manage canned responses

- Open the 'Staff panel'
- Click 'Knowledgebase' > 'Canned Responses' on the left

The list of canned messages will appear.

- Click 'Add New Response'



The 'Add New Canned Response' interface will open.

### Add New Canned Response

---

#### Canned Response Settings

Status:  Active  Disabled

Department :

All Departments ▼

#### Canned Response: Make the title short and clear

Title

Canned Response \* ([Supported Variables](#))

<> | | Aa | B | I | U | A | | | | | | | | | | | |

Canned Attachments (optional)

Choose File No file chosen

You can upload up to 10 attachments per canned response.

---

#### Internal Notes: Notes about the canned response

Add Response
Reset
Cancel

### Canned Response Settings

- **Status:** Choose whether the canned response should be enabled by default or not.
  - **Active:** The 'Canned Response' will be enabled and will be available for selection while processing a ticket, from the 'Response' drop-down in the 'Ticket Details' interface. See **Ticket Details** for more details.
  - **Disabled:** The canned response will not be available for selection in the ticket details interface. You can enable the response at anytime.
- **Department:** Select the department to which the 'Canned Response' will be assigned. The response will be available for tickets that are assigned this department. If 'All Department' is selected, then it will be available for all ticket responses.

### Canned Response

- **Title:** Enter a suitable title for the pre-made reply.

- **Canned Response:** Enter the reply text in the text editor. You can also insert variables into the text to fetch relevant information for the ticket from the database. To view the full list of variables available in Service Desk, click the 'Supported Variables' link.

**Ticket Variables**

Please note that non-base variables depend on the context of use.

Base Variables		Other Variables	
%(ticket.id)	Ticket ID (internal ID)	%(message)	Incoming message
%(ticket.number)	Ticket number (external ID)	%(response)	Outgoing response
%(ticket.email)	Email address	%(comments)	Assign/transfer comments
%(ticket.name)	Full name — see name expansion	%(note)	Internal note (expandable)
%(ticket.subject)	Subject	%(assignee)	Assigned staff/team
%(ticket.phone)	Phone number   ext	%(assigner)	Staff assigning the ticket
%(ticket.status)	Status	%(url)	C1 Service Desk's base url (FQDN)
%(ticket.priority)	Priority	%(reset_link)	Reset link used by the password reset feature
%(ticket.asset)	Asset type	<b>Name Expansion</b>	
%(ticket.category)	Category	.first	First Name
%(ticket.subcategory)	Subcategory	.middle	Middle Name(s)
%(ticket.assigned)	Assigned staff and/or team	.last	Last Name
%(ticket.create_date)	Date created	.full	First Last
%(ticket.due_date)	Due date	.legal	First M. Last
%(ticket.close_date)	Date closed	.short	First L.
%(ticket.auth_token)	Auth. token used for auto-login	.formal	Mr. Last
%(ticket.client_link)	Client's ticket view link	.shortformal	F. Last
%(ticket.staff_link)	Staff's ticket view link	.lastfirst	Last, First
<b>Expandable Variables (See Wiki)</b>			
%(ticket.topic)	Help topic		
%(ticket.dept)	Department		
%(ticket.staff)	Assigned/closing staff		
%(ticket.team)	Assigned/closing team		
<b>Scheduled Reports Variables</b>			
%(report.type)	Report type name		
%(recipient.name)	Recipient name		
%(report.datetime_from)	Report filter time (FROM)		
%(report.datetime_to)	Report filter time (TO)		

- To clear the text, click the trash can icon at the top right.
- **Canned Attachments:** To add attachments to the reply, click the 'Browse' button, navigate to the location of the file and select the file to be attached. You can attach a maximum of 10 files per 'Canned Response.', but one at a time. To append more attachments, **edit** the 'Canned Response' and add the attachments one-by one.
  - To remove an attachment, clear the checkbox beside the attachment

Canned Attachments (optional)  [Troubleshooting.pdf](#)  [recovery\\_procedures.pdf](#)  [screenshot.gif](#)

No file selected.

You can upload up to 10 attachments per canned response.

## Internal Note

- Add notes for the 'Canned Response' that are for internal purpose only.
- Click the 'Reset' button to clear all selections and entries.
- Click the 'Add Response' button to save the reply text.
- Repeat the process to add more canned responses.

Canned responses will be available for selection in the 'Ticket Details' interface when a technician is attending to a ticket:

See [Ticket Details](#) for more details.

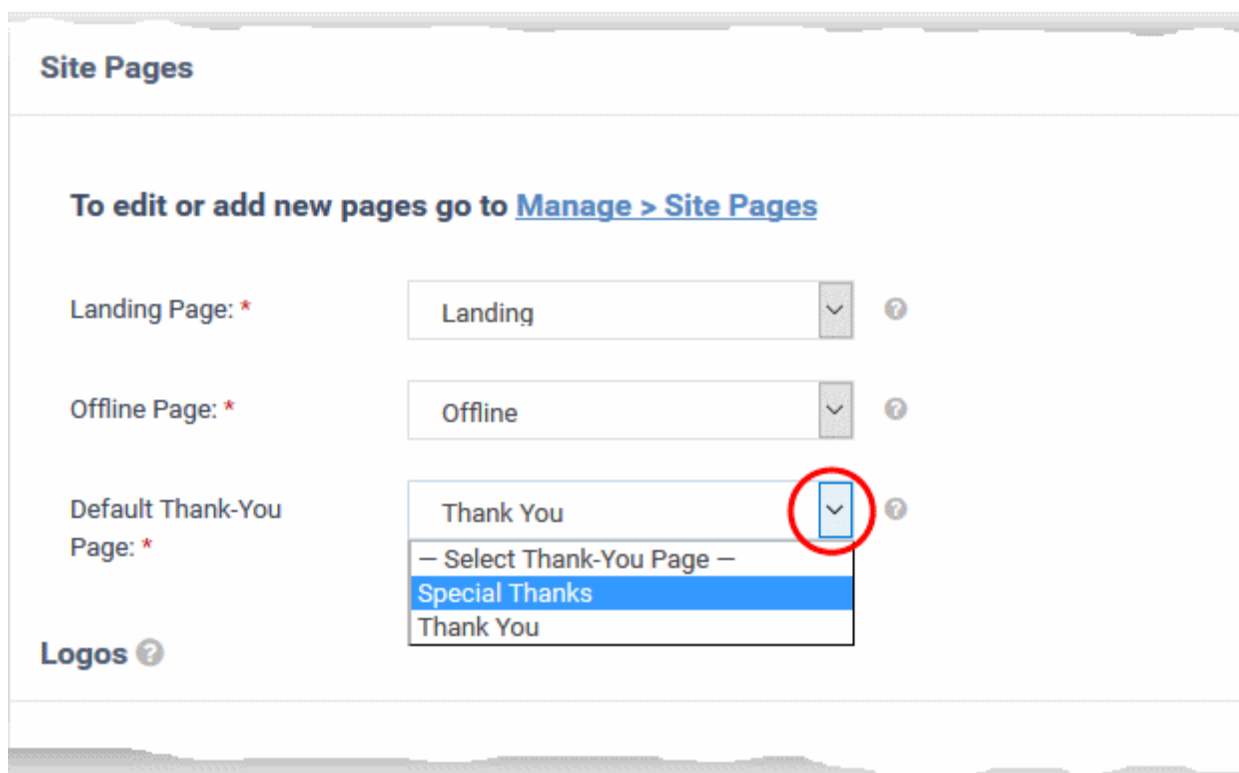
## Create custom 'Offline' and 'Thank you' pages (optional)

### Thank You page

The Support Center displays a 'Thank you' message with a default content whenever a guest user submits a ticket. An example is shown below:

You can customize the message content as required.

- The 'Thank You' message is as defined in the 'Thank You' page configured for your company
- You can create several 'Thank You' pages with different content for different scenarios and choose one at a time, to be used .See [Client Portal Pages](#) for details on creation of 'Thank You' page messages
  - To select a 'Thank You' page, Click 'Settings' > 'Company' from the service desk admin interface.
  - Choose the page to be used for the thank you message from the 'Default Thank-You Page' drop-down under 'Site Pages'

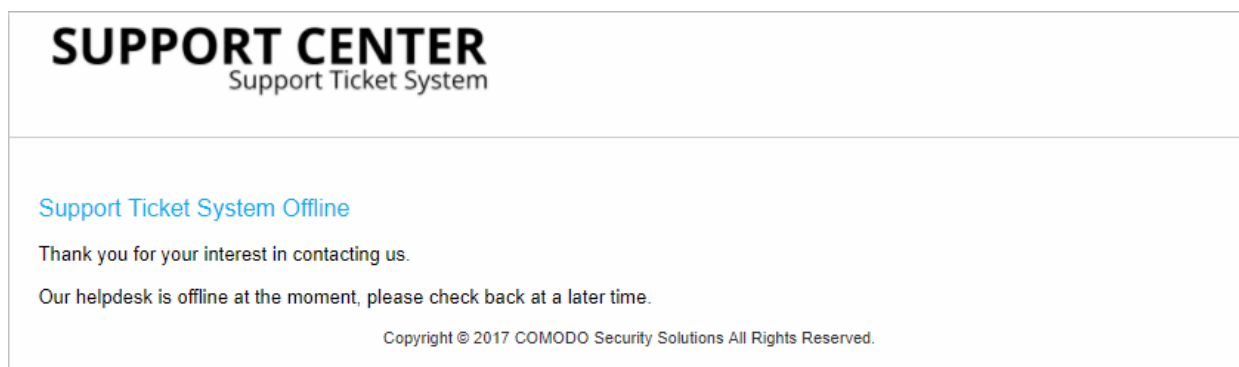


- Click 'Save Changes' for your settings to take effect

See the explanation of **Site Pages** in the section **Configuring Company Profile** for details on selection of the page to be displayed.

## Offline Page

The Support Center page displays a message indicating that the support ticket system is offline, whenever the support center is disabled for some reasons. See **C1 Service Desk System Settings** for details on enabling and disabling the support center. An example offline page is shown below:



You can customize the message content for different situations and scenarios as required.

- The 'Offline' message is as defined in the 'Offline' page configured for your company
- You can create several 'Offline' pages with different content and choose one at a time, to be used .See **Client Portal Pages** for details on creation of 'Offline' page messages
  - To select a 'Offline' page, Click 'Settings' > 'Company' from the service desk admin interface.
  - Choose the page to be used for the offline message from the 'Offline Page' drop-down under 'Site Pages'

**Site Pages**

To edit or add new pages go to [Manage > Site Pages](#)

Landing Page: \*  ?

Offline Page: \*  ?

Default Thank-You Page: \*  ?

Logos ?

- Click 'Save Changes' for your settings to take effect

See the explanation of **Site Pages** in the section **Configuring Company Profile** for details on selection of the page to be displayed.

## 2.3.6 Forms

Click 'Admin Panel' > 'Manage' > 'Forms'

- **Introduction**
- **Add a new custom form**
- **Edit a built-in or custom form**
- **Remove unwanted forms**

### Introduction

Forms are used in various Service Desk interfaces to collect information from end-users, customers and your company. For example, the contact form collects a new user's name, email address and phone number.

There are two kinds of form - built-in forms and custom forms.

- **Built-in forms** - Service Desk includes the following standard forms which you can edit as required:
  - **Contact Information** - Collect the email / phone / address details of new users. This form is published on your support portal.
  - **Ticket Details** - Collect details about the nature of an issue from a user. This can include a description of the issue, the asset affected, the priority level, and more. This form is published on your support portal.
  - **Company Information** - Collect and store details about your company (name, address, website etc). This information is inserted into the system emails sent by Service Desk. You can view and populate this form at 'Admin Panel' > 'Settings' > 'Company' > 'Basic Information'. See **Company Profile** for more details.
  - **Customer Information** - Collect details about a customer organization. Staff can add new customers with this form at 'Staff Panel' > 'Users' > 'Customers' > 'Add New Customer'. See **Manage Customers** for more details.
- **Custom forms** - You can create custom forms to collect specific pieces of data, usually from end-users.

For example, you may have a ticket category on your support website called 'Laptop Issues'. You can show a custom form to users that choose this category. The form could ask relevant questions like the laptop model/brand, the operating system and the nature of the problem ('Windows won't boot', 'VPN connection', 'Problem with an application', etc).

### The forms interface

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Forms'

- **Built-in Forms:** The default forms used in various interfaces. See [Edit a built-in or custom form](#) for help to modify these forms.
- **Custom Forms:** Forms added by an admin for specific needs.
- **Last Updated:** The date and time the form was most recently edited.

The custom forms interface lets you:

- [Add a new custom form](#)
- [Edit a built-in or custom form](#)
- [Remove unwanted custom forms](#)

### Add a new custom form

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Forms'
- Click 'Add New Custom Form'



## Custom Form

**Add new custom form section**

Custom forms are used to allow custom data to be associated with tickets

Title: \*

Instructions:

---

**Form fields available for new custom form**

SORT	LABEL	TYPE	INTERNAL	REQUIRED	VARIABLE	DELETE
⇅	<input type="text"/>	Short Answer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
⇅	<input type="text"/>	Short Answer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
⇅	<input type="text"/>	Short Answer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
⇅	<input type="text"/>	Short Answer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	

---

**Internal Notes: be liberal, they're internal**

Add Form
Reset
Cancel

**Title:** Enter a label for the form page. For example, 'Tell us about your problem '. The title is shown at the top of the page.

**Instructions:** Enter short guidance for the user. For example, 'Please answer the following questions to help us get started on your issue'.

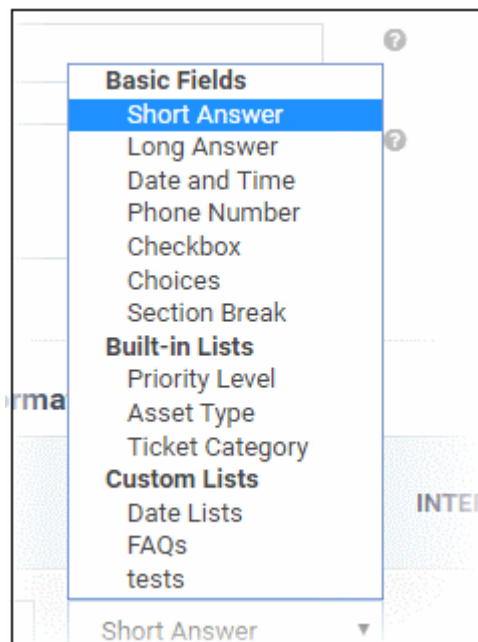
### Form Fields

- **Sort:** Drag and drop the fields to your preferred order. The questions are shown in this order on your form.
- **Label:** Enter the name of the field. This should relate to or introduce the item you select in the 'Type' column.
- **Type:** Select the type of input expected from the user.
  - **Basic fields** - Form elements for the user to complete. If you select one of these then your label should tell the user what information is expected of them.

For example, 'Short answer' and 'Long answer' are blank spaces. Your label should tell the user what to type - 'Name', 'Address', etc.

Similarly, 'Checkbox' means the form will show a box to the user to tick as appropriate. Your label should provoke a simple 'Yes' or 'No' response. For example, 'I have read and agree to the terms and conditions', or 'Save this payment type'.

- **Built-in / Custom lists** - These allow users to select their answer from a preset list. For example, the 'Priority Level' list is a drop-down menu with 'Low', 'Normal', 'High' and 'Critical'.



- Built-in lists cannot be edited but can be made public or kept internal.
- You can create your own custom lists as required. See **Custom Lists** for help to create custom lists for drop-down menus.
- **Internal:** Select this if the fields are intended for admins and staff to complete. If left unchecked, the fields can be used in both staff forms and customer facing forms.
- **Required:** Will mark the field as mandatory. Respondents must complete the field in order to submit the form.
- **Variable:** Specify a label for the field variable that you can call in your email templates.
  - Variables can be used in both built-in and custom forms.
  - You can insert these variables in the body of your email templates. The variables dynamically fetch the respective field data.
  - To add a variable, simply paste a string with the following format to the body of the mail:  
 %**{identifier.variable}**
  - For example, the 'User Details' form has a field called 'name'. The string to call the user's name is '%**{ticket.user.name}**'. You type 'Hi %**{ticket.user.name}**' in your auto-responder mail. A user called 'Bob' creates a ticket. The mail to him would read 'Hi Bob'.
  - The identifier depends on the type of interface to which the form is added. Custom forms can be added to the following interfaces:
    1. **Ticket Categories** - 'Admin Panel' > 'Manage' > 'Ticket Category' > 'Add New Category' or click on a ticket category > 'New ticket options' > 'Custom form'
    2. **Ticket details** - 'Staff Panel' > 'Tickets' > select a ticket category > click a ticket number to open it > 'More' > 'Manage forms'
    3. **User details** - 'Staff Panel' > 'Users' > 'User Directory' > click on a user > 'More' > 'Manage forms'
    4. **Customer details** - 'Staff Panel' > 'Users' > 'Customers' > click on a customer > 'More' > 'Manage forms'
  - The following table shows the identifiers for the interfaces in which the forms are used:

Interface	Variable format
Ticket categories and Ticket details	% <b>{ticket.variable}</b>

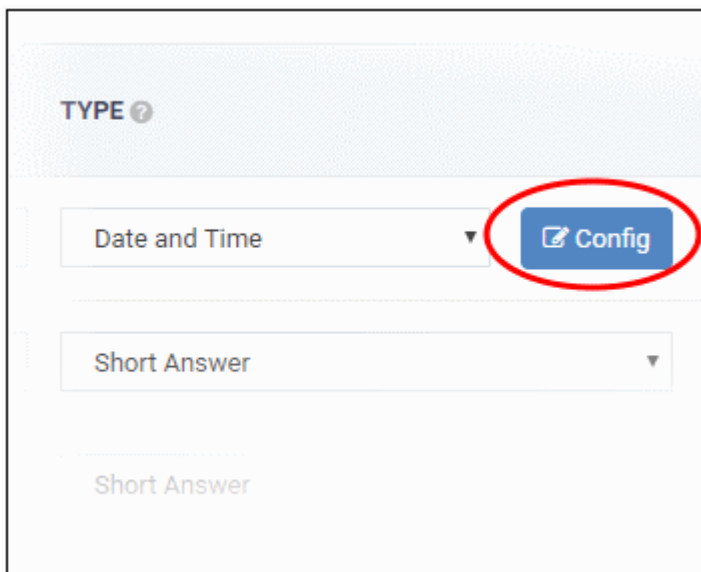
User details	%{ticket.user.variable}
Customer details	%{customer.variable}

Let's say you added a new field called 'Salutation' to a form, entered 'salutation' in the variable column and apply the form to the user details interface ('Staff Panel' > 'Users' > 'User Directory' > click a user > User page). You could reference the user's actual salutation in an email template with the variable %{ticket.user.salutation}.

- See **Email Templates** if you need help to use variables in email templates.

Click 'Add Form' to save the form

- Saving the form enables the field configuration option:





- Click the 'Config' button to view and edit field properties. The field properties depend on the form parameter. For example, the 'Date' properties are shown below:

### Field Configuration – Date ✕

Time:  Show time selection with date picker

Timezone Aware:  Show date/time relative to user's timezone

Earliest:    
*Earliest date selectable*

Latest:  

Allow Future Dates:  Allow entries into the future

Help Text:   
*Help text shown with the field*

Save
Reset
Cancel

- Update the fields as required. Click 'Save' for your settings to take effect.

An example custom form is shown below:

---

#### Printer Information


*Please fill in the fields below*

Name of the Printer:


Model Number:

Brand Name:

Is working now:

Date Purchased:  

Check List:

Warranty:  




















---

#### Ticket Details

*Please Describe Your Issue*

Issue Summary:

Issue Details:

<> B I U                   

Details on the reason(s) for opening the ticket.

### Edit a built-in or custom form

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Forms'
- Click the name of the built-in form or custom form

The 'Contact Information' built-in form is shown below as an example:

Comodo One > Service Desk > Manage > Forms

### Custom Form

Update custom form section

Custom forms are used to allow custom data to be associated with tickets

Title: \*

Instructions:

Form Fields available for ticket information

SORT	LABEL	TYPE	INTERNAL	REQUIRED	VARIABLE	DELETE
+	<input type="text" value="Email Address"/>	Short Answer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="email"/>	<input type="checkbox"/>
+	<input type="text" value="Full Name"/>	Short Answer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="name"/>	<input type="checkbox"/>
+	<input type="text" value="Phone Number"/>	Phone Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="phone"/>	<input type="checkbox"/>
+	<input type="text" value="Internal Notes"/>	Long Answer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="notes"/>	<input type="checkbox"/>
+	<input type="text"/>	Short Answer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
+	<input type="text"/>	Short Answer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

*Internal Notes: be liberal, they're internal*

- Update the editable fields as required. The update procedure is similar to adding a new custom form. See **above** for help with this.
- Click 'Save changes'
- The updates will appear in all interfaces that use the form.

### Remove unwanted custom forms

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Forms'
- Select the custom form that you want to delete from the list.
- Click 'Delete' at the top and confirm the deletion
- Please note that built-in forms cannot be deleted.

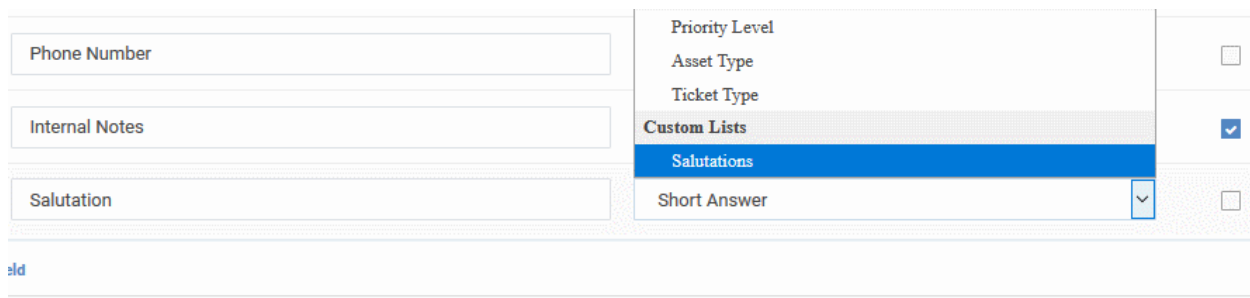
## 2.3.7 Custom Lists

Click 'Admin Panel' > 'Manage' > 'Lists'

- **Introduction**
- **Create a new custom list**
- **Edit a custom list**
- **Remove custom lists**

### Introduction

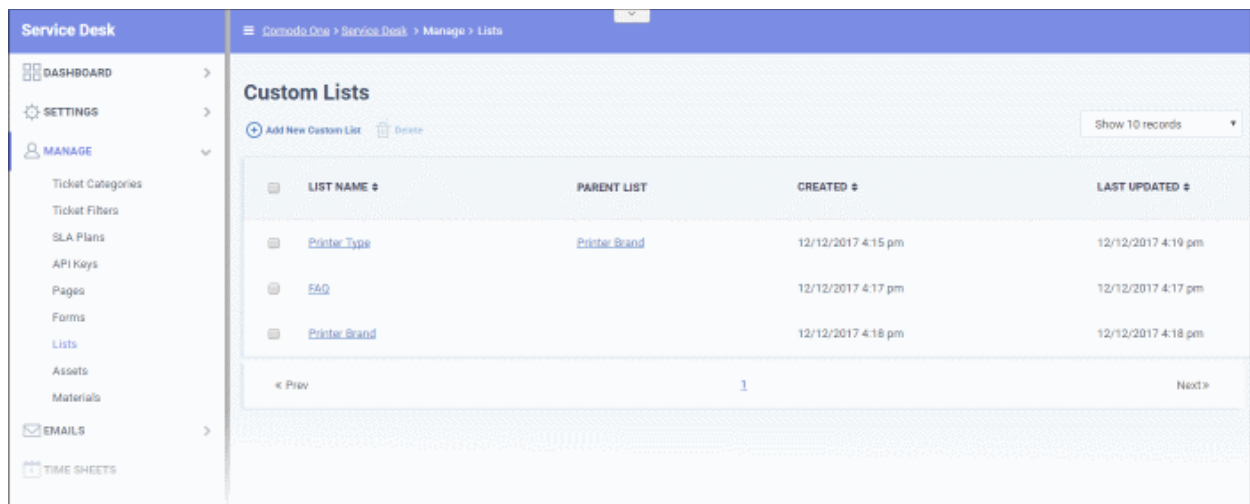
- The custom lists area lets you create lists of items to populate drop-down menus on your forms.
- For example, if you add a custom field called 'Salutation' to the new user (contact information) form, then your list would include items like 'Mr', 'Mrs', 'Ms', 'Senor', 'Senora', etc.
- Once saved, you can select your new list in the 'Type' column of the form edit screen. For example:
  - Click 'Admin Panel' > 'Manage' > 'Forms'
  - Click on the 'Contact Information' form
  - Click 'Add new field'. Type 'Salutation' as the label
  - You can select your custom list from the 'Type' drop-down:



- You can also setup multi-level lists with a 'parent-child' structure. The contents of the child list dynamically changes depending on the item chosen in the parent list.

### Open the 'Custom Lists' interface

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Lists'



- **List Name:** List label. Choose a label which describes the type of items in the list.
- **Parent List:** If this is a child list then this column shows the name of the parent list. Please note that one parent list can have only one child list. A child list can be a parent of the next level child list.
- **Created:** Date and time on which the list was added
- **Last Updated:** Date and time the list was most recently edited.

Click a column header to sort items in ascending/descending order of entries in that column.

## Create a custom list

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Lists'
- Click 'Add New Custom List':

Comodo One > Service Desk > Manage > Lists

## Custom Lists

+ Add New Custom List Delete

<input type="checkbox"/>	LIST NAME ↕	PARENT LIST	CREATED ↕
<input type="checkbox"/>	<a href="#">FAQ</a>		04/27/2016 4:50 pm
<input type="checkbox"/>	<a href="#">FAQ</a>		04/27/2016 4:51 pm

### Add New Custom List

Custom lists are used to provide drop-down lists for custom forms.

Definition	Items	Properties	Parent List
Name: *	<input type="text"/>		
Plural Name:	<input type="text"/>		
Sort Order:	Alphabetical		
Internal Notes:	<input type="text"/>		

Add List Reset Cancel

Follow these steps to create your list:

- **Step 1 - General settings**
- **Step 2 - Add items to the list**
- **Step 3 - Define item properties (optional)**
- **Step 4 - Enter the values for the properties (optional)**
- **Step 5 - Map list items to parent list (optional)**



## Step 1 - General settings

Open the 'Definition' tab in the new list screen:

### Add New Custom List

Custom lists are used to provide drop-down lists for custom forms.

Definition	Items	Properties	Parent List
Name: *	<input type="text"/>		
Plural Name:	<input type="text"/>		
Sort Order:	<input type="text" value="Alphabetical"/>		
Internal Notes:	<input type="text"/>		

- **Name:** Create label for the list. This should describe the items in the list itself. For example, if you add a field called 'What is your operating system?' to your new ticket form, then you could enter 'OS' as the name of the list.
- **Plural Name:** Enter the term to describe multiple instances of the list. For example, if your list is called 'Country', then the plural is 'Countries'. The plural form is shown in the 'Type' column of the field at 'Admin Panel' > 'Manage' > 'Forms'. If you leave this field blank, Service Desk will simply add an 's' on the end of the name.
- **Sort Order:** Choose how list items should be shown in the list (alphabetical, reverse alphabetical, or sorted manually). The options selected here will be applied to the items in the 'Items' tab.
- **Internal Notes:** Add any comments about the list. Comments are only visible to staff and admins.

Click 'Add List' to save the list

## Step 2 - Add items to the list

- Click the 'Items' tab.

**Add New Custom List**

Custom lists are used to provide drop-down lists for custom forms.

Definition    Items    Properties    Parent List

Showing 0 list items

VALUE	EXTRA – ABBREVIATIONS AND SUCH	DISABLED	DELETE
+ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Add New Item](#)

Type each item you want in the list on a separate row. These are the options you will present in the drop-down menu.

For example, if your list is called 'Operating System', then your items could be 'Windows 10', 'Windows 8/8.1', 'Ubuntu', 'Debian', 'iOS', 'Android' etc.

- Value - Enter the label of the item. This is what the user sees in the list.
- Extra - Abbreviations and such.
- Disabled - Enable or disable the item. Disabled items are not shown in the drop-down, but can be quickly re-enabled later.
- Delete - Remove the item.

Click 'Add New Item' if you want more than four items in the list.

Click 'Save Changes'. The 'Disabled' and 'Delete' check-boxes become active after you save the list.

You can finish at this point if required.

The custom list is available for selection in the 'Type' column of the forms at 'Admin Panel' > 'Manage' > 'Forms'.

Steps 3 - 5 are optional, allowing you to add tool-tips to your custom list and to create child lists.

### Step 3 - Define item properties (optional)

- The 'Properties' tab lets you add more details about the items in your list. Staff and users can see this information when they place their mouse over the item.
- For example, say you add a custom field, 'Printer Model', to your 'Ticket Details' form. You then create a custom list which consists of various printer models.
- You could add 4 items in the 'Properties' tab - 'Technology', 'Monochrome Speed', 'Color Speed' and 'Maximum Resolution'. You can then define values for the 4 properties for each printer model.

- Users select the model they are having problems with when they create their ticket. Staff and users can then see the additional model info in the ticket details screen:

The screenshot shows a ticket details screen with the following information:

- SLA Plan:** Default SLA (Active)
- Due Date:** Thu, Sep 28 2017 2:21 pm
- Asset Type:** Other
- Printer Model:** A920 (circled in red)

A dropdown menu for the printer model is open, showing the following details for the selected model 'A920':

- Technology:** Inkjet
- Monochrome speed:** up to 14 ppm
- Color Speed:** up to 8 ppm
- Maximum Resolution:** 4800 x 1200 dpi

#### Example process:

- Populate the 'Definition' and 'Items' tabs as explained in steps 1 and 2
- Click the 'Properties' tab.
- Create your properties. In our example, 'Technology', 'Monochrome Speed', 'Color Speed' and 'Maximum Resolution'.
- Leave the 'Type' as 'Short Answer' for now.
- Click 'Save Changes'
- Go back to the 'Items' tab
- Click the 'Properties' link in the row of your first item
- Type the specs of the item concerned for each property then 'Save'.
- Repeat for all items in the list
- Click 'Save Changes' to save the entire list.
- The additional properties will be visible to staff and users in the ticket details screen.

#### Add properties to a list

- Click the 'Properties' tab

### Update custom list

Custom lists are used to provide drop-down lists for custom forms.

Definition
Items
Properties
Parent List

Item Properties properties definable for each item

SORT	LABEL	TYPE	VARIABLE	DELETE
+	<input style="width: 90%;" type="text"/>	Short Answer <span style="float: right;">▼</span>	<input style="width: 90%;" type="text"/>	
+	<input style="width: 90%;" type="text"/>	Short Answer <span style="float: right;">▼</span>	<input style="width: 90%;" type="text"/>	

Save Changes
Reset
Cancel

- **Label:** Type the name of the property. For example, 'Maximum Resolution'.
- **Type:** Choose how you want to present the information. 'Short Answer' means you can type a short definition into a text-box.

The screenshot shows the 'TYPE' column of the table with a dropdown menu open. The dropdown menu is divided into sections: 'Basic Fields' (Short Answer, Long Answer, Date and Time, Phone Number, Checkbox, Choices, Section Break), 'Built-in Lists' (Priority Level, Asset Type, Ticket Category), and 'Custom Lists' (Date Lists, FAQs, no plural names, PRI, Printer Model, Printer Model). A red circle highlights the dropdown arrow icon on the right side of the 'Short Answer' option.

- **Variable** - Create a variable name for the field data. The variable can be used in email templates for

automated messages.

For example, if you type 'resolution' as the variable name for the 'Maximum Resolution' property, then you can use '%{**identifier**.resolution}' in email templates to fetch the actual value. The **identifier** depends on the interface in which you use the form. See [explanation of variables in forms](#) for help with this.

- **Delete** - Lets you remove the parameter.

Note - the 'Variable' and 'Delete' options only become active after saving the list.

- Click 'Save Changes'.
- Reopen the 'Properties' tab after saving the list.

**Update custom list**

Custom lists are used to provide drop-down lists for custom forms.

Definition
Items
Properties
Parent List

**Item Properties** properties definable for each item

SORT	LABEL	TYPE	VARIABLE	DELETE
↕	<input type="text" value="Technology"/>	Short Answer <input type="text" value="v"/>	<a href="#">Config</a> <input type="text" value=""/>	<input type="checkbox"/>
↕	<input type="text" value="Monochrome speed"/>	Short Answer <input type="text" value="v"/>	<a href="#">Config</a> <input type="text" value=""/>	<input type="checkbox"/>
+	<input type="text" value=""/>	Short Answer <input type="text" value="v"/>	<input type="text" value=""/>	
+	<input type="text" value=""/>	Short Answer <input type="text" value="v"/>	<input type="text" value=""/>	

Save Changes
Reset
Cancel

- **Config**: Set up how the property field is shown (**next step**). You can also set the limits, specify help text for the field, lead text shown inside the field, and more. The example below shows the configuration screen for the 'Short Answer' type field

### Field Configuration – Technology ✕

Size:

Max Length:

Validator:  ▼

Validation Error:

*Message shown to user if the input does not match the validator*

Placeholder:

*Text shown in before any input from the user*

Help Text:

*Help text shown with the field*

- Configure the field and click 'Save'
- Repeat the process for configuring other properties
- Click the 'Save Changes' to save the properties list.

#### Step 4 - Enter values for the properties (optional)

- Click the 'Items' tab after saving the properties list
- Click the 'Properties' link of an item

**Update custom list**

Custom lists are used to provide drop-down lists for custom forms.

Definition    Items    Properties    Parent List

Showing 6 list items

VALUE		EXTRA – ABBREVIATIONS
A920	<input checked="" type="checkbox"/> Properties	
A940	<input checked="" type="checkbox"/> Properties	
HP Deskjet 1010 Printer	<input checked="" type="checkbox"/> Properties	

**Item Properties – A920**

Technology: Inkjet

Monochrome speed: Up to 14 ppm

Color Speed: Up to 8 ppm

Maximum Resolution: 4800 x 1200 dpi

Save    Reset    Cancel

The fields added under the 'Properties' tab in the **previous step** appear in this dialog.

- Enter the values for the properties and click 'Save'
- Repeat the process to specify properties for all items
- Click 'Save Changes' to save the entered properties for the items

#### Step 5 - Map list items to parent list (optional)

- Custom lists can be constructed to have a multi-level 'parent-child' structure. The contents of the child list dynamically change depending on the item selected in the parent list.

#### Configure parent list

- Click the 'Parent List' tab
- Choose the parent list for the list you are working on:

**Update custom list**

Custom lists are used to provide drop-down lists for custom forms.

Definition   Items   Properties   **Parent List**

Parent:  (dropdown menu open)

- No parent
- No parent
- Date Lists
- FAQs
- PRI
- Printer Makes**

Save Changes   Reset   Cancel

After selecting the parent list, match items in the child to items in the parent list:

**Update custom list**

Custom lists are used to provide drop-down lists for custom forms.

Definition   Items   Properties   Parent List

Parent:  (dropdown menu)

ITEMS	PARENT ITEM
ML - 1676	<input type="text" value="Select a parent item"/> (dropdown menu open)
A920	<input type="text" value="Select a parent item"/>
A940	<input type="text" value="Select a parent item"/>

Save Changes   Reset   Cancel

- Click 'Save Changes'

The list can now be added to custom field drop-downs in custom forms.



### Edit a custom list

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Lists'
- Click the name of the custom list you want to modify

The 'Update Custom List Page' screen appears. The update procedure is similar to adding a new list. See **above** if you need help with this.

### Remove custom lists

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Lists'
- Select the custom lists that you want to delete from the list
- Click 'Delete' and confirm the deletion

## 2.3.8 View and Manage Asset Types

- Click 'Admin Panel' > 'Manage' > 'Assets'
- An asset is an item or service added to a ticket in order to charge custom rates for specific types of work.
- For example, a 'Printer' may be one of your assets. You may want to charge a different rate for work done on printers. Add the printer asset to all tickets that involve printers.
- Only items in the 'Assets' interface will be available for selection in tickets.

Asset rates are charged as follows:

- Default charging plan - The 'global' rate for an item. This rate will be charged if:
  - The customer does not have a contract
  - The contract with the customer does not include a charging plan
- Custom charging plans - Assign a charging plan to a customer's contract. The charging plan can include specific hourly rates for certain assets.

See **Appendix 3 - How charging works in Service Desk** for more details on charging plans and contracts.

### To view asset types and default rates

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Manage' on the left then 'Assets'

Comodo One > Service Desk > Manage > Assets

## Assets

Show 25 records

<input type="checkbox"/>	ASSETS ↕	GLOBAL RATES (£/H) ↕	STATUS
	<a href="#">Server</a>	6.00	Default
<input type="checkbox"/>	<a href="#">tape drive</a>	10.00	Enabled
	<a href="#">Workstation</a>	5.00	Default
	<a href="#">Printer</a>	10.00	Default
	<a href="#">Mobile</a>	0.00	Default
	<a href="#">Router</a>	0.00	Default
	<a href="#">Other</a>	0.00	Default
<input type="checkbox"/>	<a href="#">External Hard Disk Drive</a>	3.00	Enabled

« Prev | 1 | Next »

Assets - Column Descriptions	
Column Header	Description
Assets	The name of the asset
Global Rates	The hourly service rate for the asset type as set in the default charging plan. You can set the global rate by editing the default charging plan ('Admin Panel' > 'Manage' > 'Charging'). See <b>Manage Charging Plans</b> for more details.
Status	Whether the asset is available for selection or not. Predefined assets cannot be disabled and show as 'Default'. Custom assets can be enabled or disabled.

- Click 'Assets' or 'Global Rates' column header to sort the items in ascending/descending order of entries in that column.
- Use the 'Show records' drop-down on the top right to select the number of items to be displayed per page.

### Add a new asset type

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Manage' on the left then 'Assets'
- Click 'Add New Asset' at the top

The screenshot shows the 'Assets' management interface. At the top, there is a breadcrumb trail: Comodo One > Service Desk > Manage > Assets. Below this, the 'Assets' section has a '+ Add New Asset' button circled in red. To its right are 'Enable' and 'Disable' buttons. Below the buttons is a table with columns for 'ASSETS' and 'GLOBAL RATES (£/H)'. The table lists 'External Hard Disk Drive' with a rate of 3.00 and 'Mobile' with a rate of 0.00. Below the table, the 'Asset' form is visible, featuring an 'Asset name' input field and 'Submit' and 'Cancel' buttons.

- Enter a label for the asset in the 'Asset name' box
- Click 'Submit'
- The new asset type will be added with status = 'Enabled'.
- You can set hourly rates for the asset in a charging plan ('Admin Panel' > 'Manage' > 'Charging' > 'Add New Charging').
- You can then apply the charging plan to a customer contract.

### To edit an asset type

- Click on the name of the 'Asset Type'

**Assets**

+ Add New Asset    ✓ Enable    ✕ Disable    Show 25 records

<input type="checkbox"/>	ASSETS ↓↑	GLOBAL RATES (£/H) ⇅	STATUS
<input type="checkbox"/>	<a href="#">External Hard Disk Drive</a>	3.00	Enabled
	<a href="#">Mobile</a>	0.00	Default

**Asset Page**

Asset name: \*

- Edit the name of the asset, if required, in the 'Asset name' text box and click 'Save Changes'.

**Note:** You can edit only the name of custom added assets and not pre-configured asset types.

#### To enable / disable an item from the 'Assets' list

- Select an item and click 'Enable' or 'Disable' at the top. Please note you cannot disable default asset types.
- Choose 'Yes, Do it' from the confirmation dialog

Disabled asset types will not be available in the 'Asset Type' drop-down in the 'Ticket Details' interface. Tickets generated previously for this asset type will remain.

## 2.3.9 Manage Materials and Expense Items

Click 'Admin Panel' > 'Manage' > 'Materials'

- The 'Materials' interface lets you manage an inventory of consumables and expense items. These items can be added to tickets by staff members who can also apply costs for each material.
- Admins need to approve material costs and expenses added by staff. After approval, the cost will be billed to the customer. See **Material Approval** for more details.

#### Open the 'Materials' interface

- Click 'Manage' on the left then 'Materials' in the Admin Panel

MATERIAL NAME	DATE ADDED	LAST UPDATED
<a href="#">Toll</a>	04/18/2016 3:02 pm	04/18/2016 3:02 pm
<a href="#">Mileage</a>	04/18/2016 3:02 pm	04/18/2016 3:02 pm
<a href="#">Meal</a>	04/18/2016 3:02 pm	04/18/2016 3:02 pm
<input type="checkbox"/> <a href="#">4 GB RAM</a>	04/21/2016 2:37 pm	02/13/2017 3:32 pm
<input type="checkbox"/> <a href="#">Ink Cartridge Holder</a>	04/21/2016 2:38 pm	04/21/2016 2:39 pm
<input type="checkbox"/> <a href="#">HP Ink Cartridge</a>	04/21/2016 3:20 pm	04/21/2016 3:20 pm
<input type="checkbox"/> <a href="#">Cabinet Screws</a>	12/16/2016 4:36 pm	12/26/2016 2:34 pm
<input type="checkbox"/> <a href="#">EJ 45 Network Cable 2 meters</a>	12/16/2016 4:59 pm	12/16/2016 4:59 pm
<input type="checkbox"/> <a href="#">Netgear WNA 1100 WiFi Dongle</a>	01/02/2017 3:28 pm	01/02/2017 3:28 pm
<input type="checkbox"/> <a href="#">Power Cord</a>	01/03/2017 2:54 pm	01/03/2017 2:54 pm

The 'Materials' interface shows existing materials along with the dates they were added and last updated.

### Add a new material

- Click the 'Add New Material' link at top-left of the interface

The 'Add New Material' interface will open.

## Material

### Add New Material

**Material is object that you need to use in task and you can add them to tickets. It will change their cost.**

Name: \*

Pricing Type:

Price per unit

Price per unit

Price per service

- Enter a name for the material then click 'Add Material'
- Select a pricing type:
  - **Price per unit** - Staff will set the quantity and a price-per-unit when they add this material to a ticket:

Materials	Added by	Quantity	Cost	Total	
Printer cartridges	frontfork	<input type="text" value="8"/>	<input type="text" value="7.50"/>	<input type="text" value="60"/>	<input type="button" value="Delete"/>

- **Price per service** - Staff will only specify a price for the material when they add it to a ticket. They need to add more instances of the material if the quantity is greater than 1:

Materials	Added by	Quantity	Cost	Total	
Remote virus removal	frontfork	<input type="text"/>	<input type="text" value="30"/>	<input type="text" value="30"/>	<input type="button" value="Delete"/>

Staff can click the 'Add Material' button to attach the expense item to a ticket they are working on. See **Add Materials to a ticket** for more details.

### Update a material

- Click the name of the material

#### Update Material

Material is object that you need to use in task and you can add them to tickets. It will change their cost.

Name: \*

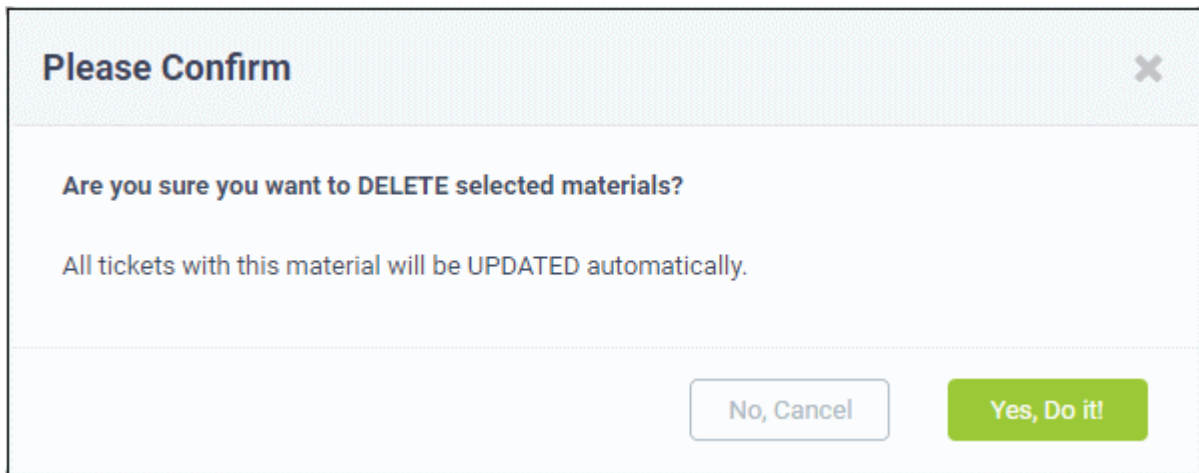
<input type="checkbox"/>	<a href="#">Ink Cartridge Holder</a>	04/21/2016 2:38 pm	04/21/2016 2:39 pm
<input type="checkbox"/>	<a href="#">HP Ink Cartridge</a>	04/21/2016 3:20 pm	04/21/2016 3:20 pm
<input type="checkbox"/>	<a href="#">Cabinet Screws</a>	12/16/2016 4:36 pm	12/26/2016 2:34 pm
<input type="checkbox"/>	<a href="#">RJ 45 Network Cable 2 meters</a>	12/16/2016 4:59 pm	12/16/2016 4:59 pm

The 'Update Material' screen will be displayed.

- Update the name as required and click 'Save changes'

### Remove a material or expense item

- Select the item and click 'Delete' at the top



- Click 'Yes, Do it'

The item will be removed and will not be available for selection in the 'Add/Edit Materials' dialog in the ticket details interface.

## 2.3.10 Manage Charging Plans

Click 'Admin Panel' > 'Manage' > 'Charging'

- **Introduction**
- **View and edit the default charging plan**
- **Create a new charging plan and associate it with a contract**
- **Edit a charging plan**
- **Enable/disable a charging plan**

### Introduction

Charging plans let you define hourly rates for work on specific assets (printers, routers, mysql etc), or work of a specific type (remote, on-site, telephone). Once created, you can add a charging plan to a customer contract.

Each charging plan lets you define:

1. **Default hourly rate** (mandatory). This rate is charged for any work not covered by a variable rate.
2. **Variable rates** (optional). A variable rate is one that you charge for specific types of work. You can set up variable rates for work that is:
  - A certain duration ('Longer than 20 minutes', 'Greater than an hour' etc)
  - Of a specific support type ('Telephone', 'Remote', 'On-site')
  - On a particular type of asset (printers, servers, workstations etc)

You define a variable rate by creating a rule which states the price of a certain type of work. You can add multiple rules to a single charging plan, allowing you to set up different charges for different types of work.

Service Desk checks your support tickets and charges the default or variable rate as appropriate.

### Default charging plan

If you don't create a custom plan for a customer, then you can use the default charging plan. The default plan is simply a list of rates that you charge for work on certain assets. The rates in the default plan are called 'Global rates'.

- Click 'Admin Panel' > 'Manage' > 'Charging' > 'Default Charging' to view and modify global rates.
- The global rates are charged if:
  - The customer does not have a contract

OR

- Their contract doesn't include a custom charging plan

#### Notes:

- You can assign a plan to a contract when creating a \*new\* contract ('Staff Panel' > 'Contracts' > 'Add Contract')
- You cannot edit a contract to add/replace a charging plan. You must go through the 'Charging' interface to assign a plan to an existing contract ('Admin Panel' > 'Manage' > 'Charging').
- See **Manage Contracts** if you wish to know more about contracts.
- See **Appendix 3 - How charging works in Service Desk** for more details on calculation of charges for time spent of tickets.

### The charging interface

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Charging'

The screenshot shows the 'Service Desk' interface. The left sidebar has a 'MANAGE' section with a sub-item 'Charging' circled in red. The main content area is titled 'Charging' and contains a table with the following data:

<input type="checkbox"/>	CHARGING	SELECTED CONTRACTS	STATUS CHANGE DATE	STATUS
<input type="checkbox"/>	<a href="#">Default Charging</a>	All		Default
<input type="checkbox"/>	<a href="#">Special Charging</a>	-		Disabled
<input type="checkbox"/>	<a href="#">Multicharging</a>	Universities	21/02/2019 11:26	Disabled

At the bottom of the table, there are navigation links: « Prev, 1, Next ».

The charging area lets you add new plans, edit existing plans, and assign plans to contracts.

- **Charging** - Name of the charging plan. The plan name to view and edit its details.
- **Selected Contracts** - Contracts which are using this plan.
- **Status Change** - Date and time the plan was last updated.
- **Status** - Whether or not the plan is active. Possible values = Enabled or Disabled.

### Default Charging Plan

Click 'Admin Panel' > 'Manage' > 'Charging' > 'Default Charging'

The default charging plan is a list of prices you will charge for work on specific assets. The rates in the default plan are called the 'Global Asset Rates'.

- You can edit the default charging plan to set/change the global asset rates at anytime
- Rates for new assets:
  - You must first add the new asset to 'Admin Panel' > 'Manage' > 'Assets'.
  - You can then specify a rate for the asset in the default charging plan ('Admin Panel' > 'Manage' > 'Charging' > 'Default Charging').
  - See **View and Manage Asset Types** if you need help to view, add and manage asset types.
- The default charging plan is only used if the customer does not have a contract, or if their contract doesn't



include a custom charge plan.

## **View and edit the default charging plan**

- Click 'Admin Panel' (see the last link on the left)
- Click 'Manage' > 'Charging'
- Click 'Default Charging' from the list of plans

Service Desk > Manage > Charging

## Charging

[+ Add New Charging](#) [✓ Enable](#) [✗ Disable](#) [📄 Clone](#)

<input type="checkbox"/>	CHARGING ⇅	SELECTED CONTRACTS
<input checked="" type="checkbox"/>	<a href="#">Default Charging</a>	All
<input type="checkbox"/>	<a href="#">Special Charging</a>	-
<input type="checkbox"/>	<a href="#">Multicharging</a>	Universities

### Charging Page ?

Charging name: \*

**Asset Rates:**

server	<input type="text" value="0"/>
workstation	<input type="text" value="0"/>
printer	<input type="text" value="0"/>
mobile	<input type="text" value="0"/>
router	<input type="text" value="0"/>
other	<input type="text" value="0"/>

[Save Changes](#) [Cancel](#)

- **Charging Name** - The label of the default charging plan. You cannot edit the label.
- **Asset Rates** - The list of assets added to 'Manage' > 'Assets'.

Set the hourly rate for each asset as required. The rate should be in the default currency of your account at 'Admin Panel' > 'Settings' > 'System'. See **Service Desk System Settings** for more details.

- Click 'Save Changes'.

## **Create a new charging plan and assign it to contracts**

There are two ways to add new charging plans:

- **Manually create a charging plan**
- **Clone an existing charging plan to create a new plan**

### **Manually create a charging plan**

- Open the 'Admin Panel' (see last link on the left)
- Click 'Manage' > 'Charging'
- Click 'Add New Charging'

The screenshot displays the 'Charging' management interface. At the top, there is a navigation breadcrumb: [Service Desk](#) > [Manage](#) > [Charging](#). Below this, the main heading is 'Charging'. A red circle highlights the '+ Add New Charging' button, with a red arrow pointing down to the 'Add New Charging' form section.

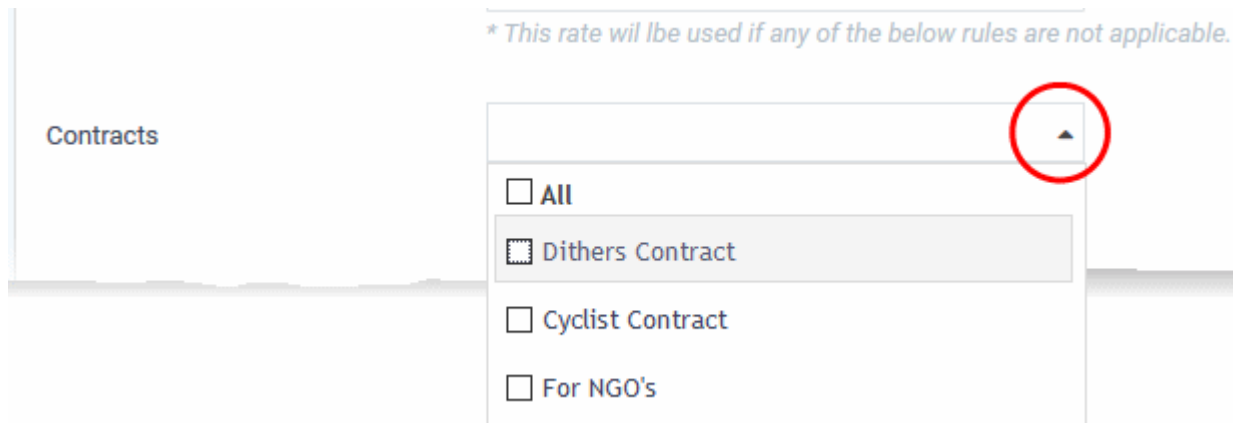
The 'Charging' table contains the following data:

<input type="checkbox"/>	CHARGING ⇅	SELECTED CONTRACTS	STATUS CHANGE DATE ⇅	STATUS
	<a href="#">Default Charging</a>	All		Default
<input type="checkbox"/>	<a href="#">Special Charging</a>	-		Disabled
<input type="checkbox"/>	<a href="#">Multicharging</a>	Universities	21/02/2019 11:26	Disable

The 'Add New Charging' form includes the following sections and fields:

- General Information**
- Charging name: \*** (Text input field)
- Charging Default Rate(\$/h) \*** (Text input field with a dropdown arrow)
- \* This rate will be used if any of the below rules are not applicable.*
- Contracts** (Dropdown menu)
- Enable after submitting
- Enable variable rating ?
- Submit** (Green button) and **Cancel** (White button)

- **Charging Name** - Create a short label for the plan. The plan name will appear in the details page of all contracts to which it is applied.
- **Charging Default Rate** - The 'regular' per-hour rate that you will charge under this plan. The default rate is applied to all work that is not covered by any 'variable' rates you create.
- **Contracts** - Select the customer contract(s) to which the charging plan should apply.
  - A contract is applied to a specific customer.
  - Click 'Staff Panel' > 'Contracts' to create and manage contracts. See **Manage Contracts** if you need help with this.



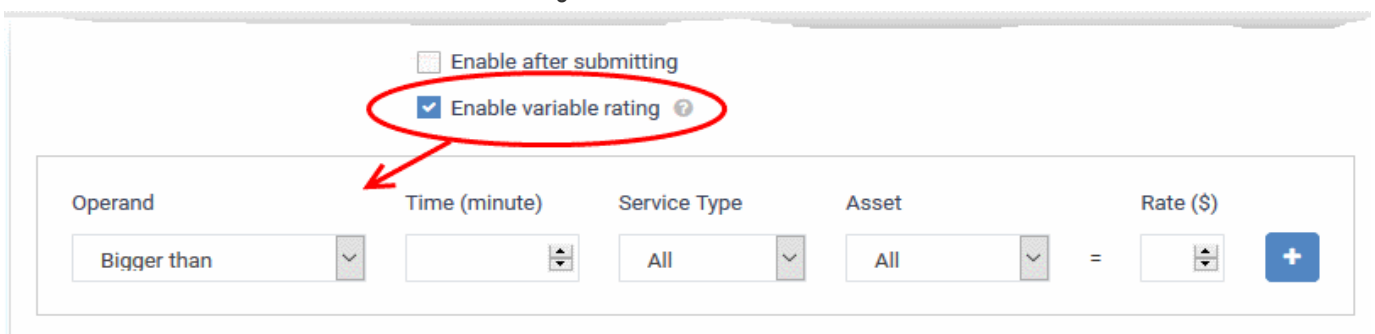
- **Enable after submitting** - The charging plan becomes active immediately after saving. By enabling a plan, you activate it for all contracts that you have specified. Leave this deselected if you want to enable the plan at a later time. See '**Enable/Disable a Charging Plan**' for more details.
- **Enable variable rating** - Create custom hourly rates for specific types of service. For example, you might want to charge a different rate for on-site visits, or for work on a particular type of asset.
  - Variable rates are defined by creating a rule with specific conditions. If the conditions are met then the variable rate kicks in.
  - You can add multiple rules to a charging plan.
  - The 'default' rate is applied to sessions which do not meet the criteria of any rules.

Once saved and enabled:

- You can return to 'Admin Panel' > 'Manage' > 'Charging' to edit the plan if required.
- You can assign a plan to a contract when creating a \*new\* contract ('Staff Panel' > 'Contracts' > 'Add Contract')
- You cannot edit an existing contract to change/add a charging plan. You must use the 'Charging' interface to assign a plan to an existing contract.

### Create a variable rate rule

- Select 'Enable variable rating'



The options for creating a rule are as follows:

- **Operand and Time** - The condition for the duration of the service session. Select the relationship operator from the operand drop-down and enter the duration (in minutes) in the 'Time' combo box. For example, you can set the duration as 'Bigger than 120 minutes, Smaller than 60 minutes' and so on.
- **Service Type** - Choose the service type offered during the session. The available options are:
  - Remote
  - Telephone
  - On-site
  - All (work of any type will be covered by the rule)

- **Asset** - The type of item that is worked on. The drop-down contains the default assets and custom assets added to your Service Desk account.
- **Rate** - Specify the per-hour rate to be charged if the above conditions are met.
- Click the '+' button to add more rules
- Click 'Save Changes' to save the plan. If enabled, it will be automatically applied to any contracts that you specified.

## Clone an existing charging plan to create a new plan

- Open the 'Admin Panel' (see last link on the left)
- Click 'Manage' then 'Charging'
- Select a charging plan which you want to use as a template and click 'Clone'

The screenshot shows the 'Service Desk > Manage > Charging' interface. At the top, there are buttons for '+ Add New Charging', 'Enable', 'Disable', and 'Clone'. The 'Clone' button is circled in red. Below this is a table of charging plans:

<input type="checkbox"/>	CHARGING ⇅	SELECTED CONTRACTS	STATUS CHANGE DATE ⇅	STATUS ⇅
	<a href="#">Default Charging</a>	All		Default
<input type="checkbox"/>	<a href="#">Special Charging</a>	-		Disabled
<input type="checkbox"/>	<a href="#">Multicharging</a>	Universities	21/02/2019 11:26	Disabled
<input checked="" type="checkbox"/>	<a href="#">Low cost</a>	-	17/02/2020 1:36	Enabled

A red arrow points from the 'Clone' button to a modal dialog box titled 'Clone Charging'. The dialog box has a close button (X) in the top right corner. It contains a 'Charging Name:' label and a text input field with the value '[Clone] Low cost'. At the bottom right of the dialog box are two buttons: 'No, Cancel' and 'Yes, Do it!'.

- Enter a name for the new charging plan and click 'Yes, Do it!'

The 'Copy Charging' interface opens with values from the original plan. You can edit these as required for your new plan.

## Copy Charging

**General Information**

Charging name: \*

Charging Default Rate(\$/h) \*  \* This rate will be used if any of the below rules are not applicable.

Contracts

Enable after submitting

Enable variable rating ?

Operand	Time (minute)	Service Type	Asset	Rate (\$/h)
<input type="text" value="Bigger than"/>	<input type="text" value="10"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="1"/> <input type="button" value="+"/>

- Edit the default and variable rates as required. See [Manually create a charging plan](#) for more details on the options in this interface.
- The 'Contracts' field shows the contracts to which the source charging plan is applied. Modify the contracts to which new plan will apply as required.
- Variable rating. Configure any variable pricing you wish to implement on your new plan. See [Manually create a charging plan](#) and [Manage Charging Plans](#) for more advice on variable plans.
- Click 'Save Changes' to add the plan.

### Edit a Charging Plan

You can edit a custom charging plan to change the default rate, variable rates, and the contracts to which it is assigned.

- Open the 'Admin Panel' (see last link on the left)
- Click 'Manage' then 'Charging'
- Click the name of the charging plan you want to edit

The screenshot displays the 'Service Desk > Manage > Charging' interface. At the top, there are action buttons: '+ Add New Charging', 'Enable', 'Disable', and 'Clone'. Below is a table of charging plans:

<input type="checkbox"/>	CHARGING ↕	SELECTED CONTRACT
	<a href="#">Default Charging</a>	All
<input type="checkbox"/>	<a href="#">Special Charging</a>	-
<input type="checkbox"/>	<a href="#">Multicharging</a>	Universities
<input type="checkbox"/>	<a href="#">Low cost</a>	-
<input type="checkbox"/>	<a href="#">Low cost for charity organizations</a>	-

A red circle highlights the 'Low cost' link, with a red arrow pointing down to the 'Update Charging' form. The form has a breadcrumb 'Service Desk > Manage > Charging' and a title 'Update Charging'. Under 'General Information', there are the following fields:

- Charging name: \*** (Text input: Low cost)
- Charging Default Rate(\$/h) \*** (Number input: 10)
 

*\* This rate will be used if any of the below rules are not applicable.*
- Contracts** (Dropdown menu)
- Enable after submitting**
- Enable variable rating** ⓘ

At the bottom of the form are two buttons: 'Save Changes' (green) and 'Cancel' (grey).

- Edit the default and variable rates as required. See **Manually create a charging plan** for more details on the options in this interface.
- The 'Contracts' field shows the contract(s) to which the charging plan is currently applied. Modify the contracts to which the plan will apply as required.
- Variable rating. Configure any variable pricing you wish to implement on your new plan. See **Manually**



**create a charging plan** and **Manage Charging Plans** for more advice on variable plans.

- Click 'Save Changes' to save the plan.

The changes are applied to the contracts from the time of saving.

### Enable/Disable a Charging Plan

- Click 'Admin Panel' > 'Manage' > 'Charging' > select a plan > click the 'Enable' or 'Disable' button above the table.
- A plan must be enabled before it will apply to a contract.
- If a charging plan is disabled, it will be removed from the contracts to which it was applied. The contracts will be set for default charging as configured in them.
- Disabling a plan will also deselect the contracts in the plan details page. You cannot just re-enable the plan, you must go into the plan details page and re-select the contract(s) you require. See **Edit a Charging Plan** for more details on the options in this interface.

### Enable or disable a charging plan

- Open the 'Admin Panel' (see last link on the left)
- Click 'Manage' then 'Charging'
- Select a charging plan with 'Disabled' status and click 'Enable' at the top to enable it

The screenshot shows the 'Charging' management interface. At the top, there are navigation links: 'Service Desk > Manage > Charging'. Below this, there are action buttons: '+ Add New Charging', 'Enable' (circled in red), 'Disable', and 'Clone'. A 'Show 25 records' button is on the right. The main table has columns: 'CHARGING', 'SELECTED CONTRACTS', and 'STATUS CHANGE DATE'. The table contains several rows, with 'Multicharging' selected (checkbox checked). Below the table, a 'Please Confirm' dialog box is open, asking 'Are you sure you want to ENABLE selected charging?' and 'Please confirm to continue.' The dialog has two buttons: 'No, Cancel' and 'Yes, Do it!'.

- Click 'Yes, Do it!' In the confirmation dialog
- Select a charging plan with 'Enabled' status and click 'Disable' at the top to deactivate it.

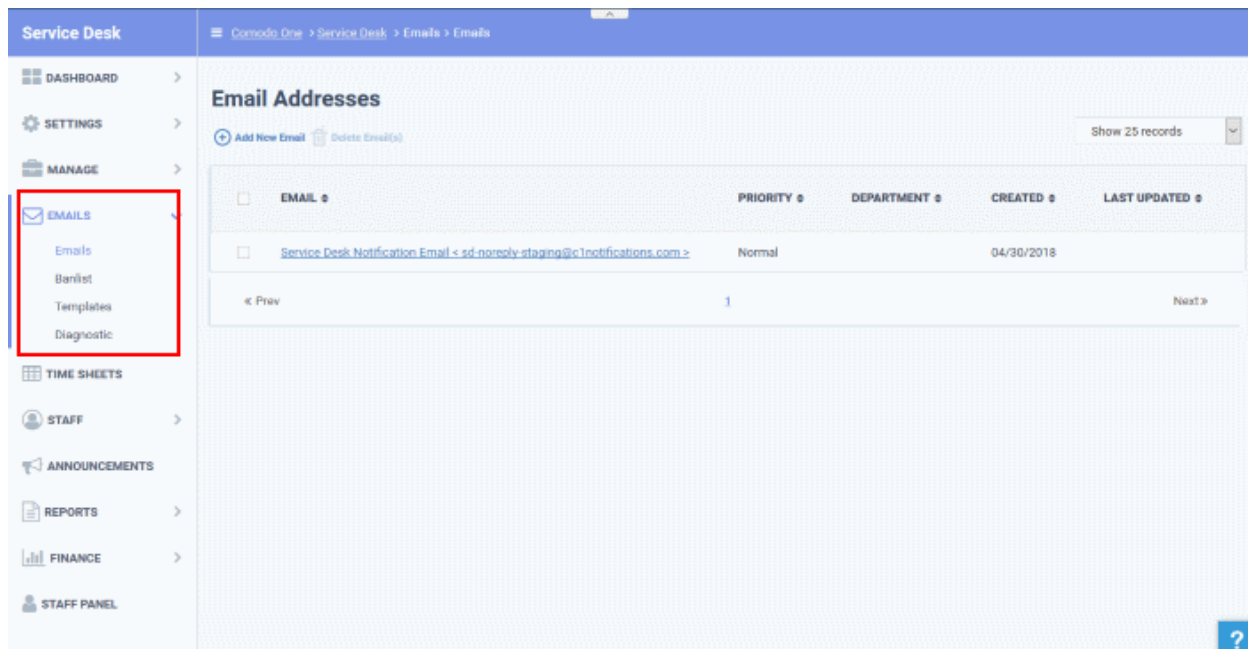
## 2.4 Email Management

Click 'Admin Panel' > 'Emails' to access the email management sections.

- **Emails** - Specify your support email addresses. Service Desk can automatically create tickets from emails sent to these addresses. The addresses can also be used to send system emails. Examples include welcome emails and notifications.
  - Addresses you add here will be available in **Settings > Email Settings and Options** for you to select as system and alert addresses.
- **Banlist** - Mail from banned addresses is automatically rejected.
- **Templates** - Define templates for alerts, announcements, ticket acknowledgments, and more.
- **Diagnostic** - Send test mails to check whether your SMTP settings are valid.

Service desk can also send notifications in batches after a certain period of time, or after a certain quantity of notifications has built up. Please contact your account manager if you wish to enable this feature.

- Click 'Admin Panel' > 'Emails':



New emails are fetched every 3 minutes if you are logged into Service Desk. If you are not logged in then mail is fetched every ten minutes.

See the following sections for more help:

- **Setup your support mail addresses**
- **Block user email addresses**
- **Email templates**
- **Test outgoing email settings**

### 2.4.1 Setup your Support Email Addresses

Click 'Admin Panel' > 'Emails' > 'Emails'

- End users can create tickets by sending an email to your support email address. The 'Email Addresses' area lets you add and manage your support addresses. All messages sent to these addresses are converted to a support ticket and automatically assigned to a particular department.
- The addresses you add here are also available for selection in **Settings > Email Settings and Options** as

the addresses from which system emails are sent.

- The default notification address which ships with Service Desk cannot be deleted or edited. However, you can create your own addresses which can, of course, be edited or deleted. You can edit, but not delete, addresses which are currently being used to send system and alert emails.
- There are two ways you can setup email fetching:
  - **Fetch emails via forwarding** - Service Desk generates a unique forwarding address for your account. You add a rule to your mail server to forward support emails to this address. Mails sent to the forwarding address are converted into tickets.
  - **Fetch emails via IMAP or POP** - Service Desk collects support emails direct from your mail server then converts them into tickets.
- **Prerequisite** - In order for Service Desk to create tickets from emails, you must first enable email fetching at the 'Email Settings and Options' interface.
  - Click 'Admin Panel' > 'Settings' > 'Emails'.
  - Select the 'Enable' option beside 'Email Fetching'
  - Click 'Save Changes' for your settings to take effect
  - See **Email Settings and Options** to read more

### The email address area

- Open the admin panel (see the last link on the left)
- Click 'Emails' > 'Emails'
- The interface lists all existing support email addresses and allows you to create new addresses:

The screenshot shows the 'Email Addresses' management interface. The left sidebar has 'EMAILS' highlighted. The main area shows a table with the following data:

EMAIL	PRIORITY	DEPARTMENT	CREATED	LAST UPDATED
<a href="#">Service Desk Notification Email &lt;sd-noreply-staging@itarianotifications.com &gt;</a>	Normal		04/30/2018	
<a href="#">Support &lt;support@frontfork.com &gt;</a>	Normal	Support	02/20/2020	02/20/2020 12:23 pm

- **Email:** The name specified for the email address and the email address
- **Priority:** The criticality level assigned to tickets created by emails received at this address
- **Department:** The department that the ticket is assigned.
- **Created:** The date on which the email address was added
- **Last Updated:** The date and time the email was most recently edited

Click a column header to sort items in ascending/descending order.

The 'Email Addresses' interface lets you:

- **Add a new support email address**
- **Remove unwanted addresses**

### Add a new email address

- Open the admin panel (see the last link on the left)

- Click 'Emails' > 'Emails'
- Click 'Add New Email':

The screenshot shows the 'Email Addresses' management interface. At the top, there is a breadcrumb trail: 'Service Desk > Emails > Emails'. Below this, the title 'Email Addresses' is displayed. A red circle highlights the '+ Add New Email' button, with a red arrow pointing down to the 'Add New Email' form. The form is divided into several sections:

- Email Information & Settings:** Contains two text input fields: 'Email Address: \*' and 'Email Name: \*'.
- New Ticket Settings:** Contains three dropdown menus: 'Department: - System Default -', 'Priority: - System Default -', and 'Category: - System Default -'. Each dropdown has a question mark icon to its right. Below these is a checkbox labeled 'Auto-Response:  Disable for this Email Address ?'.
- Email Login Information ?**: A section header with a question mark icon.

The 'Add New Email' form contains the following areas:

- **Email information & settings**
- **New ticket settings**
- **Account login information**
- **Fetch email via forwarding OR Fetch email via IMAP/POP**
- **SMTP settings**

#### Email Information & Settings

- **Email Address:** Enter the email address to which users should send support requests. Service Desk will automatically convert mails sent to this address into tickets.

- You can only have one instance of each email address on this page.
- You should setup multiple addresses if you want to assign specific mails to specific departments or categories. For example, general-inquiries@my-company.com, account-questions@my-company.com, server-issues@my-company.com, enterprise-support@my-company.com, etc.
- **Email Name:** Enter a unique name to identify the address. For example, 'Front Desk Support Requests'.

### New Ticket Settings

- **Department:** Assign tickets sent to this email address to a specific department. If you don't choose a department then the ticket is assigned to the default department. You can set the default department at 'Admin Panel' > 'Settings' > 'System'. See **Departments** to read more.
- **Priority:** Choose the criticality of tickets which were created from mails sent to this address. For example, Low, Normal, High.
- **Category:** Choose the ticket category assigned to tickets created via this email address.
  - Ticket categories are broad support topics such as 'Billing', 'Account changes', 'Technical Support' and so forth. You can setup ticket categories at 'Admin Panel' > 'Manage' > 'Ticket Categories'.
  - These categories are usually presented to users to help them more easily select the area with which they need help. For example, your customer-facing help page might have a menu which says 'Please select the area we can assist you with'.
  - You might want to assign the ticket to a category IF you intend for it to be handled by a specific department. If so, then please make sure you have created separate (corresponding) email addresses for each category in 'Admin Panel' > 'Emails' > 'Emails'.
  - See **Ticket Categories** to read more on this.
- **Auto-Response:** Auto-responder mails are sent to users to confirm that you have received their support request. Select this option if you don't want to send these automatic responses.

### Email Login Information

**Email Login Information** ?

Username:

Password:

- **Username:** The username of the email account. This is usually the same as the email address.
- **Password:** The password of the email account

Service Desk uses the account credentials to fetch incoming mail via IMAP/POP, and to send responses via SMTP.

### Fetch Email via Forwarding

- Use this option if you want Service Desk to create tickets from mails forwarded to a specific address.
- Service Desk automatically generates an address for you to use:

**Fetching Email via Forwarding** Status:  Enable  DisableEmail for forwarding: 

- Configure your mail server to forward mails to the address in the '**Email Address**' field to the forwarding address.
- Mails sent to the forwarding address are converted into tickets.

**Note:**

To confirm that you can receive mail at the forwarding address, some mail boxes send a verification code to the new address. This verification code should be pasted in the mailbox configuration page.

You can view the verification code sent by your mailbox as a ticket in the 'Tickets' interface:

- Open the 'Staff Panel' then click 'Tickets' > 'Open' on the left
- You should see a new ticket which contains the verification code.
- Copy the verification code and enter it in the mail box configuration page.

**Fetch Email via IMAP or POP**

- Use this option if you want Service Desk to collect support emails direct from your mail server. Service Desk will convert mails received from the **support email address** into tickets.
- You need to specify the hostname, port and protocol of your mail server.

**Fetching Email via IMAP or POP ?**

Status:  Enable  Disable

Hostname:  ?

Port Number:  ?

Mail Box Protocol:  ?

Emails Per Fetch:  emails ?

Fetches Emails:

- Move to folder:  ?
- Delete emails
- Do nothing (not recommended)

**Send Email via SMTP**

- Use this option if you want Service Desk to send outgoing mail, like auto-responses, from the address specified in the **email address field**.
- You need to specify the hostname and port number of your SMTP server:

**Sending Email via SMTP ?**

Status:  Enable  Disable

Hostname:  ?

Port Number:  ?

Authentication Required:  Yes  No

Header Spoofing:  Allow for this Email Address ?

**Internal Notes**

**Internal Notes:** Admin's notes.

- Add any notes related to the email address for internal purpose.
- Click the 'Submit' button

If the status in the incoming and outgoing mail settings are enabled, then the Service Desk will check all the parameters and if found correct, the email address will be added to the list.

### **Edit an email address**

- Open the admin panel (see the last link on the left)
- Click 'Emails' > 'Emails'
- Click on the email address you want to update.



The screenshot shows the 'Email Addresses' management page. At the top, there are navigation links for 'Service Desk', 'Emails', and 'Emails'. Below the navigation, there are buttons for 'Add New Email' and 'Delete Email(s)', along with a 'Show 25' dropdown. A table lists email addresses with columns for 'EMAIL', 'PRIORITY', and 'DEPA'. The second row is highlighted with a red circle, showing 'Support < support@frontfork.com >' with a 'Normal' priority. A red arrow points from this row to the 'Update Email' form below. The form is divided into two sections: 'Email Information & Settings' and 'New Ticket Settings'. The 'Email Information & Settings' section has input fields for 'Email Address: \*' (containing 'support@frontfork.com') and 'Email Name: \*' (containing 'Support'). The 'New Ticket Settings' section has dropdown menus for 'Department:' (set to 'Support'), 'Priority:' (set to 'Normal'), and 'Category:' (set to '- System Default -'). At the bottom of the form, there is a checkbox for 'Auto-' and a link 'Disable for this Email Address'.

The update process is similar to adding a new email address. See **above** if you need help with this.

### Remove unwanted addresses

Note - You cannot remove an address if it is set as the default for receiving alerts. Click 'Admin Panel' > 'Settings' > 'Emails' to change the 'Default Alert Email' address.

- Open the admin panel (See the last link on the left)

- Click 'Emails' > 'Emails'
- Select the addresses you want to remove then click 'Delete Email(s)'

The screenshot shows the 'Email Addresses' page in the Comodo One Service Desk. The breadcrumb navigation is 'Service Desk > Emails > Emails'. The page title is 'Email Addresses'. There are two buttons: 'Add New Email' and 'Delete Email(s)'. The 'Delete Email(s)' button is circled in red. Below the buttons is a table of email addresses. The first row is 'Service Desk Notification Email < sd-noreply-staging@itariannotifications.com >' with a priority of 'Normal'. The second row is 'Support < support@frontfork.com >' with a priority of 'Normal'. The checkbox for the second row is checked and circled in red. A red arrow points from the 'Delete Email(s)' button to a confirmation dialog box. The dialog box has the title 'Please Confirm' and the text: 'Are you sure you want to DELETE selected emails? Deleted emails CANNOT be recovered. Please confirm to continue.' There are two buttons: 'No, Cancel' and 'Yes, Do it!'.

- Click 'Yes. Do it!' to confirm removal.

## 2.4.2 Block User Email Addresses

Click 'Admin Panel' > 'Emails' > 'Banlist'

- You can configure Service Desk to reject tickets from certain senders by banning their email address.
- Banned users can still login to the client portal but cannot create tickets.
- You can relax the ban at anytime

Use the following links for help with related tasks:

- [The banned emails area](#)
- [Add an email address to the ban list](#)
- [Delete email addresses from the ban list](#)

### The banned emails area

- Open the admin panel (see the last link on the left)
- Click 'Emails' > 'Banlist'

The screenshot shows the 'Banned Email Addresses' page in the Comodo One Service Desk. The left sidebar has 'EMAILS' and 'Banlist' circled in red. The main content area shows a table with the following data:

EMAIL ADDRESS	BAN STATUS	DATE ADDED	LAST UPDATED
<a href="#">garrulousgeorge@frontfork.com</a>	Active	02/20/2020 3:51 pm	02/20/2020 3:51 pm
<a href="#">irkingirwin@saddleandpedals.com</a>	Active	02/20/2020 3:51 pm	02/20/2020 3:51 pm
<input checked="" type="checkbox"/> <a href="#">stingystella@saddleandpedals.com</a>	Passive	02/20/2020 3:51 pm	02/20/2020 3:51 pm

- **Email Address** - The email address of the user. Click the address to edit or update it.
- **Ban Status** - Whether the ban on the user is active on inactive.
  - Select an email address then use the 'Enable' / 'Disable' options at the top to turn the ban on or off.
- **Date added** - The date and time the address was added to the ban list.
- **Last updated** - The date and time the address was most recently edited

### Add an email address to the ban list

- Open the admin panel (See the last link on the left)
- Click 'Emails' > 'Banlist'
- Click 'Ban New Email'

Service Desk > Emails > Banlist

## Banned Email Addresses ?

Show 25 records

<input type="checkbox"/>	EMAIL ADDRESS <span>⌵</span>	BAN STATUS <span>⌵</span>	DATE ADDED <span>⌵</span>	LAST UPDATE
<input type="checkbox"/>	<a href="mailto:garrulousgeorge@frontfork.com">garrulousgeorge@frontfork.com</a>	Active	02/20/2020 3:51 pm	02/20/2020
<input type="checkbox"/>	<a href="mailto:irkinciswin@ceddleandpedale.com">irkinciswin@ceddleandpedale.com</a>	Active	02/20/2020 3:51 pm	02/20/2020

### Add New Email Address to Ban List

**Valid email address required.**

Ban Status: \*  Active  Disabled

Email Address: \*

**Internal Notes: Admin's notes.**

### Ban Status:

- **Active** - Service Desk rejects tickets and mails from this user.
- **Disabled** - Service Desk allows tickets and mails from this user.

**Email Address:** The email address of the user concerned.

Click the 'Add' button when you have completed all fields.

### Delete email addresses from the ban list

Removing an email address from the list will automatically lift the ban on the user.

- Open the admin panel (See the last link on the left)
- Click 'Emails' > 'Banlist'

- Select the email addresses you want to remove
- Click 'Delete'

The screenshot shows the 'Banned Email Addresses' page in the Comodo One Service Desk. The page has a blue header with a breadcrumb trail: 'Service Desk > Emails > Banlist'. Below the header, there's a title 'Banned Email Addresses' with a help icon. To the right of the title are buttons for '+ Ban New Email', 'Enable', 'Disable', and 'Delete'. A red circle highlights the 'Delete' button, with a red arrow pointing down to a confirmation dialog box.

The table below shows the list of banned email addresses:

<input type="checkbox"/>	EMAIL ADDRESS ↕	BAN STATUS ↕	DATE ADDED ↕	LAST UPDATED ↕
<input type="checkbox"/>	<a href="mailto:garrulousgeorge@frontfork.com">garrulousgeorge@frontfork.com</a>	Active	02/20/2020 3:51 pm	02/20/2020 3:51 pm
<input checked="" type="checkbox"/>	<a href="mailto:irkingirwin@saddleandpedals.com">irkingirwin@saddleandpedals.com</a>	Active	02/20/2020 3:51 pm	02/20/2020 3:51 pm
<input type="checkbox"/>	<a href="mailto:stingystella@saddleandpedals.com">stingystella@saddleandpedals.com</a>	Passive	02/20/2020 3:51 pm	02/20/2020 3:51 pm

The confirmation dialog box is titled 'Please Confirm' and contains the text: 'Are you sure you want to DELETE selected ban rules? Please confirm to continue.' It has two buttons: 'No, Cancel' and 'Yes, Do it!'.

- Click 'Yes, Do it!' To confirm the removal

The user can now submit tickets to your portal.

## 2.4.3 Email Templates

Click 'Admin Panel' > 'Emails' > 'Templates'

- Template sets allow you to create standardized emails for announcements, report notifications, tickets, and user responses.

There are two categories of template:

- **Global template** - Click 'Settings' > 'Emails'

This template is used for emails from all departments IF no department template is set.

- **Department templates** - Click 'Staff' > 'Departments'

These templates are used for emails from specific departments. Department templates over-rule global templates.

Both department and global templates the following sub-categories:

- **Scheduled Reports Templates:** For mails to staff who receive scheduled reports
- **System Management Templates:** For announcements to staff members

- **Staff Ticket Templates:** For alert emails to staff when a predefined setting is triggered
- **End-User Ticket Templates:** For auto-response emails to end-users.

General notes:

- You can create a custom template by cloning then editing an existing template.
- You can insert variables which dynamically fetch data from your portal. For example:  
%{ticket.staff.name} - Inserts the name of staff member to whom the ticket is assigned

Use the following links to go to the area you need help with:

- [Email template sets](#)
- [Create a new template set](#)
- [Edit a template set](#)
  - [Insert variables](#)

## Email template sets

- Open the admin panel (see the last link on the left)
- Click 'Emails' > 'Templates'

The screenshot shows the 'Email Template Sets' page in the Service Desk admin panel. The breadcrumb trail is 'Service Desk > Emails > Templates'. The page title is 'Email Template Sets'. There are buttons for 'Add New Template Set', 'Enable', 'Disable', and 'Delete'. A 'Show 25 records' dropdown is visible. The table below lists several template sets:

<input type="checkbox"/>	NAME	STATUS	IN-USE	DATE ADDED	LAST UPDATED
<input type="checkbox"/>	Default Email Templates (HTML) (System Default)	Active	Yes	04/30/2018 1:55 pm	04/30/2018 1:55 pm
<input type="checkbox"/>	Frontfork Company	Active	No	02/22/2019 2:28 pm	02/22/2019 2:28 pm
<input type="checkbox"/>	For Maintenance department	Passive	No	02/23/2019 12:05 am	02/19/2020 12:42 pm
<input type="checkbox"/>	For Sales department	Passive	No	02/19/2020 11:19 am	02/19/2020 12:42 pm

At the bottom of the table, there are navigation links: '<< Prev', '1', and 'Next >>'.

**Name:** The label of the email template

- Click the name of a set to view/edit templates within it

**Status:** Whether the template is enabled or disabled. Only active templates are available for selection in 'Settings' > 'Emails' and 'Staff' > 'Departments'.

- Select a template set and click 'Enable' or 'Disable' at the top as required

**In-use:** Shows whether the template is used for global emails or a specific department

**Date Added:** Date and time at which the template was created

**Last Updated:** Date and time the template was most recently edited by an admin

## Add a new template set

- Open the admin panel (see the last link on the left)
- Click 'Emails' > 'Templates'
- Click 'Add New Template Set'

**Email Template Sets**

<input type="checkbox"/>	NAME ↕	STATUS ↕	IN-USE
<input type="checkbox"/>	<a href="#">Default Email Templates (HTML) (System Default)</a>	Active	Yes
<input type="checkbox"/>	<a href="#">Frontfork Company</a>	Active	No
<input type="checkbox"/>	<a href="#">For Maintenance department</a>	Passive	No

---

**Add New Template**

**Template information**

Name: \*

Status: \*  Enabled  Disabled ?

Template Set To Clone:  ?

Language:  ?

---

**Admin Notes : Internal notes.**

- **Name:** Enter a label for the template set
- **Status:** Choose whether the template should be active or not. Only active templates are available for selection in 'Settings' > 'Emails' and 'Staff' > 'Departments'.
- **Template Set To Clone:** Choose an existing set to use as the starting point for your new, custom set.
- **Language:** Select the language of the new email template set.
- **Admin Notes:** Add any comments on the new template set for internal reference.

Click 'Add Template' to save the new template.

You can now edit the templates in your cloned set as required:

## Edit a template set

- Open the admin panel (see the last link on the left)
- Click 'Emails' > 'Templates'
- Click an email template set

**Email Template Sets**

+ Add New Template Set    ✓ Enable    ✗ Disable    🗑 Delete

<input type="checkbox"/>	NAME ↕	STATUS ↕	IN-USE
<input type="checkbox"/>	<a href="#">Default Email Templates (HTML) (System Default)</a>	Active	Yes
<input type="checkbox"/>	<a href="#">For Maintenance department</a>	Active	No
<input type="checkbox"/>	<a href="#">For Maintenance</a>	Passive	No



### Update Template

---

**Template information**

Name: \*

Status: \*  Enabled  Disabled

Language: \*

**Scheduled Reports Templates:: Click on the title to edit.**

[Scheduled Reports](#)  
Alert sent to staff that had created scheduled report

**System Management Templates:: Click on the title to edit.**

[Announcement Notice](#)  
Template used to notify subscribers on announcement

**Staff Ticket Templates:: Click on the title to edit.**

[Internal Note Alert](#)  
Alert sent to selected staff, if enabled, on new Internal note.

[New Message Alert](#)  
Alert sent to staff, if enabled, when user replies to an existing ticket.

[New Ticket Alert](#)  
Alert sent to staff, if enabled, on new ticket.

[New Ticket Share](#)  
Ticket send to staff, user or custom email address.

[Overdue Ticket Alert](#)  
Alert sent to staff on stale or overdue tickets.

[SLA Warning Ticket Alert](#)  
Alert sent to staff members when a ticket reaches warning levels defined in the SLA.

[Ticket Assignment Alert](#)  
Alert sent to staff on ticket assignment.

[Ticket Auto Close](#)  
Alert sent to staff, if enabled, on close ticket.

[Ticket Transfer Alert](#)  
Alert sent to staff on ticket transfer.

**End-User Ticket Templates:: Click on the title to edit.**

[New Activity Notice](#)  
Template used to notify collaborators on ticket activity (e.g CC on reply)

[New Message Auto-response](#)  
Confirmation sent to user when a new message is appended to an existing ticket.

[New Ticket Auto-reply](#)  
Canned Auto-reply sent to user on new ticket, based on filter matches. Overwrites "normal" auto-response.

[New Ticket Auto-response](#)  
Autoreponse sent to user, if enabled, on new ticket.

[New Ticket Notice](#)  
Notice sent to user, if enabled, on new ticket created by staff on their behalf (e.g phone calls).

[Over Limit Notice](#)  
A one-time notice sent, if enabled, when user has reached the maximum allowed open tickets.

[Response/Reply Template](#)  
Template used on ticket response/reply

[Ticket Stage Template](#)  
Template used on stage transfer.

**Admin Notes : Internal notes.**

Save Changes
Reset
Cancel

The set contains the following templates:

### Scheduled Reports Templates

- **Scheduled Reports:** Used to notify staff members that a report is ready.

### System Management Template:

- **Announcement Notice:** Emails used for messages to staff. See [Manage Announcements](#) to read more.

### Staff Ticket Templates:

- **Internal Note Alert:** Sent to staff when a new internal note is added to a ticket. This can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' interface.
- **New Message Alert:** Sent to staff when a user replies to an existing ticket. The alert can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' in the 'New Message Alert' section.
- **New Ticket Alert:** Sent to staff when a new ticket is created. This can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' interface.
- **New Ticket Share:** Sent to staff members when the member is added to a ticket.
- **Overdue Ticket Alert:** Sent to staff when a ticket is overdue. This can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' interface.
- **SLA Warning Ticket Alert:** Sent to staff when activity, or lack of activity, on a ticket jeopardizes the terms of a service level agreement (SLA) with a customer.
- **Ticket Assignment Alert:** Sent to staff when a ticket is assigned to them. This can be enabled or disabled at 'Admin Panel' > 'Settings' > 'Alerts & Notices'.
- **Ticket Auto Close Alert:** Sent to staff when a ticket is closed by auto-close rules. This can be enabled or disabled at 'Admin Panel' > 'Settings' > 'Alerts & Notices'.
- **Ticket Transfer Alert:** Sent to staff when a ticket is reassigned to them. This can be enabled or disabled at 'Admin Panel' > 'Settings' > 'Alerts & Notices'.

### End-User Ticket Template:

- **New Activity Notice:** Sent to end-users when there is a new response to one of their tickets.
- **New Message Auto-response:** Sent to end-users after they post a new message to a ticket.
- **New Ticket Auto-reply:** Canned responses sent to end-users after they submit a new ticket. These templates are sent when the content of their ticket triggers a rule. The 'auto-reply' overrules the 'auto-response'
- **New Ticket Auto-response:** Sent to end-users when a new ticket is created by them. The 'auto-response' is sent if no 'auto-reply' rule is triggered. The alert can be enabled or disabled at 'Admin Panel' > 'Settings' > 'Autoresponder'.
- **New Ticket Notice:** Sent to end-users when a ticket is created on their behalf by a staff member. For example, the user described their issue over the phone, and the staff member subsequently created a ticket from the conversation. The alert can be enabled or disabled at 'Admin Panel' > 'Settings' > 'Autoresponder'.
- **Over Limit Notice:** Sent to end-users when they have reached the maximum number of open tickets that they are allowed. You can configure this number at 'Admin Panel' > 'Settings' > 'Tickets' > 'Maximum Open Tickets'. The alert can be enabled or disabled at 'Admin Panel' > 'Settings' > 'Autoresponder'.
- **Response/Reply Template:** Sent to end-users with canned response/reply alerts for active tickets.
- **Ticket Stage Template** - Sent to end-users when a ticket moves from one phase of processing to the next. Applies only to multi-stage tickets.

Click on a template to view and edit the content. For example, the following screenshot shows the 'New Ticket Alert' template in the 'Staff Ticket Template' category:

## Email Template Set/For Maintenance department

New Ticket Alert

Go

### New Ticket Alert ?

[Supported Variables](#)

Email Subject and Body:

New Ticket Alert

# Hi **%{recipient.name}**,

New ticket **%{ticket.number}** created

From:	<b>%{ticket.name}</b> < <b>%{ticket.email}</b> >
Department:	<b>%{ticket.dept.name}</b>

**%{message}**

To view or respond to the ticket, please [login](#) to the support ticket system

*Your friendly Customer Support System*

Save Changes

Reset Changes

Cancel Changes

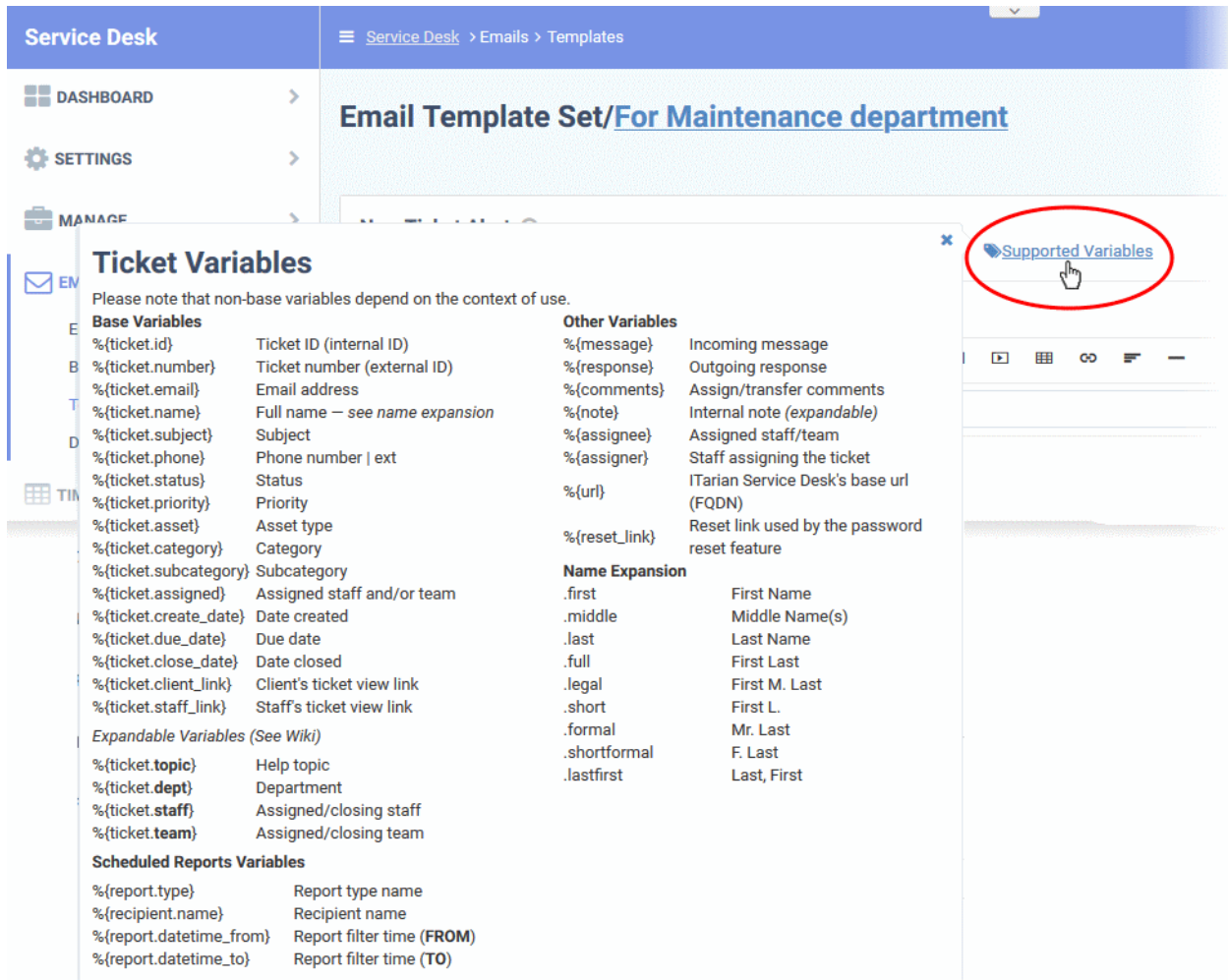
- Edit the template content as required.
- You can also insert variables to the content as required. The values for the variables are dynamically fetched from ticket details and from the data you have in the support portal. See the next section, **Insert Variables**, if you need help with this.
- Click 'Save Changes' to update the template.

### Insert variables

Variables are dynamic fields which you can add to your email templates. The values of the variables are drawn from the ticket data and from your support portal. For example:

**%{ticket.dept}** - Inserts the name of the department to which the ticket is assigned.

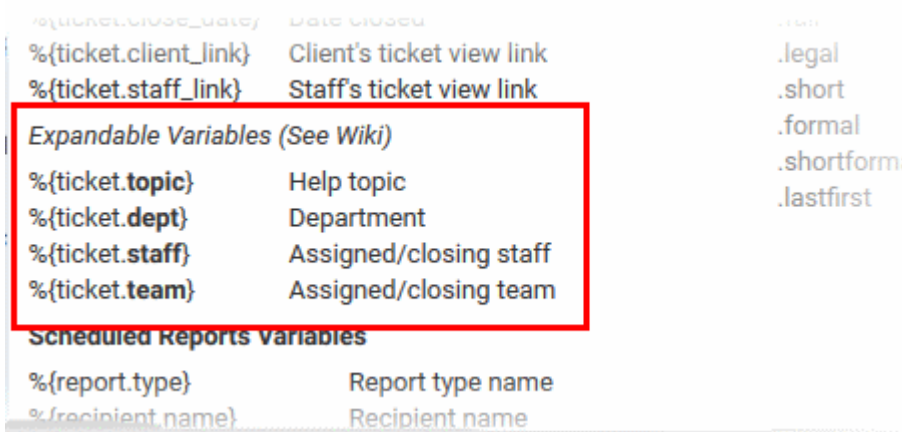
- Place your mouse over 'Supported Variables' to view a list of variables you can use:



- Insert the variables into the content where required. For example 'Your ticket has been assigned to %  
{ticket.assigned} in the %  
{ticket.dept} department.'

### Expandable Variables:

Expandable variables are variables to which you can add certain terms to fetch very specific information:



The possible extended variables are given below:

### topic

`%{ticket.topic.name}` - The ticket category to which the ticket belongs.

`%{ticket.topic.parent}` - The parent category to the category to which the ticket belongs.

### dept

`%{ticket.dept.name}` - The department to which the ticket is assigned.

`%{ticket.dept.manager}` - The person in-charge of the department to which the ticket is assigned.

`%{ticket.dept.signature}` - The signature message configured for the department.

`%{ticket.dept.emailAddress}` - The contact email address of the department to which the ticket is assigned.

#### **staff**

`%{ticket.staff.name}` - The staff member or the admin to whom the ticket is assigned.

`%{ticket.staff.dept}` - The department to which the staff member belongs.

`%{ticket.staff.TZoffset}` - The date and time at which the ticket is assigned to the staff member.

`%{ticket.staff.email}` - The email address of the staff member to whom the ticket is assigned.

`%{ticket.staff.signature}` - The signature message of the staff member

## 2.4.4 Test Outgoing Email Settings

Click 'Admin Panel' > 'Emails' > 'Diagnostic.'

Administrators can check whether the alerts and notices for various settings are sent successfully to users and staff members. The email delivery depends on the server settings and/or SMTP settings of the email account used for sending out these emails.

- The email accounts for sending system and alert emails are selected from the Settings > Emails interface. See **Email Settings and Options** for more details.
- The MTA settings for the SMTP server for the emails are configured from the Emails > Emails interface. See **Setup your Support Email Addresses** for more details.

The 'Test Outgoing Email' interface allows administrators to send test mails from the email accounts configured for sending outgoing emails to the email addresses which they can access, to check whether their SMTP settings are valid and active.

#### **Test the outgoing email settings**

- Click 'Emails' on the left then 'Diagnostic' in the Admin Panel

The 'Test Outgoing Email' screen will be displayed:

Comodo One > Service Desk > Emails > Diagnostic

## Diagnostic

### Test Outgoing Email

Use the following form to test whether your Outgoing Email settings are properly established. ?

From: \*

To: \*

Subject: \*

Message: email message to send. \*

<> [Rich Text Editor Icons]

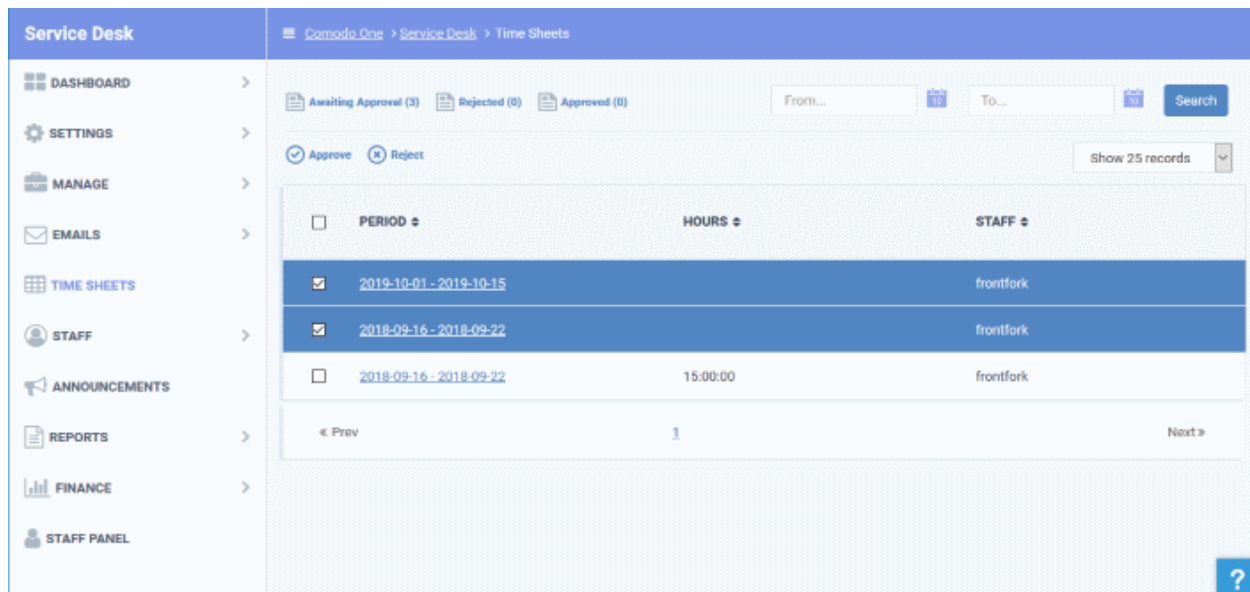
- **From:** Select the outgoing email address to be tested. The drop-down displays the email addresses added in Emails section. Refer to the section **Email Addresses** for more details.
  - **To:** Enter the email addresses that you want to receive the test email from the Service Desk
  - **Subject:** Enter the subject line for the test mail.
  - **Message:** Enter a message for email.
- Click the 'Send Message'. If the outgoing mail settings are configured correctly, then the mail will be delivered successfully.

## 2.5 Manage Time Sheets

- Click 'Admin > Timesheets' to open this interface
- Service Desk staff/agents can create time sheets to record time spent on tickets and other tasks.
  - Staff should click 'Staff Panel' > 'My Time Sheets' to create or update a sheet. See **Manage Staff Time Sheets** if you need more help on this.
- Admins can evaluate submitted timesheets and approve or reject as appropriate.
- Approved sheets are saved for future reference. Rejected time sheets can be updated and re-submitted by staff.
  - You can also generate a report on staff tickets, billable time and materials used. Go to 'Admin Panel' > 'Reports' > **Agents** to do so.

### Open the 'Timesheets' interface

- Open the admin panel (see the last link on the left)
- Click 'Timesheets' on the left



The category options at the top allow you to view the time sheets with different statuses.

- **Awaiting Approval** - Displays time sheets that were submitted but have yet to be analyzed and approved/rejected.
- **Rejected** - Displays time sheets that were rejected by administrators. The rejected sheets can be edited by the staff and re-submitted for approval.
- **Approved** - Displays time sheets that have been approved by administrators. Clicking on a time sheet allows you to view notes from the administrator and the details in the sheet. Approved sheets cannot be deleted.

### Column Headers

The column headers for the lists of all categories are the same.

- **Period** - Displays the date range of the time period covered by the time sheet. Clicking on the date range opens the sheet and allows you to view the entries for analysis.
- **Hours** - Displays the total hours spent by the staff member on the tickets and other tasks, within the time period.
- **Staff** - Indicates the staff to whom the time sheet belongs.

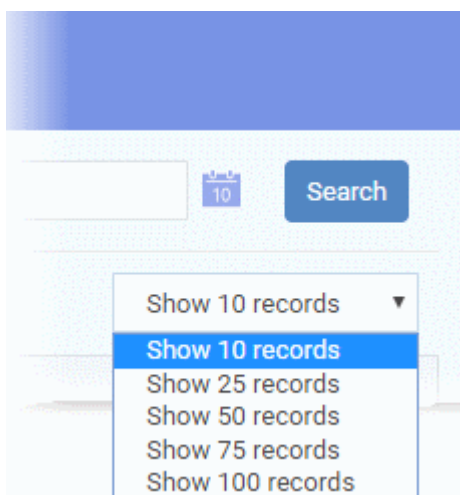
### Sorting Options:

- Clicking on any column header sorts the items in ascending/descending order of the entries in that column

### Search Options:

You can search for time sheets that fall within a specific date range.

- Enter the 'From' and 'To' dates using the calendar icons beside the respective fields and click the 'Search' button
- To clear the results and display all items, clear the 'From' and 'To' fields and click the 'Search' button again or simply click the respective category link at the top.
- By default, the interface displays 10 items per page. To increase the number of items displayed on a single page, choose the number from the drop-down at the top right.



## View, approve or reject a time sheet

- Click the time sheet to be viewed



The screenshot shows the 'Time Sheets' management interface. At the top, there are filters for 'Awaiting Approval (2)', 'Rejected (0)', and 'Approved (1)'. Below these are 'Approve' and 'Reject' buttons. A list of time sheet entries is shown with columns for 'PERIOD' and 'HOURS'. The entry for '2017-04-09 - 2017-04-15' with 22:40:00 hours is circled in red, with a red arrow pointing to the 'View Time Sheet' section below.

**View Time Sheet**

Staff: Wile E Coyote  
Time Zone: +00:00

< Previous Week    Next Week >

ACTIVITY	TIME	SUN 04/09	MON 04/10	TUE 04/11	WED 04/12	THU 04/13	FRI 04/14	SAT 04/15
Ticket #1	01:00:00			01:00:00				
Ticket #1	01:00:00			01:00:00				
Misc								
Problem Identification	05:55:00	00:45:00	00:55:00	02:00:00	01:30:00	00:45:00		
OS Reinstalaion	16:45:00	01:00:00	02:00:00	03:00:00	00:45:00	05:00:00	05:00:00	
License Activation								
Application Installation								
<b>Total</b>		01:45:00	02:55:00	07:00:00	02:15:00	05:45:00	05:00:00	

Approve    Reject

The 'View Time Sheet' screen will appear with the details of tickets and miscellaneous jobs attended by the staff

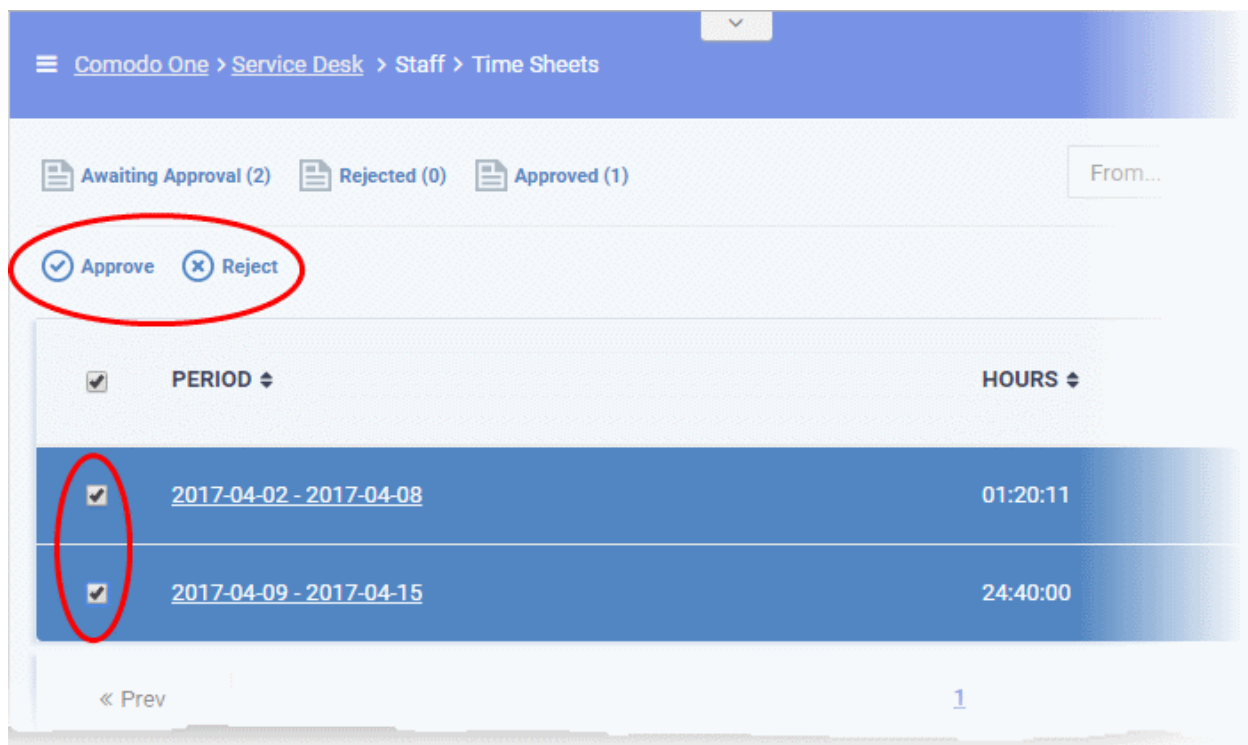
member with spent on them on each day, within the period covered by the sheet. By default, the first week of the period will be displayed. You can navigate through successive weeks using the 'Previous Week' and 'Next Week' buttons at the top right. You can evaluate the performance of the staff using various factors like time spent on the tickets, total working hours on each day and so on.

- To approve the time sheet, click the 'Approve' button
- To reject the time sheet, click the 'Reject' button

The sheet will be moved under respective category.

Alternatively, you can approve more than one sheet at once from the Time Sheets interface.

- To accept several sheets at once, select the sheets from the 'Timesheets' interface and click 'Approve'
- To reject several sheets at once, select the sheets from the 'Timesheets' interface and click 'Reject'



The approved time sheets will be moved to the 'Approved' category and the rejected time sheets will be moved to the 'Rejected' category. You can view those sheets by clicking the respective categories at the top of the interface.

The rejected time sheets will also be displayed under the 'Rejected' category in the 'Staff Panel' for the staff member, to view and edit. See [Updating a Time Sheet](#) in [Managing Staff Time Sheets](#) for more details.

After they correct and re-submit a time sheet, it will appear under the 'Awaiting Approval' category. Administrators can review the sheet again and approve or reject it.

## 2.6 Manage Staff

Click 'Admin Panel' > 'Staff'

- Staff Members are the support personnel who attend to tickets submitted by users. Staff may also be referred to as 'agents' in Service Desk.
- You can only add new staff members through the Comodo One interface.
  - Login to Comodo One > Click 'Management' > 'Staff'
- Service Desk imports staff with the same role they have in C1. The role determines their permissions in the Service Desk interface. You can also create custom roles in Service Desk if required.
- New staff are assigned to the 'default' Service Desk department. You can also create new departments and

assign staff to them.

- You can set the default department at 'Admin Panel' > 'Settings' > 'System'
- See [Departments](#) for more help with departments in general.
- See [Update a staff member](#) for help to assign staff to a department
- The staff area lets admins update staff details, create new roles and departments, create time-sheet templates, and review material/expense items.

The screenshot displays the 'Staff Members' page in the Comodo One Service Desk. The page title is 'Staff Members' and the breadcrumb trail is 'Comodo One > Service Desk > Staff > Staff Members'. The page features a sidebar on the left with navigation options: DASHBOARD, SETTINGS, MANAGE, EMAILS, TIMESHEETS, STAFF (selected), and ANNOUNCEMENTS. The main content area shows a table of staff members with columns: NAME, USERNAME, STATUS, ROLE, PORTAL ROLE, DEPARTMENT, CREATED, and LAST LOGIN. There are three staff members listed: ACME Corp (Account Admin, Support), Road Runner (Admin, Support), and Wile E. Coyote (Admin, Support). The page also includes a 'Role Reset' button, a 'Show 10 records' dropdown, and pagination controls.

See the following sections for more on each area:

- [Staff Members](#)
- [Staff Roles](#)
- [Departments](#)
- [Timesheet Templates](#)
- [Material Approval](#)

## 2.6.1 Staff Members

Click 'Admin Panel' > 'Staff' > 'Staff Members'

- The staff members area lets you view and manage staff (a.k.a. 'Agents'), update their details, assign them to departments, change their roles/permissions, and more.

Notes:

- You can only add new staff members through the Comodo One interface.
  - Open C1 > Click 'Management' > 'Staff'
  - See [this page](#) in the Comodo One guide for help to create staff.
- New staff are assigned to the 'System Default' department. Click 'Admin Panel' > 'Settings' > 'System' to view or change the default department. See [Service Desk System Settings](#) if you need more help.
- You can create new departments and assign staff to them as required.
- Service Desk imports staff with the same role they have in C1. The role determines their permissions with the Service Desk interface. You can also create custom roles for staff.

### Manage staff members

- Open the 'Admin panel' (see the last link on the left)

- Click 'Staff' > 'Staff Members'

<input type="checkbox"/>	NAME	USERNAME	STATUS	ROLE	PORTAL ROLE	DEPARTMENT	CREATED	LAST LOGIN
<input type="checkbox"/>	herculespopular	herculespopular22@gmail.com	Active	Account Admin	Account Admin	Support	05/21/2018 10:09 am	02/13/2020 11:13 am
<input checked="" type="checkbox"/>	Steam Ship	ssgalia@yahoo.com	Active	Technician	Technician	System Default - (Support)	03/04/2019 9:44 am	03/04/2019 1:19 pm
<input type="checkbox"/>	John Grey	john22grey@yopmail.com	Active	Technician	Technician	System Default - (Support)	10/15/2019 12:43 pm	
<input type="checkbox"/>	Amir	fsregionaltransport@gmail.com	Active	Technician	Technician	System Default - (Support)	02/11/2020 10:38 am	02/11/2020 10:40 am

- **Name:** The full name of the staff member.
  - Click the name to open the 'Update Staff' screen. The screen lets you view and edit staff details and change their role and department. See [Update details, role and department of a staff](#) for more information.
- **User Name:** The name the staff member uses to login to Service Desk.
- **Status:** **Active** - Can login and access Service Desk. **Locked** - Cannot login to Service Desk.
- **Role:** The role determines the Service Desk permissions of the staff member. You can change a staff member's role in the 'Update Staff' dialog.
  - See [Update staff details](#) for more.
  - See [Staff Roles](#) to read more about roles.
- **Portal Role:** The role assigned to the staff member in the Comodo One Portal. There are three default roles in C1 that are not editable - 'Account Admin', 'Admin', and 'Technician'.  
 You can create a custom role by cloning a default role then editing its permissions. If a staff member has a custom role then the portal role column shows the default role from which it was created.
  - See <https://help.comodo.com/topic-289-1-716-11210-Manage-Roles.html> to read more about portal roles.
- **Department:** The Service Desk department to which the staff member belongs. Click the staff member's name to change the department. See [Update details, role and department of a staff](#) if you need more help.
- **Created:** The date at which the staff member was added to Comodo One.
- **Last Login:** The date and time the staff member most recently logged into Service Desk.

See the following for more help:

- [Update staff details, role and department](#)
- [Reset the role assigned to staff](#)

### Update staff details, role and department

You can view and edit the staff member's phone number, department and role. You can also edit the signature appended to outgoing mails from the staff member.

- Open the admin panel (see the last link on the left)

- Click 'Staff' > 'Staff Members'
- Click the name of the staff member.

## Staff Account

### User Information

Username: ssgalia@yahoo.com ⓘ

Staff Name: Steam Ship

Email Address: ssgalia@yahoo.com ⓘ

Role:  ▼

Department:  ▼

Phone Number:

Mobile Number:

---

**Staff's Signature:** Optional signature used on outgoing emails. ⓘ

*Signature is made available as a choice, on ticket reply.*

**User Name** - The name the staff member uses to log into Comodo One and Service Desk

**Staff Name** - The full name of the staff member

Email Address - The email address of the staff member

Note: You cannot edit the username or email address from here. Account admins can edit the staff name in the Comodo One interface at 'Management' > 'Staff'.

Role - The role determines the staff member's privileges in Service Desk. There are two ways you can approach roles:

- 1) **Use the Comodo One roles** - Login to C1 > click 'Management' > 'Roles'.

All roles created in C1 are automatically mirrored in Service Desk. You can clone a default C1 role and modify its permissions to create a custom role. C1 roles are also cascaded to other modules such as Endpoint Manager and CRM.

- 2) **Create roles in Service Desk** - Open Service Desk > click 'Admin Panel' > 'Staff' > 'Roles'

Roles you create in Service Desk are exclusive to the application. They are not mirrored in other Comodo One modules like Endpoint Manager or CRM.

Staff imported from C1 inherit the role they have in the portal. You can change this role in the Service Desk interface at any time.

- See **Staff Roles** if you want to read more about adding and managing roles.

Select a role for the staff member from the drop-down:

**Department** - The internal department to which the staff member belongs. New staff are auto-assigned to the Service Desk 'Default' department. You can view and change the default department at 'Admin Panel' > 'Settings' > 'System'. See **Service Desk System Settings** for more guidance on setting default department.

Service Desk ships with three basic departments:

- Support
- Sales
- Maintenance

Click 'Admin Panel' > 'Staff' > 'Departments' to create new departments. See **Departments** for more guidance on managing departments.

Select a department you want to assign to the staff member from the drop-down:

**Phone Number:** Enter the contact number and extension for the staff member.

**Mobile Number:** Enter the cell phone number of the staff member

**Staff Signature:** This text is appended to all outgoing mails from staff to customers. It can include, for example, company contact details, disclaimers or 'About us' information.

Click 'Save Changes' to update the staff member's details.

### Reset the role assigned to a staff

Resetting a staff member's role reverts it to their original C1 role.

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Staff Members'
- Select the target staff

- Click 'Role Reset' at the top left.

The screenshot shows the 'Staff Members' page in the Comodo One Service Desk. At the top left, there is a 'Role Reset' button with a circular arrow icon, which is circled in red. Below it is a table with columns: NAME, USERNAME, STATUS, ROLE, PORTAL ROLE, and DEPARTMENT. The table contains five rows of staff members. The second, third, and fourth rows are highlighted in blue, indicating they are selected. A red arrow points from the 'Role Reset' button to a confirmation dialog box that appears below the table. The dialog box has the title 'Please Confirm' and the text: 'Are you sure you want to Role Reset selected staff? Please confirm to continue.' At the bottom of the dialog box, there are two buttons: 'No, Cancel' and 'Yes, Do it!'.

<input type="checkbox"/>	NAME ↕	USERNAME ↕	STATUS ↕	ROLE ↕	PORTAL ROLE ↕	DEPARTMENT
<input type="checkbox"/>	<a href="#">herculespopular</a>	herculespopular22@gmail.com	Active	<a href="#">Account Admin</a>	<a href="#">Account Admin</a>	Sys...
<input checked="" type="checkbox"/>	<a href="#">Steam Ship</a>	ssgalia@yahoo.com	Active	<a href="#">Technician to solve access issues</a>	<a href="#">Technician</a>	Sys...
<input checked="" type="checkbox"/>	<a href="#">John Grey</a>	john22grey@yopmail.com	Active	<a href="#">Admin for material approval</a>	<a href="#">Technician</a>	Sys...
<input type="checkbox"/>	<a href="#">Amir</a>	fsregionaltransport@gmail.com	Active	<a href="#">Technician</a>	<a href="#">Technician</a>	Sys...

- Click 'Yes, Do it!' in the confirmation dialog.

## 2.6.2 Staff Roles

Click 'Admin Panel' > 'Staff' > 'Roles'

- Roles determine the permissions and access rights that staff members have within the Service Desk interface.
- Service Desk inherits three roles from Comodo One:
  - Account Administrator
  - Administrator
  - Technician
- 'Account Administrator' and 'Administrator' cannot be deleted, but you can modify them. These roles initially have access to all areas and full control over all departments.
- You can also create custom named roles with different permissions.
- Staff added to C1 are imported to Service Desk with the same role they have in C1 .
- Admins can move staff to another role in the 'Staff Members' interface ('Admin Panel' > 'Staff' > 'Staff Members' > click on a staff member's name). See **Update details, role and department of a staff** in the previous section if you need help with this.

See the following for more help:

- **The roles interface**
- **Create a new role**
- **Edit a role**
- **Remove roles**

## The roles interface

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Roles'

**Role Name:** The role label.

- Click the role name to update it. See **Edit a role** for more details.

**Status:** Enable or disable the role.

- Staff members with a disabled role cannot login to Service Desk.
- Click the role name to activate / deactivate the role.

**Members:** The number of staff members assigned to the role.

- Click the number to view the member list.

**Departments:** The number of departments that can be accessed by role members.

**Created On:** The date and time at which the role was created.

**Last Updated:** The date and time the role was last modified.

## Create a new role

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Roles'
- Click 'Add New Role' at the top:



The screenshot shows the 'User Roles' management interface. At the top, there is a breadcrumb trail: 'Service Desk > Staff > Roles'. Below this is the 'User Roles' section with a '+ Add New Role' button circled in red and a red arrow pointing down to the 'Add New Role' form. The form includes a 'Role Information' section with a 'Name' field and a 'Status' dropdown (Active/Disabled). Below is the 'Group Permissions' section, which is split into 'Admin Panel' and 'Staff Panel' tabs. The 'Admin Panel' is currently selected, showing a grid of permission categories with checkboxes for each sub-item.

ROLE NAME	STATUS	MEMBERS	DEPARTMENTS
<a href="#">Account Admin</a>	Active	1	3
<a href="#">Admin</a>	Active	0	3
<a href="#">Technician</a>	Active	1	3
<a href="#">Admin for material approval</a>	Active	1	0

**Add New Role**

**Role Information:** Disabled role will limit staff members access. Admins are exempted.

Name: \*

Status:  Active  Disabled

**Group Permissions:** Applies to all group members

**Admin Panel** | **Staff Panel**

- Dashboard**
  - Dashboard
  - Notifications
- Settings**
  - Company
  - System
  - Tickets
  - Users
  - Emails
  - Access Control Settings
  - Knowledgebase
  - Autoresponder
  - Alerts & Notices
- Manage**
  - Ticket Categories
  - Ticket Filters
  - SLA Plans
  - API Keys
  - Pages
  - Forms
  - Lists
  - Assets
  - Materials
  - Charging
- Emails**
  - Emails
  - Banlist
  - Templates
  - Diagnostic
- Time Sheets**
- Staff**
  - Staff Members
  - Roles
  - Departments
  - Timesheet Templates
  - Material Approval
- Announcements**
- Reports**
- Finance**

You can pick different permissions for the admin panel and the staff panel. From top-to-bottom, role permissions are

split into three main groups:

- **Group permissions** - which areas of the staff and admin panels are visible to role members.
- **Functional permissions** - what actions role members can or cannot do.
- **Department access** - which departments role members are allowed to access.

The 'Add New Role' screen contains the following fields and options:

## Role Information

- **Name:** Enter a descriptive label for the role.
- **Status:** Select whether the role is active or disabled. If disabled, role members cannot login to Service Desk and will not receive department alert & notices.

## Group and Functional Permissions

- Group permissions let you set access rights to specific features and areas of Service Desk. You can set different permissions for both the admin and staff panels.
- Disabled features will not be visible to staff who have this role.
- The area directly underneath lets you choose the functions that role members can perform:

## Group Permissions: Applies to all group members

Admin Panel
Staff Panel

▼  **Dashboard**

- Dashboard
- Notifications

▼  **Settings**

- Company
- System
- Tickets
- Users
- Emails
- Access Control Settings
- Knowledgebase
- Autoresponder
- Alerts & Notices

▼  **Manage**

- Ticket Categories
- Ticket Filters
- SLA Plans
- API Keys
- Pages
- Forms
- Lists
- Assets
- Materials
- Charging

▼  **Emails**

- Emails
- Banlist
- Templates
- Diagnostic

**Time Sheets**

▼  **Staff**

- Staff Members
- Roles
- Departments
- Timesheet Templates
- Material Approval

**Announcements**

▼  **Reports**

- Time Log
- Tickets
- Assets
- Service Types
- Departments
- Agents
- Users
- Resource Appointment

▼  **Finance**

- Cost
- Contracts

- Can **Edit** Tickets *Ability to edit tickets.*
- Can **Post Reply** *Ability to post a ticket reply.*
- Can **Close** Tickets *Ability to close tickets. Staff can still post a response.*
- Can **Assign** Tickets *Ability to assign tickets to staff members.*
- Can **Transfer** Tickets *Ability to transfer tickets between departments.*
- Can **Delete** Tickets *Ability to delete tickets (Deleted tickets can't be recovered!)*
- Can **Ban** Emails *Ability to add/remove emails from banlist via ticket interface.*
- Can **Change Outgoing** Emails *Ability to change default outgoing email address during ticket reply.*
- Can **Manage Premade** *Ability to add/update/disable/delete canned responses and attachments.*
- Can **Manage FAQ** *Ability to add/update/disable/delete knowledgebase categories and FAQs.*
- Can **View Staff Stats** *Ability to view stats of other staff members in allowed departments.*
- Can **See Issue Summary & Details** On Top *Ability to see issue summary& details on top in new ticket screen.*

## Department Access

- Select which departments can be accessed by role members. These departments are additional to the primary department to which the staff member belongs.

## Admin Notes

- Add remarks regarding the role for the reference of other admins.
- Click the 'Create Role' button to save your new role.

## Edit a role

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Roles'
- Click on the role you want to edit.

The screenshot displays the 'User Roles' management interface. At the top, there are buttons for '+ Add New Role' and 'Delete', and a 'Show 25 records' dropdown. Below is a table with columns: ROLE NAME, STATUS, MEMBERS, DEPARTMENTS, CREATED ON, and LAST U. The table lists several roles, with 'Technician to solve access issues' circled in red. A red arrow points from this role to the 'Update Role' form below. The form includes a 'Role Information' section with a warning: 'Disabled role will limit staff members access. Admins are exempted.' It has a 'Name' field containing 'Technician to solve access issues' and a 'Status' section with 'Active' selected. The 'Group Permissions' section is titled 'Applies to all group members' and has two tabs: 'Admin Panel' and 'Staff Panel'. Under 'Staff Panel', there are three expandable sections: 'Dashboard' (with sub-items Dashboard and Notifications), 'Settings' (with sub-items Company, System, Tickets, Users, and Emails), and 'Manage' (with sub-items Ticket Categories, Ticket Filters, SLA Plans, API Keys, and Pages).

<input type="checkbox"/>	ROLE NAME ↕	STATUS ↕	MEMBERS ↕	DEPARTMENTS ↕	CREATED ON ↕	LAST U
<input type="checkbox"/>	<a href="#">Account Admin</a>	Active	1	3	05/21/2018 10:09 am	05/21/2018
<input type="checkbox"/>	<a href="#">Admin</a>	Active	0	3	05/21/2018 10:09 am	05/21/2018
<input type="checkbox"/>	<a href="#">Technician</a>	Active	1	3	05/21/2018 10:09 am	05/21/2018
<input type="checkbox"/>	<a href="#">Admin for material approval</a>	Active	1	0	02/13/2020 12:10 pm	02/13/2020
<input type="checkbox"/>	<a href="#">Technician to solve access issues</a>	Active	1	1	02/13/2020 12:10 pm	02/13/2020

**Update Role**

**Role Information:** Disabled role will limit staff members access. Admins are exempted.

Name: \*

Status:  Active  Disabled ⓘ

**Group Permissions:** Applies to all group members

**Admin Panel** **Staff Panel**

**Dashboard**

- Dashboard
- Notifications

**Settings**

- Company
- System
- Tickets
- Users
- Emails

**Manage**

- Ticket Categories
- Ticket Filters
- SLA Plans
- API Keys
- Pages

The 'Update Role' interface lets you change the role name, enable/disable the rule and change role permissions. The interface is similar to 'Add New Role' interface. See the explanation [above](#) for help to do this.

### Remove roles

You cannot delete roles inherited from C1, and you cannot delete roles that still have staff assigned to them. Remove all staff from a role before attempting to delete it.

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Roles'
- Select the role you want to remove
- Click 'Delete':

The screenshot shows the 'User Roles' interface. At the top, there is a breadcrumb trail: Service Desk > Staff > Roles. Below this, the 'User Roles' title is displayed with a help icon. There are two buttons: '+ Add New Role' and 'Delete' (with a trash icon). A red circle highlights the 'Delete' button, and a red arrow points from it to a confirmation dialog box. The dialog box has the title 'Please Confirm' and contains the text: 'Are you sure you want to DELETE selected roles?', 'Deleted groups CANNOT be recovered and might affect staff's access.', and 'Please confirm to continue.' At the bottom of the dialog are two buttons: 'No, Cancel' and 'Yes, Do it!'.

<input checked="" type="checkbox"/>	ROLE NAME >	STATUS </>	MEMBERS </>	DEPARTMENTS </>	CREATED ON </>	LAST UPDATED
<input type="checkbox"/>	<a href="#">Account Admin</a>	Active	1	3	05/21/2018 10:09 am	02/13/2020
<input type="checkbox"/>	<a href="#">Admin</a>	Active	0	3	05/21/2018 10:09 am	05/21/2020
<input type="checkbox"/>	<a href="#">Technician</a>	Active	1	3	05/21/2018 10:09 am	05/21/2020
<input checked="" type="checkbox"/>	<a href="#">Admin for material approval</a>	Active	1	0	02/13/2020 12:10 pm	02/13/2020
<input checked="" type="checkbox"/>	<a href="#">Technician to solve access issues</a>	Active	1	1	02/13/2020 12:10 pm	02/13/2020

- Click 'Yes, Do it!' to confirm the removal

## 2.6.3 Departments

Click 'Admin Panel' > 'Staff' > 'Departments'

- Service Desk ships with three default departments:
  - Maintenance
  - Support (default)
  - Sales
- All new staff are initially assigned to the default, 'Support' department. You can change the default

department at anytime in 'System Settings & Preferences' ('Admin Panel' > 'Settings' > 'System')

- Tickets will also be assigned to the default department if they are not already routed to a different department. Tickets can be re-routed by a ticket category, by incoming email settings, or by ticket filter settings. See '**Ticket Settings and Options**' for more details.
- You can create additional departments based on your requirements. For example, a department called 'Computer Maintenance' could be populated with staff who have the required skill set to deal with such tickets. **Ticket Categories** and **Ticket Filters** can be configured to route new tickets to staff members in the appropriate department.

## Manage departments

- Open the 'Admin Panel' (see last link on the left)
- Click 'Staff' > 'Departments' in the left-hand menu

NAME	TYPE	QUOTE	USERS	EMAIL ADDRESS	DEPT. MANAGER
<input type="checkbox"/> Support (Default)	Public	Disabled	6	-	
<input type="checkbox"/> Sales	Public	Enabled	0	-	
<input type="checkbox"/> Maintenance	Private	Enabled	0	-	
<input type="checkbox"/> Chennai IT Services	Public	Disabled	0	-	
<input type="checkbox"/> Test Department	Public	Disabled	0	-	

- **Name:** The department label.
- **Type:** 'Public' or 'Private'. 'Users can submit tickets to a private department, but will not be able to view the department name. The department signature will not be included in email replies.
  - Click a department name to open its settings and switch its type between public and private.
  - The default department *must* be public. Go to 'Admin Panel' > 'Settings' > 'System' to set the default department.
- **Quote:** If enabled, staff can create price quotes for the cost of the ticket from within the ticket itself.
- **Users:** The number of staff that have access to the department. Click the number to view all entitled staff members.
- **Email Address:** The outgoing email address configured for the department.
- **Dept. Manager:** The staff member/admin assigned to manage the department. Click the name to open the 'Update Staff' screen.

## Add a new department

- Open the 'Admin Panel' (see last link on the left)
- Click 'Staff' > 'Departments' in the left-hand menu
- Click the 'Add New Department' link:

Comodo One > Service Desk > Staff > Departments

## Department

**Add New Department**

**Department Information**

Name: \*

Type:  Public  Private (Internal) ?

SLA:  ?

Manager:  ?

Quote:  Enables or disables to open quote ?

Ticket Assignment:  Restrict ticket assignment to department members ?

---

**Outgoing Email Settings**

Outgoing Email:  ?

Template Set:  ?

**Autoresponder Settings: ?**

New Ticket:  Disable for this Department ?

New Message:  Disable for this Department ?

Auto-Response Email:  ?

**Alerts & Notices: ?**

Recipients:  ?

**Role Access:** Check all roles allowed to access this department. ?

Account Admin (1)

Admin (1)

Technician (2)

Technician Org 1 (2)

**Department Signature: ?**

### Department Information

- **Name:** Enter a label for the department
- **Type:** 'Public' or 'Private'.

- 'Public' - Users can submit support tickets to public departments. Users can view the assigned department in the client portal.
- 'Private' - Users can submit support tickets to private departments, but cannot view the assigned department in the client portal. The department signature is not shown in email replies.
- **SLA:** Select the **Service Level Agreement (SLA)** for the tickets routed to this department.
- **Manager:** Select a manager for this department from the list of staff members. Managers have the right to unassign tickets and can be configured to receive special alerts. See **Configure Alerts and Notices** for more details.
- **Quote:** Choose whether the department should be allowed to generate quotes for billable products and services from the Service Desk console. If enabled, staff members attending to a ticket assigned to the department can initiate a quote from the 'Ticket Details' interface. See **explanation of quote generation** in the section **Ticket Details** for more details.
- **Ticket Assignment:** If enabled, new tickets created can be assigned to staff members belonging to this department only and staff members of different groups having access to this department.

### Outgoing Email Settings

- **Outgoing Email:** Select the outgoing email address that should be used for this department's replies to users in response to their tickets. See **Setup your Support Email Addresses** for details about how to add/edit email addresses.
- **Template Set:** Select the email template set that should be used for sending auto-responses and alerts & notices for tickets routed to this department. See **Email Templates** for details about how to add/edit email templates.

### Autoresponder Settings

- **New Ticket:** If selected, auto-response emails on creation of new tickets and routed to this department is not sent. This setting overrides the global settings configured in **Autoresponder Settings** screen.
- **New Message:** If selected, auto-response emails to users to confirm newly posted messages for tickets in this department is not sent. This setting overrides the global settings configured in **Autoresponder Settings** screen.
- **Auto-Response Email:** Select the auto-response email address that should be used for this department. See **Setup your Support Email Addresses** to know more about how to add/edit email addresses.

### Alerts & Notices

- **Recipients:** Select the recipients from the drop-down options who should receive the **configured alerts & notices** on ticket events.

### Role Access

This section displays the list of staff roles and the number of members in each. Select the roles so that the staff with those roles can access the tickets assigned to the department, and to participate in departmental activity.

### Department Signature

Enter the signature of the department that will be displayed in the ticket reply emails. The option to select this is available in the Staff Panel in ticket related screens.

- Click the 'Create Dept' button at the bottom of the screen for the settings done in the page to take effect.

### Edit a department's details

- Click on the department name in the list.

The 'Update Department' screen will be displayed. The update procedure is same as explained above while adding a new department.

### Delete a department

- Select the department that you want to delete, click 'Delete' at the top and confirm the deletion in the 'Confirmation' dialog. Please note that the default department is public and therefore cannot be deleted.



## 2.6.4 Time Sheet Templates

Click 'Admin Panel' > 'Staff' > 'Time Sheet Templates'

- Timesheets let staff record time spent on tickets and other tasks. See [Manage Staff Time Sheets](#) if you want background information on this item.
- Timesheet templates let you create sheets with activities tailored to your business.
- Once saved, staff can choose the template as the basis of a new time sheet in 'Staff Panel' > 'My Time Sheets'. Staff just need to enter the time spent on each activity.
- Admins can review, approve or reject submitted timesheets.

### Manage Staff Time Sheets

The 'Timesheet Templates' interface allows administrators to create and manage timesheet templates. To open the interface:

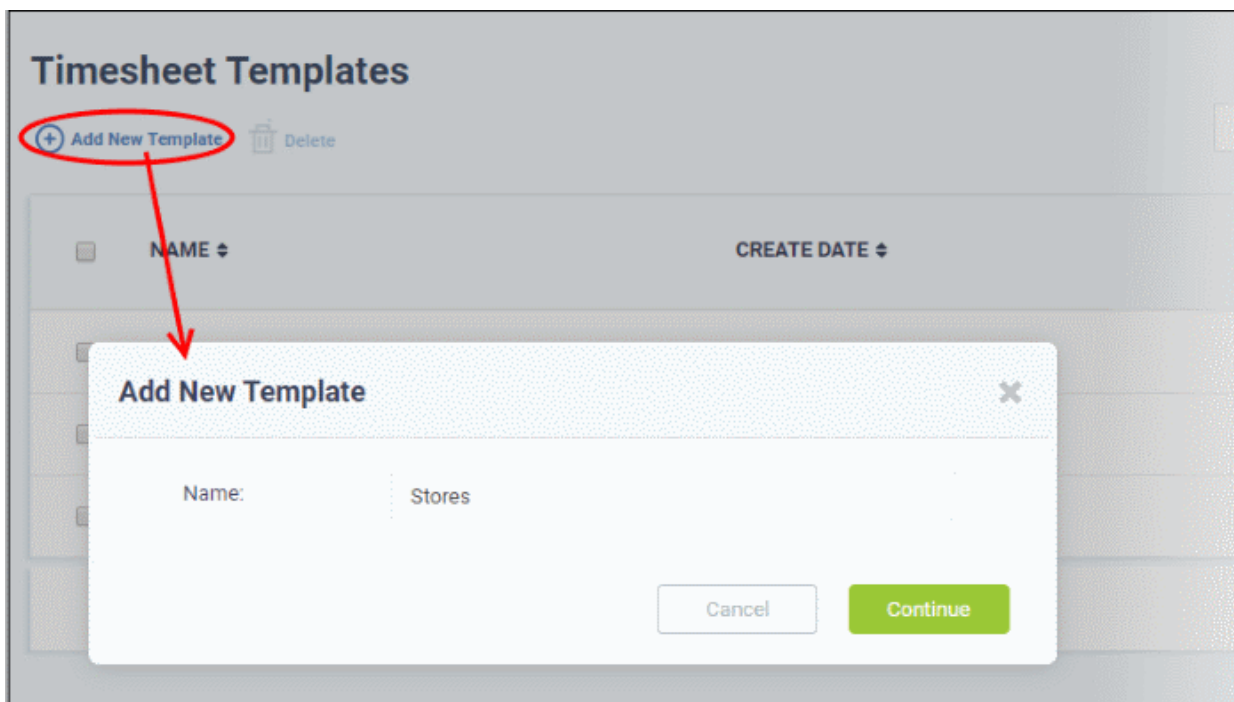
- Click 'Staff' on the left then 'Timesheet Templates' in the Admin Panel

NAME	CREATE DATE
<a href="#">R&amp;D</a>	12/16/2016 6:47 pm
<a href="#">Installation</a>	01/02/2017 3:39 pm
<a href="#">Maintenance</a>	01/02/2017 5:24 pm

- **Name:** The name of the timesheet template. Clicking on a template name will open the template activities screen. Template activities are the individual tasks included in a template.
- **Create Date:** Date on which the template was created.

### Add a new timesheet template

- Click the 'Add New Template' link at the top

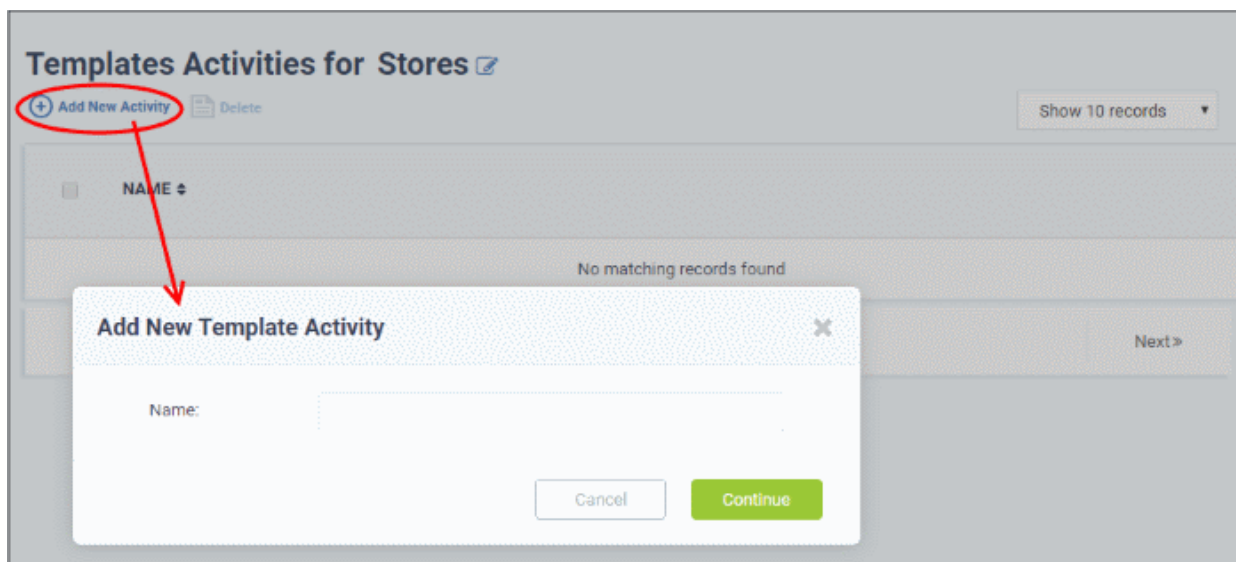


The 'Add New Template' dialog will appear. Each template name should describe a broad category of task type. For example, 'Server Installation' or 'System Maintenance'. You can define sub-tasks within the template as 'Activities' later.

- Enter a name for the new template shortly describing the task and click 'Continue'.

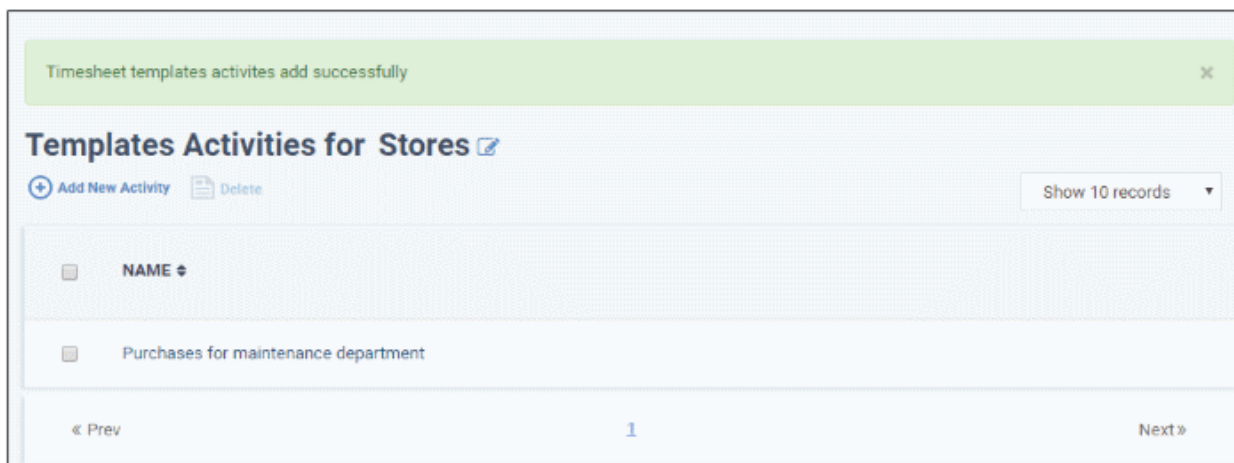
The next step is to add activities to the template. Each activity should be a constituent task of the template.

- Click 'Add New Activity' at the top of the timesheet template



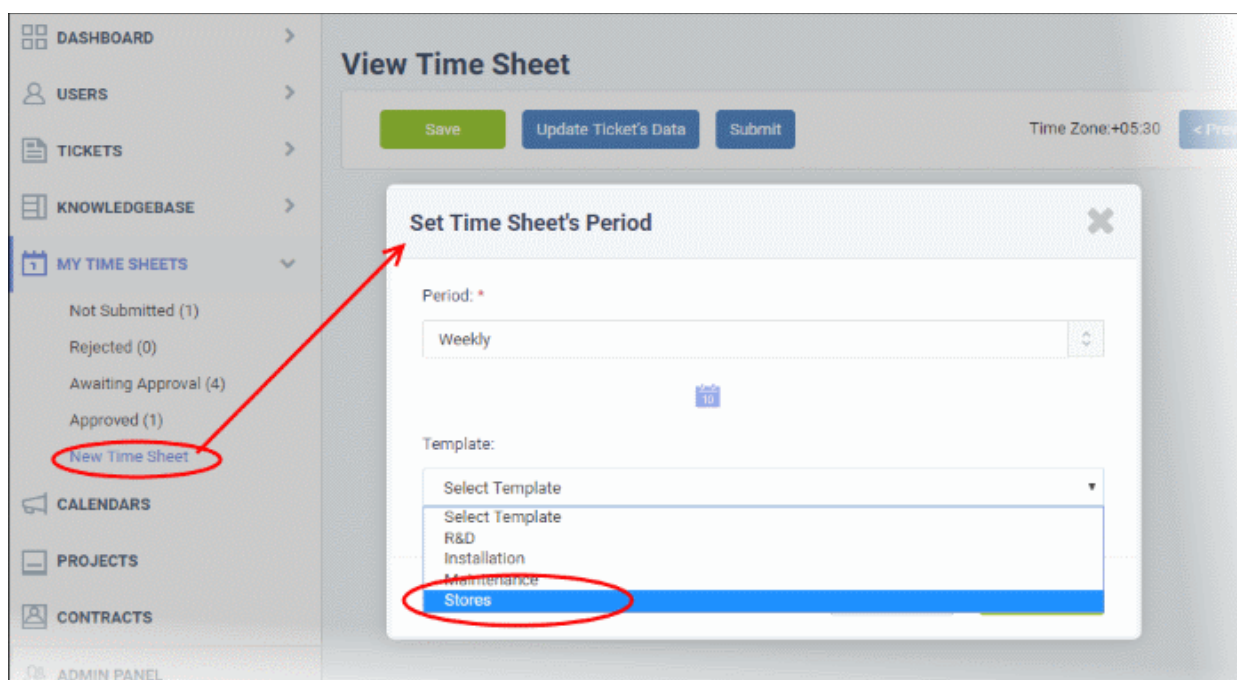
- Enter the name of the activity in the 'Add New Template Activity' dialog and click 'Continue'

The activity is added to the list.

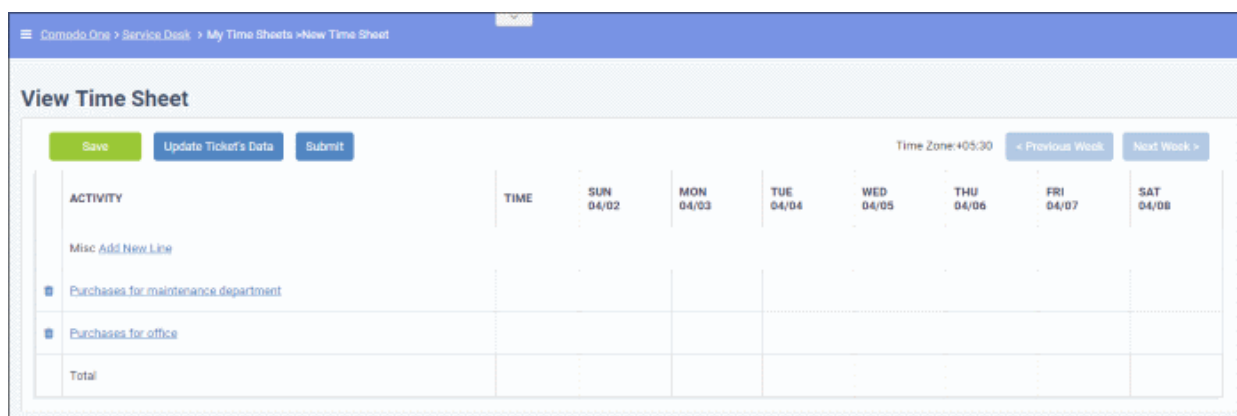


- Repeat the process to add more activities to the list
- Select an activity and click 'Delete' to remove it

The template is available for selection when a staff member creates a time sheet in the Staff Panel.



On selecting the template, the time sheet will be automatically populated with all activities in the template.



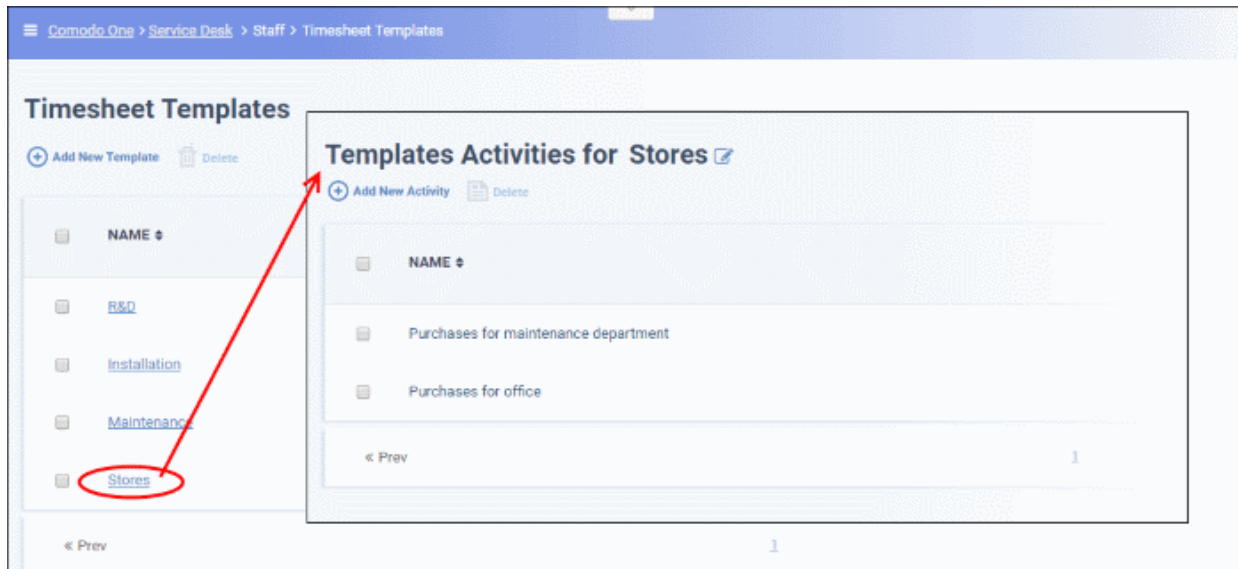
Staff can enter the time spent per day on each activity. If required, staff can add new activities to the time sheet by

clicking 'Add New Line'. For more details on creating and managing time sheets, refer to the section **Managing Staff Time Sheets**.

#### Edit or update a time sheet template

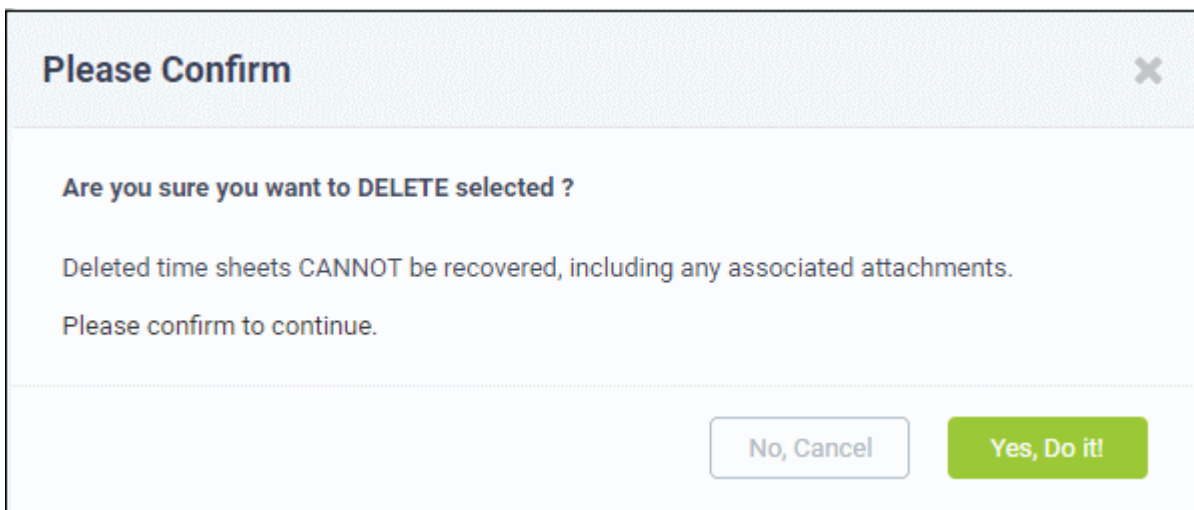
- Click the name of the template from the 'Timesheet Templates' interface

The 'Template Activities' interface for the selected template will open.



You can change the name of the template and add or remove activities. The process is similar to adding a new template as described **above**.

- To remove a template, select it and click 'Delete' at the top



- Click 'Yes, Do it!' in the confirmation dialog.

## 2.6.5 Material Approval

- Staff can add a list of expenses and costs to a ticket which were incurred while resolving an issue.
- Material costs and expenses need to be approved by an administrator before they are included in a customer's bill.
- The 'Materials Approval' screen lets admins approve or reject costs added to tickets by staff.

**Open the 'Materials Approval' interface**

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Material Approval'

MATERIAL NAME	COST	TICKET #	DATE ADDED	LAST UPDATED	STAFF
Ink Cartridge Holder	8.00	<a href="#">22</a>	04/21/2016 3:20 pm	-	
HP Ink Cartridge	40.00	<a href="#">22</a>	04/21/2016 3:20 pm	-	
4 GB RAM	34.99	<a href="#">23</a>	04/25/2016 12:25 pm	-	
Mileage	5.00	<a href="#">23</a>	04/25/2016 12:25 pm	-	
Toll	25.00	<a href="#">24</a>	07/19/2016 4:33 pm	-	
HP Ink Cartridge	100.00	<a href="#">448</a>	12/02/2016 3:41 pm	-	
4 GB RAM	2000.00	<a href="#">448</a>	12/02/2016 3:41 pm	-	
Ink Cartridge Holder	40.00	<a href="#">448</a>	12/02/2016 3:42 pm	-	
HP Ink Cartridge	50.00	<a href="#">448</a>	12/02/2016 3:43 pm	-	
4 GB RAM	1500.00	<a href="#">448</a>	12/02/2016 3:43 pm	-	

The links at the top allow you to filter material requests by:

- **Awaiting Approval** - Displays materials that were added by staff but have yet to be approved/rejected.
- **Rejected** - Displays materials that were rejected by administrators.
- **Approved** - Displays materials that have been approved by administrators.

**Column Headers**

- **Material name** - Displays the name of the material or expense added to the ticket. A 'Material' doesn't always have to be a physical item. It could also describe an expense item related to a ticket, such as highway toll fees.
- **Cost** - Material cost as entered by the staff member.
- **Ticket #** - Indicates the ticket number to which the material/expense has been added. Clicking the ticket number opens the ticket details page. See **Ticket Details** for more details.
- **Date Added** - Indicates the date and time at which the material/expense was added to the ticket. This column is only visible for materials in the 'Awaiting Approval' category.
- **Last Updated** - Indicates the date and time at which the material/expense details were last modified. This column is only visible for materials in the 'Awaiting Approval' category.
- **Staff** - Indicates the staff member who added the material to the ticket
- **Reason** - Displays the reason mentioned by the administrator for rejecting the material cost/expense. (Available only for 'Rejected' category)

**View, approve or reject a material/expense item**

- Click the 'Awaiting Approval' link.
- Use the filter options to search for a specific item if required.
- Select an item or items using the check-boxes on the left.
- Click the 'Approve' or 'Reject' link at the top.

The status of the material/expense item will be updated immediately in the ticket details page of the respective ticket.

**Search Options:**

- Use the calendar icons beside the 'From' and 'To' date fields to search for materials/expenses added within a certain date range. Click 'Apply'.
- To search for materials/expenses added by a particular staff member, select the staff member from the 'Staff' drop-down (default = all). Click 'Apply'.
- To search for materials/expenses added to a specific ticket, enter the ticket number in the 'Ticket #' field. Click 'Apply'.
- You can use more than one filter at a time to search for specific items
- To display all results again, clear all fields / choose 'Select Staff' in the 'Staff' drop-down then click 'Apply'. Alternatively, click the category link at the top ('Awaiting Approval', 'Rejected' or 'Approved')

**Sorting Options:**

- Click a column header to sort items in ascending/descending order
- The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100.

## 2.7 Manage Announcements

Click 'Admin Panel' > 'Announcements'

- You can send email notifications containing important information to all staff members.
- Announcements can be about items like changes to work flows, upcoming server maintenance, reminders to close tickets within the stipulated time, and so on.
- You can send announcements immediately or save as a draft to circulate later.

Use the following links to jump to the task you need help with:

- **[Overview of the interface](#)**
- **[Create a new announcement](#)**
- **[Send an announcement](#)**
- **[Update an announcement](#)**

**Overview of the interface**

- Open the Admin panel (see the last link on the left)
- Click 'Announcements':

The screenshot displays the 'Announcements' section of the Service Desk interface. On the left is a navigation menu with options like Dashboard, Settings, Manage, Emails, Time Sheets, Staff, Announcements (highlighted), Reports, and Finance. The main content area shows a list of announcements with the following data:

<input type="checkbox"/>	TITLE ↕	STATUS ↕	DATE ADDED ↕	LAST UPDATED ↕
<input checked="" type="checkbox"/>	<a href="#">New SLA added to Service Desk</a>	Ready for sent	02/11/2020 3:59 pm	02/11/2020 4:11 pm
<input type="checkbox"/>	<a href="#">Important Announcement</a>	Sent	02/11/2020 4:00 pm	02/11/2020 4:00 pm
<input type="checkbox"/>	<a href="#">New holiday list</a>	Draft	02/11/2020 4:01 pm	02/11/2020 4:01 pm
<input type="checkbox"/>	<a href="#">Meeting on Friday</a>	Ready for sent	02/11/2020 4:02 pm	02/11/2020 4:02 pm

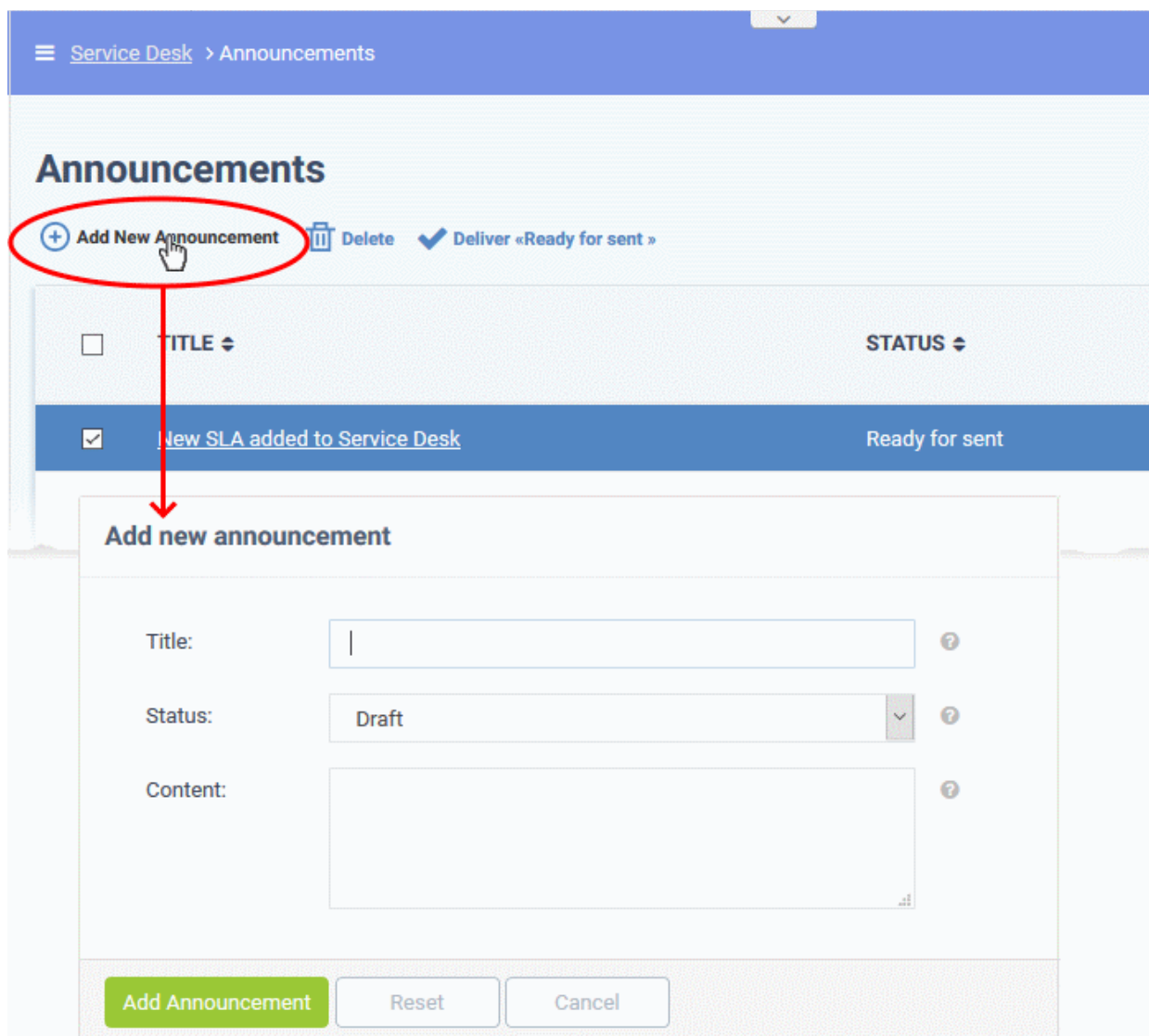
At the bottom of the table, there are navigation controls: « Prev, 1, Next ».

- **Title:** The subject of the announcement.
- **Status:** Whether the announcement has been sent, is ready to send, is saved as a draft, or is in the process of being sent.
- **Date Added:** The date when the announcement was added to Service Desk.
- **Last Updated:** The date and time when the announcement was added/edited.

Click a column header to sort items in ascending/descending order.

#### Create a new announcement

- Open the admin panel
- Click 'Announcements' on the left
- Click 'Add New Announcement':



**Title:** Enter the title for the announcement

**Status:** Select the status of the announcement. The options available are:

- Draft: Announcements that are incomplete and can be saved as draft. These cannot be sent to staff members.
- Ready for sent: Announcements that are ready for sending to staff members.

**Content:** Enter the message you wish to send to staff members.

Click 'Add Announcement' to save.

### Send an announcement

- Open the admin panel
- Click 'Announcements' on the left
- Select the announcements you want to send
- Click 'Deliver <Ready for sent>':



Service Desk > Announcements

## Announcements

+ Add New Announcement Delete ✓ Deliver «Ready for sent » Show 25 records

<input type="checkbox"/>	TITLE ↕	STATUS ↕	DATE ADDED ↕	LAST UPDATED ↕
<input checked="" type="checkbox"/>	<a href="#">New SLA added to Service Desk</a>	Ready for sent	02/11/2020 3:59 pm	02/11/2020 4:11 pm
<input type="checkbox"/>	<a href="#">Important Announcement</a>	Sent	02/11/2020 4:00 pm	02/11/2020 4:00 pm
<input type="checkbox"/>	<a href="#">New holiday list</a>	Draft	02/11/2020 4:01 pm	02/11/2020 4:01 pm

### Please Confirm

Are you sure you want to deliver all «Ready for sent » announcements to subscribers

No, Cancel Yes, Do it!

- Click 'Yes, Do it!' in the confirmation dialog

Service Desk sends the announcement via email to all staff members.

**Note** - You can only send announcements that have the status 'Ready for sent'. Click 'Admin Panel' > 'Announcements' to change the status of an announcement.

### Update an announcement

You can change the subject, content and status of a saved announcement at any time.

- Open the admin panel
- Click 'Announcements' on the left
- Click on the title of the announcement you want to edit

Service Desk > Announcements

## Announcements

+ Add New Announcement 
 Delete 
 Deliver «Ready for sent» 
 Show

<input type="checkbox"/>	TITLE ↕	STATUS ↕	DATE ADDED ↕	LAST UPD
<input type="checkbox"/>	<u>New SLA added to Service Desk</u>	Draft	02/11/2020 3:59 pm	02/12/20...
<input type="checkbox"/>	<u>Important Ann</u>	Sent	02/11/2020 4:00 pm	02/11/20...
<input type="checkbox"/>	<u>New holiday list</u>	Draft	02/11/2020 4:00 pm	02/11/20...

### Add new announcement

Title:

Status:

Content:

- Change the title, content and status as required.
- Click 'Update Announcement' to save your changes

### Remove an announcement

- Open the admin panel
- Click 'Announcements' on the left
- Select the announcement that you want to delete
- Click 'Delete' at the top of the screen and confirm the deletion.

## 2.8 Generate Reports

Click 'Admin Panel' > 'Reports'

- Service Desk reports provide comprehensive data on ticket activity.
- You can generate billing reports, department reports, time-log reports, asset reports, agent reports (admin/staff members) and user reports.

- You can also schedule reports to be auto-generated at set times and sent to selected recipients.

#### Open the 'Reports' screen:

- Open the admin panel (see the last link on the left)
- Click 'Reports':

The screenshot displays the 'Service Desk' interface. On the left, a navigation sidebar lists various modules: DASHBOARD, SETTINGS, MANAGE, EMAILS, TIME SHEETS, STAFF, ANNOUNCEMENTS, and REPORTS. The 'REPORTS' menu is highlighted with a red border and contains sub-items: Time Log, Tickets, Assets, Service Types, Departments, Agents, Users, and Resource Appointment. The main content area is titled 'Reports' and features a 'Time Log' section. This section includes a form with the following fields: 'Period From' (02/01/2019), 'To' (02/28/2019), 'Department' (Select Department), 'Agent' (Select Agent), 'Service Type' (Select Service Type), 'Category' (Select Category), and 'Asset' (Select Asset). A blue 'Go!' button is positioned below the form. Below the 'Time Log' section is a 'Scheduled Reports' section, which shows a summary: 'Every month on 24 at 12:00 for last month' with edit and delete icons.

#### Report Types

- Time Log:** Generate a report on tickets between specific dates.
- Tickets:** Generate granular reports on ticket activity. You can filter the report by numerous criteria.
- Assets:** A report on tickets that included work on a specific asset. Assets are items like printers, workstations, servers etc.
- Service Types:** Generate reports by the type of support provided in the ticket. This can be 'Remote', 'Telephone' or 'On-Site'. The report also shows the time spent and the charges applied.
- Departments:** Generate a report on tickets worked on by specific departments.
- Agents:** Generate a report on tickets worked on by selected staff members.
- Users:** Users are the people who submit tickets to your support department. This section lets you generate reports on tickets from named users.
- Resource Appointment:** Appointments are activities that were added to an agent / staff member's calendar. For example, to schedule an on-site visit. These reports show the number of hours spent on appointments by specific agents between dates that you select.

See '**Scheduled Reports**' for help to schedule reports.

**Tip:** You can generate cost reports for customers and contract reports from 'Admin Panel' > 'Finance' > 'Cost'. See **Generate Cost Reports** if you need help to do this.

## 2.8.1 Time Log Reports

Click 'Admin Panel' > 'Reports' > 'Time Log'

- Time log reports provide information on ticket activity during selected periods.
- Each report includes the date/time of ticket creation, ticket ID, the ticket assignee, the asset type that the ticket concerns, and the status of the ticket.
- Reports can be exported to PDF and CSV formats.

**Tip:** You can also view Service Desk logs in the Comodo One portal.

- Click 'Management' at the top of the portal interface and select 'Audit Logs'

For more help with this, see the online help page <https://help.comodo.com/topic-289-1-716-12456-View-Audit-Logs.html>.

### Create a time log report

- Open the admin panel (see the last link on the left)
- Click 'Reports' > 'Time Log'

## Reports

### Time Log

Period From:

To:

Department:

Category:

Agent:

Asset:

Service Type:

### Scheduled Reports

**You do not have any scheduled report**

### Filter options

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **Department:** Filter by the department to which the ticket is assigned.
- **Category:** Filter by the type of issue that was worked on.
- **Agent:** Filter by the staff member to whom the tickets are assigned.
- **Asset:** Filter by the type of item that was worked on.
- **Service Type:** Filter logs by the kind of support service that was provided. Types = 'Remote', 'On-Site' and 'Telephone'.
- Click the 'Go!' button to generate the report for the selected period and filters.

If no filters are selected, the full report for all ticket activities within the period is generated and shown.

Export to CSV ▾ Export to PDF ▾

TIME ↕	TICKET ID ↕	DEPARTMENT ↕	CATEGORY ↕	AGENT ↕	ASSET ↕	SERVICE TYPE ↕	STATE ↕
04/04/2018 2:45 pm	787	Maintenance	Asset Issue	Coyote		Telephone	created
04/04/2018 2:45 pm	787	Maintenance	Asset Issue	Coyote		Telephone	assigned
04/04/2018 2:46 pm	787	Maintenance	Asset Issue	Coyote		Telephone	assigned
04/06/2018 2:58 pm	787	Maintenance	Asset Issue	Coyote		Telephone	overdue
04/10/2018 3:11 pm	796	Maintenance	Asset Issue				created
04/10/2018 3:12 pm	797	Maintenance	Asset Installation	Coyote			created
04/10/2018 3:12 pm	797	Maintenance	Asset Installation	Coyote			assigned
04/11/2018 2:21 am	797	Maintenance	Asset Installation	Coyote			resumed
04/03/2018 3:42 pm	786	Sales	Asset Installation	Coyote		Telephone	created
04/03/2018 3:42 pm	786	Sales	Asset Installation	Coyote		Remote	created

« Prev | 1 | 2 | 3 | 4 | 5 | ... | 27 | Next »

- **Time** - The date and time of the ticket activity.
- **Ticket ID** - The number assigned to the ticket.
- **Department** - The Service Desk department to which the ticket was assigned.
- **Category** - The help topic under which the ticket falls.
- **Agent** - Staff member to whom the ticket was assigned.
- **Asset** - The hardware, software or service that is the subject of the ticket. User's specify the asset type when creating the ticket.
- **Service Type** - The kind of service rendered during the service session. The possible values are:
  - Onsite
  - Remote


- Telephone
- **State** - The activity on the ticket. The possible activities are:
  - **Created** - The ticket was added.
  - **Assigned** - The ticket was allotted to a staff.
  - **Paused** - The ticket activity was temporarily stopped .
  - **Resumed** - The ticket activity was restarted.
  - **Closed** - The ticket was closed.
  - **Reopened** - The ticket was reopened.
  - **Overdue** - The ticket was not closed within the stipulated time.
  - **Warning** - Warnings flagged for the ticket per the SLA plan.
  - **Transferred** - The ticket was transferred to another staff member.

### Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.



### Scheduled Reports

- Click the icon  beside 'Scheduled Reports' to schedule a report and configure recipients. See **Scheduled Reports** for more details.

## 2.8.2 Ticket Report

Click 'Admin Panel' > 'Reports' > 'Tickets'

- The ticket report provides comprehensive information on all ticket activity for a selected period.
- Information includes ticket ID, the date and time of ticket creation, user's name and email address and the staff member assigned to the ticket.
- Reports can be exported to PDF and CSV formats.

**Tip:** You can also view Service Desk logs in the Comodo One portal.

- Click 'Management' at the top of the portal interface and select 'Audit Logs'

For more help with this, see the online help page <https://help.comodo.com/topic-289-1-716-12456-View-Audit-Logs.html>.

### Create a tickets report

- Open the admin panel (See the last link on the left)
- Click 'Reports' > 'Tickets'

## Reports

### Tickets

Period From	<input type="text" value="02/01/2019"/>		To	<input type="text" value="02/28/2019"/>
User email	<input type="text"/>		Source	<input type="text" value="Select Source"/>
Status	<input type="text" value="Select Status"/>		Asset	<input type="text" value="Select Asset"/>
Agent	<input type="text" value="Select Agent"/>		Priority	<input type="text" value="Select Priority"/>
Overdue	<input type="text" value="All"/>		Department	<input type="text" value="Select Department"/>
SLA	<input type="text" value="All"/>		Customer	<input type="text" value="Select Customer"/>
Issue Summary	<input type="text"/>		Category	<input type="text" value="– Select Category –"/>

### Filter options

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **User email:** Include tickets created by a specific user. Select the user's email address.
- **Source:** Filter the report by channel by which tickets are received.
- **Status:** Include only tickets with a selected state.
- **Asset:** Include tickets created for a specific item type.
- **Agent:** Include only tickets assigned to a specific staff/agent.
- **Priority:** Include only tickets of a certain criticality level.
- **Overdue:** Include only tickets that are marked overdue.
- **Department:** Include only tickets assigned to a certain department.
- **SLA:** Include only tickets assigned with a specific service level agreement plan.
- **Customer:** Include only tickets created by users belonging to a specific company.
- **Issue Summary:** Include only tickets containing a specific brief description of the issue and enter the issue summary in part or full.
- **Category:** Include only tickets that fall under a specific help topic.
- Click the 'Go!' button to generate the report. If no filters are selected then the report covers all ticket activities.

Export to CSV ▾ Export to PDF ▾

NUMBER ↕	ISSUE SUMMARY ⇅	STATUS ⇅	SOURCE ⇅	USER ⇅	AGENT ⇅	OVERDU
1112	System restarts frequently	open	Email	Joe	frontfork	Not Over
1111	Quote for cooling pad	open	Phone	John	frontfork	Not Over
1110	Need a mousepad	open	Phone	Avantistude	frontfork	Overdue
1109	Delete the system temp fil...	open	Other	Avantistude		Overdue
1108	Power Connection Problem	open	Phone	Dyanorat481	frontfork	Overdue
1107	Please fix VPN Connectio...	open	Other	Dyanorat481	frontfork	Overdue

- **Number:** The identification number (ID) of the ticket.
- **Issue Summary:** A brief description of the issue.
  - In many cases, the issue summary will have been specified by the user or staff member who created the ticket.
  - The issue summary of tickets that were created by another C1 module like EM will include the condition that generated the ticket.
- **Status:** Whether the ticket is open, paused or closed.
- **Source:** How the ticket was added. The possible values are phone, email, support portal and other.
- **User:** The name of the user with email ID, who created the ticket or on behalf of whom, the ticket was created by a staff member.
- **Agent:** The name of the staff member to whom the ticket is assigned.
- **Overdue:** Indicates whether the ticket is open beyond the stipulated closing time.
- **Asset:** The type of item that the ticket concerns. For example, 'Workstation', 'Server', 'Printer', 'Mobile'.
- **Priority:** Criticality of the ticket.
- **Customer:** The company to which the user belongs.
- **Dept:** The name of the department to which ticket was assigned.
- **SLA:** The service level agreement plan selected for the ticket.
- **Created:** The date and time the ticket was submitted.
- **Closed:** The date and time the ticket was closed.
- **Billable Time:** The time spent on resolving the issues(s) mentioned in the ticket by staff member, that is chargeable.
- **Spent Time:** Actual time spent by staff for resolving the ticket.
- **Materials:** Total cost of billable items and expenses which were used while resolving the ticket.
- **Billable Time Cost:** The charge calculated for the billable time, as per the service contract associated with the customer.
- **Category:** The help topic on which the user requested support.

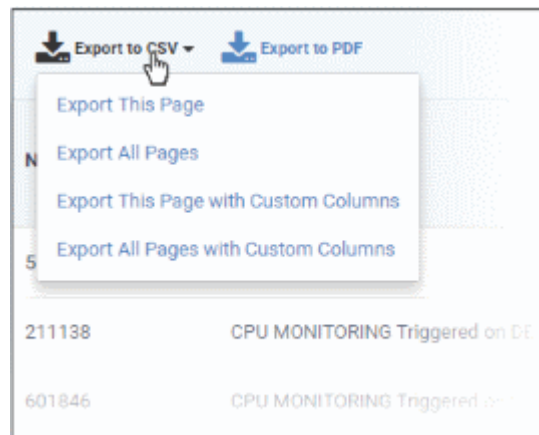
### Download the Report



- Click 'Export to PDF' or 'Export to CSV' to generate the report.


You have the option to include custom fields, if any, for a ticket report.

- Click 'Export to CSV'



- **Export this page** - The report file includes only the tickets in the current page
- **Export all pages** - The report file includes all tickets in the report
- **Export this page with custom columns** - The report file includes only tickets in the current page with custom fields, if any. See '**Forms**' and '**Custom Lists**' for info about adding custom fields.
- **Export all pages with custom columns** - The report file includes all tickets in the report, with custom fields, if any. See '**Forms**' and '**Custom Lists**' for info about adding custom fields.

### Scheduled Reports

- Click the icon  beside 'Scheduled Reports' to configure automatic reports and add recipients. See '**Scheduled Reports**' for more details.

## 2.8.3 Asset Reports

Click 'Admin Panel' > 'Reports' > 'Assets'

- Asset reports show the number of tickets that are open, closed, assigned and overdue for an asset category. Asset categories include items such as 'Printers', 'Routers', 'Servers' etc.
- This can help you see which assets are in most demand and where support infrastructure could be strengthened.
- Asset information also includes time spent, billable time, material cost and billable time cost.
- You can generate a report for all asset categories or a single asset category. Reports can be exported to PDF and CSV formats.

### Create an assets report

- Open the admin panel (See the last link on the left)
- Click 'Reports' > 'Assets'

## Filter options

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **Asset:** Choose the asset category for which the report has to be generated. Leave as 'Select Asset' to include all asset categories in the report.
- Click the 'Go!' button to generate the report for the selected period and filter.

If an asset is not selected, then the full report for all asset categories will be generated for the time period and displayed.

ASSET #	OPEN	CLOSED	ASSIGNED	OVERDUE	ALL TICKETS	BILLABLE TIME	SPENT TIME	MATERIALS(\$)	BILLABLE TIME COST
server	0	2	2	0	2	0 hrs 36 min	0 hrs 31 min	25	60.00
workstation	3	1	2	3	4	0 hrs 37 min	0 hrs 35 min	65	49.33
printer	6	0	5	6	6	1 hrs 52 min	1 hrs 43 min	20	121.32
mobile	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
router	0	1	1	0	1	24 hrs 8 min	24 hrs 6 min	275	2654.67
other	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0

< Prev
1
Next >

Click 'Asset' column header to sort items in ascending/descending order.

- **Asset:** The name of the asset category.
- **Open:** Number of tickets that are open for the asset category.
- **Closed:** Number of tickets that are closed for the asset category.
- **Assigned:** Number of tickets that are assigned the asset category.
- **Overdue:** Number of tickets that are assigned the asset category and not closed within the stipulated time.
- **All tickets:** Total number of tickets that are assigned the asset category, that is, the sum of open and closed tickets for it.
- **Billable Time:** Time spent on tickets for the asset category which can be charged to the customer.
- **Spent Time:** Total time spent resolving tickets for the asset category.
- **Materials:** The total cost of materials used in tickets for the asset category.
- **Billable Time Cost:** The total charge for time listed in the 'Billable Time' column.

## Download the Report

- You can download reports in PDF and CSV formats.

- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

### Scheduled Reports

- Click the  icon beside 'Scheduled Reports' to schedule a report and configure recipients. See '[Scheduled Reports](#)' for more details.

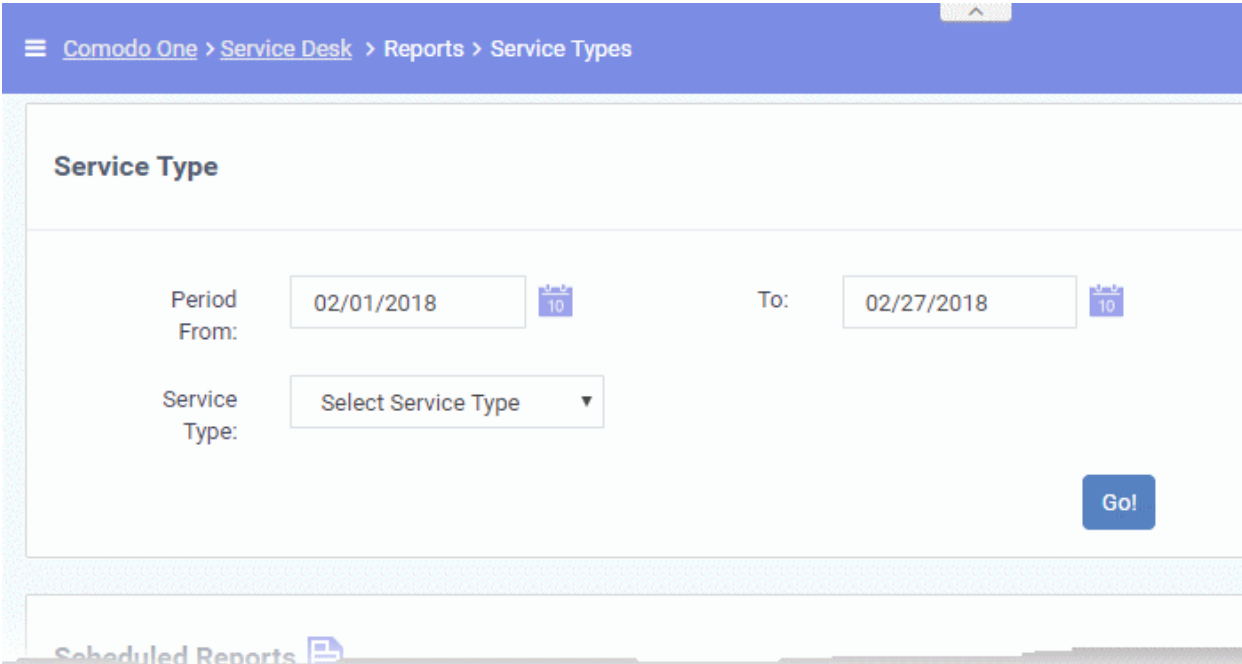
## 2.8.4 Service Types Reports

Click 'Admin Panel' > 'Reports' > 'Service Types'

- A 'service type' is the mode of support provided in the ticket. This can be 'remote', 'telephone' or 'onsite'.
- The service type report shows the number of sessions which involved each type, the total time spent, billable time, and so on.
- This can help you see which service types are in most demand and where support infrastructure could be strengthened.
- You can generate a report for all service types or a single service type. Reports can be exported to PDF and CSV formats.

### Create a service type report

- Open the admin panel (see the last link on the left)
- Click 'Reports' > 'Service Types'



### Filter options

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **Contract:** Choose the service type for which the report has to be generated.
- Click the 'Go!' button to generate the report for the selected period and service type(s).
- If a service type is not selected, then the full report for all service types will be generated for the time period and displayed.

SERVICE TYPES	THREADS	TICKETS	TOTAL TIME SPENT	BILLABLE TIME	BILLABLE TIME COST(S)	SERVER	WORKSTATION	PRINTER	MOBILE	ROUTER	OTHER	SERVER1
Remote	6	1	0 hrs 0 min	0 hrs 0 min	0.5	1	-	-	-	-	-	-
Telephone	-	0	0 hrs 0 min	0 hrs 0 min	-	-	-	-	-	-	-	-
Onsite	9	1	3 hrs 12 min	3 hrs 12 min	320.47	1	-	-	-	-	-	-
« Prev	1										Next»	


Click 'Service Type' column header to sort items in ascending/descending order.

- **Service types:** The name of the service type .Possible values are:
  - Remote
  - Onsite
  - Telephone
- **Threads:** The total number of service sessions involving the service type within the report period.
- **Tickets:** The total number of attended tickets involving the service type within the report period.
- **Total Time Spent:** The total time spent on the service type.
- **Billable Time :** The net chargeable time spent on the service type excluding the pre-paid hours defined in the service contracts bound to the customers.
- **Billable Time Cost:** The total charge calculated for the billable time, based on the hourly rates defined in the contracts and charging plans associated with them.
- **Asset Types** (Server, Workstation etc.): A breakup of time spent providing the type of service on different asset types within the report period.

#### Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

#### Scheduled Reports

- Click the icon  beside 'Scheduled Reports' to schedule a report and configure recipients. See '[Scheduled Reports](#)' for more details.

## 2.8.5 Department Ticket Reports

Click 'Admin Panel' > 'Reports' > 'Departments'

- Department reports show ticket activity by Service Desk department.
- This includes the number of open and closed tickets per department, the number of those tickets that have been assigned to staff, and the number of overdue tickets.
- Reports also include time spent, billable time and material cost for the department.
- You can generate a report on all departments or for a single department.
- The report can be exported to PDF and CSV formats.

#### Create a department report

- Open the admin panel (see the last link on the left)
- Click 'Reports' > 'Departments'

## Reports

---

### Departments

Period From:  To:

Department:  ▼

### Filter options

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **Department:** Choose the department for which the report has to be generated.
- Click the 'Go!' button to generate the report for the selected period and filter.
- If no department is selected then the report covers all departments.

Export to CSV
 Export to PDF

DEPARTMENT ⚙	OPEN	CLOSED	ASSIGNED	OVERDUE	ALL TICKETS	BILLABLE TIME	SPENT TIME	MATERIALS(\$)	BILLABLE TIME COST
Maintenance	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
Sales	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
Support	9	4	10	9	13	27 hrs 13 min	26 hrs 57 min	385	2885.32

< Prev
1
Next >

Click the 'Department' column header to sort items in ascending/descending order.

- **Department:** The name of the department.
- **Open:** Number of tickets assigned to the department and in open status.
- **Closed:** Number of tickets assigned to the department and have been closed.
- **Assigned:** Total number of tickets are assigned to the department.
- **Overdue:** Number of tickets assigned to the department and not closed within the stipulated time.
- **All tickets:** Total number of tickets that are assigned to the department (sum of open and closed tickets).
- **Billable Time:** Time spent on tickets for the department which can be charged to customers.
- **Spent Time:** Total time spent resolving tickets for the department.
- **Materials:** The total cost of materials used in tickets for the department.
- **Billable Time Cost:** The total charge for time listed in the 'Billable Time' column.

### Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

### Scheduled Reports

- Click the icon beside 'Scheduled Reports' to schedule a report and configure recipients. See '**Scheduled Reports**' for more details.

## 2.8.6 Agent Reports

Click 'Admin Panel' > 'Reports' > 'Agents'

- 'Agents' are staff members and admins. Agent reports provide info on the number of tickets that are open, closed, assigned, paused and overdue for each staff member.
- Report also include information on billable time, time spent per ticket, material costs and billable time.
- You can generate a report for all staff or for a single staff member. Reports can be exported to PDF and CSV formats.

### Create an agents report

- Open the admin panel (See the last link on the left)
- Click 'Reports' > 'Agents'

**Reports**

**Agents**

Period From: 12/01/20 To: 12/15/20

Agent: Select Agent

Go!

### Filter options

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **Agent:** Choose the staff member on whom you want to generate a report. Leave as 'Select Agent' to generate a report on all staff.
- Click the 'Go!' button to generate the report for the selected period and filter.

Export to CSV Export to PDF

AGENT #	OPEN	CLOSED	ASSIGNED	OVERDUE	PAUSED	ALL TICKETS	BILLABLE TIME	SPENT TIME	MATERIALS(\$)	BILLABLE TIME COST
garrykristen@yopmail.com	0	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
jacob@yopmail.com	0	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
kamal@yopmail.com	6	4	10	6	1	10	27 hrs 9 min	26 hrs 55 min	320	2879.99
richardson@yopmail.com	0	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
selena@yopmail.com	0	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0

« Prev 1 Next»


- **Agent:** The name of the staff member.
- **Open:** Number of tickets assigned to a staff member and in open state.
- **Closed:** Number of tickets assigned to the staff member that have been closed.
- **Assigned:** Total number of tickets assigned to the staff member.
- **Overdue:** Number of tickets assigned to the staff member and not closed within the stipulated time.

- **Paused:** Number of tickets paused temporarily by the staff member.
- **All tickets:** Total number of tickets assigned to the staff member (sum of open and closed tickets).
- **Billable Time:** Time spent on tickets by the staff member which can be charged to the customer
- **Spent Time:** Total time spent resolving tickets for the by the staff member.
- **Materials:** The total cost of materials used in tickets worked on by staff members.
- **Billable Time Cost:** The total charge for time listed in the 'Billable Time' column.

#### Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

#### Scheduled Reports

- Click the icon  beside 'Scheduled Reports' to schedule a report and configure recipients. See '[Scheduled Reports](#)' for more details

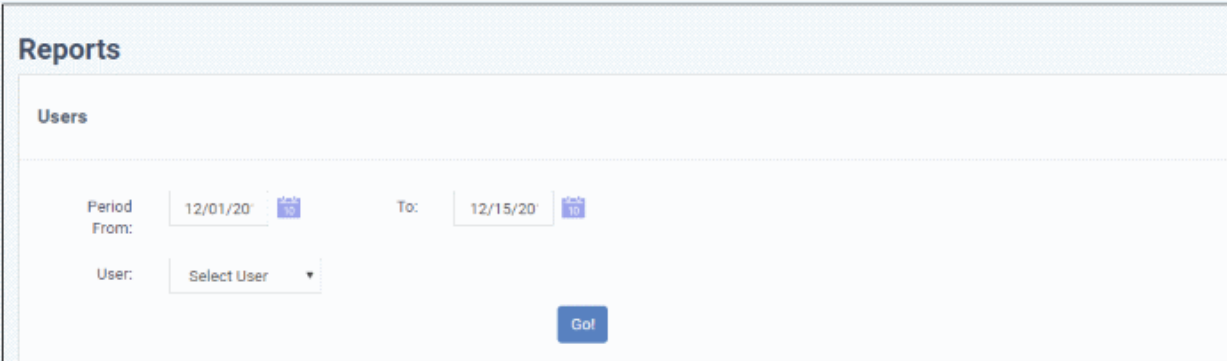
## 2.8.7 Users Reports

Click 'Admin Panel' > 'Reports' > 'Users'

- 'Users' are the people who submit support requests to your team. The users report provides info on tickets created by / on behalf of registered and guest users.
- The report includes details about time spent on the user's tickets, billable time, material costs, and more.
- You can generate a report for all users or for a single user. Reports can be exported to PDF and CSV formats.

#### Create a user report

- Open the admin panel (see the last link on the left)
- Click 'Reports' > 'Users'



The screenshot shows a web interface titled 'Reports'. Underneath, there is a section for 'Users'. The form includes two date pickers: 'Period From:' with the value '12/01/20' and 'To:' with the value '12/15/20'. Below these is a dropdown menu for 'User:' with the text 'Select User'. A blue 'Go!' button is positioned at the bottom right of the form area.

#### Filter options

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **User:** Choose the user on whom you want to generate a report. If no user is selected then the report covers all users.
- Click the 'Go!' button to generate the report for the selected period and filter.

USER #	OPEN	OVERDUE	CLOSED	ASSIGNED	PAUSED	ALL TICKETS	BILLABLE TIME	SPENT TIME	MATERIALS(\$)	BILLABLE TIME COST
sahana@yopmail.com	1	1	1	1	0	2	24 hrs 12 min	24 hrs 9 min	275	2660.00
john@yopmail.com	5	5	2	6	1	7	0 hrs 45 min	0 hrs 42 min	65	56.99
sathish.pachaiyappan@comodo.com	2	2	1	3	0	3	2 hrs 16 min	2 hrs 5 min	45	168.33
kama@yopmail.com	1	1	0	0	0	1	0 hrs 0 min	0 hrs 0 min	0	0.00


Click the 'User' column header to sort the items in ascending or descending order.

- **User:** The name of the registered or guest user.
- **Open:** Number of tickets created by the user and yet to be resolved.
- **Overdue:** Number of tickets created by/for the user that have not been closed within the stipulated time.
- **Closed:** Number of tickets that are created by/for the user and closed by the assigned staff member.
- **Assigned:** Total number of tickets created by/for the user that are assigned to a staff member.
- **Paused:** Number of tickets that are paused temporarily by the assigned staff member.
- **All tickets:** Total number of tickets that were created by/for the user (sum of open and closed tickets).
- **Billable Time:** Time spent on tickets for the selected users which can be charged to the customer.
- **Spent Time:** Total time spent resolving tickets for the selected users.
- **Materials:** The total cost of materials used in tickets for the selected users.
- **Billable Time Cost:** The total charge for time listed in the 'Billable Time' column.

### Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

### Scheduled Reports

- Click the icon  beside 'Scheduled Reports' to schedule a report and configure recipients. See '[Scheduled Reports](#)' for more details

## 2.8.8 Resource Appointment Reports

Click 'Admin Panel' > 'Reports' > 'Resource Appointment'

- An appointment is a task or meeting added to a staff member's **calendar**.
  - See [Manage Calendars](#) to read more about the Service Desk calendar.
- The report shows an overview of scheduled tasks and meetings by staff.



### Create a resource appointment report

- Open the admin panel (see the last link on the left)
- Click 'Reports' > 'Resource Appointment'



## Reports

**Resource Appointment**

Period From   To  


Group By  ▼

Quarter  ▼ Year  ▼

Year  ▼

Agent  ▼

---

**Scheduled Reports** 

**You do not have any scheduled report**

### Filter options

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **Group By:** Select how the entries should be sorted in the report, that is, by days, weeks, months, quarters or by years.
- **Quarter** - Generate a report which covers a selected quarter (three months) of a year, regardless of the time you chose in the 'Period' filter.
  - Select the year and quarter from the menus to generate a report on a specific quarter, or...
  - Leave at default to generate report for the period between the 'From' and 'To' fields
- **Year** - Generate a report which covers the selected year, regardless of the time you chose in the 'Period' filter.
  - Select the year from the drop-downs to generate a report on a specific year, or...
  - Leave at default to generate report for the period between the 'From' and 'To' fields
- **Agent:** Select a staff member to create a report on only the appointments of that person. Leave as 'Select Agent' to include all staff members in the report.
- Click the 'Go!' button to generate the report for the selected period and filter. The following example shows report by months.



**Service Desk**    Service Desk > Reports > Tickets

## Reports

### Tickets

Period From: 02/01/2019 To: 02/28/2019

User email:

Status:

Agent:

Overdue:

SLA:

Issue Summary:

Source:

Asset:

Priority:

Department:

Customer:

Category:

**Go!**

### Scheduled Reports

You do not have any scheduled report

- Click the icon beside 'Scheduled Reports' to start the report configuration wizard
- The first step is to configure the report filters. Please note the filters will vary depending on the type of report:

### Tickets : Filter ✕

User email:

Source:  ▼

Status:  ▼

Asset:  ▼

Agent:  ▼

Priority:  ▼

Overdue:  ▼

Department:  ▼

SLA:  ▼

Organization:  ▼

Issue Summary:

Category:  ▼

[Next →](#)

- Configure each filter according to the data you wish to see in the final report. For details about the filters in each type of report, see [Generate Reports](#).
- Leave the filters at default values to generate a full, unfiltered report.
- Click 'Next' to configure report send time, frequency, time-period and recipients:

### Tickets : Filter ✕

**Time \***

**Frequency** **Uncomplete**

Every day  
 Every week  
 Every month

**File Type**  ▼

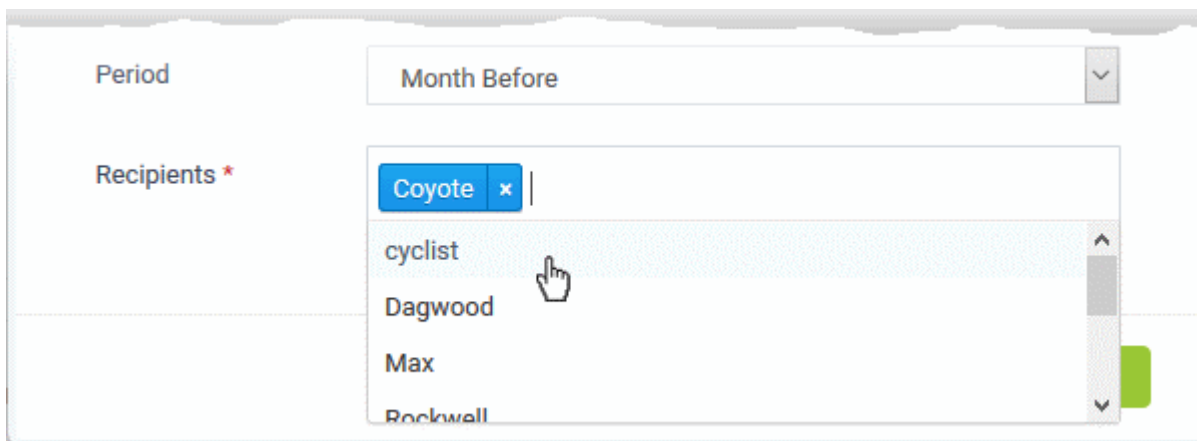
**Include Custom Fields**

**Period**  ▼

**Recipients \***

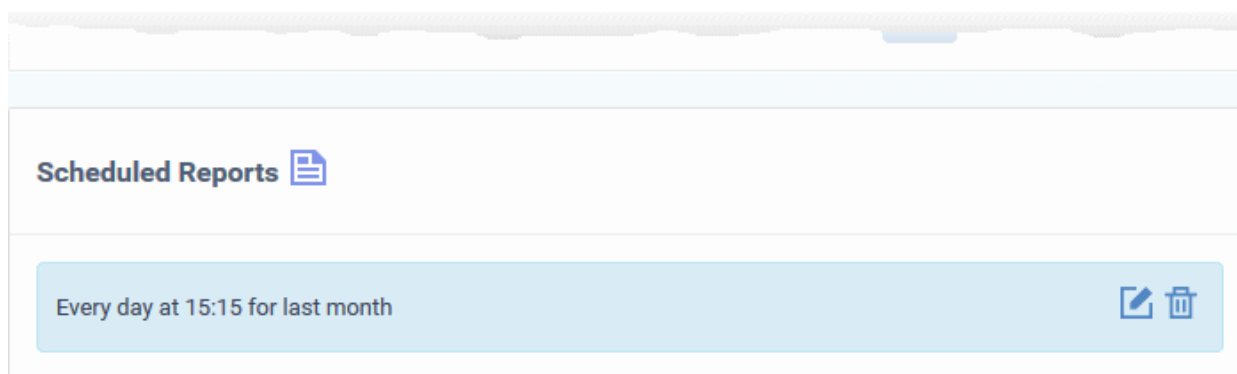
- **Time** - Time of day at which the report should be generated and sent
- **Frequency** - How often the report should be generated and sent:
  - **Every day** - The report will be sent daily
  - **Every week** - Select the day(s) of the week on which the report should be sent.
  - **Every month** - Select the day(s) of the month on which the report should be sent.
- **File Type** - File format of the report. The report will be delivered to recipients in the format you choose here. The available options are:
  - CSV
  - PDF
- **Include Custom Fields** - Specify whether or not the report should contain the custom field values in the details of the item for which the report is generated.
- **Period** - The report coverage period. The options available are:
  - **Day Before** - Creates a report for the 24 hours preceding the time of report generation
  - **Week Before** - Creates a report for the 7 days preceding the time of report generation
  - **Month Before** - Creates a report for the month preceding the time of report generation

- **Recipients** - Select staff/agents to whom the reports should be sent.





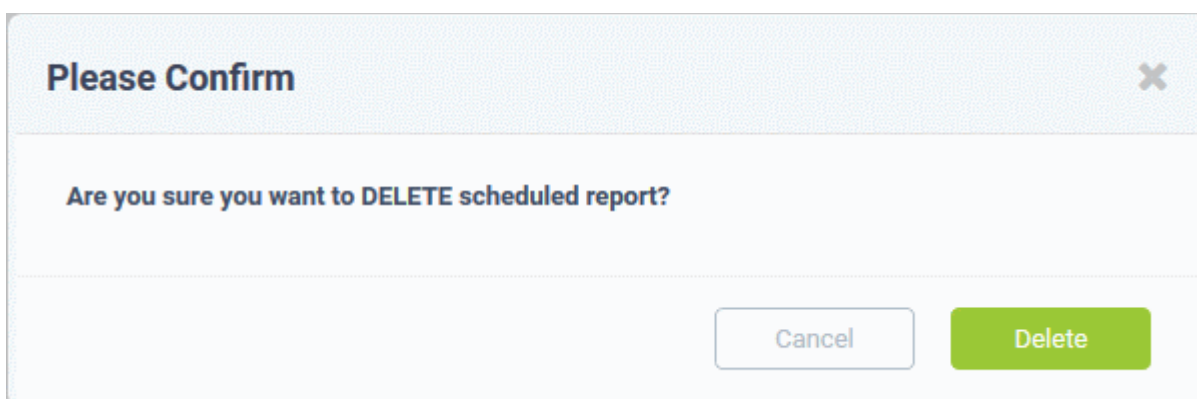
- Click 'Save'

The schedule is saved and shown at the bottom of report screen.



The reports are automatically sent to the configured recipients per the selected frequency.

- Click the edit icon  beside a schedule to edit it. The filter parameters screen will be displayed. Follow the same add procedure as **explained above** to edit the schedule.
- Click the trash  can icon beside the schedule to delete it.



- Click 'Delete' to remove the report schedule.

## 2.9 Finance

Click 'Admin Panel' > 'Finance' to open this area

- The 'Finance' section lets you generate cost reports and manage contracts.
- Costs are billable items and fees which apply to customers.

The screenshot shows the 'Service Desk' interface with a sidebar on the left and a main content area on the right. The sidebar includes options like DASHBOARD, SETTINGS, MANAGE, EMAILS, TIME SHEETS, STAFF, ANNOUNCEMENTS, REPORTS, FINANCE (selected), and STAFF PANEL. The main content area is titled 'Reports' and shows a 'Cost' report configuration form. The form includes a 'Report Type' dropdown set to 'Cost by Customer', 'Period From' and 'To' date pickers set to 02/01/2019 and 02/27/2019 respectively, a 'Customer' dropdown set to 'Select Customer', and an 'Advanced Settings' section with a checked checkbox for 'Include zero time and cost tickets'. A 'Go!' button is at the bottom of the form. Below the form is a 'Scheduled Reports' section with a document icon and the message 'You do not have any scheduled report'.

There are two sections in the finance area:

1) **Costs** - Lets you generate two types of report:

- **Cost by Customer** - A report on overall billable items accruing to specific customers. The costs can come from contract fees, billable time and material costs.
- **Cost by Contracts** - A report on billable items generated by a specific contract. The report also shows ticket activity and threads by those customers.

You can also schedule that reports are generated at a specific time and sent to recipients of your choice.

- See [Generate Cost Reports](#) for more.

2) **Contract** - Lets you add and manage service contracts and associate them with customers.

- Each contract includes a contract period, a subscription fee, a custom charging plan, pre-paid hours, and more.
- See [Manage Contracts](#) for further help.

## 2.9.1 Generate Cost Reports

- Click 'Admin Panel' > 'Finance' > 'Cost'

Cost reports let you view billing details for a selected time period for any organization. Each report includes per-contract fees and any charges for additional hours or materials/expenses.

- **Cost by Customer** - Total costs which apply to a customer from all sources.
- **Cost by Contract** - The costs generated by a specific contract.

### Service Contract

A service contract between you and a customer can include:

- A contract fee (optional). A fixed charge that can be levied weekly/bi-weekly/monthly/yearly.
- Pre-paid hours. These hours are usually 'included in the fee' and not charged to the customer. You can specify a different number of hours for different support types ('On-site', 'Remote' and 'Telephone').
- A charging plan (optional). These plans let you set charges for time that exceeds the pre-paid hours. A charging plan includes:
  - A default hourly rate (mandatory). This is applied to sessions not covered by a variable rate.
  - Variable rates (optional). These rates let you set different charges for specific types of support (telephone, on-site, remote).
  - Charging plans are only applied after any pre-paid hours have been used up.
  - If no custom charging plan is applied then the default plan is applied. The default charging plan can be managed in '**Admin Panel**' > '**Manage**' > '**Charging**'.
  - For more details on service contracts, see **Manage Contracts**.

The following sections explain more about:

- **Cost Reports for Customers**
- **Contract Reports**

### Cost Reports for Customers

- The customer cost report can be generated for all customers enrolled in Service Desk or for an individual customer.
- Reports can be exported to PDF and CSV formats.

### Create a cost report

- Click 'Admin Panel' > 'Finance' > 'Cost'
- Select 'Cost by Customer' in the 'Report Type' drop-down



Service Desk > Finance > Cost

## Reports

### Cost

Report Type Cost by Customer ▼

Period From 02/01/2019 10 To 02/27/2019 10

Customer Select Customer ▼

Advanced Settings  Include zero time and cost tickets

**Go!**

### Scheduled Reports

You do not have any scheduled report

**Filters:**

- **Period** - Enter the start and end date of the report period.
- **Customer** - Select the customer for which the report should be generated. Leave this at 'Select Customer' to generate a report for all customers.
- **Include zero time and cost tickets** - Include tickets which did not involve any costs nor time.

See the following sections for more details on

- **Cost report for a specific customer**
- **Cost report for all customers**

**Cost report for a specific customer**

- Select the time period for the report
- Select the customer from the 'Customer' drop-down
- Click the 'GO!' button
- The report contains the details of tickets attended for that customer with asset information, billable time, billable cost, material cost and the sum.
- A typical report for a selected customer looks as follows:

Export to CSV Export to PDF

Kanchi Idly Steamer Customize Columns

Total: 0

CONTRACT ↕	FEE(\$)	TICKET ↕	ISSUE SUMMARY ↕	RESOLUTION ↕	SERVICE TYPES ↕	ASSETS ↕	BILLABLE TIME(HH:MM) ↕	BILLABLE TIME COST(\$)
-	0	1111	Quote for cooling pad	-	Telephone	Workstation	0 hrs 30 min	0
-	0	1112	System restarts frequently	-	Remote	Workstation	0 hrs 40 min	0

« Prev 1 Next »

The grand total of costs for the customer is shown at the top of the table. You can change the columns shown by clicking the 'Customize Columns' button. The following is a list of all possible columns:


- **Contract** - The service contract associated with the customer at the time of attending to the ticket.
- **Fee** - The subscription fee as per the service contract.
  - The contract fees include any fixed weekly/bi-weekly/monthly/annual subscription fees agreed with the customer.
  - If no contract is associated with the customer at the time of attending to the ticket, the fee is shown as '0.00'.
- **Ticket** - The ID number of the ticket.
- **Issue Summary** - A brief description of the issue.
  - In many cases, the issue summary will have been specified by the user or staff member who created the ticket.
  - The issue summary of tickets that were created by another Comodo One module like EM will include the condition that generated the ticket.
- **Resolution** - A description of the fix/solution. This is set by the staff member attending to the ticket.
- **Service Types** - The kind of services rendered during the service sessions, accounted for billing. The possible values are:
  - Onsite
  - Remote
  - Telephone
- **Assets** - The type of item that the ticket concerns. For example, 'Workstation', 'Server', 'Printer', 'Mobile'.
- **Billable Time** - Time which is chargeable to the customer for working on their tickets.
- **Billable Time Cost** - Charges calculated for billable time (in the default currency set for your Service Desk).
  - Only charges for additional hours are shown here.
  - Time becomes billable after all 'pre-paid' hours are used up. Charges are only applied to billable time in excess of the pre-paid hours in the contract.
  - Charges are calculated based the asset rates defined in the contract.
  - If asset rates are not defined in the contract then the global rates are applied.
- **Materials** - Total cost of billable items and expenses which were used when resolving the ticket.
- **Sum** - The amount chargeable for the ticket.

## Download Reports

- You can download reports in PDF and CSV formats.

- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

### Scheduled Reports

- Click the  beside 'Scheduled Reports' to schedule a report and configure recipients. See '[Scheduled Reports](#)' for more details.

### Cost report for all customers

- Select the time period for the report
- Leave 'Select Customer' in the 'Customer' drop-down
- Click the 'GO!' button
- The report will contain the total billable time, billable costs, and material costs for each customer.
- A typical report for all customers looks as follows:



Export to CSV Export to PDF

Total: 9.92 [Customize Columns](#)

CUSTOMER ↕	FEE(\$) ↕	BILLABLE TIME(HH:MM) ↕	BILLABLE TIME COST(\$) ↕	MATERIALS(\$) ↕	SUM(\$) ↕
ABC TV Services	-	0 hrs 0 min	-	-	-
ACME Corp.	0	1 hrs 6 min	9.92	0	9.92
Alpha Factory	-	0 hrs 0 min	-	-	-


You can change the columns shown by clicking the 'Customize Columns' button. The following is a list of all possible columns:

- Customer** - The client organization or company.
- Fee** - The fixed subscription charge as per the contract with the customer.
  - You can charge a contact fee on a weekly, bi-weekly, monthly or annual basis.
  - The fee is shown as '0.00' if no contract is associated with the customer.
- Billable Time** - Time which is chargeable to the customer for working on their tickets.
- Billable Time Cost** - Charges calculated for billable time for the customer (in default currency set for your Service Desk).
  - Only charges for additional hours are shown here.
  - Time becomes billable after all 'pre-paid' hours are used up. Charges are only applied to billable time in excess of the pre-paid hours in the contract.
  - Charges are calculated based the asset rates defined in the contract.
    - If asset rates are not defined in the contract then the global rates are applied.
- Materials** - Total cost of materials and expenses which were used to resolve the issue.
- Sum** - The amount chargeable to the customer.

### Download Reports

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

### Scheduled Reports

- Click the  icon beside 'Scheduled Reports' to schedule a report and configure recipients. See

'Scheduled Reports' for more details.

### Contract Reports

Click 'Admin Panel' > 'Finance' > 'Cost' > 'Cost by Contracts'

- A contract report shows the charges generated by a specific contract. The report also shows the number of tickets and support sessions for customers on the contract.
- Reports can be generated for all contracts or specific contracts.
- Reports can be generated for a selected period of time, or for the entire contract duration.
- Reports can be exported to PDF and CSV formats.

**Tip** - Click 'Admin Panel' > 'Finance' > 'Contracts' if you want to view and manage existing contracts.

### Create a contract report

- Click 'Admin Panel' > 'Finance' > 'Cost'
- Select 'Cost by Contracts' in the 'Report Type' drop-down

The screenshot shows the 'Contracts' report generation interface. The 'Report Type' dropdown menu is highlighted with a red circle and is set to 'Cost by Contracts'. Below this, there are fields for 'Period From' (02/01/2019) and 'To' (02/27/2019), a 'Contract' dropdown menu set to 'Select Contract', and a 'Get detailed report' checkbox. A blue 'Go!' button is located at the bottom of the form. Below the form, there is a section for 'Scheduled Reports' which currently shows 'You do not have any scheduled report'.

### Filters:

- **Period:** The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- **Contract:** Select a specific contract for the report. Leave this at 'Select Contract' to generate a report on every contract.
- **Get detailed report:**

- **Enabled** - Generate a report which covers the whole period, regardless of the time you chose in the 'Period' filter.
- **Disabled** - Generate a report for the selected period.
- Click the 'Go!' button to generate the report.

The example shown below is a report for all contracts:

CONTRACT	CONTRACT FEE(\$)	BILLING PERIOD	ACTIVE CHARGING	TOTAL PREPAID HOURS	CURRENT BILLING PERIOD	UNUSED HOURS METHOD	UNUSED PREPAID HOURS	TOTAL BILLABLE TIME
Software Companies	2000.00	Monthly	Default Charging	130	14/02/2019 - 14/03/2019	Not carry forward	130	0
Universities	20000.00	Yearly	Default Charging	40	14/09/2018 - 14/09/2019	Not carry forward	27	0


« Prev 1

- Contract - The label of the service contract.
- Contract Fee - The subscription fee for the billing cycle as set out in the contract.
- Billing Period - Billing cycle defined in the contract.
- Active Charging - The charging plan applied to the contract.
  - Click 'Admin Panel' > 'Manage' > 'Charging' to view and manage charging plans.
  - See Manage Charging Plans to read more about charging plans
- Total Pre-paid Hours - The total service time across all service types, covered by the subscription fee.
- Current Billing Period - The period for which the current fee is calculated
- Unused Hours Method - Whether or not the contract states unused pre-paid hours should be carried forward to the next billing period.
- Unused Prepaid Hours - The amount of 'pre-paid' time which is still remaining in the current billing cycle.
- Total Billable Time - Time which is chargeable to the customer for working on their tickets.
  - Time becomes billable after all 'pre-paid' hours are used up. If you have assigned a charging plan to the contract, then they will be charged at the default/variable rates set out in the plan. If no plan is assigned to the contract then work will be charged at the global asset rates.
  - Click 'Admin Panel' > 'Manage' > 'Charging' to view and manage charging rates.
  - Click 'Admin Panel' > 'Manage' > 'Assets' to view and manage global asset rates.
- Total Billable Cost - The total cost calculated for the billable time
- Current Fee - The contract fee calculated for the report period.
- # Threads - The total number of service sessions for the customers to which the contract is bound.
- # Tickets - The number of tickets attended for the customers within the report period.
- Sum - The total of 'Total Billable Cost' and 'Current Fee'.

### Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

### Scheduled Reports

- Click the  icon beside 'Scheduled Reports' to schedule a report and configure recipients. See '[Scheduled Reports](#)' for more details.

## 2.9.2 Manage Contracts

Click 'Admin Panel' > 'Finance' > 'Contracts'

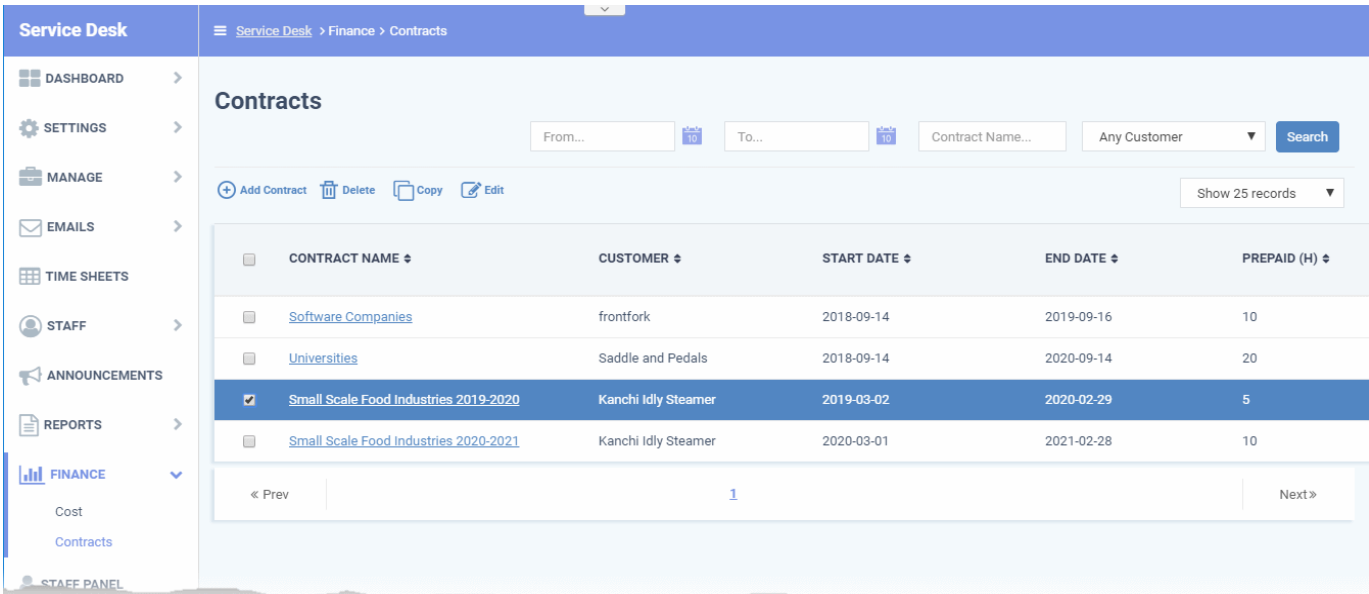
**Contract** - An agreement between you and a customer which specifies the charges you will levy for your services over a billing cycle.

You can configure the following in a Service Desk contract:

- **Contract Fee** (optional). A fixed charge for a billing cycle (weekly, bi-weekly, monthly or annual). The contract fee is always charged on top of any charging plans and/or global asset rates.
- **Prepaid Hours** (optional). The number of hours your company will provide at no charge under the contract fee. You can set different pre-paid hours for each type of service (telephone, remote, on-site). If the time spent exceeds the pre-paid hours, then only the excess time is subject to charge.
- **Charging plan** (optional). A template you can add to a contract which lets you define custom hourly rates for your services. Charging plan rates are only applied after prepaid hours have been used. You can add the following to a charging plan:
  - **Default Hourly Rate** (mandatory). Hourly charge applied to work not covered by a variable rate.
  - **Variable Rates** (optional). Special rates for specific types of work. For example, you might want to charge a different rate for on-site visits, or for work on a specific asset, or for work that exceeds a certain length of time.
- **Global Asset Rates** ('Admin Panel' > 'Manage' > 'Charging' > 'Default Charging') - While not part of a contract, per se, you should still consider global asset rates. Asset rates specify charges for work on items like workstations, servers, printers, routers etc. Global asset rates are only charged when prepaid hours and charging plans have been processed. For more details on global asset rates, see [Default Charging Plan](#) in [Manage Charging Plans](#).
- See [Appendix 3 - How Charging Works in Service Desk](#) to read more on how charges are calculated for customers, based on contracts and charging plans.

Open the contracts interface:

- Open 'Admin Panel' > 'Finance' > 'Contracts'



CONTRACT NAME	CUSTOMER	START DATE	END DATE	PREPAID (H)
<a href="#">Software Companies</a>	frontfork	2018-09-14	2019-09-16	10
<a href="#">Universities</a>	Saddle and Pedals	2018-09-14	2020-09-14	20
<input checked="" type="checkbox"/> <a href="#">Small Scale Food Industries 2019-2020</a>	Kanchi Idly Steamer	2019-03-02	2020-02-29	5
<input type="checkbox"/> <a href="#">Small Scale Food Industries 2020-2021</a>	Kanchi Idly Steamer	2020-03-01	2021-02-28	10

The interface lets you view, enable/disable, clone and create new contracts.

- **Contract Name** - The label of the contract. Contracts are often named after a target customer or a class of customer.

- Click a contract name to view and edit its details
- See '**Manually create a new contract.**' for more details on this interface.
- **Customer** - The organization / company with whom the contract is associated.
- **Start Date** - The date from which the contract is effective.
- **End Date** - The expiry date of the contract.
- **Pre-Paid** - The number of hours for which the customer will not be charged.

The following sections explain more about:

- **Create new contracts**
- **View / Edit contract details**
- **Remove a Contract**
- **Sorting and filtering options in the 'Contracts' interface**

## **Create New Contracts**

New contracts can be added in two ways:

- **Manually create a new contract.**
- **Clone an existing contract which can be modified to create a new contract.**

## **Manually create a new contract**

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Click 'Add Contract' at the top of the 'Contracts' interface


## New Contract


### General Information

Contract Name: \*

Customer: \*

Contract Details:

Start Date: \* ?  

End Date: \* ?  

### Contract Parameters

Fee: ?

Billing Period: ?  ▼

Unused Hours: ?  ▼

**Prepaid Hours will be calculated according to the number written on the field next to service types. ?**

Prepaid Hours:   Unlimited ?

Distribute prepaid hours to service types

Onsite:   Unlimited ?

Remote:   Unlimited ?

Telephone:   Unlimited ?

### Charging Method ?

Charging:  ▼  Not now

There are three main sections in the new contract form:

#### 1. General Information

- **Contract Name** - Label to identify the contract



- **Company** - The customer organization to whom the contract applies
- **Contract Details** - Brief description of the contract
- **Start Date** - The date from which the contract is effective
- **End Date** - The date the contract expires

## 2. Contract Parameters

**Fee** - A fixed charge billed to the customer for the services you provide. The billing cycle determines how often the fee is charged.

- This fee will always be charged, regardless of other charges in charging plans and global asset rates.
- You may wish to set a fee then use 'Prepaid Hours' to specify the amount of work that will be covered by the fee.
- If no fee is specified, then charges for service sessions are calculated from other parameters in the contract.

**Billing Period** - How often the total charges in the contract will be billed to the customer

- Weekly
- Bi-Weekly
- Monthly
- Yearly

**Unused Hours** - Choose whether or not any remaining pre-paid hours at the end of a billing cycle are carried over to the next cycle. Hours that are carried forward will be added to the pre-paid hours of the same service type in the next billing cycle.

**Prepaid Hours** - Hours worked by your staff during this period that will not be charged to the customer.

You have the option to spread prepaid hours over different services types - 'Onsite', 'Remote' and 'Telephone'.

Unlimited - You will not charge a fee for any hours worked by your staff on this service type.

**Prepaid Hours will be calculated according to the number written on the field next to service types. ?**

Prepaid Hours:   Unlimited ?

Distribute prepaid hours to service types

Onsite:   Unlimited ?

Remote:   Unlimited ?

Telephone:   Unlimited ?

- **Prepaid Hours** - Total hours you want to provide for the contract fee. Your customer can spend these hours on support of any type. Unlimited - provide support of any type for free for the full billing period.  
OR
- **Distribute prepaid hours to service types** - Specify the number of pre-paid hours for individual service types. Unlimited - provide the support type for free for the full billing period.

## 3. Charging Method

Specify a charging plan for the contract.

Charging plans are templates which let you specify custom hourly rates for your services.

- Click 'Admin Panel' > 'Manage' > 'Charging' to create a custom charging plan. See **Manage Charging Plans** if you need more help with this.

Charging plan rates are only applied after prepaid hours have been used.

- **Charging** - Select the plan you want to add to the contract from the drop-down.
- **Default Charging** - A plan which charges the global asset rates.
- **Not Now** - disable charging plans on this contract.

Click 'Save' to apply the contract to the customer.

### **Clone an existing contract to create a new contract**

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Select the contract which you want to use as a template and click 'Copy'
- Click 'Yes, Do it!' in the confirmation dialog

The 'Copy Contract' form will appear. The general information, contract parameters and pre-paid hours are pre-populated with the values of those in the source contract.

## Copy Contract

### General Information

Contract Name: \*

Customer: \*

Contract Details:

Start Date: \* ⓘ  ⓘ

End Date: \* ⓘ  ⓘ

### Contract Parameters

Fee: ⓘ

Billing Period: ⓘ

Unused Hours: ⓘ

Prepaid Hours will be calculated according to the number written on the field next to service types. ⓘ

Prepaid Hours:   Unlimited ⓘ

Distribute prepaid hours to service types

Onsite:   Unlimited ⓘ

Remote:   Unlimited ⓘ

Telephone:   Unlimited ⓘ

### Charging Method ⓘ

Charging:   Not now

- Enter a new name, choose the customer, edit the contract parameters. and select a new charging plan (optional) for the contract. This is explained **above**.
- Click 'Save' to add the new contract.

## View and Edit Contract Details

The 'Edit Contract' interface lets you view details such as the company associated with the contract, the duration of the contract, the contract fee and any charging plans.

### View and edit the details of a contract

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Click the name of a contract
- Or
- Select a contract and click 'Edit' on the top

### Edit Contract

The changes will affect on all the tickets on this contract period for this customer. This may have consequences that cannot be reverted!

#### General Information

Contract Name: *	<input type="text" value="Software Companies"/>
Customer: *	<input type="text" value="frontfork"/>
Contract Details:	<input type="text" value="Yearly subscription services for assets and materials."/>
Start Date: * ⓘ	<input type="text" value="09/14/201"/> ⓘ
End Date: * ⓘ	<input type="text" value="09/16/201"/> ⓘ

#### Contract Parameters

Fee: ⓘ	<input type="text" value="2000.00"/>
Period: ⓘ	<input type="text" value="Monthly"/>

The 'Edit Contract' interface shows general information, contract parameters, pre-paid hours and the details of the charging method applied to the contract. You can edit the details if required. See [Manually create a new contract](#) for more details on the parameters.

- Click Save for your changes to take effect.

The changes will be applied to all tickets from customers who operate under the contract.

## Remove a Contract

You can remove any unwanted/out-dated contracts from Service Desk

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Select the contracts
- Click 'Delete'

**Contracts**

From...  To...  Contract Name...  Any Company...

+ Add Contract  Delete  Copy

<input type="checkbox"/>	CONTRACT NAME ↕	COMPANY ↕	START DATE ↕	END DATE ↕
<input checked="" type="checkbox"/>	<a href="#">Cyclist Contract</a>	Cyclists Inc.	2018-02-21	2018-05-20
<input type="checkbox"/>	<a href="#">Low cost for Charity</a>	Cycle Trust	2018-02-26	2019-02-25

**Please Confirm** ✕

Are you sure you want to DELETE selected contracts? Deleted contracts CANNOT be recovered.

- Click 'Yes, Do it!' In the confirmation dialog

The contract will be removed from the company.

### Sorting and filtering options in the 'Contracts' interface

#### Sorting Options:

- Click on a column header to sort items in ascending/descending order

#### Search Options:

You can search for contracts based on their coverage period, name and customer.

- Use the 'From' and 'To' fields to search for contracts that are valid between specific date ranges.
- To search by contract name, type a contract name in the 'Contract Name' field.
- Use the 'Customer' drop-down to filter contracts by specific company.
- Click the 'Search' button apply your filter.
- To clear all filters, simply click 'Contracts' on the left.

## 3 Service Desk Staff Panel

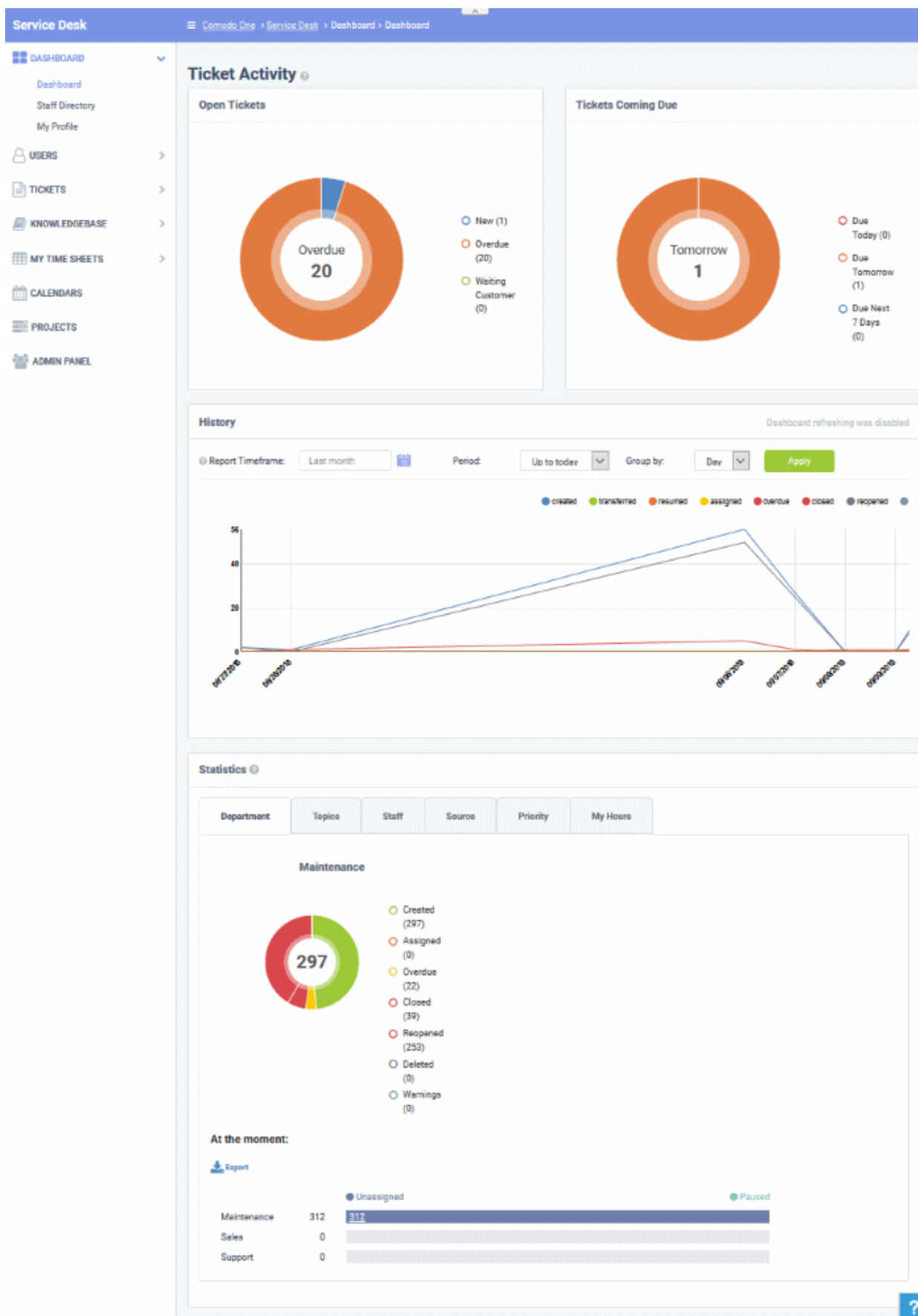
- The 'Staff Panel' lets staff (aka 'agents') manage tickets assigned to them, create new end-users, edit customers, manage knowledge-base items, manage projects and update their time sheets.
- Staff members are added by administrators through the Comodo One portal. The permissions of a staff member are determined by the role to which they are assigned ('Admin Panel' > 'Staff' > 'Roles') and the

department to which they belong 'Admin Panel' > 'Staff' > 'Departments').

- Staff Members that are given admin permissions can also access the admin panel.


Staff can navigate to different areas of the console by clicking the links on the left of the interface. Tool tips offering guidance are available for most features.

## **Main Functional Areas**

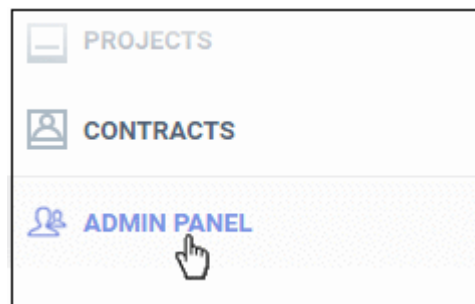


- **Dashboard** - View a graphical summary of ticket activity, including assigned, closed and due tickets. Tickets are also sorted by department, ticket category, staff member, source and priority. See **Staff Panel Dashboard** for more details.

- **Users** - Add/import users, and manage customers. The section also allows staff to assign users to customers. See **Manage Users and Customers** for more.
- **Tickets** - Manage tickets created by users (and tickets created by staff on behalf of a user). See **Manage Tickets** for more details.
- **Knowledgebase** - Create FAQs that can be hosted in the end-user web portal. Staff can also create canned responses that can be used when responding to a ticket. See **Manage Knowledgebase** for more details.
- **My Time Sheets** - Create time sheets, record work done at different time periods and submit to admins for approval. See **Manage Staff Time Sheets** more details.
- **Calendars** - Schedule appointments. e.g. for on-site visits. Appointments can be shared with and tracked by other staff members. See **'Manage Calendars'** for more details.
- **Projects** - Create task-orientated projects which span multiple tickets, departments and agents. See **Manage Projects** for more details.

Various interfaces display a informational tool-tip  beside key features. Click the tool-tip to view quick help on the feature.

Click the link at the bottom of the left-hand menu to switch between the admin and staff panels. This is only available to staff members that also have admin rights.



## 3.1 Staff Panel Dashboard

The staff panel dashboard contains three areas:

- **Dashboard** - A graphical overview of ticket activity and related statistics.
- **Staff Directory** - The names of all staff enrolled into Service Desk.
- **My Profile** - Allows staff to configure their contact details, time zone, preferred language and more.



Service Desk
Comodo One > Service Desk > Dashboard > Dashboard

**DASHBOARD**

- Dashboard
- Staff Directory
- My Profile

**USERS**

**TICKETS**

**KNOWLEDGEBASE**

**MY TIME SHEETS**

**CALENDARS**

**PROJECTS**

**ADMIN PANEL**

### Ticket Activity

#### Open Tickets

- New (1)
- Overdue (20)
- Waiting Customer (0)

#### Tickets Coming Due

- Due Today (0)
- Due Tomorrow (1)
- Due Next 7 Days (0)

---

### History

Dashboard refreshing was disabled

Report Timeframe: ▼ Last month 📅 Period: ▼ Up to today Group by: ▼ Day Apply

---

### Statistics

Department
Topics
Staff
Source
Priority
My Hours

#### Maintenance

- Created (297)
- Assigned (0)
- Overdue (22)
- Closed (39)
- Reopened (253)
- Deleted (0)
- Warnings (0)

**At the moment:**

📄 Export

	Unassigned	Paused
Maintenance	312 <span style="border: 1px solid blue; padding: 2px;">312</span>	
Sales	0	
Support	0	

The following sections explain more about:

- [View the Dashboard and Export Reports](#)
- [View Staff Members](#)
- [My Profile](#)

## 3.1.1 View the Dashboard and Export Reports

- Click 'Staff Panel' > 'Dashboard' > 'Dashboard' to open this interface.
- The staff dashboard is a highly informative overview of all current and recent tickets. Staff can specify the period for which statistics are shown.
- The dashboard contains stats and charts about tickets assigned to the staff member.

The screenshot displays the Service Desk Administrator Dashboard. The left sidebar contains navigation options: DASHBOARD (Dashboard, Staff Directory, My Profile), USERS, TICKETS, KNOWLEDGEBASE, MY TIME SHEETS, CALENDARS, PROJECTS, and ADMIN PANEL. The main content area is titled 'Ticket Activity' and includes:

- Open Tickets:** A donut chart showing 20 overdue tickets. Legend: New (1), Overdue (20), Waiting Customer (0).
- Tickets Coming Due:** A donut chart showing 1 ticket due tomorrow. Legend: Due Today (0), Due Tomorrow (1), Due Next 7 Days (0).
- History:** A line chart showing ticket activity over time from 09/27/2018 to 09/30/2018. Legend: created, transferred, returned, assigned, overdue, closed, reopened.
- Statistics:** A section for 'Maintenance' with a donut chart showing 297 tickets. Legend: Created (297), Assigned (0), Overdue (22), Closed (39), Reopened (253), Deleted (0), Warnings (0). Below this is a table 'At the moment:' showing counts for Unassigned and Paused tickets across Maintenance (312), Sales (0), and Support (0).

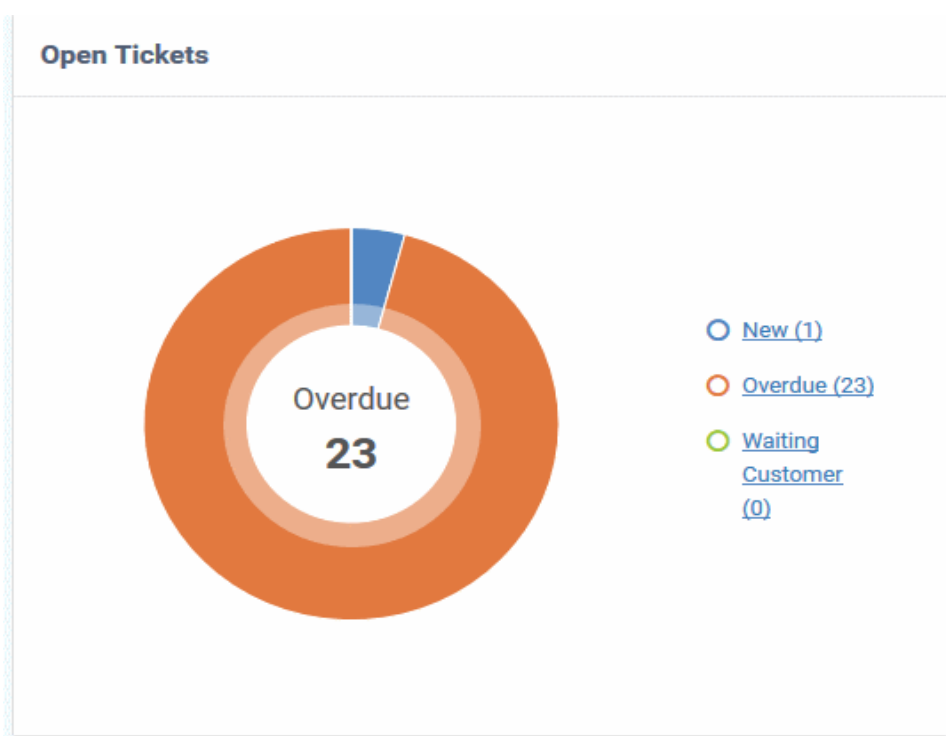
## Ticket Activity

Ticket activity contains the following sections:

- Open tickets - Shows all unresolved tickets. The chart breaks these down into new tickets, overdue tickets and those which are awaiting customer response.
- Tickets coming due - Tickets approaching the deadline by which they must be resolved according to the SLA which applies to the ticket.
- History - A historical timeline which shows the number of tickets per day/week/month in various categories.
- Statistics - Pie charts showing tickets by department, ticket category, assigned staff-member, priority and more.

## Open Tickets

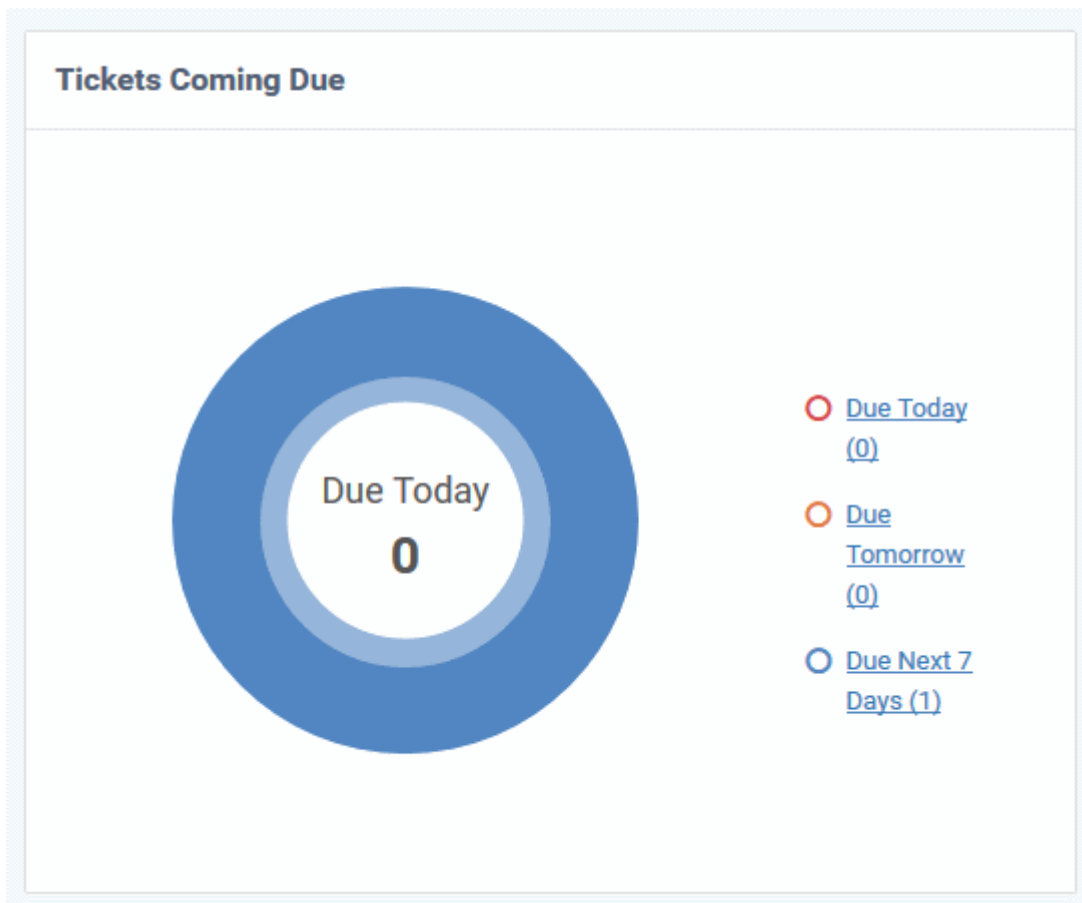
The total number of unresolved tickets. The pie chart breaks this down into tickets that are yet to be attended (new), overdue and awaiting customer response.



- Place your mouse on a sector to see the number of tickets in each category.

## Ticket Coming Due

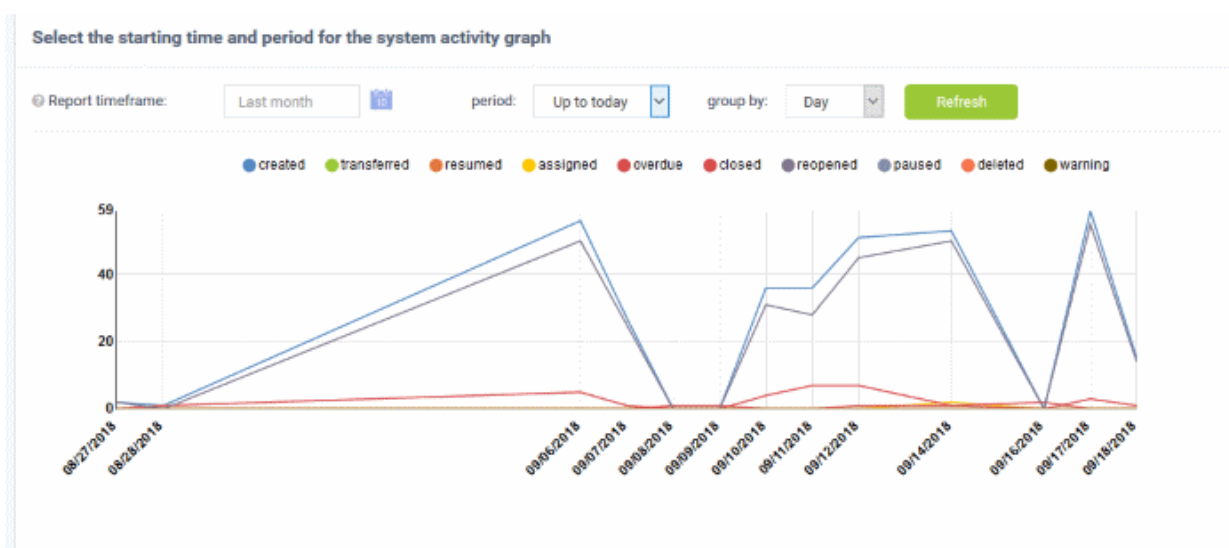
A heads up on tickets that are due in the near future:



- Place your mouse on a sector to see the number of tickets in each category.

## Ticket History Graph

Line chart which shows a break-down of ticket statuses in your assigned organization over-time. For example, the chart shows how many tickets have a status of 'closed', 're-opened' or 'assigned' at various points in time. You can select which statuses are shown by clicking on the legend above the graph.



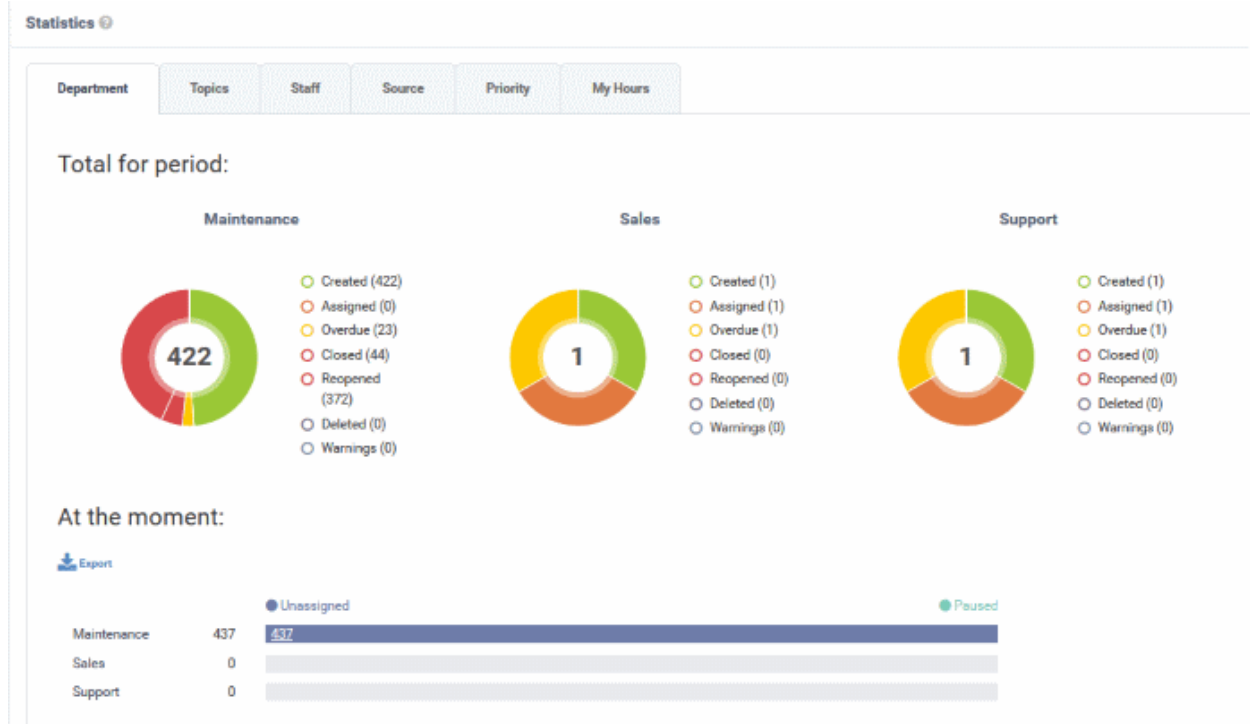
By default, the graph shows details for the previous 30 days. Use the 'Report timeframe' options to change the time-period. Click 'Refresh' to implement your changes.

- The data is refreshed and updated automatically according to the settings done in 'My Profile'.

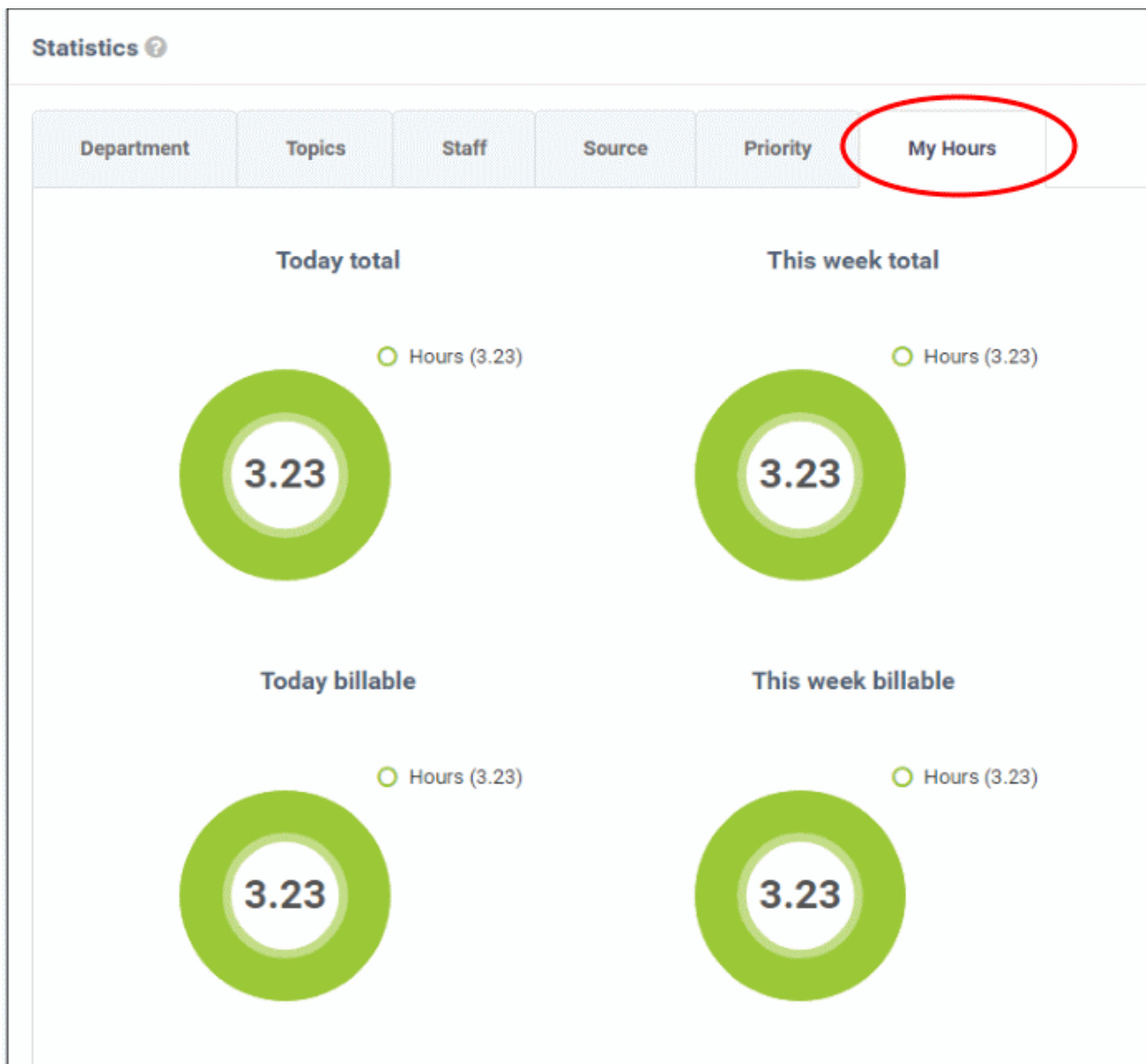
## Statistics

The statistics area shows details for the entire period since you started using Service Desk. You can view statistics based on 'Department', 'Ticket Category', 'Staff', 'Ticket Generation Source' and 'Priority'.

The 'At the moment' graph at the bottom shows the number of tickets that are unassigned and paused depending on the parameter selected. For example, if 'Source' is selected, the graph will display the number of tickets that are unassigned and paused for each ticket source type. Sources include 'Email', 'Phone' and 'Other'.



- 'Overdue' - tickets that have passed the completion deadline for a particular Service Level Agreement (SLA) plan.
- 'Warnings' - tickets that are configured to trigger warnings for a particular SLA plan.
- The 'My Hours' tab shows stats on time spent on tickets by the currently logged-in staff member.



## Export Statistics to a CSV file

Click the 'Export' button at the bottom of the interface to download the stats in CSV format. This file can be opened with applications such as Microsoft Excel or Open Office Calc. Please note this option is not available for 'My Hours' statistics.

## 3.1.2 View Staff Members

Click 'Staff Panel' > 'Dashboard' > 'Staff Directory'

- The 'Staff Members' screen lists the name, department and contact details of all staff enrolled in service desk.

Staff Members						
			Show 10 records	- All Departments -	Search...	
NAME	STATUS	ROLE	EMAIL ADDRESS	DEPARTMENT	CREATED	LAST LOGIN
Coyote	Active	Account Admin	coyote@yopmail.com	Support	03/04/2016 12:04 pm	04/27/2017 5:34 am
Gerald	Active	Admin	gerald@yopmail.com	Support	02/15/2017 11:12 am	03/09/2017 10:07 am
Max	Active	Technician	maelenin2016@outlook.com	Support	07/26/2016 11:04 am	07/26/2016 11:18 am
Dagwood	Active	Technician	avantstude@gmail.com	Support	08/01/2016 5:29 am	01/04/2017 9:22 am
Steam Ship	Active	Technician Org 1	sagalia@yahoo.com	Support	07/26/2016 11:04 am	01/10/2017 5:08 am
Gir	Active	Technician Org 1	anb@yahoo.co.in	Support	01/10/2017 6:42 am	
< Prev		1			Next >	

## Sorting

- Click a column header to sort items in ascending/descending order.

The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. You can navigate to different pages by clicking 'Next' and 'Prev'.

## Filters

- To search for staff members by department, select the department from the drop-down at the top. The matching results will be fetched automatically.
- The 'Search' field allows to filter staff members by name, role and email address. Enter the parameter fully or partly in the 'Search' field. The staff members matching your parameters will be automatically fetched. To display the list fully, clear the text in the field.

## Column Headers

- Name:** The name of the staff member.
- Status:** Indicates whether the staff member is active or inactive
- Role:** Staff roles determine the permissions they have within the service desk console. Roles are configured by admins in 'Admin Panel' > 'Staff' > 'Roles'.
- Email Address:** Email address of the staff member entered at the time of enrollment.
- Department:** The department to which the staff member is assigned.
- Created:** The date and time the member was enrolled to C1.
- Last Login:** The date and time the member last logged into C1.

Staff details are as per the information entered during staff enrollment.

### 3.1.3 My Profile

Click 'Staff Panel' > 'Dashboard' > 'My Profile'

- 'My Account Profile' allows staff to edit their name, email address, phone numbers, language, time zone and more.



Comodo One > Service Desk > Dashboard > My Profile

### My Account Profile

#### Contact Information

Username: ⓘ  
coyoteewile@yahoo.com

Person Name:  
Coyote

Email Address:  
coyoteewile@yahoo.com

Phone Number:  
 Ext.

Mobile Number:

#### Preferences Profile preferences and settings.

Preferred Language:

Maximum Page Size (per page):

Auto Refresh Rate: ⓘ

Default Signature: ⓘ

Default Paper Size: ⓘ

Show assign tickets ⓘ

#### Signature Optional signature used on outgoing emails. ⓘ

Signature is made available as a choice, on ticket reply

## Contact Information

- **Username:** The login username of the staff member. Cannot be edited
- **Person Name:** Full name of the staff member. Cannot be edited
- **Email Address:** The email address of the staff member. Cannot be edited
- **Phone Number:** Contact desk phone number of the staff member
- **Mobile Number:** Mobile phone number of the staff member

## Preferences

- **Preferred Language:** Select the language which will be used in the interface.
- **Maximum Page Size:** Number of records that should be shown per page. For example, the number of tickets that should be shown per page. If 'system default' is selected, then the settings chosen by the administrator will take effect. See **C1 Service Desk System Settings** for more details.
- **Auto Refresh Rate:** Configure how frequently ticket statuses and dashboards should be refreshed. If disabled, staff can manually refresh by clicking the 'Refresh' button.
- **Default Signature:** Select the signature that should be displayed in ticket response emails to customers. You can create your signature in the text field at the bottom of the page. The 'Department' signature is set by administrators.

**Tip:** Administrators can set a signature messages for responses from different department from the 'Admin Panel', through 'Staff' tab > 'Departments'. See **Departments** for more details. Staff members can also change the signature in tickets screen.

- **Default Paper Size:** Set the page size used when printing tickets to PDF. Staff members can also change the page size in the ticket print dialog screen.
- **Show Assigned Tickets:** If enabled, the staff member's name will not be displayed in tickets assigned to them. The department name will be displayed instead.

### Signature

- Enter the signature that will be displayed in your ticket responses. You can choose this signature by selecting 'My Signature' in the 'Default Signature' drop-down further up this page. You also have the option to leave the signature blank or either select 'My signature' or 'Department signature' when you are actually responding to a ticket.

Click 'Save Changes' for your updates to take effect.

## 3.2 Manage Users and Customers

Click 'Staff Panel' > 'Users'

- **Users** - Individuals who submit tickets to Service Desk. Tickets can be submitted at your customer help portal or via email. Admins have the option to require registration, or to allow unregistered users (guests) to submit tickets.
- **Customers** - An organization, usually a company or business, from whom you will accept tickets. We advise you create customers in the Comodo One interface rather than in Service Desk. Such 'managed' customers will be universally available in all integrated modules (Endpoint Manager, Quote Manager etc).

You can create service contracts with customers, and assign users to a customer to keep track of billable hours on a ticket and more.

<input type="checkbox"/>	NAME ↕	EMAIL ↕	STATUS ↕	CREATED
<input type="checkbox"/>	<a href="#">Ssgalia</a> (2)	ssgalia@yahoo.com	Locked (Pending Activation)	02/12
<input type="checkbox"/>	<a href="#">Mmoxford</a> (30)	mmoxford@yahoo.com	Guest	11/05
<input checked="" type="checkbox"/>	<a href="#">Hertriumph</a> (88)	hertriumph@gmail.com	Guest	10/29
<input type="checkbox"/>	<a href="#">Dyanorat481</a> (86)	dyanorat481@gmail.com	Guest	10/29

Click the links below for more details:

- [Manage Users](#)
- [Manage Customers](#)

### 3.2.1 Manage Users

Click 'Staff Panel' > 'Users' > 'User Directory'

- 'Users' are the individuals who submit tickets to your support team. They can submit tickets via your support center, by email, or direct from an Endpoint Manager device.

Users are added to Service Desk in the following ways:

- Individually add users via the Service Desk interface, or bulk import them from .csv.
- Admins/staff can create a new user at the same time as they create a ticket. The new user is automatically enrolled as a guest.
- Endpoint Manager integration - Users can submit a ticket direct from a managed endpoint by right-clicking on the Endpoint Manager tray icon. The device user is added as a guest.

Guests must be registered if they are to login into your support portal to create / track tickets. Staff can use the following methods to register guests:

- Register them manually.
- Send them an enrollment mail with an account activation link
- Set a temporary password for the user to login to the support portal

See **Register a User** for help with this.

- Note - admins need to enable login abilities in 'Admin Panel' > 'Settings' > 'Access Control Settings'. See **Access Control Settings** if you need help with this.

See the following for more on managing users:

- **The 'User Directory' interface**
- **Add users**
- **Register a user**
- **Send password reset / activation email to the user**
- **Manage account access and user information**
- **Add form fields for user details**
- **Add a user to a customer company**
- **Manage tickets raised by a user**
- **Create a new ticket on behalf of a user**
- **Export users list**
- **Edit a user**
- **Delete a user**

#### The 'User Directory' interface

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'User Directory'

NAME	EMAIL	STATUS	CREATED	UPDATED	CUSTOMER
Maruthicelerio (2)	maruthicelerio@gmail.com	Guest	01/23/2020 3:03 pm	01/23/2020 3:03 pm	
Aliceroadster (3)	aliceroadster@gmail.com	Active (Registered)	11/22/2019 1:04 pm	02/07/2020 9:54 am	Saddle and Pedals
Fiatliena (6)	fiatliena@gmail.com	Guest	09/11/2019 11:36 am	09/11/2019 11:36 am	
Patch Management Agent (0)	agent.patchmanagement@comodo.com	Guest	03/01/2019 9:32 am	03/01/2019 9:34 am	
Monitor Agent (0)	agent.monitor@comodo.com	Guest	03/01/2019 9:32 am	03/01/2019 9:34 am	
John (2)	john@kanchiidlysteamer.com	Guest	02/26/2019 1:11 pm	02/26/2019 1:11 pm	Kanchi Idly Steamer

## Column Headers

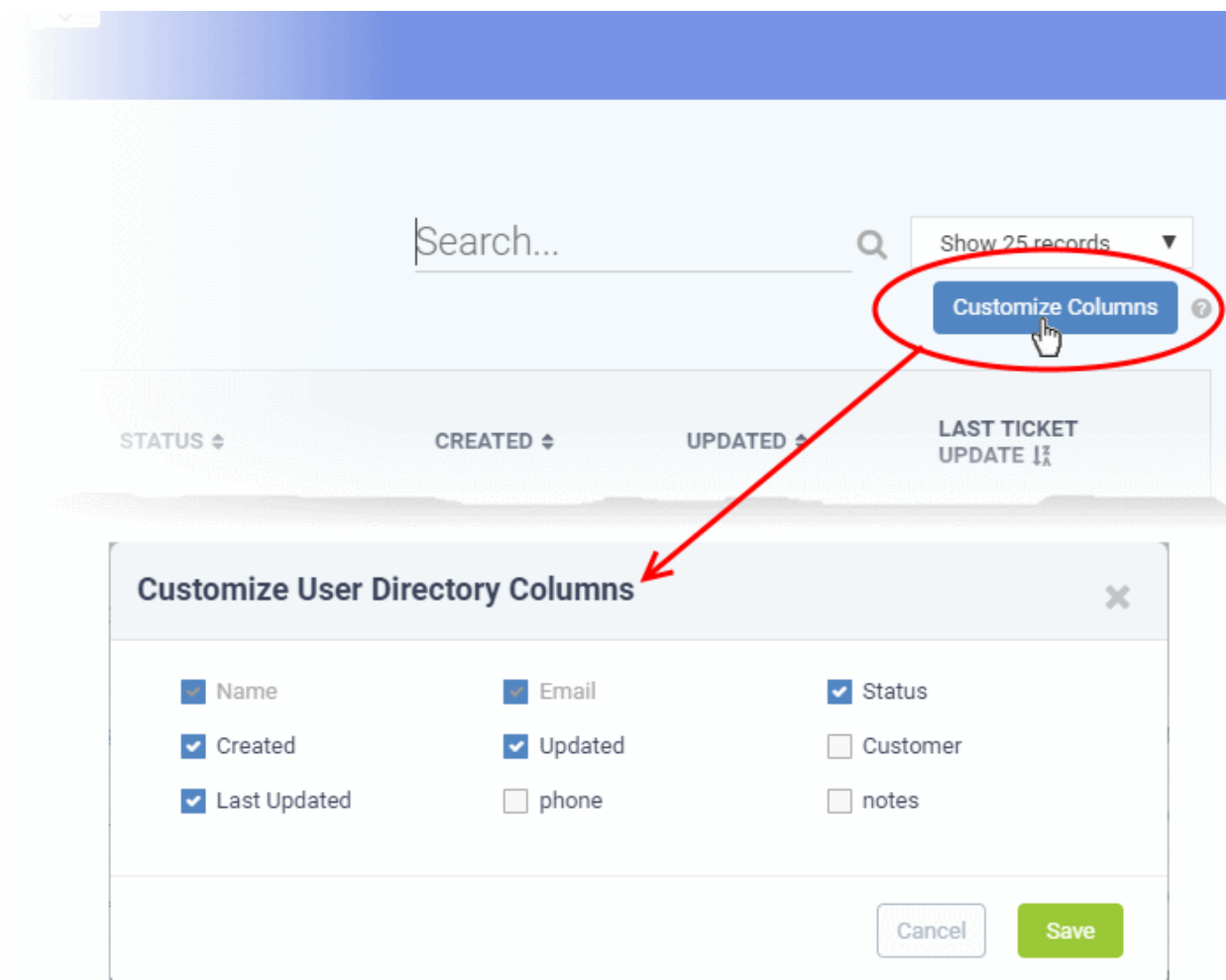
- The user directory shows basic details about each user in six columns. You can add or remove columns by clicking '**Customize Columns**'.

The following is a list of all possible columns:

- Name** - The label of the user. The number beside a username shows the number of tickets they have submitted. Click on the user's name to view all tickets they have created.
- Email** - The email address of the user.
- Status** - Whether the user is a registered or guest user.
- Created** - The date and time on which the user was added to Service Desk.
- Updated** - Date and time of the most recent update to the user's details. You can quickly view/edit user details by placing your mouse cursor over a user name.
- Last Ticket Update** - Date and time of the most recent update to a ticket submitted by the user.
- Customer** - The company to which the user belongs.
- Phone Number** - The contact number of the user as registered with service desk
- Internal Notes** - Comments about the user as entered by the administrators while adding or editing the user, for internal reference.

## Modify table columns

- Click the 'Customize Columns' button to add or remove columns:



- Use the check-boxes to enable or disable columns as required
- Note: Mandatory columns appear gray and cannot be disabled.
- Click 'Save' to add/remove the selected columns to the list.

### Add Users

- You can add users individually or import them from a .csv file.
- Users must be registered in order for them to login Service Desk to create and track tickets.
- You can assign users to customers in the 'Customers' screen ('Staff Panel' > 'Users' > 'Customers').
  - **Add individual users**
  - **Import users from .csv**

#### Add individual users

- Open the 'Staff Panel'
- Click 'Users' > 'User Directory'
- Click the 'Add New User' link:

**User Directory**

+ Add New User Import Export to CSV Delete

NAME EMAIL STATUS

**Create New User**

Email Address: \*

Full Name: \*

Phone Number: Ext:

Internal Notes:

Register with Default Settings  
Default timezone: GMT -5.00 - Eastern Time (US & Canada), Bogota, Lima

Cancel Reset Add User

The fields available in the form shown above are fetched from the built-in contact information. Contact information can be configured in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See **Forms** for more details.

**Email Address:** Enter the email address of the user. After registration, this email address acts as their username to log into your support portal.

**Full Name:** Enter the user's first and last names.

**Phone Number:** Enter the user's contact number.

**Internal Notes:** Type any remarks you feel you need to add about the user.

**Register with Default Settings:** Enable to enroll the user with the default registration method. Disable to register with a different method.

- You can view/change the default registration method at 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** if you need more help with this.
- It may be 'Register users manually', 'Register users with an activation mail', or 'Register with a temporary password'.

Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

Default User Timezone: GMT 5.30 - India, Sri Lanka

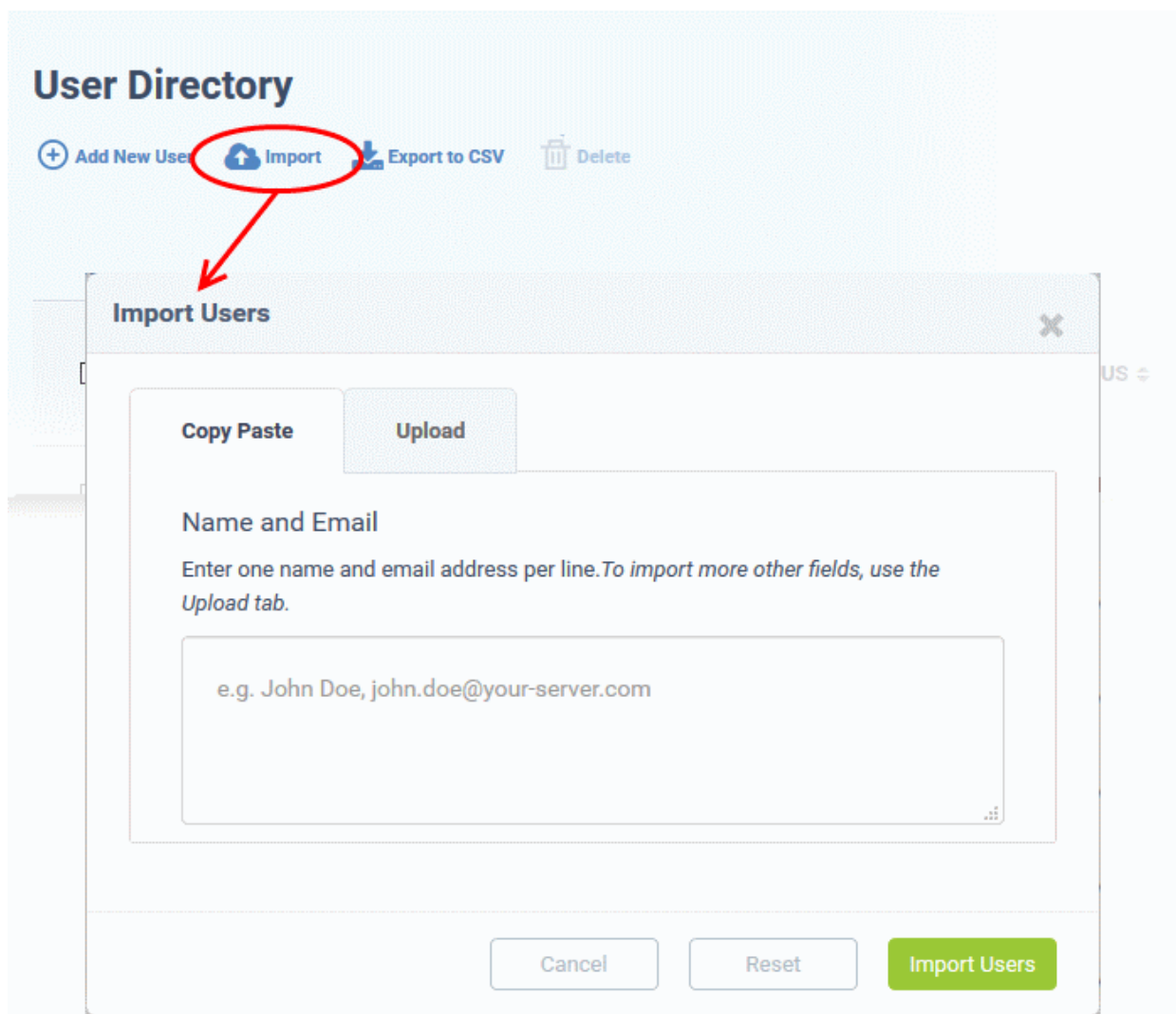
Cancel Reset Add User

- **Register users manually** - The user is initially added a guest and needs to be manually registered afterwards. You can register a guest as follows:
  - Click 'Users' > 'User Directory' > click on the name of the guest > Click the 'Register' button
  - See **Register a user** for more details.
- **Register with activation email** - The user is initially added as a guest and sent a mail which contains a link to register their account.
  - The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.
- **Register with a temporary password** - Create a temporary account password which registers the user immediately.
  - You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.
  - 'Require password change on first login' - Enable to force the user to create a new password after first login (recommended):
- **Default User Timezone** - Select the time zone to which the user belongs from the drop-down
- Click 'Add User'.

The user is added as a guest or registered user depending on the registration method. Once registered, you can manage their account and assign them to a customer company.

### Import users

- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users'
- Click 'Import' at the top



There are two ways to import users:

1. **Copy Paste** - Import users with name and email address only.

- Enter the user's full name, followed by a comma, then their email address.
- Add more users in subsequent lines.
- Click Import Users' to add the users as guests.

2. **Upload** - Import users from a .csv file. More details can be added about a user with this method.

- Create a .csv file of users that you want to import. The file should have the following column headers:  
  
Email,Name,Phone,Notes,"Customer ID (Optional)
- Each line should contain the contact information of a single user
- Save the .csv, then click 'Browse' to upload the file to Service Desk:



### Import Users

**Copy Paste** | **Upload**

**Import a CSV File**

Use the columns shown in the table below. To add more fields, visit the Admin Panel -> Manage -> Forms -> Contact Information page to edit the available fields. Only fields with `variable` defined can be imported.

[Example CSV File](#)

Email	Name	Phone	Notes	Organization ID (Optional)
john.doe@your-server.com	John Doe			

No file selected.

**Tip** : Click 'Example CSV File' to download a sample file.

Depending on your settings, imported users will be added as guests, or their account activation started.

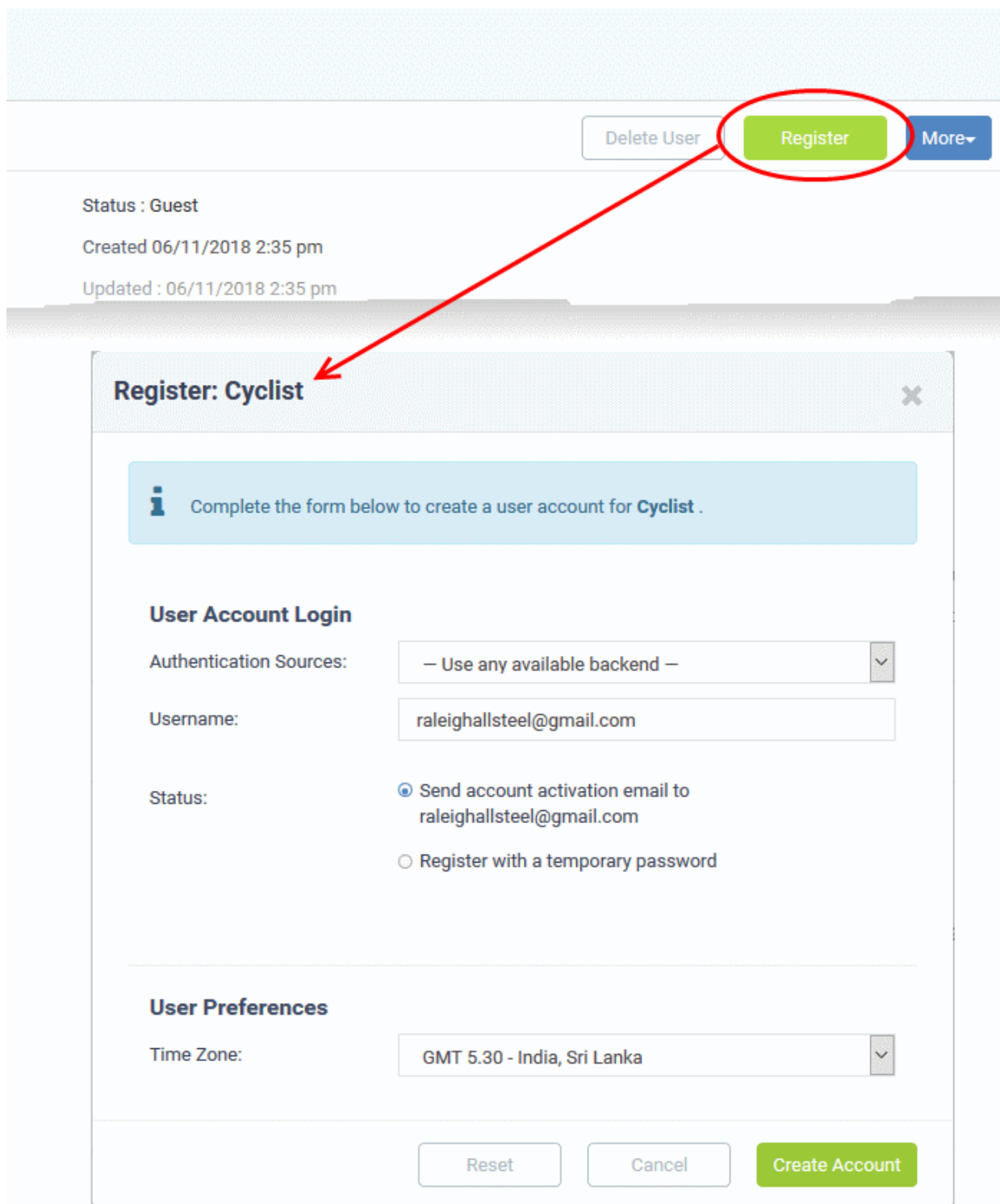
You can configure default registration settings in 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** if you need further help with this.

### Register a user

Staff can register guests in the 'User Details' screen. Users can also register themselves by signing up for an account at your support center page.

### Register a guest user

- Open the 'Staff Panel' (see last link in the left-hand menu)
- Click 'Users'
- Click on the name of the guest user that you want to register
- Click the 'Register' button



- Complete all required fields then click the 'Create Account' button. The account is created with the status 'Locked (Pending Activation)'. The account needs to be activated for the user to access the portal and create support tickets.

There are two ways you can activate an account:

- **Through an activation email**
- **Using a temporary password**

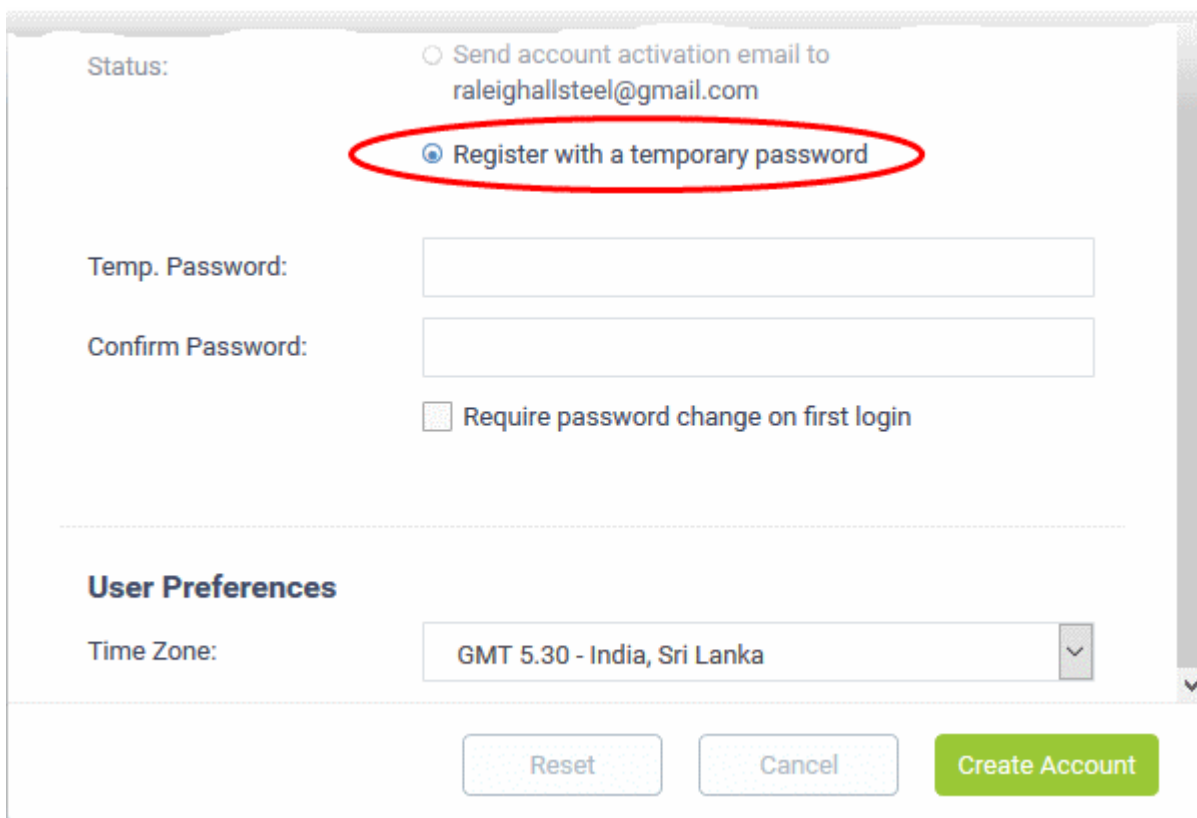
#### Activation via activation email

- Select 'Send account activation email...'
- Select the time zone to which the user belongs

- Click 'Create Account'
- The user's status is changed to 'Locked (Pending)'. An activation email is sent to the user. After clicking the activation link in the mail, the user is asked to create a password. Once activation is complete, their status will change to 'Active (Registered)'.

#### Activation via temporary password

- Select 'Register with a temporary password'



The screenshot shows a registration form with the following elements:

- Status:** Two radio button options:   
•  Send account activation email to raleighallsteel@gmail.com  
•  Register with a temporary password (This option is circled in red in the image)
- Temp. Password:** A text input field.
- Confirm Password:** A text input field.
- Require password change on first login
- User Preferences** section:
  - Time Zone:** A dropdown menu currently showing "GMT 5.30 - India, Sri Lanka".
- At the bottom, there are three buttons: "Reset", "Cancel", and "Create Account" (highlighted in green).

- Create and confirm the temporary password.
- **Require password change on first login** - The user must create a new password right after logging in with the temporary password.
- **Timezone** - Select the time zone to which the user belongs
- Click 'Create Account'

The user is registered. You should communicate the temporary password and the URL of your portal to the user. The user can login with their email address and the temp. password.

## SUPPORT CENTER

Support Ticket System

Elizabeth Ford | Profile | Tickets (0) - Sign Out

Support Center Home
 Open New Ticket
 Tickets (0)

### Manage Your Profile Information

Use the forms below to update the information we have on file for your account

---

#### Contact Information

Email Address:

Full Name:

Phone Number:  Ext:

---

#### Preferences

Time Zone: GMT -5.0 - Eastern Time (US & Canada), Bogota, Lima

---

#### Access Credentials

Current Password:

New Password:

Confirm New Password:

**Tip** - Your Service Desk portal can be accessed at [https://<your\\_subdomain\\_name>.servicedesk.comodo.com](https://<your_subdomain_name>.servicedesk.comodo.com).

### Send password reset / activation email to the user

- Open the staff panel (See the last link on the left)
- Click 'Users' > 'User Directory'
- Click the name of the user whose password you wish to reset/to whom you wish to send an activation mail
- Click the 'More' button on the upper-right of the user details screen:

#### Registered Users

Delete User
Manage Account
More

Status : Active (Registered)

Created 07/15/2016 3:41 pm

Updated : 07/15/2016 3:41 pm

- Send Password Reset Email
- Manage Account Access
- Manage Forms

#### Locked (Pending Activation) Users

Delete User
Manage Account
More

Status : Locked (Pending Activation)

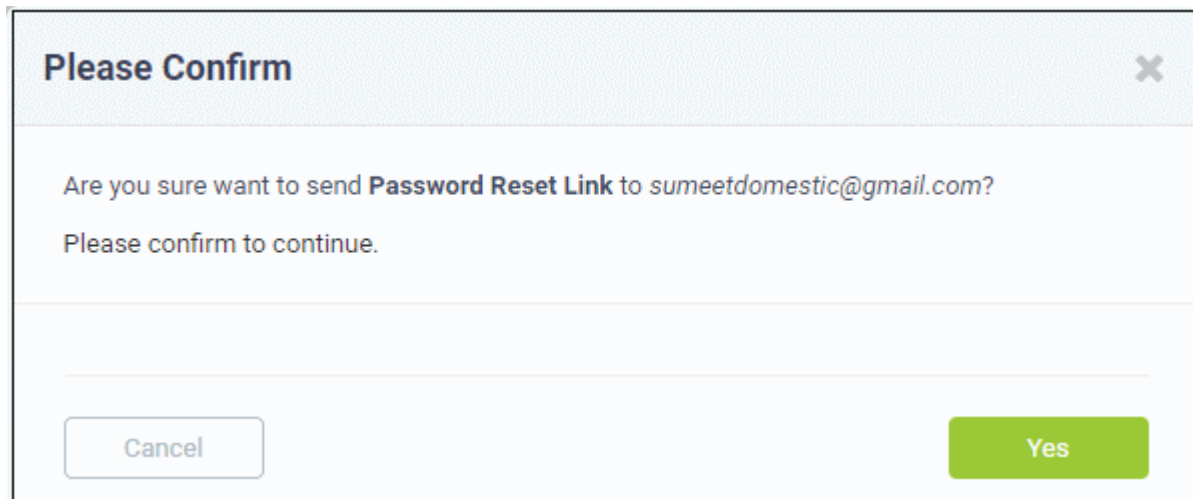
Created 04/25/2016 11:05 am

Updated : 12/07/2016 6:03 pm

- Send Activation Email
- Manage Account Access
- Manage Forms

### Reset password

- Click the 'Send Password Reset Email' link

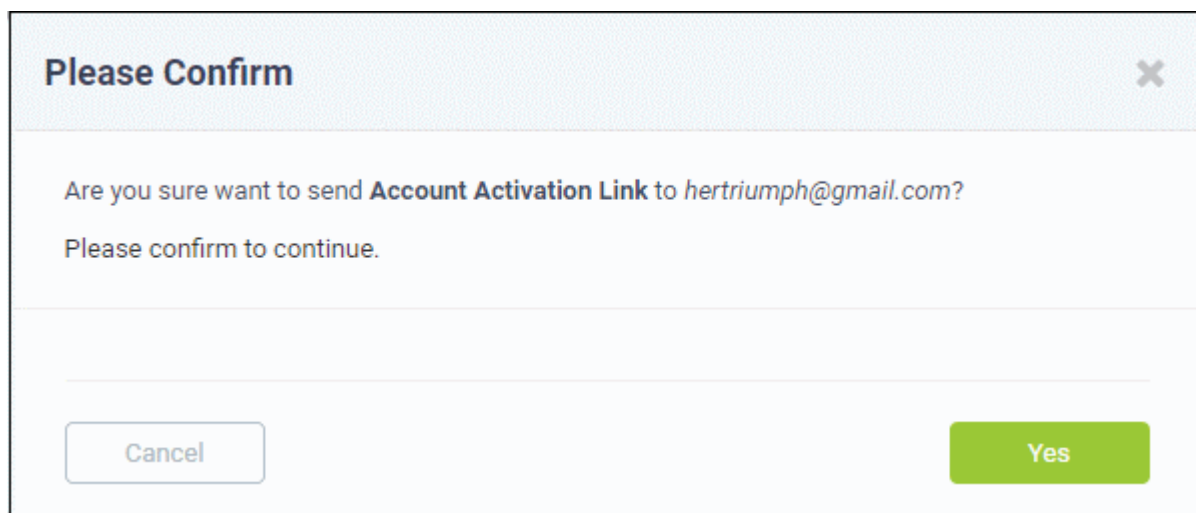


- Click 'Yes' to confirm sending the password reset email to the user.

An email containing the password reset link is sent to the user. The user has to click the link then enter their registered email address in the 'Forgot My Password' page.

#### Activate a user

- Click the 'Send Activation Email' link



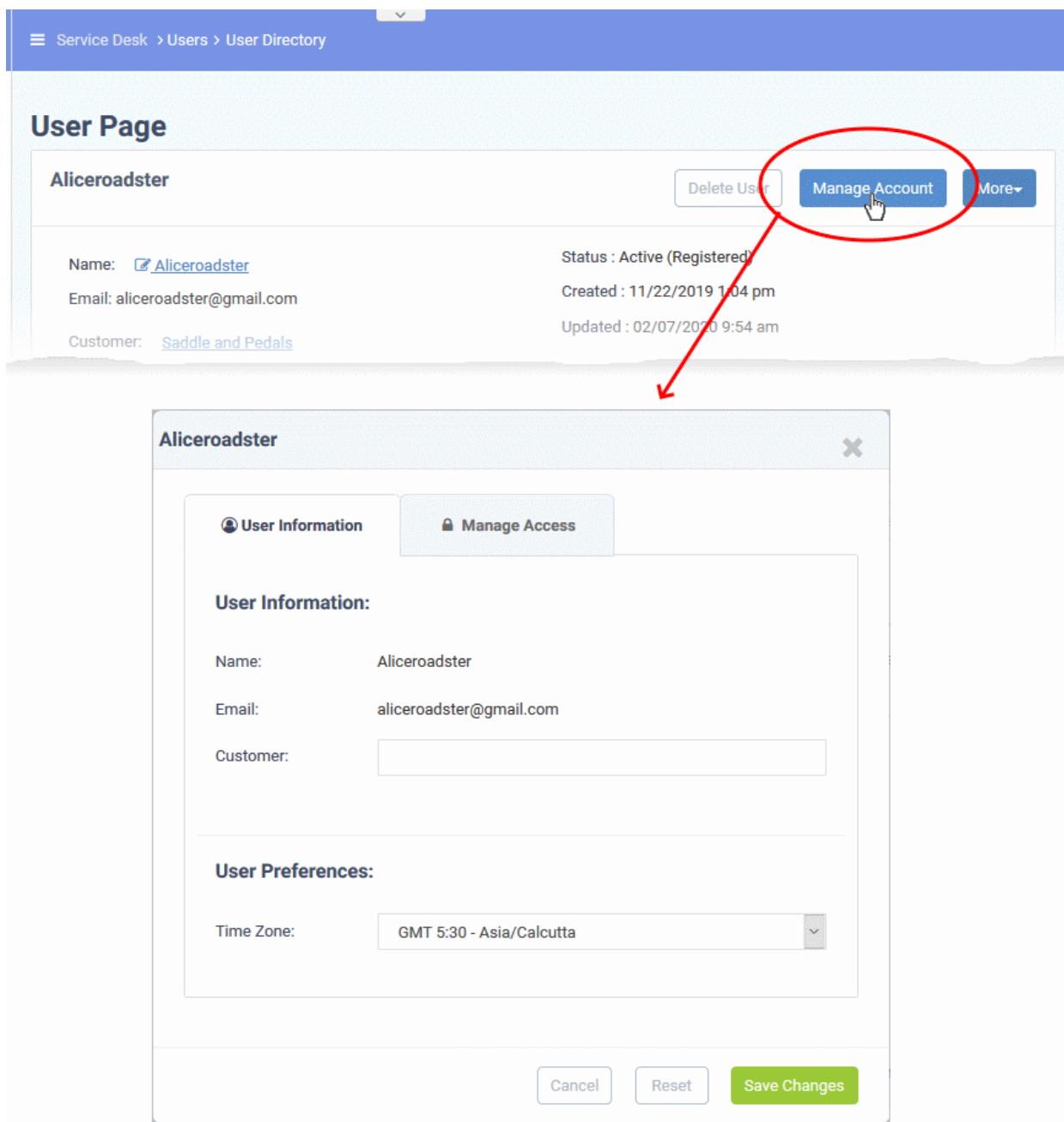
- Click 'Yes' to confirm and send the activation mail.

An activation email is sent to the user. After clicking the activation link, the user can configure their password in the 'Manage Your Profile' page. Once activation is complete their status will change to 'Active (Registered)'.

#### Manage account access and user information

You can lock a user's account and disallow password changes.

- Open the staff panel (see last link on the left)
- Click 'Users' > 'User Directory'
- Click the name of the user to open their 'User Page'
- Click the 'Manage Account' button or click the 'More' button and choose 'Manage Account Access'



**User Information** - change a user's company and time zone.

**Manage Access** tab - configure the user's access to their own account:

The screenshot shows a user management window titled "Aliceroadster" with a close button (X) in the top right corner. The window has two tabs: "User Information" (selected) and "Manage Access".

**Account Access:**

Status: Active (Registered)

Username:

New Password:

Confirm Password:

**Account Flags**

- Administratively Locked
- Password Reset Required
- User Cannot Change Password

At the bottom of the window, there are three buttons: "Cancel", "Reset", and "Save Changes" (highlighted in green).

### Add form fields for user details

You can add additional fields to the form if you want to add more information about users.

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'User Directory'
- Click the name of the user to open their details page
- Click the 'More' button and choose 'Manage Forms'

User Directory

Delete User Manage Account More

Status : Active (Registered)

Created : 11/22/2019 1:04 pm

Updated : 02/07/2020 9:54 am

Send Password Reset Email

Manage Account Access

Manage Forms

### Manage Forms

Sort the forms on this ticket by click and dragging on them. Use the box below the forms list to add new forms to the ticket.

Contact Information

+ Add a new form to this ticket

Reset Cancel Save Changes

- Select the form you want to add from the drop-down.
  - See **Forms** if you haven't created any custom forms
- Click the 'Save Changes' button.
- Staff can update a user's details by clicking their name in the 'User Details' interface.



### Update Samantha ✕

**i** Please note that updates will be reflected system-wide.

**Contact Information:** Please provide all the details


Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

Test:



**Troubleshooting FAQ:**

### Add a user to a customer company

- All customers that you add to Comodo One are automatically imported to Service Desk.
- You can also create 'standalone' customers in Service Desk itself. Standalone customers are specific to Service Desk and are not available in C1 or other modules such as Endpoint Manager.
  - See **Manage Customers** if you want to read more about adding customers to Service Desk.
  - You can add users to an existing customer or to a new customer.

### Add a user to a customer


- Open the staff panel (See the last link on the left)
- Click 'Users' > 'User Directory'
- Click the name of the user to open their 'User Page'
- Click the 'Add Customer' link as shown below:

The screenshot shows the 'User Page' for Alexander Dagwood. The user's name is Alexander Dagwood, and their email is hertriumph@gmail.com. The user's status is 'Locked (Pending)'. The user was created on 04/25/2016 and last updated on 02/25/2019. A red circle highlights the 'Add Customer' link in the 'Customer' field. An arrow points from this link to a modal window titled 'Customer for Alexander Dagwood'. The modal window has a search bar for existing customers and a form to create a new customer. The form fields include Name, Web Domain, Address, Phone, Ext, Website, and Internal Notes. The modal window has 'Cancel', 'Reset', and 'Add Customer' buttons.

- Type the first few letters of an existing customer's name in the search field.
- Select the target company from the suggestions then click 'Continue':

### Customer for Alexander Dagwood

**i** Search existing customers.

  
 **Dithers Construction Company**

---

#### Customer Information

Web Domain:            dithercons.com

Address:

Phone:

Website:

The user is added to the customer.

- Alternatively, complete all form fields to create a new customer then click 'Add Customer':

### Customer for Alexander Dagwood ✕

**i** Search existing customers.

**Create New Customer: Details on customer.**

Name: \*

Web Domain: \*

Address:

Phone:  Ext:

Website:

Internal Notes:

### Manage all tickets from a specific user

You can view and manage user tickets in the user directory area.

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'User Directory'
- Click the name of the user to open their details page:

Service Desk > Users > User Directory

## User Page

**Aliceroadster** Delete User Manage Account More▼

Name: [Aliceroadster](#) Status: Active (Registered)  
 Email: aliceroadster@gmail.com Created: 11/22/2019 1:04 pm  
 Customer: [Saddle and Pedals](#) Updated: 02/07/2020 9:54 am

**User Tickets** Notes

Create New Ticket

TICKET ↕	LAST UPDATE DATE ↕	STATUS ↕	SUBJECT ↕
<a href="#">1232</a>	02/08/2020 10:18 am	Open	What is the cost of an Epson printer
<a href="#">1172</a>	11/29/2019 1:48 pm	Closed	Saddle company discovery (Ip range) resulted by DESKTOP-UK;
<a href="#">1171</a>	11/29/2019 1:48 pm	Closed	Saddle company discovery (Ip range) resulted by DESKTOP-UK;

< 1 >

« Prev Next »

The 'User Tickets' tab lists all tickets created by the user, or created on behalf of the user by a staff member.

**Ticket:** The number assigned to the ticket.

- Click the number to open the ticket details screen. See **Ticket Details** for help to review, respond and take actions on the ticket.

**Last Update Date:** Date and time the ticket was most recently edited.

**Status:** The current standing of the ticket in your workflow. For example open, closed, overdue or paused.

**Subject:** Summary of the issue as entered by the user.

**Assigned To:** The staff member responsible for dealing with the ticket.

- Place your mouse over a ticket to view its details.

### Create a new ticket on behalf of a user

- Staff and admins can create tickets on behalf of users. You might want to do this if, for example, a customer described their issue over a phone-call.
- Staff can also create tickets for issues that they resolved, but which had no ticket. This is useful to record time spent/materials used and bill accordingly.
  - Select 'Work done in the past' to enable this option.
  - Tickets for completed tasks are given a status of 'Closed'.

## Create a ticket for a user

- Open the staff panel
- Click 'Users' > 'User Directory'
- Click on the user for whom you want to create a ticket
- This opens the user details page:

The screenshot displays the 'Service Desk' interface. On the left is a navigation sidebar with options: DASHBOARD, USERS (expanded to show User Directory and Customers), TICKETS, KNOWLEDGEBASE, MY TIME SHEETS, CALENDARS, and PROJECTS. The main content area shows the 'User Directory' with a table of users. A red circle highlights the user 'Aliceroadster' in the table, with a red arrow pointing to the 'User Page' below. The 'User Page' for 'Aliceroadster' shows user details and a 'Create New Ticket' button highlighted with a green circle. Below the button is a table of tickets for this user.

TICKET	LAST UPDATE DATE	STATUS	SUBJECT
<a href="#">1232</a>	02/06/2020 4:31 pm	Open	What is the cost of an Epson printer
<a href="#">1172</a>	11/29/2019 1:48 pm	Closed	Saddle company discovery (Ip range) resulted by DESKTOP-UK7C
<a href="#">1171</a>	11/29/2019 1:48 pm	Closed	Saddle company discovery (Ip range) resulted by DESKTOP-UK7C

- Click 'Create ticket'
- The new ticket form opens:

**New Ticket**

**User Information:**

Search User:

Create new user ?

Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

Ticket Notice:  Send alert to user.

---

**Ticket Information & Options:**

Ticket Source: \*

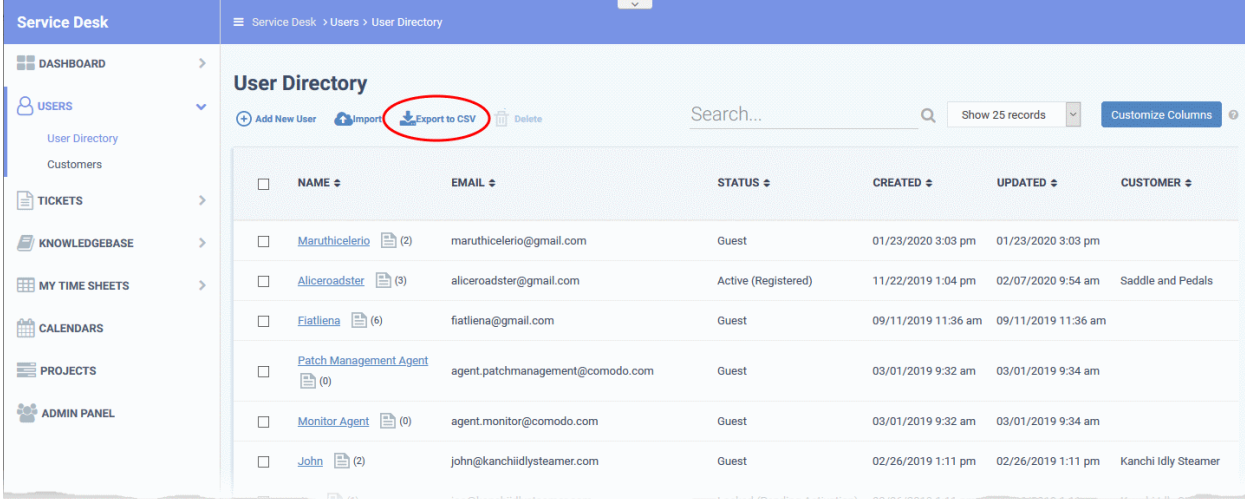
Category: \*

The interface is same as 'New Ticket' created by a staff member from the 'Tickets' interface except the user name in this screen comes pre-selected. See '[Create a new ticket on behalf of a user](#)' in [Manage Tickets](#) for more details.

### Generate a users report

You can generate a report on users as follows:

- Open the staff panel (See the last link on the left)
- Click 'Users' > 'User Directory'
- Click 'Export to CSV':



The screenshot shows the 'User Directory' page in the Comodo One Service Desk. The left sidebar contains navigation options: DASHBOARD, USERS (expanded to show User Directory and Customers), TICKETS, KNOWLEDGEBASE, MY TIME SHEETS, CALENDARS, PROJECTS, and ADMIN PANEL. The main content area is titled 'User Directory' and includes a search bar, a 'Show 25 records' dropdown, and a 'Customize Columns' button. Below these are action buttons: 'Add New User', 'Import', 'Export to CSV' (circled in red), and 'Delete'. A table lists users with columns for NAME, EMAIL, STATUS, CREATED, UPDATED, and CUSTOMER.

<input type="checkbox"/>	NAME	EMAIL	STATUS	CREATED	UPDATED	CUSTOMER
<input type="checkbox"/>	<a href="#">Maruthicelerio</a> (2)	maruthicelerio@gmail.com	Guest	01/23/2020 3:03 pm	01/23/2020 3:03 pm	
<input type="checkbox"/>	<a href="#">Aliceroadster</a> (3)	aliceroadster@gmail.com	Active (Registered)	11/22/2019 1:04 pm	02/07/2020 9:54 am	Saddle and Pedals
<input type="checkbox"/>	<a href="#">Fiatliena</a> (6)	fiatliena@gmail.com	Guest	09/11/2019 11:36 am	09/11/2019 11:36 am	
<input type="checkbox"/>	<a href="#">Patch Management Agent</a> (0)	agent_patchmanagement@comodo.com	Guest	03/01/2019 9:32 am	03/01/2019 9:34 am	
<input type="checkbox"/>	<a href="#">Monitor Agent</a> (0)	agent_monitor@comodo.com	Guest	03/01/2019 9:32 am	03/01/2019 9:34 am	
<input type="checkbox"/>	<a href="#">John</a> (2)	john@kanchiidlysteamer.com	Guest	02/26/2019 1:11 pm	02/26/2019 1:11 pm	Kanchi Idly Steamer

.csv files are best viewed in spreadsheet applications like Microsoft Excel and OpenOffice Calc.

### Edit a user

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'User Directory'
- Click the name of the user to open their details page
- Click the name of the user:



The screenshot shows the 'User Page' for 'Aliceroadster' in the 'User Directory'. The user's name is circled in red, and a red arrow points from it to the 'Update Aliceroadster' modal form. The modal form contains a warning message: 'Please note that updates will be reflected system-wide.' Below this, there is a 'Contact Information' section with fields for 'Email Address: \*' (aliceroadster@gmail.com), 'Full Name: \*' (Aliceroadster), 'Phone Number:' (with an 'Ext:' field), and 'Internal Notes:'. At the bottom of the modal are 'Reset' and 'Update User' buttons.

- Edit user details as required
- Click 'Update User' to save your changes.

### Delete a user

You can remove users at anytime. You have the option to reassign their tickets to other users if required.

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'User Directory'
- Click the name of the user to open their details page
- Click 'Delete User' as shown:

Service Desk > Users > User Directory

## User Page

**Aliceroadster**

[Delete User](#) [Manage Account](#) [More](#)

Name: [Aliceroadster](#) Status: Active (Registered)  
Email: aliceroadster@gmail.com Created: 11/22/2019 1:04 pm  
Customer: [Saddle and Pedals](#) Updated: 02/07/2020 9:54 am

### Delete User: Aliceroadster

**Deleted users and tickets CANNOT be recovered**

**Aliceroadster**  
<aliceroadster@gmail.com>

**Contact Information**  
Phone Number:  
Internal Notes:

Delete **3 tickets** and any associated attachments and data.

[No Cancel](#) [Yes, Delete User](#)

- You cannot remove users that still have tickets associated with them. You can delete their tickets OR reassign them to other users.
  - Click the '<NN> tickets' link to reassign their tickets to a different user. You can reassign some or all of their tickets to others.
  - Enable the 'Delete...' checkbox to delete all tickets still associated with the user.
- Click 'Yes, Delete User' when ready.

You cannot restore a deleted user. If required, you can re-create the user by creating a new user account.

### Remove multiple users at once

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'User Directory'
- Select the users to be removed
- Click the 'Delete' button at the top.

The screenshot shows the 'User Directory' page in the Comodo One Service Desk. The breadcrumb navigation is 'Service Desk > Users > User Directory'. The page title is 'User Directory'. There are buttons for 'Add New User', 'Import', 'Export to CSV', and 'Delete'. A search bar is on the right. Below the buttons is a table with columns: NAME, EMAIL, STATUS, and CREATED. The table contains several rows of user information. A red circle highlights the 'Delete' button, and a red arrow points from it to a 'Please Confirm' dialog box. The dialog box contains the following text:

**Please Confirm**

Are you sure you want to DELETE selected user(s)?

**Deleted user(s) CANNOT be recovered, including any associated attachments.**

Delete all tickets and any associated attachments and data.

Buttons: No, Cancel | Yes, Do it!

- **Delete all tickets and any associated attachments and data** - Enable this to confirm removal of any tickets associated with the users
- Click 'Yes, Do it!' to confirm the deletion.

### 3.2.2 Manage Customers

Click 'Staff Panel' > 'Users' > 'Customers'

- A customer is an organization, usually a company or business from whom you will accept tickets. 'Users' are the people who actually submit the tickets.
- Customers added to your Comodo One account are automatically imported to Service Desk. Such 'Managed' customers are universally available in all integrated modules (Endpoint Manager, Quote Manager etc).
  - Login to C1 > Click 'Management' > 'Customer' to add and manage customers in the portal.
  - See <https://help.comodo.com/topic-289-1-716-8483-Manage-Companies.html> for help to add customers in C1.
- Alternatively, you can create 'standalone' (aka 'unmanaged') customers in Service Desk. Customers added via Service Desk are not available in C1 or other modules. You can add such standalone customers to C1 later to convert them to fully managed.

See the following for more help:

- **The customers interface**
- **Add a customer**
- **Manage customer details**
- **Manage users of a customer**
- **Manage forms**
- **Manage tickets**
- **Manage notes**
- **View customer contracts**
- **Remove unmanaged customers**
- **Export customer list**

### The customers interface

- Open the staff panel (See the last link on the left)
- Click 'Users' > 'Customers'

The screenshot shows the 'Service Desk' interface with the 'Customers' page selected. The left sidebar has 'USERS' and 'Customers' circled in red. The main content area shows a table of customers with the following data:

CUSTOMER ID	NAME	USERS	CREATED	UPDATED
1	<a href="#">frontfork</a>	1	04/30/2018 1:55 pm	
2	<a href="#">Saddle and Pedals</a>	2	07/31/2018 10:41 am	
3	<a href="#">Fork Springs Regional Transports</a>	3	09/18/2018 4:47 pm	10/01/2018 12:29 pm
4	<a href="#">Kanchi Idly Steamer</a>	6	02/25/2019 5:11 pm	02/26/2019 10:17 am
5	<a href="#">The Orpanage</a>	2	02/17/2020 12:55 pm	02/17/2020 12:55 pm

- **Customer ID** - The identity number assigned to the customer by Service Desk.
- **Name** - The organization or company that is your customer.
  - Click the name of a customer to open their details interface. The customer details interface lets you:
    - **Manage customer details**
    - **Add and manage users of the customer**
    - **Manage forms for the customer**
    - **View and manage tickets**
    - **Manage notes**
    - **View customer contracts**
- **Users** - Number of Service Desk users belonging to the customer company.
- **Created** - The date on which the customer was added to Service Desk.
- **Updated** - Date and time at which the customer details were most recently updated.

Click a column header to sort items in ascending/descending order

The 'Search' field lets you filter customers by name, address, phone number and website. Simply start typing your search term to see matching customers.

## Add a Customer

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'Customers'
- Click 'Add New Customer' at the top

The screenshot shows the 'Customers' management page in the Service Desk. At the top, there is a breadcrumb trail: 'Service Desk > Users > Customers'. Below this, the 'Customers' section header is visible. A red circle highlights the '+ Add New Customer' button, with a red arrow pointing to the 'Add New Customer' modal window that is open in the foreground.

The modal window, titled 'Add New Customer', contains the following form fields:

- Name:** \* (required)
- Web Domain:** \* (required)
- Address:**
- Phone:** and **Ext:** (extension)
- Website:**
- Internal Notes:**

At the bottom of the modal, there are three buttons: 'Cancel', 'Reset', and 'Add Customer' (highlighted in green).

- **Name:** Enter a label for the customer company.
- **Web Domain:** Enter the domain that the customer uses for employee email. For example, enter 'example.com' if the customer's employees have email addresses like alice@example.com.

- Service Desk creates two new users with email addresses in this domain - 'Monitor Agent' and 'Patch Management Agent'. These accounts are used to receive automatically generated tickets from Endpoint Manager.
- They also assign to the customer any guests who submit tickets from an email at their domain.
- **Address and Phone:** Contact details of the company.
- **Website:** URL of the customer's public-facing / marketing website.
- **Internal Notes:** Enter any comments about the customer.

**Note:** You can change the field labels of this form in 'Admin Panel' > 'Manage' > 'Forms' > 'Customer Information'. See **Forms** for more information.

- Click 'Add Customer'
- The customer is added and their details interface opens:

## Military Road Cyclists

**Military Road Cyclists**
More ▾

---

Name: [Military Road Cyclists](#)
Created: 02/18/2020 9:52 am

Account Manager:
Updated: 02/18/2020 9:52 am

---

Users
Tickets
Notes
Contracts

+ Add User
+ Import
🗑 Remove

<input type="checkbox"/>	NAME ↕	STATUS ↕	EMAIL ↕	CREATED ↕	UPDATED ↕
<input type="checkbox"/>	<a href="#">Monitor Agent</a> 📄 (0)	Guest	agent.monitor@militaryroadcyclists.com	02/18/2020 9:52 am	02/18/2020 9:52 am
<input type="checkbox"/>	<a href="#">Patch Management Agent</a> 📄 (0)	Guest	agent.patchmanagement@militaryroadcyclists.com	02/18/2020 9:52 am	02/18/2020 9:52 am

< Prev
1
Next >

Two new 'users' and email ids are automatically created - the Monitor Agent and the Patch Agent. The emails of these two agents are used to collect tickets which are auto-submitted to service desk by other C1 modules.

Next: **Manage customer details.**

### Notes:

- Customers added via this interface are available in Service Desk alone and are not listed in the C1 interface.
- Staff can assign users to these customers and can access the customers' tickets and contracts.
- Staff members can also add customers from the 'User Directory' interface (See the explanation under '**Add a user to a customer company**' in the previous section **Manage Users** to learn about this).

## Manage Customer Details

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of the customer to view their details.

The details interface lets you view and update both managed and non-managed customers.

- **'Managed' customers** - Those added through the Comodo One console. Managed customers are available for selection in all Comodo One modules, including Endpoint Manager and CRM.
- **'Non-Managed' customers** - Those added via the Service Desk interface. These customers are only available in Service Desk.

You can also configure:

- The default email account for outgoing mails sent on behalf of the customer.
- The account manager responsible for the customer
- Ticket auto-assignment rules and more.

#### **View and manage details of a customer**

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'Customers'
- Click the name of the customer company to open its details interface.
- Click the name of the company in the details interface to open its configuration interface

The screenshot shows the 'Service Desk > Users > Customers' navigation path. The main heading is 'Kanchi Idly Steamer'. Below it, there is a 'More' button. The 'Name' field is circled in red, and a red arrow points from it to the 'Fields' tab in the configuration interface below. The configuration interface has two tabs: 'Fields' and 'Settings'. The 'Fields' tab is active, showing 'Customer Information: Details on customer.' with the following fields: Name: \* (Kanchi Idly Steamer), Web Domain: \* (kanchiidlysteamer.com), Address: (Periyar Nagar), Phone: (0987654321) and Ext: ( ), Website: (www.kanchiidlysteamer.com), and Internal Notes: ( ). At the bottom, there are 'Cancel', 'Reset', and 'Update Customer' buttons.

The configuration interface has two tabs:

- **Fields** - View and edit general details of the customer.
- **Settings** - View and edit advanced details like outgoing email addresses, account administrator, auto-assignment rules and so on.

#### The 'Fields' tab

- The fields tab shows general details of the customer and allows you to edit them as required.
- If required, you can create custom form fields for the customer. Click 'Admin Panel' > 'Manage' > 'Forms' > 'Customer Information' to add new fields or 'Add Custom Form' to create a new form.



**Kanchi Idly Steamer**

**Fields** | **Settings**

**Customer Information: Details on customer.**

Name: \* Kanchi Idly Steamer

Web Domain: \* kanchiidlysteamer.com

Address: Periyar Nagar

Phone: 0987654321 Ext:

Website: www.kanchiidlysteamer.com

Internal Notes:

Cancel Reset Update Customer

Edit the details as required.

**Name** - The company added as customer to service desk. You cannot edit the name from here.

**Web Domain** - The domain used for email by your customer.

- Service Desk creates two new users - 'Monitor Agent' and 'Patch Management Agent' - with email addresses at this domain. These accounts are used to receive automatically generated tickets from Endpoint Manager.
- They are also used to assign to your customer any guests who submit tickets from an email address at this domain.
- You can change the domain name if required

**Address and Phone** - The contact details of the customer. You can change these details as required.

**Website** - The URL of the company's website. You can change the website details if required.

**Internal Notes** - Enter any comments about the customer.

**Type** - Indicates whether the customer is 'managed' (added through C1) or 'non-managed' (stand-alone customer added through Service Desk)

### The 'Settings' tab

**Available Outgoing Email Address** - Shows all addresses added which are capable of sending outgoing mail.

- You can configure these email addresses in 'Admin Panel' > 'Emails' > 'Emails'. See [Email Addresses](#) if you want more help with this.

**Default Outgoing Email Address** - Select the address you want to use to send emails (ticket responses) to users who belong to this customer.

**Account Manager** - The drop-down shows all admins and staff added to service desk. Choose the account manager responsible for the customer.

**Auto Assignment** - Choose whether or not tickets created by users of the customer are automatically assigned to the account manager.

**Primary Contacts** - Select the person with whom your staff can liaise on issues.

**Automated Collaborations** - Collaborators receive copies of all communications between staff and users during the progress of a ticket. Collaborators can respond to communications.

- Primary Contacts** - Add collaborators from the contact list.
- Customer Members** - Add collaborators from users who belong to the customer.

#### Main Domain

- Auto Add Members From:** Guests are auto-assigned to a customer if the email address they used to submit a ticket matches any domain in this field.

Click 'Update Customer' for your settings to take effect.

## Manage users of a customer

Click 'Staff Panel' > 'Users' > 'Customers' > click on a customer name > Open the 'Users' tab

- The users tab lets you add or remove users for customers

### Add users to a customer

There are two places you can add users to a customer:

#### 1. The 'User Directory' area

- Click 'Staff Panel' > 'Users' > 'User Directory'
- Click on a user name to open their details
- Click 'Add Customer'
- See '[Add a user to a customer company](#)' in the previous section **Manage Users** to learn about this

#### 2. The 'Customers' area

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click on a customer name
- Open the 'Users' tab and click 'Add User'
- Alternatively, click 'Import' to import users from a .csv file

The rest of this section explains option 2 above in more detail.

- [Manually add users to a customer](#)
- [Import users from a list](#)
- [Remove users from a customer](#)

### Manually add users to a customer

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Users' tab to view a list of users belonging to the customer
- Click the 'Add User' link:

The screenshot shows the 'Kanchi Idly Steamer' account page in the Service Desk. The 'Users' tab is selected and circled in red. Below the tabs, there are buttons for '+ Add User', '+ Import', and 'Remove'. A red arrow points from the '+ Add User' button to the 'Add User' modal form. The form contains the following fields:

- Email Address: \*
- Full Name: \*
- Phone Number: (with an 'Ext:' field)
- Internal Notes: (text area)
- Register with Default Settings
- Default timezone: GMT 5:30 - Asia/Calcutta

At the bottom of the form are 'Cancel', 'Reset', and 'Add User' buttons.

- *Tip.* You can configure the fields in the form above in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See **Forms** if you want more help with this.

Complete the details of the new user.

- **Email Address:** Contact mail address. This doubles-up as their username to login to your support portal.
- **Full Name:** First name and last name of the user.
- **Phone Number:** The contact number of the user.
- **Internal Notes:** Enter any comments about the user.
- **Register with Default Settings** - Select whether the registration should use the settings in 'Admin Panel' > 'Settings' > 'Users'
  - Admins can configure how new user accounts are to be registered from the Admin Panel > Settings >

Users interface. See **User Registration Settings** for more details.

- Leave selected if you want to use the default settings.
- Deselect to choose a different registration method.

The screenshot shows a registration settings form. At the top, there is a checkbox labeled "Register with Default Settings" which is currently unchecked. Below this, there is a light blue highlighted area containing three radio button options: "Register users manually" (which is selected), "Register with activation email", and "Register with a temporary password". At the bottom right of the form, there are three buttons: "Cancel", "Reset", and "Add User".

- **Register users manually** - The user is initially added a guest and needs to be manually registered afterwards. You can register a guest as follows:
  - Click 'Users' > 'User Directory' > click on the name of the guest > Click the 'Register' button
  - See **Register a user** for more details.
- **Register with activation email** - The user is initially added as a guest and sent a mail which contains a link to register their account.
  - The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.
- **Register with a temporary password** - Create a temporary account password which registers the user immediately.
 

You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.

  - *'Require password change on first login'* - Enable to force the user to create a new password after first login (recommended).
- **Default User Timezone** - Select the time zone to which the user belongs from the drop-down

Click 'Add User'. The user will be added to service desk and assigned to the customer company. Repeat the process to add more users

### Import users of a customer company

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Users' tab to view a list of users belonging to the customer
- Click the 'Import' link at the top

Service Desk > Users > Customers

## Kanchi Idly Steamer

Kanchi Idly Steamer

Name: [Kanchi Idly Steamer](#)

Account Manager: frontfork

**Users** Tickets Notes Contracts

+ Add User + Import Remove

NAME	STATUS	EMAIL
<a href="#">Monitor Agent</a> (0)	Guest	agent.monitor@kanchiidly

### Import Users

Copy Paste Upload

Name and Email

Enter one name and email address per line. To import more other fields, use the Upload tab.

e.g. John Doe, john.doe@your-server.com

Cancel Reset Import Users

There are two ways to import users:

1. **Copy Paste** - Import users with name and email address only.

- Enter the user's full name, followed by a comma, then their email address.
- Add more users in subsequent lines.
- Click 'Import Users' to add the users as guests.

2. **Upload** - Import users from a .csv file. More details can be added about a user with this method.

- Create a .csv file of users that you want to import. The file should have the following column headers:  
Email,Name,Phone,Notes,Customer ID

Note: Customer ID is mandatory for importing the user to the respective company. You can view

the ID for the customer at 'Staff Panel' > 'Users' > 'Customers'.

- Each line should contain the contact information of a single user
- Save the .csv, then click 'Choose file' to upload the file to Service Desk:

**Import Users**
✕

Copy Paste

Upload

**Import a CSV File**

*Use the columns shown in the table below. To add more fields, visit the Admin Panel -> Manage -> Forms -> Contact Information page to edit the available fields. Only fields with `variable` defined can be imported.*

[📄 Example CSV File](#)

Email	Name	Phone	Notes	Organization ID (Optional)
john.doe@your-server.com	John Doe			

Choose file No file chosen

Cancel

Reset

Import Users

**Tip** : Click 'Example CSV File' to download a sample file.

- Click 'Import Users'. The users will be added to Service Desk and assigned to the customer company.
- Depending on your settings, imported users will be added as guests, or their account activation started.
  - You can configure default registration settings in 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** if you need further help with this.
- You can add more fields to the upload tab in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See **Forms** for more help with this.

#### Remove users from a company

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Users' tab to view a list of users belonging to the customer
- Select the users you want to delete and click the 'Remove' button

The screenshot shows the 'Users' management interface. The 'Users' tab is selected and circled in red. Below it are buttons for 'Add User', 'Import', and 'Remove', with 'Remove' also circled in red. A table lists users: Monitor Agent, Patch Management Agent, Dennis, John, and Joe. The 'Dennis' and 'John' rows are selected, and their checkboxes are circled in red. A red arrow points from the 'Remove' button to a 'Please Confirm' dialog box. The dialog box asks: 'Are you sure want to REMOVE selected user from Kanchi Idly Steamer customer?' and has 'No, Cancel' and 'Yes, Do it!' buttons.

- Click 'Yes, Do it' in the confirmation dialog to remove the user.

The user will not be able to login to the web portal and generate tickets.

### Manage forms

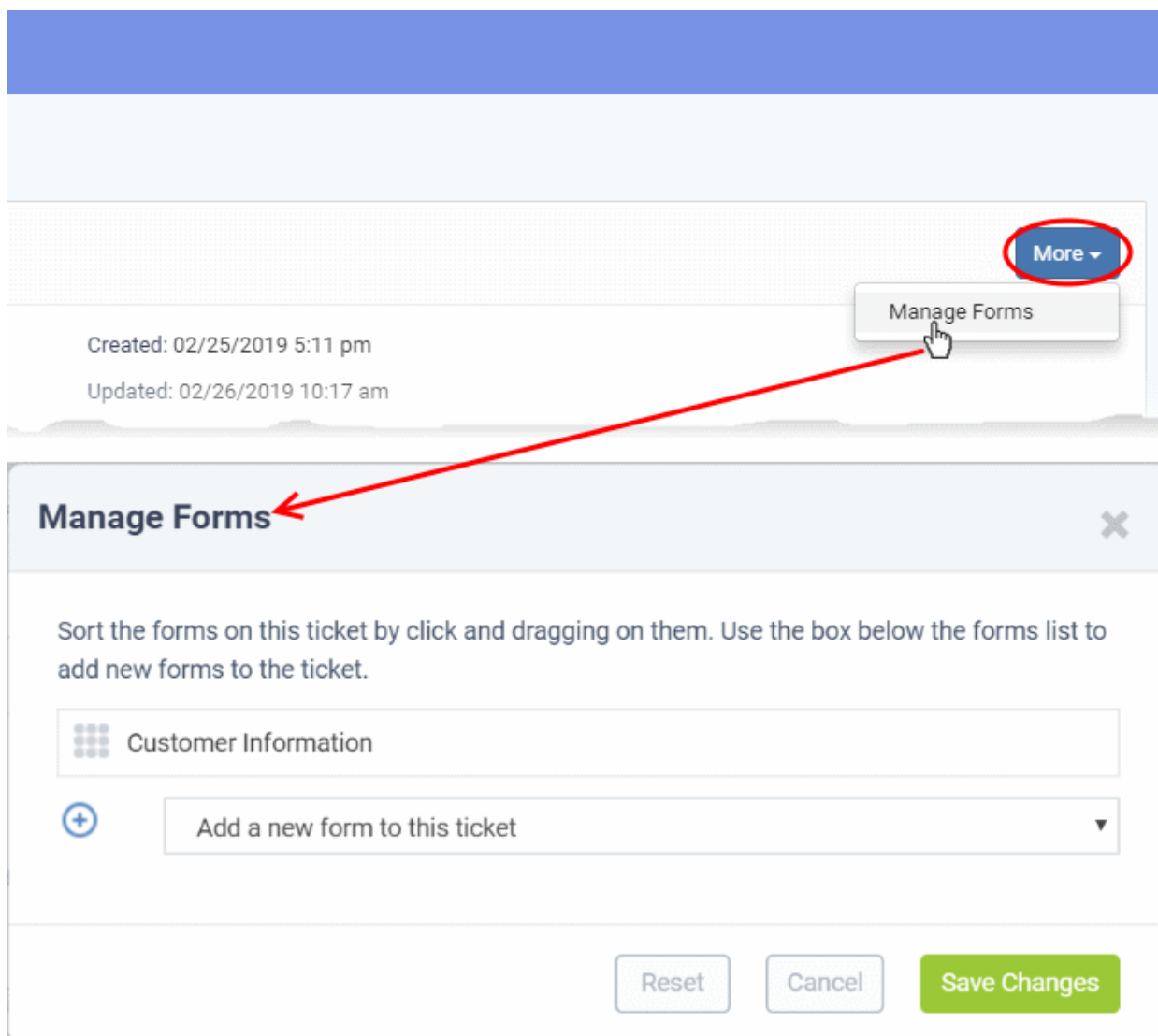
You can add extra fields to a customer's detail page so you can include more information about them.

- **Prerequisite** - You must first create a custom form in 'Admin Panel' > 'Manage' > 'Forms' > 'Add New Custom Form'.
- A 'form' can be as little as a single field, or can have multiple fields.
- For example, you might create a form for a customer's Tax ID number, or a larger form for each of the company's 'C' level executives.
- Once created, you can add these additional forms to any customer detail page.

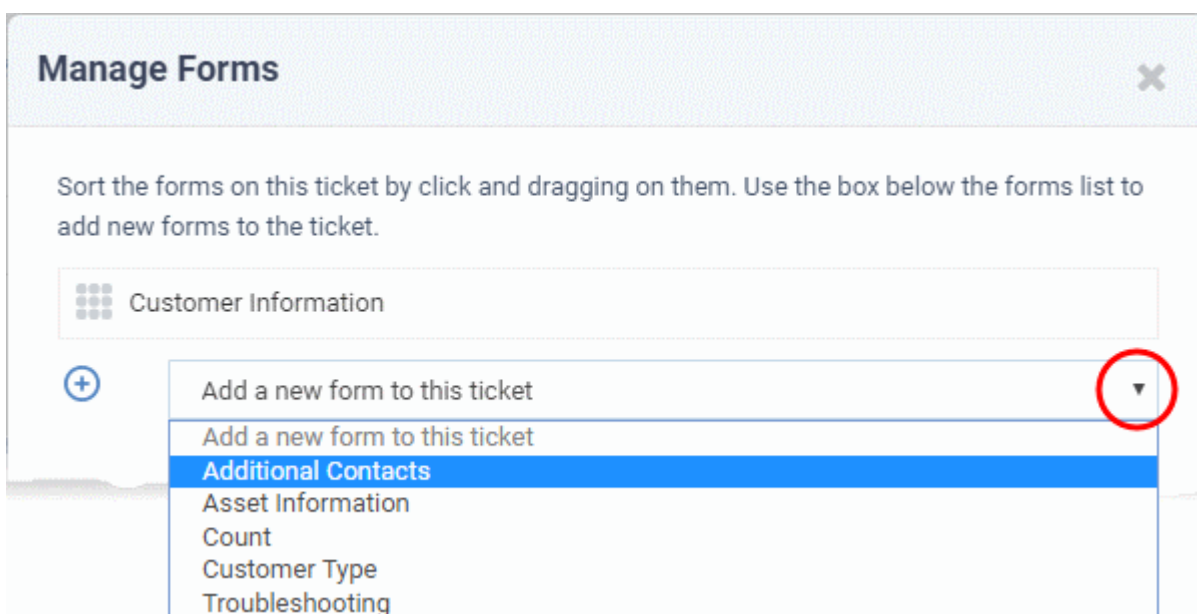
#### Add additional details about a customer

- Click 'Users' > 'Customers'
- Click the name of a customer to open its details interface
- Click the 'More' button at top-right and choose 'Manage Forms':





- The drop-down contains all forms created in 'Admin Panel' > 'Manage' > 'Forms'
- Select the form you want to add from the drop-down.



- Repeat the process to add more forms

- Drag-and-drop the forms to choose the order in which they appear on the details page.
- Click the 'Save Changes' button.

Admins and staff can complete the additional fields at any time:

- Click 'Users' > 'Customers'
- Click the name of the customer to open its details page
- The new forms appear as configured:

### Kanchi Idly Steamer

Fields  Settings

**Customer Information:** Details on customer.

Name: \* Kanchi Idly Steamer

Web Domain: \*

Address:

Phone:  Ext:

Website:

Internal Notes:

**Additional Contacts :**

Overseas contact number:

Man power Agent Contact:

Type: Non-managed

- Complete the form and click the 'Update Customer' button at the bottom.

## Manage tickets raised by users of a customer company

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Tickets' tab to view a list of tickets generated by users belonging to the customer

The screenshot shows the 'Kanchi Idly Steamer' customer details page. At the top, there is a breadcrumb trail: Service Desk > Users > Customers. Below this, the customer name 'Kanchi Idly Steamer' is displayed with a 'More' button. The page includes fields for Name (Kanchi Idly Steamer), Account Manager (frontfork), Created (02/25/2019 5:11 pm), and Updated (02/26/2019 10:17 am). Below the details, there are four tabs: Users, Tickets (highlighted with a red circle), Notes, and Contracts. The 'Tickets' tab displays a table with the following data:

TICKET	LAST UPDATE DATE	STATUS	SUBJECT	ASSIGNED TO
<a href="#">1112</a>	02/26/2019 3:13 pm	Open	System restarts frequently	frontfork
<a href="#">1111</a>	02/26/2019 1:37 pm	Open	Quote for cooling pad	frontfork

At the bottom of the table, there are navigation controls: « Prev, 1, and Next ».

### Column Headers

- **Ticket:** The number assigned to the ticket.
  - Click the ticket number to open the 'Ticket Details' screen. See '**Ticket Details**' for more details.
  - Place your mouse over a ticket number to see a preview of the ticket
- **Last Update Date:** The date and time of the most recent activity on the ticket.
- **Status:** Whether the ticket is open, closed, overdue or paused.
- **Subject:** An outline of the issue. This is entered in the 'Issue Summary' field in the web portal by the user.
- **Assigned To:** The name of the staff member to whom the ticket is allotted.

### Manage notes

The 'Notes' feature lets you add general comments about a customer. Notes are internal, so they are only visible to staff members.

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Notes' tab

Service Desk > Users > Customers

## Kanchi Idly Steamer

**Kanchi Idly Steamer** More ▾

Name: [Kanchi Idly Steamer](#) Created: 02/25/2019 5:11 pm  
Account Manager: frontfork Updated: 02/26/2019 10:17 am

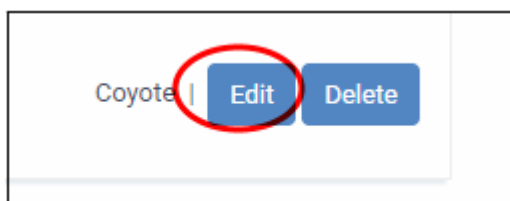
Users Tickets **Notes** Contracts

02/26/2019 3:24 pm  
The customer has many users to be enrolled frontfork | Edit Delete

02/26/2019 3:25 pm  
The customer expanded their network frontfork | Edit Delete

[+ Click to create a new note](#)

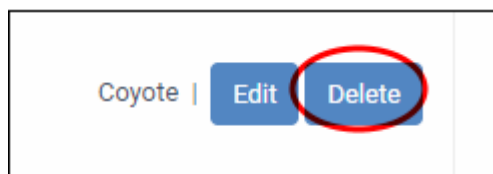
- Click the 'Click to create a new note' link, enter the required content and then click the 'Create' button at the bottom to add a new note.
- To view / edit a note, click the 'Edit' button at the far end of the note.



- Click the 'Save' button to save an edited note. Click 'Undo' to revert your changes.



- To delete a note, click 'Delete' at the far end of the note.



## View customer contracts

The 'Customer Details' interface lets you view contracts associated with a customer.

- You can create and manage contracts in 'Admin Panel' > 'Finance' > 'Contracts'

### Service Contract

A service contract between you and a customer can include:

- A weekly/bi-weekly/monthly/yearly fee
- Pre-paid hours for different service types ('On-site', 'Remote' and 'Telephone'). These hours are 'included in the fee' a not charged to the customer.
- A charging plan for time that exceeds the pre-paid hours (optional). The charging plan includes:
  - Variable rates for specific types of service (optional).
  - A 'default' hourly rate which is applied to sessions not covered by a variable rate.
  - Charging plans are only applied after any pre-paid hours have been used up.
  - If no custom charging plan is applied then the default plan is applied. The default charging plan can be managed in '**Admin Panel**' > '**Manage**' > '**Charging**'.
  - For more details on the service contracts, see **Manage Contracts**.

- Click "Staff Panel" > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Contracts' tab

The screenshot shows the 'Service Desk > Users > Customers' navigation path. The main header is 'Kanchi Idly Steamer' with a 'More' button. Below this, the 'Name' is 'Kanchi Idly Steamer' and 'Account Manager' is 'frontfork'. The 'Created' date is '02/25/2019 5:11 pm' and 'Updated' is '02/26/2019 10:17 am'. There are four tabs: 'Users', 'Tickets', 'Notes', and 'Contracts'. The 'Contracts' tab is active, showing a table with columns: 'CONTRACT NAME', 'TICKETS COUNT', 'PREPAID HOURS', 'RELATED BILLABLE HOURS (SUM)', and 'REMAIN BILLABLE HOURS (SUM)'. The table contains two rows: 'Small Scale Food Industries 2019-2020' and 'Small Scale Food Industries 2020-2021'. The second row is selected. A 'Remove' button is visible at the top left of the table area. The page shows 'Showing 1 - 2 of 2' items.

CONTRACT NAME	TICKETS COUNT	PREPAID HOURS	RELATED BILLABLE HOURS (SUM)	REMAIN BILLABLE HOURS (SUM)
<input type="checkbox"/> Small Scale Food Industries 2019-2020	0	60	0	60
<input checked="" type="checkbox"/> Small Scale Food Industries 2020-2021	0	120	0	120

- Contract Name:** The label of the contract created for the customer.

- **Ticket Count:** Number of tickets associated with the customer.
- **Pre-paid Hours:** The number of hours covered by the weekly / bi-weekly / monthly / yearly fixed fee mentioned in the contract.
- **Related Billable Hours (Sum):** Total chargeable hours spent by staff working on tickets for the customer on all three service types (Onsite, Remote and Telephone).
- **Remaining Billable Hours (Sum):** Amount of hours left of the customer's total pre-paid hours.

## Remove Unmanaged Customers

- Customers added via C1 are known as 'Managed' customers. They are automatically imported into Service Desk and cannot be removed. This is because they also appear in other products like Endpoint Manager.
- Customers added via the Service Desk interface are known as 'Unmanaged' customers. You can remove unmanaged customers because they only exist in Service Desk and not in other products.
- You can only remove unmanaged customers that have no enrolled users. You need to delete all users from the customer before you can remove the customer itself.

## Remove customers

- Click 'Users' > 'Customers'
- Select the customer you want to remove

**Reminder:** You must remove all users from a customer before you can remove the customer itself.

- Click 'Delete' at the top.

Service Desk > Users > Customers

## Customers

+ Add New Customer   Export to CSV   **Delete**   Search...

<input type="checkbox"/>	CUSTOMER ID	NAME	USERS	CREATED
<input type="checkbox"/>	1	<a href="#">front fork</a>	1	04/30/2018 1:55 pm
<input checked="" type="checkbox"/>	2	<a href="#">Saddle and Pedals</a>	0	07/31/2018 10:41 am
<input type="checkbox"/>	3	<a href="#">Fork Springs Regional Transports</a>	3	09/18/2018 4:47 pm

### Please Confirm

Are you sure you want to DELETE selected customer(s)?

**Deleted tickets CANNOT be recovered, including any associated data.**

No, Cancel   Yes, Do it!

- Click 'Yes, Do it!' in the confirmation dialog

### Export a customer list to CSV

You can save a list of all customers (managed and unmanaged) as a comma separated values (CSV) file.

- Click 'Users' > 'Customers'
- Click 'Export to CSV'

Service Desk > Users > Customers

## Customers

[+ Add New Customer](#)
[Export to CSV](#)
[Delete](#)

Search...

<input type="checkbox"/>	CUSTOMER ID	NAME ↕	USERS ↕	CREATED ↕
<input type="checkbox"/>	1	<a href="#">frontfork</a>	1	04/30/2018 1:55 pm
<input type="checkbox"/>	2	<a href="#">Saddle and Pedals</a>	1	07/31/2018 10:41 am
<input checked="" type="checkbox"/>	3	<a href="#">Fork Springs Regional Transports</a>	3	09/18/2018 4:47 pm
<input type="checkbox"/>	4	<a href="#">Kanchi Idly Steamer</a>	6	02/25/2019 5:11 pm

.csv files are best viewed in spreadsheet applications like Microsoft Excel and OpenOffice Calc.

### 3.3 Manage Tickets

Click 'Staff Panel' > 'Tickets'

- The tickets area lists all submitted tickets along with their status, priority and assignee
- You can respond to tickets, assign tickets to staff, schedule tickets, view ticket materials and more
- The interface also lets you create a new ticket on behalf of a user

See the following for more help:

- **Overview of the interface**
- **View a short summary of a ticket**
- **Assign tickets to staff**
- **Schedule a ticket**
- **Edit, reassign, or add collaborators to a ticket**
- **View ticket materials and expense items**
- **Close / reopen tickets**
- **Create a ticket on behalf of a user**
- **Delete tickets**
- **Generate ticket reports**
- **Sorting and Filtering Options in the 'Tickets' Interface**

#### Overview of the interface

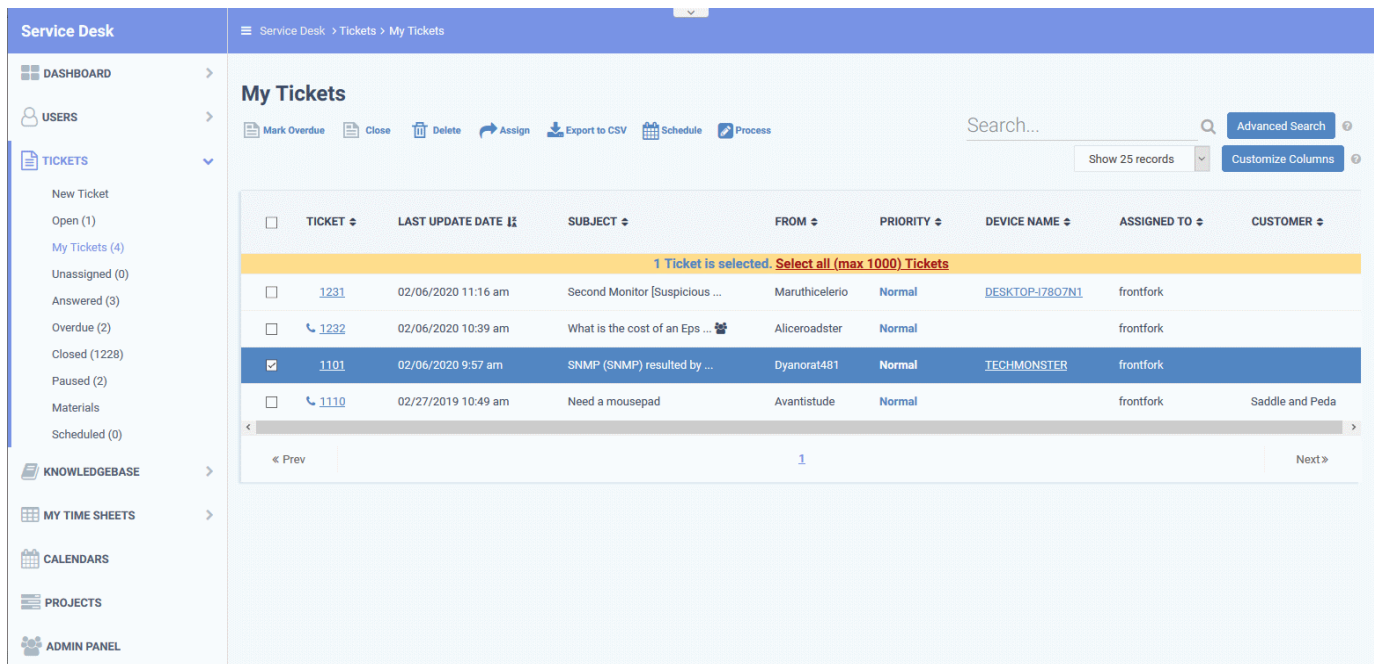
- Open the staff panel (See the last link on the left)
- Click 'Tickets' on the left then click 'Open' (to see all open tickets)
- Alternatively, select one of the other ticket categories:

My Tickets



Unassigned  
 Answered  
 Overdue  
 Closed  
 Scheduled  
 Paused

**'Tickets' menu on the left  
 Column headers**







## Tickets menu on the left

- **New Ticket** - Submit a support ticket for a user. See **'Create a ticket on behalf of a user'** if you need help with this.
- **Open** - Tickets that are not yet resolved. Click the ticket number to answer, transfer, reassign or schedule the ticket.
  - 'Assigned' and 'Answered' tickets may be excluded from this view by configuring options in the **'Ticket Settings and Options'** interface.
- **My Tickets** - Tickets that are assigned to the person who is currently logged-in. Click the ticket number/subject to answer, transfer, reassign, schedule, or register time-spent on a ticket.
- **Unassigned** - Tickets that have not yet been assigned. Admins can assign tickets to staff by clicking the ticket number then the 'Assign' link. See **'Assign tickets to a staff member'** for more details.
- **Answered** - Tickets for which there has been at least one reply. Click the ticket number to review, reassign, transfer and more.
- **Overdue** - Tickets that were not closed within the period specified in the SLA. Overdue tickets are automatically closed if set in the **'Ticket Settings and Options'** interface.
- **Closed** - Tickets that are finished/complete. Click the ticket number to review, reopen, reassign etc.
- **Scheduled** - Tickets that have a set time by which they should be started and/or finished. The schedule is shown on the staff member's calendar. Click the ticket number to answer, re-assign, transfer, re-schedule, etc.

- **Paused** - Tickets that are not being worked on at the current time. The ticket can be resumed by the staff member assigned to the ticket, or by an admin. Click the ticket number then 'Resume' to do this.
- **Materials** - View material costs and other expenses added to tickets by staff. Material costs must be approved by an admin. See [View materials/expense items added to a ticket](#) for more on this.

### Column Headers

The columns you see depend on the filters you have chosen, and you can modify columns by clicking the '[Customize Columns](#)' button. The following is a list of ALL possible columns:

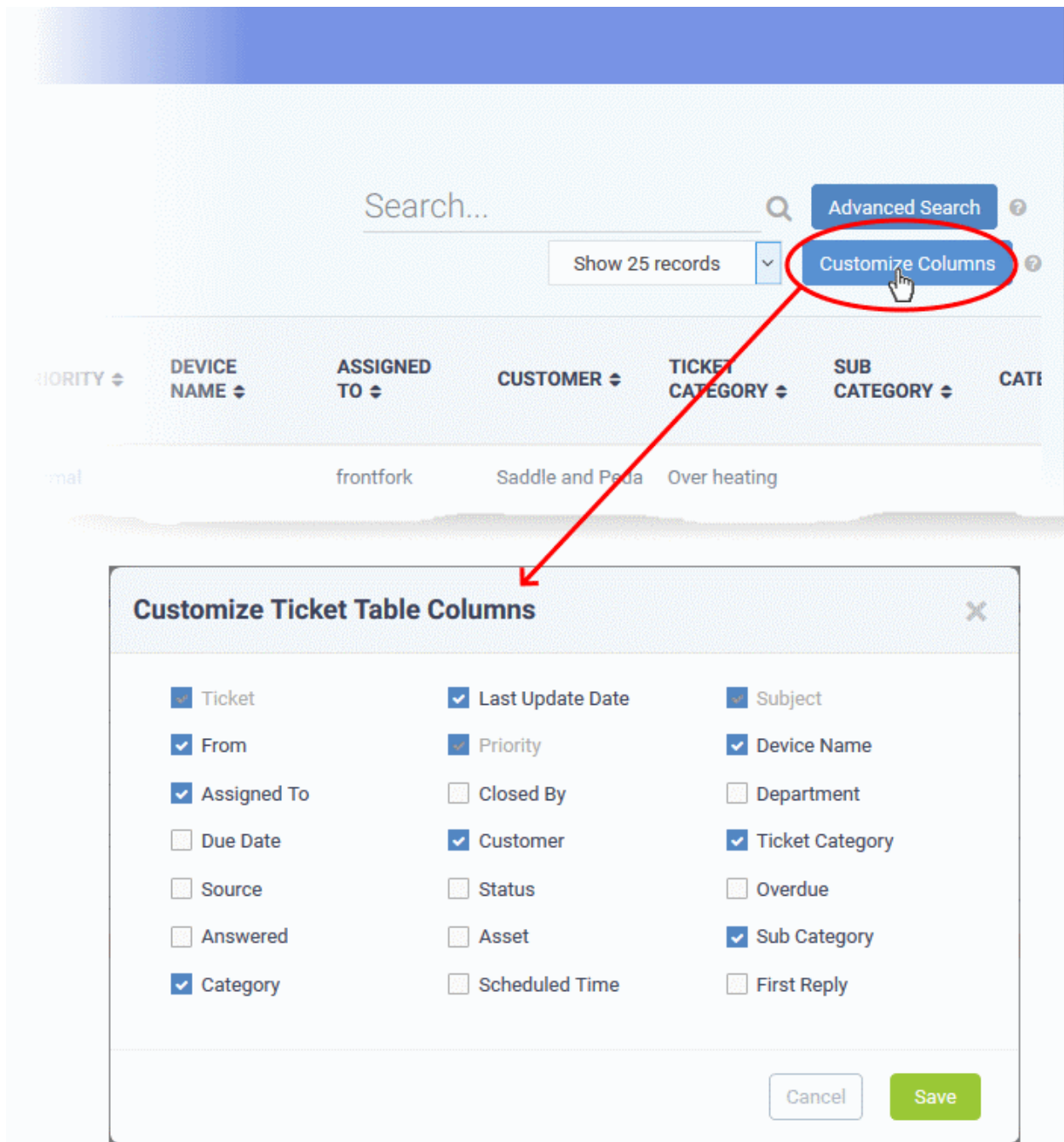
- **Ticket** - The number assigned to the ticket. Click the ticket number to open the 'Ticket Details' screen.
  -  - Tickets raised via the web portal
  -  - Tickets sent in by email
  -  - Tickets created by staff members on behalf of users
- **Last Update Date** - Date and time the ticket was created, re-opened, updated or closed.
- **Subject** - A brief description of the issue.
  - The subject is usually chosen by the user or staff member who created the ticket.
  - Tickets that were auto-created by another C1 module will simply state the name of the module responsible. For example, 'RMM Generated Ticket'.
  - The  icon indicates that one or more collaborators have been added to the ticket CC list
- **From** - The name of the user who created the ticket, or on whose behalf the ticket was created.
- **Priority** - The criticality of the ticket.
  - Ticket priority depends on the settings in 'Ticket Category', 'Department' and 'Ticket Filters'.
  - Tickets sent in by email can have their priority set by the sender's mail client. This has to be enabled in 'Admin Panel' > 'Settings' > 'Emails'.
  - If no custom settings apply, then tickets are given the default priority of 'Normal'.
- **Device Name** - The endpoint which generated the ticket.
  - This is only shown for tickets auto-created by Endpoint Manager.
  - Click the device name to view more details about the device.
  - See <https://help.comodo.com/topic-399-1-786-10175-View-Summary-Information.html> if you need more information about the device details screen.
- **Assigned to** - The text of this column header depends on the ticket status. For example, for 'Unassigned' tickets the column header will be 'Department'.
  - **Assigned to:** The name of the staff member to whom the ticket is assigned
  - **Department:** The name of the department to which the ticket is assigned
- **Customer** - The company of the user who raised the ticket
- **Source** - The channel through which the ticket was created. Possible channels are:
  - Phone
  - Email
  - Other
  - Web
  - API
- **Ticket Category** - The help topic on which the user requested support. See [Ticket Categories](#) for more on this.
- **Department** - The department in your organization to which the ticket is assigned
- **Due Date** - The date and time by which the ticket should be closed.

- **Closed By** - Staff member who closed the ticket.
- **Status** - Ticket progress. Possible values are:
  - Open
  - Answered
  - Overdue
  - Closed
  - Paused
- **Overdue** - Indicates the ticket was not closed by its due date.
- **Answered** - Indicates whether or not a response has been given to the user.
- **Asset** - The product, service, or item that the ticket concerns.
- **Category** (Ticket Type) - Type of request that the ticket concerns. The possible values are:
  - Alert
  - Order
  - Problem
- **Sub-category** - Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
- **Scheduled Time** - Date and time at which the ticket will be started.
- **First Reply** - Date and time of the first response to the user.

## Add / Remove columns

The columns you see on the right depend on the ticket filter chosen on the left. You can add columns if you want to view additional details, or hide columns as required.

- Click the 'Customize Columns' button:



- Use the check-boxes to enable or disable columns as required
- Certain columns are mandatory for certain views
- Click 'Save' to add/remove the selected columns to the list

### View a short summary of a ticket

- Place your mouse cursor over a ticket to view brief details:

The screenshot shows the 'My Tickets' interface. At the top, there are action buttons: Mark Overdue, Close, Delete, Assign, Export to CSV, Schedule, and Process. A search bar is on the right. Below is a table of tickets with columns: TICKET, LAST UPDATE DATE, SUBJECT, FROM, PRIORITY, DEVICE NAME, and ASSIGNED TO. Ticket #1233 is selected, and its details are shown in a modal window.

TICKET	LAST UPDATE DATE	SUBJECT	FROM	PRIORITY	DEVICE NAME	ASSIGNED TO
1233		My laptop is overheating				frontfork
1232						frontfork
1101						frontfork

**Ticket #1233: My laptop is overheating**

**Ticket Summary**

**Ticket State:** Open Normal  
**Create Date:** 02/06/2020 12:36 pm  
**Due Date:** 02/08/2020 12:35 pm  
**Assigned To:** frontfork  
**From:** [Avantistude](#) avantistude@gmail.com  
**Department:** Support  
**Categories:** Over heating / Report a Problem

[Thread \(3\)](#) | [Notes \(2\)](#) | [Reply](#) | [Reassign](#) | [Transfer](#) | [Post Note](#) | [Edit Ticket](#)

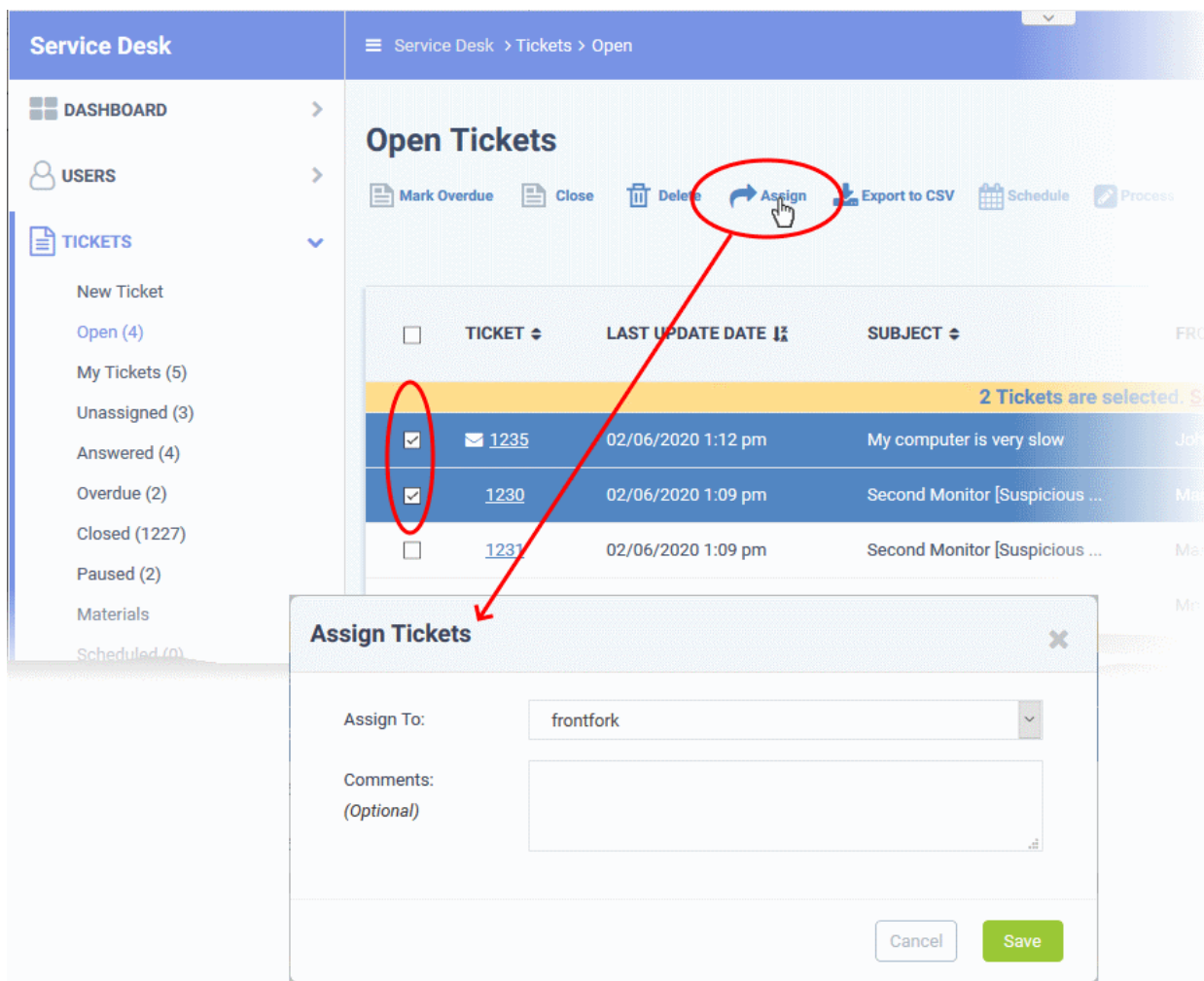
The links at the bottom allow staff members to manage the ticket. See '**Ticket Details**' for more details.

### Assign tickets to a staff member

- Admins can assign/reassign individual or multiple tickets to a staff from the 'Tickets' interface.
- The ticket will appear in the 'My Tickets' area of the person to whom it is assigned.

### Assign tickets

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select one or more tickets and click 'Assign' at the top



- **Assign to** - Select the admin/staff member to whom you want to assign the ticket
- **Comments (Optional)** - Enter task notes, instructions, or a reason you assigned the ticket to this person. The comment is added as an internal note on the ticket.
- Click 'Save'

## Schedule a ticket

- Scheduled tickets are useful for tasks that will start at a set time in the future. For example, a site visit or scheduled maintenance.
- The schedule is added to the calendar of the currently logged-in admin/staff.
- The ticket is automatically assigned to the person who creates the schedule, even if it is currently assigned to someone else.

## Create a schedule for a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select a ticket and click 'Schedule' at the top
- The calendar for the currently logged-in admin/staff opens. The ticket details are shown on the title bar:

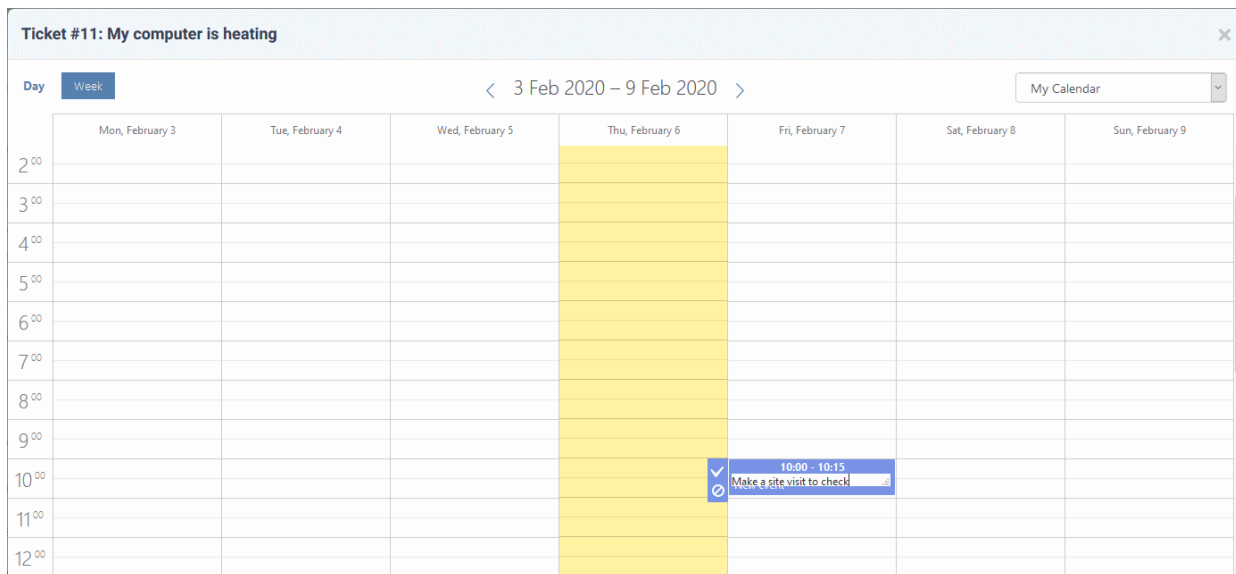
The screenshot shows the 'My Tickets' page in the Service Desk. The left sidebar contains navigation options: DASHBOARD, USERS, and TICKETS. The main area displays a list of tickets with columns for TICKET ID, LAST UPDATE DATE, SUBJECT, and FROM. A red circle highlights the 'Schedule' button in the top toolbar. Another red circle highlights the checkbox for ticket #11. A red arrow points from the 'Schedule' button to the detailed view of ticket #11.

**Ticket #11: My computer is heating**

Day: **Week** | < 3 Feb 2020 – 9 Feb 2020 > | My Calendar

Day	Mon, February 3	Tue, February 4	Wed, February 5	Thu, February 6	Fri, February 7	Sat, February 8	Sun, February 9
0:00							
1:00							
2:00							
3:00							
4:00							
5:00							
6:00							
7:00							
8:00							
9:00							
10:00							

- The current week is shown by default. Use the '>' button to move to the next week / day
- Double-click the cell that represents the time slot you want for the ticket
- Enter a short description of the task.



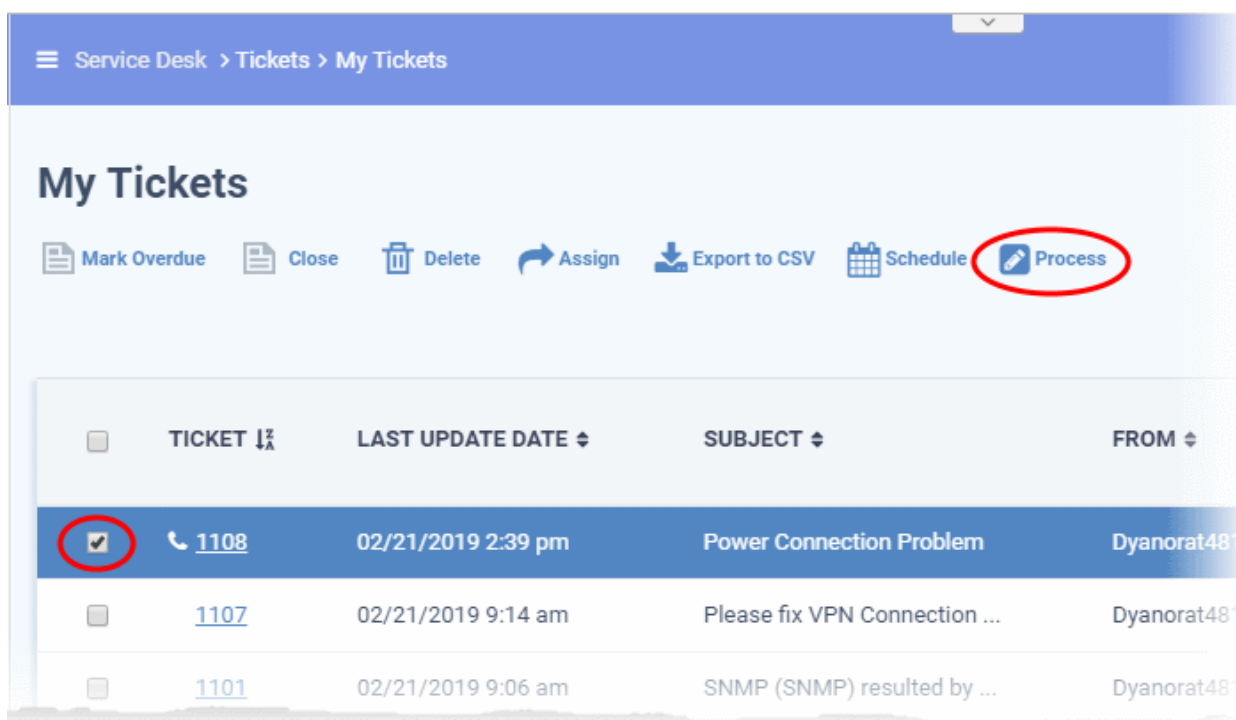
- Click the check-mark  to save the schedule
- The appointment is added to the calendar. You can view your calendar from the 'My Calendar' interface. See [Manage Calendars](#) for more details.
- The ticket is moved to the list under the 'Scheduled' category on the left.

### Edit, reassign, or add collaborators to a ticket

- The 'Process' feature lets you reassign a ticket, update user information, change ticket category/department, add collaborators, and more.
- This feature is available for all ticket categories except closed tickets.

### Use the process option

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select a ticket and click 'Process' at the top:





## Tickets

**Process Ticket #1108**

**User Information:** Currently selected user  
Dyanorat481 <dyanorat481@gmail.com> Change

Issue Summary\*:

Issue Description: Device does not power on

---

**Ticket Information:** Due date overrides SLA's grace period.

Ticket Source:

Category:

Sub Category Level 1:

Department:

SLA Plan:

Time Spent: 0 hrs 32 min

Due Date:  Date   Time

Time is based on your time zone (GMT+5.30)

Resolution:

---

**Assign The Ticket**

Assignee:

Ticket is currently assigned to **frontfork**

Comments:

---

**Collaborators**

Add New Collaborator

Process
Cancel

### User Information

- **User name:** The person who submitted the ticket or for whom the ticket was created. This is pre-populated. Click 'Change' to select a different user.
- **Issue Summary:** Brief description of the issue. Update if required.
- **Issue Description:** Ticket description provided by the creator of the ticket. This is not editable.

## Ticket Information

- **Ticket Source:** The channel through which the ticket was created. The options available are 'Phone', 'Email', 'Web', 'API' and 'Other'. This is pre-populated and can be updated if required
- **Category:** The help topic under which this ticket falls. This is pre-populated and can be updated if required. See '**Ticket Categories**' for more details.
- **Sub Category** - Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
- **Department:** The department to which the ticket is currently assigned. This is pre-populated and can be updated if required. See '**Departments**' for more details.
- **SLA Plan:** The service level plan associated with the ticket. Use the drop-down menu to change the plan if required. The option chosen here will prevail even if the SLA plan for the 'Ticket Category' and 'Department' is different.
- **Time Spent** - Cumulative time spent on the ticket by all contributing staff members. This total includes time recorded automatically during a session and time manually added by administrator/staff.
- **Due Date:** The date and time by which the ticket should be closed. Change the date and time if required. This will override the date generated by default.
- **Resolution** - A description of the fix/solution. This could also be a description of the steps taken so far, and those that remain, in order to bring about a fix. This is set by the staff member attending to the ticket. Change the resolution if required.

## Assign the Ticket

- **Assignee:** Person who is currently responsible for the ticket. You can change the assigned staff member if required.
- **Comments:** Enter instructions for the assignee or reasons for the assignment.

## Collaborators

- Add people who also worked on the ticket as additional recipients for ticket updates.
- Click 'Add New Collaborator' to associate new or existing users with the ticket.

### Ticket #1108: Add a collaborator ✕

**i** Search existing users or add a new user.

Search by email, phone or name

Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

Register with Default Settings  
*Default timezone: GMT 5:30 - Asia/Calcutta*

- Type the first few letters of a username/email address in the search box. Select the user from the suggestions.
- Enter the email address, full name and other details.
- Click 'Add User'
- Repeat the process to add more collaborators
- Click the 'Process' button after you have made your changes. The ticket will be updated per the new details.

#### View ticket materials/expense items

- Staff can add materials and expense items to a ticket if they were required to resolve the issue.
- Admins must approve these items. Once approved, they will be billed to the customer.
- The 'Materials' screen lets you all view materials / expenses added to the tickets, along with their approval status.

#### View ticket materials/expenses

- Click 'Tickets' on the left then select 'Materials':

The screenshot displays the 'Added Materials' section of the Service Desk interface. It features a search bar at the top with 'From...' and 'To...' date pickers and a 'Ticket #' input field with a 'Search' button. Below the search bar is a table with the following data:

MATERIAL NAME	TICKET #	COST	DATE ADDED	LAST UPDATED	STATUS
Mains cord	<a href="#">1108</a>	2.00	02/21/2019 12:47 pm	02/21/2019 12:49 pm	Approved
Toll	<a href="#">1233</a>	1.00	02/06/2020 3:21 pm	02/06/2020 3:24 pm	Rejected
Cooling fan	<a href="#">1233</a>	5.00	02/06/2020 3:21 pm		Awaiting

The table is followed by a pagination bar showing '1' and 'Next' buttons.

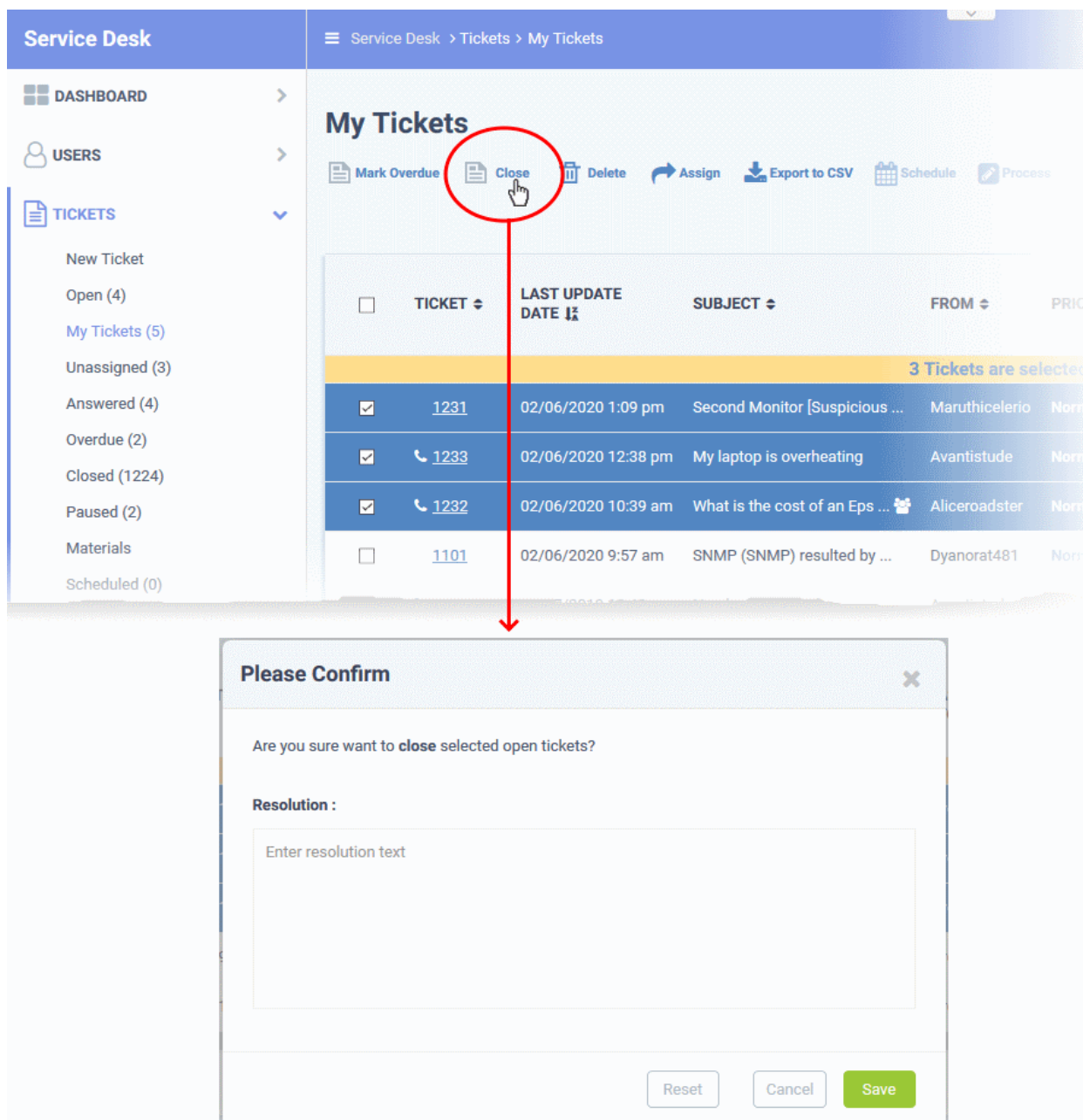
- **Material Name** - The label of the component used or the expense incurred
- **Ticket #** - The number of the ticket to which the material or expense item was added. Click the ticket number to view or update the ticket.
- **Cost** - The cost of the material/expense item as entered by the staff member
- **Date Added** - The date and time at which the item was added to the ticket
- **Last Updated** - The date and time at which the item details were last updated by the staff member
- **Status** - Indicates whether the material/expense was approved by the administrator. The possible states are:
  - **Awaiting** - The expense item has been added to a ticket but has not yet been approved by an administrator.
  - **Approved** - The expense item has been added to a ticket and approved for billing by an admin.
  - **Rejected** - The expense item has been rejected by an administrator.

### Close / reopen tickets

- You can close tickets if all tasks are complete. All billable time will be assigned to the customer.
- If required, you can also reopen closed tickets.

### Close tickets

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select the tickets you want to close
- Click 'Close'



- Enter the resolution message for closing the ticket.
- Click 'Save'.

The ticket is updated with the resolution message. The ticket is moved to the 'Closed' category.

### Reopen closed tickets

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then select 'Closed'
- Select the tickets you want to reopen
- Click 'Reopen'

The screenshot shows the 'Service Desk' interface with a sidebar on the left containing 'DASHBOARD', 'USERS', and 'TICKETS'. The 'TICKETS' section is expanded, showing various ticket statuses. The main area displays 'Closed Tickets' with a table of tickets. A red circle highlights the 'Reopen' button, and a red arrow points to a 'Please Confirm' dialog box. The dialog box contains the following text:

**Please Confirm**

Are you sure want to **REOPEN** selected closed tickets?

Reasons for status change (internal note). Optional but highly recommended.

At the bottom of the dialog box are two buttons: 'No, Cancel' and 'Yes, Do it!'.

- Enter the reason for reopening the tickets and click 'Yes, Do it!'
- The message is added as internal note to the tickets
- The status of the tickets is changed to 'Open' and automatically assigned to the currently logged-in staff / admin.

### Create a new ticket on behalf of a user

- Staff and admins can create tickets on behalf of users from the tickets interface. You might want to do this if, for example, a customer described their issue over a phone-call.
- Staff can also create tickets for issues that they resolved, but which had no ticket.
  - Select 'Work done in the past' to enable this option.
  - Tickets for completed tasks are given a status of 'Closed'.

There are two ways to create a ticket for a user

**1. Create a ticket by selecting a user from the directory** - Click 'Staff Panel' > 'Users' > 'User Directory' > click on a user > 'User Tickets' > 'Create New Ticket'. The new ticket form appears with the user details pre-populated. See **Create a new ticket on behalf of a user** in the section **Manage Users** if you need help with this.

**2. Create ticket for a new user from the 'Tickets' interface** - Click 'Staff Panel' > 'Tickets' > 'New Ticket'. The rest of this section explains creating a new ticket from the 'Tickets' interface.

**Create a new ticket**

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then select 'New Ticket'

The new ticket form contains the following sections:


- **User information** - Details about the user on whose behalf of you are creating the ticket
- **Ticket information and options** - Ticket category, SLA plan, due date, assigned staff member, and more.
- **Backdated ticket** - Specify whether the work is already complete.
- **Ticket details** - Issue description, priority, asset type, and more
- **Response** - Initial reply sent to the user
- **Internal note** - Notes regarding the issue for internal reference

The following sections describe each ticket section in detail:

### User Information

**User Information:**

Search User:

Create new user 

Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

Ticket Notice:  Send alert to user.

**Search user** - Create ticket for an existing user. Start typing their user name or email. Choose the user from the suggestions.

**Create new user** - Create a new user. The ticket will be associated with this new user.

- Enter the email address, full name and phone number of the user. Add any notes about the user in the respective fields. The internal notes are only visible to admins/staff.
- New users are added as guests. You can associate users with customers in the 'User Directory' interface.
- See **Manage Users** if you need help with this.

**Ticket Notice** - Sends an email to the user which informs them that the ticket has been created.

### Ticket Information & Options



## Ticket Information & Options:

Ticket Source: \*

Category: \*

Schedule Time:

Department:

SLA Plan:

*Due Date will be automatically generated based on Category Department, SLA Plan, Hours of Operations and Custom Due Date Selection in order.*

Due Date: \*      *Time is based on your time zone (GMT+5.30)*

Assign To:

- **Ticket Source:** Select the channel through which you received the request from the user. The options are 'Phone', 'Email' and 'Other'.
- **Category:** Select the help topic under which the ticket falls. Depending on the ticket category selected, more forms may be included in the ticket. See '**Ticket Categories**' and '**Forms**' for more details.
- **Schedule Time:** Choose a date in the future when work on the ticket should begin. The schedule will be added to your calendar.
- **Department:** The department is auto-selected when you choose the ticket category. You can choose a different department if you want.
- **SLA Plan:** The service level plan associated with the ticket. This is determined by the ticket category. Use the drop-down menu to change the plan if required.
- **Due Date:** The date and time by which the ticket should be closed. A default due date is auto-generated based on the ticket category, department and SLA. You can change the date and time as required. This will override the date generated by default.
- **Assign To:** Choose the staff member to whom you want to assign the ticket. This assignee stands even if the 'Agent' for the category is different.

## Backdated Ticket

**Backdated Ticket:**  Work done in the past

Start Date:

End Date:

- **Work done in the past** - Enable this if the ticket is for work that has already completed. The ticket is automatically given a status of 'Closed'.
  - Enter the task start and end dates in the spaces provided.
  - Make sure the end date is before the 'Due Date' entered elsewhere on the form.

## Ticket Details

**Ticket Details: Please Describe Your Issue**

Issue Summary: \*

<> Aa **B** *I* U **A** **A**

—

Details on the reason(s) for opening the ticket.

Priority Level:

Asset Type:

Type:

SubType:

- **Issue Summary:** Create a one-line description of the issue.
- **Issue Details:** Enter a more detailed description of the issue.
- **Priority Level:** Ticket criticality. This is determined by the ticket category. Change the priority if required.
  - The option chosen here will prevail even if the 'Priority' for the selected 'Ticket Category' is different.
  - Staff can change the priority while the ticket is in-progress. See **Ticket Details** for more details.
  - See **Appendix 2 - Ticket Priorities** if you need help with priorities.
- **Asset Type:** The type of item that the ticket concerns. For example, 'Workstation', 'Server', 'Printer', 'Mobile'.
- **Type:** The broad issue category. The options are 'Alert', 'Order' and 'Problem'.
- **Sub type:** Type a sub-set if you wish to further refine the 'Type'. Sub-types can be used to add more details about the category and asset type. For example, 'Overheating' may be a sub-category of a 'Problem' with a 'Server'.

## Response

**Response:** Optional response to the above issue.

Canned Response:

Attachments:  No file selected. *Response required for file upload*

Ticket Status:  **Close On Response** (Only applicable if response is entered)

Resolution:  Set Response as Resolution or [Add Resolution](#)

Signature:  None  Dept. Signature (if set)

- It is optional to create a response. Type any response you wish to send to the user in the text field provided. Responses will be automatically sent to the user after you click 'Open'.
- **Canned Response:** Select if you want to send a pre-defined response to the ticket.  
Any canned responses you select are added to the 'Response' text field. You are free to edit and/or add text to complement the canned response.  
You can add multiple canned responses to build a more complete answer. For example, you might add the following 3 canned responses to a single response - 'Acknowledgment', 'Ticket has been queued', 'Contact details'. Please enter a line space between each canned response for formatting reasons.
  - See **Canned Responses** for help to create and manage canned responses.
- **Attachments:** Click the 'Browse' button to add relevant attachments to the ticket.
- **Ticket Status:** If enabled, the ticket is closed immediately after saving. You must have entered a response for this to work (see the descriptions above).
- **Resolution:**
  - Enabled - The answer/response is considered as resolving the issue.
  - OR
  - click 'Add Resolution', if you want to specify a different resolution statement.
- **Signature:**
  - **None** - Means you can either send with no signature OR type a custom signature in the editor.
  - **'Dept. Signature'** - Use the signature of the department to which the ticket is assigned. See **'Staff Members'** and **'Department'** for more details about adding signatures.

### Internal Note

- Enter comments, reminders and remarks to staff who might work on the ticket. Internal notes are only visible to admins/staff, and not to the user.
- Click 'Open' to create the ticket on behalf of a user.
- The ticket is added to the 'Tickets' interface. You or the staff member to whom the ticket is assigned can view/update the ticket by clicking the subject or ticket number.

## Delete tickets

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select the tickets you want to remove from Service Desk
- Click 'Delete'

The screenshot shows the 'Service Desk' interface with a sidebar on the left containing 'DASHBOARD', 'USERS', and 'TICKETS'. The 'TICKETS' section is expanded, showing various ticket status counts. The main content area is titled 'Closed Tickets' and includes a toolbar with 'Reopen', 'Delete', 'Assign', and 'Export to CSV' buttons. A table of tickets is displayed below, with three tickets selected. A red circle highlights the 'Delete' button, and a red arrow points to a 'Please Confirm' dialog box. The dialog box contains a text area for 'Reasons for status change (internal note)', a confirmation question 'Are you sure you want to DELETE selected tickets?', a warning 'Deleted tickets CANNOT be recovered, including any associated attachments. \* If at least one ticket has been used in project then they will not be deleted!', and two buttons: 'No, Cancel' and 'Yes, Do it!'.

- Enter the reason for removing the tickets (optional).
- Click 'Yes, Do it!' to confirm removal.
- Note - Deleted tickets cannot be recovered.

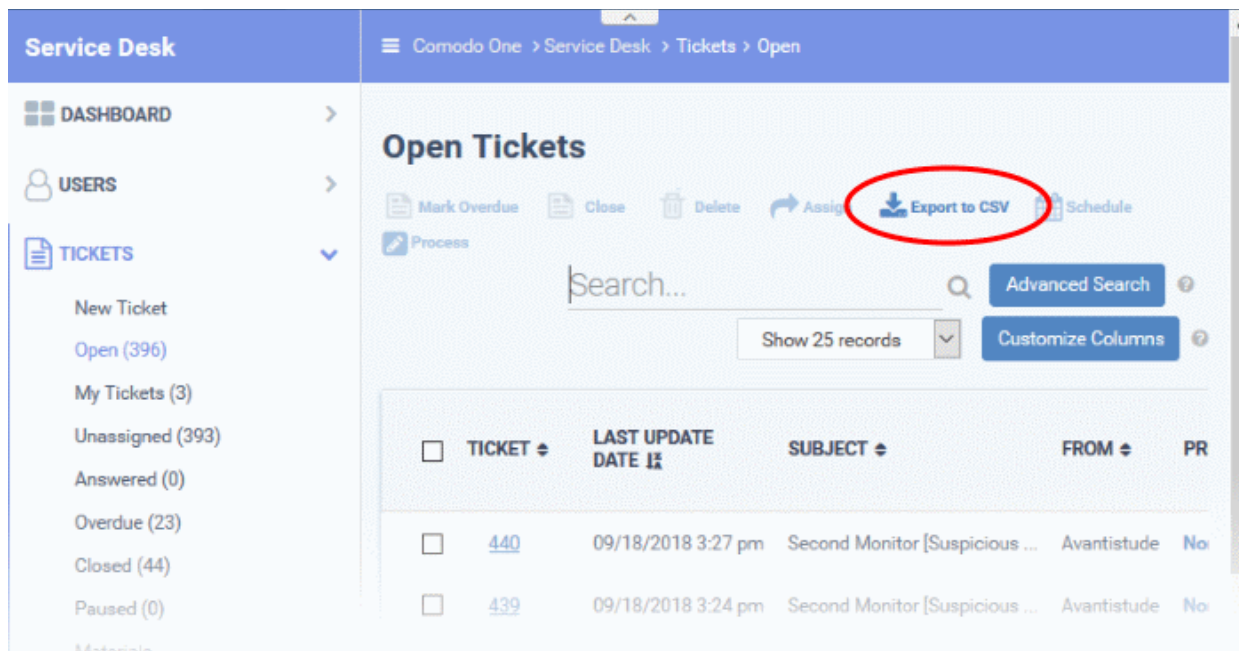
## Export tickets to a CSV file

You can save the list of tickets as a comma separated value (CSV) file for archiving and analysis purposes.

## Generate a tickets report

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)

- Click 'Export to CSV' at the top



.csv files are best viewed in spreadsheet applications like Microsoft Excel and OpenOffice Calc.

## Sorting and Filtering Options in the 'Tickets' Interface

### Sorting items

- Click a column header to sort items in ascending/descending order

### Search Options

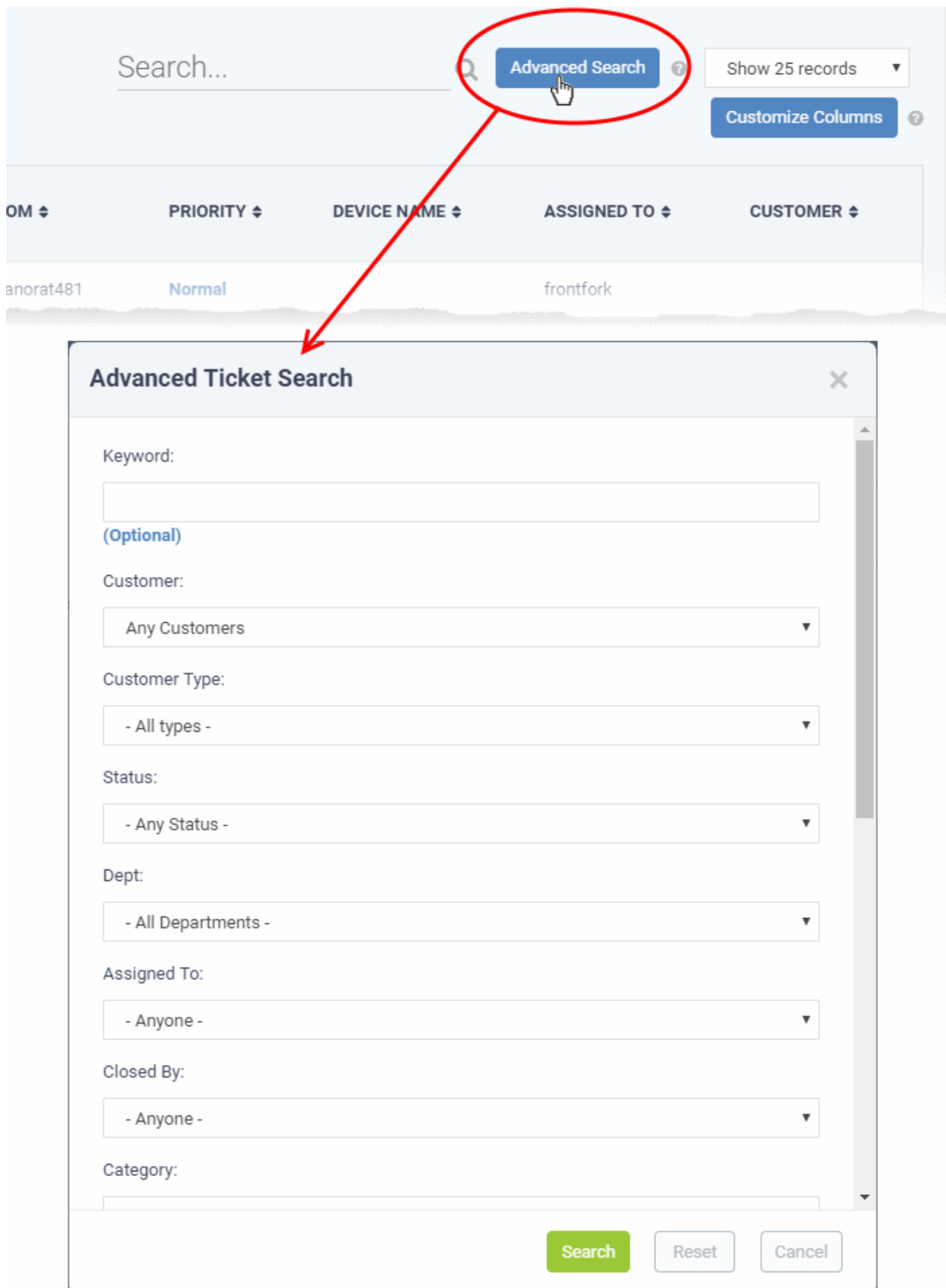
You can run a simple search or an advanced search on tickets.

#### Simple Search

- The 'Search' field lets you filter tickets by the following criteria:
  - Ticket ID
  - User name
  - Customer
  - Device Name
- Start typing your search term and tickets matching your criteria will be automatically displayed.
- To display all tickets, clear the search field (or simply click the ticket category link on the left).

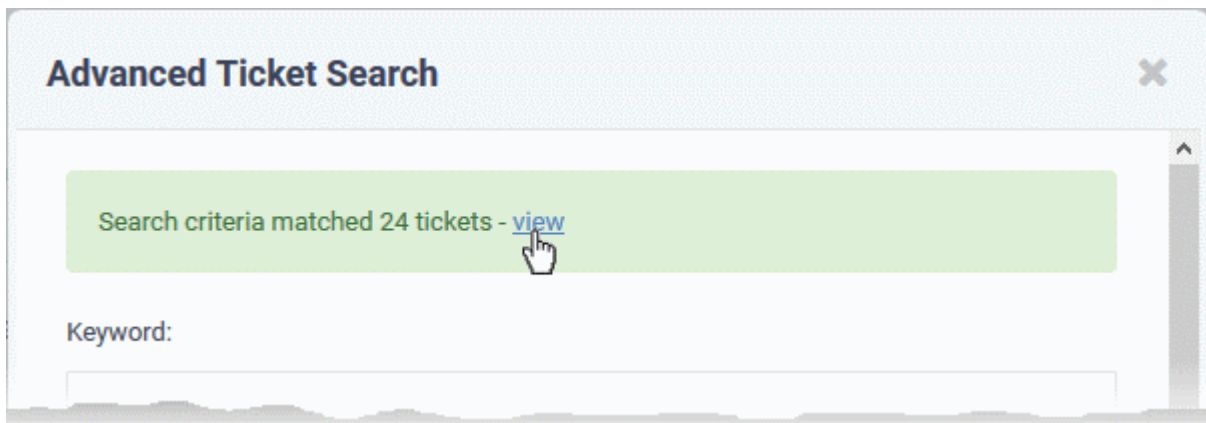
#### Advanced Search

- 'Advanced Search' lets you filter tickets based on preset criteria
- Click the 'Advanced Search' button



- Enter/select the parameters that you want to use as search criteria.
- Click the 'Reset' button to clear the fields.
- Click the 'Search' button after filling the required search parameters.

The number of tickets that matches the search parameters will be displayed at the top of the screen.



- Click the 'view' link to see the list of tickets which match the search criteria
- To view all tickets again, click the respective ticket category under 'Tickets' on the left

### 3.3.1 Ticket Details

- Click 'Staff Panel' > 'Tickets' > 'Open' (...or select a different ticket category as required)
- Click on the number of the ticket you want to open

Tickets can be single stage or multi-stage depending on the category to which the ticket belongs.

- **Single stage ticket** - Can be closed by the department/staff member to whom it was assigned. You can configure this in 'Admin Panel' > 'Manage' > 'Ticket Categories'.
- **Multi-stage tickets** - Multi-stage tickets are suited to more complex issues which require input from more than one department. The ticket is auto-assigned to the next department or staff member after each stage is closed. See **Ticket Categories** to read more about this.

The ticket details screen contains multiple sections. Click the following links to jump to the section you need help with:

- **Title bar** - Controls to manage the ticket.
- **Ticket Information** - General details about the ticket.
- **Ticket Workflow** - Appears only for multi-stage tickets. Displays the status of successive stages of the ticket.
- **Ticket Actions** - Take various actions on the ticket - post replies and notes, record time spent, assign the ticket, generate quotes for materials and more.
  - **Post a reply**
  - **Post an internal note**
  - **Change the department**
  - **Reassign the ticket**
  - **Initiate Quote generation for billable items**
- **History** - A list of ticket activities.
- **Material Details** - Billable materials and expense items added to the ticket
- **Time Spent** - Time spent working on the ticket by all contributing staff members. This includes time recorded automatically during each service session, and manually added time. The table also shows how much of the time is billable.
- **Staff** - View staff members associated with the ticket and add new staff.

#### Title bar

- The control buttons in the title bar let you perform various actions on a ticket:

Service Desk > Tickets > My Tickets

**OPEN** My laptop is overheating #1233  
Reporter: Avantistude

Schedule Process Add Material Edit Close Delete More

**Ticket Information**

Priority :	Normal	User :	Avantistude (853)
Department :	Support	Email :	avantistude@gmail.com
Create Date :	Thu, Feb 6 2020 12:36pm	Customer :	Saddle and Pedals
Device Name :		Phone :	-
Assigned To :	frontfork	Source :	Phone (182.74.23.22)
SLA Plan :	Default SLA (Active)	Last Message :	Thu, Feb 6 2020 12:36pm

Click the following links to find out more:

- **Process** - Quick edit feature. Reassign the ticket, update ticket details, change due-date, add collaborators.
- **Remote Control** - Establish a remote desktop connection to the device that generated the ticket. Only available for tickets auto-generated by the Endpoint Manager module.
- **Materials** - Add billable items and expenses which were used to resolve the issue.
- **Schedule** - Create or modify the ticket schedule. The schedule sets the start and end time of the ticket.
- **Create a Knowledgebase article** - Use the ticket and responses as the basis of a new support article.
- **Change the ticket owner** - Ticket owner = End user who submitted the ticket, or on whose behalf the ticket was created.
- **Claim a ticket** - Assign the ticket to yourself.
- **Manage forms** - Add forms to a ticket to request more information. Once added, the form can be completed by a staff member in the **ticket edit screen**, or by the user in the web portal.
- **Ban a user from creating tickets**
- **Print a ticket**
- **Edit a ticket**
- **Pause / resume a ticket**
- **Close / reopen a ticket**
- **Delete a ticket**

### Ticket information

- Click the 'Ticket Information' stripe
- The ticket information box shows the user who raised the ticket, the ticket status, the assignee, due date, billable time, and more.
- The number of fields that are displayed depends on the 'Forms' added to the ticket. See **'Forms'** for more details.
- You can edit these details, if required. See **'Edit the ticket'** for help with this.



Ticket Information		^
Priority :	Normal	User: <a href="#">Dyanorat481</a> (86) ▾
Department :	Support	Email: dyanorat481@gmail.com
Create Date :	Thu, Feb 21 2019 9:10am	Customer : -
Device Name :	<a href="#">DESKTOP-D80SVJJ</a>	Phone: -
Assigned To :	frontfork	Source: Other
SLA Plan :	Default SLA (Active)	Last Message : Thu, Feb 21 2019 9:10am
Due Date :	Sat, Feb 23 2019 3:52am	Last Response : Thu, Feb 21 2019 9:14am
First Reply :	21.02.2019 09:22 am	Category : -
Last Update :	21.02.2019 09:26 am	Resolution : -

- **Priority:** The criticality of the ticket. Priority can be inherited from the ticket category or department, or set manually during ticket creation. Staff can also change the priority of the ticket while it is in progress.
  - See [Appendix 2 - Ticket Priorities](#) for general advice on assigning priorities
- **Department:** The name of the department to which the ticket is assigned. Staff can change the department as required and can assign it to a different staff member in the new department.
- **Create Date:** The date and time at which the ticket was received.
- **User:** The name of the user who created the ticket, or on whose behalf the ticket was created by an agent.
  - Tickets auto-submitted by a managed device have the name of the device owner as the 'user'.
  - The number beside the user name shows the quantity of tickets raised by the user
  - Click the number to manage the user, the user's tickets, and the company to which the user belongs. See '[Manage Users](#)' and '[Manage Customers](#)' for more details.

**User:** [Dyanorat481](#) (14) ▾

---

**Email:**

---

**Customer :**

- [11 Open Tickets](#)
- [3 Closed Tickets](#)
- [» All Tickets](#)
- [Manage User](#)
- [Manage Customer](#)

- **Email:** The email address of the user who created the ticket, or on whose behalf the ticket was created by an agent. Tickets auto-submitted by a managed device state the email address of the device owner.
- **Customer:** The company to which the user belongs.
- **Phone:** The contact number of the user.
- **Device Name** - The label assigned to the device.
  - This is only shown for tickets auto-created by Endpoint Manager.
  - Click the device name to view more details about the device.
  - See <http://help.comodo.com/topic-399-1-786-10175-View-Summary-Information.html> for more details of the information contained in this interface.
- **Source:** The channel through which the ticket was created. Possible values are 'Web', 'Phone' and 'Email'.
- **Assigned To:** The name of the staff member to whom the ticket is currently assigned. You can re-assign the ticket to a different staff member/agent from the 'Actions' area. See **Reassign Ticket** for help to do this.
- **SLA Plan:** The service level plan associated with the ticket. The SLA can be inherited from the ticket category or the department. Staff can change the SLA if required while working on a ticket.
- **Due Date:** The date and time by which the ticket should be closed. The due date may be determined by the SLA plan or the department, or is set manually by staff at ticket creation. You can change the due date by editing the ticket.
- **Category:** The help topic chosen when creating the ticket.
- **Last Message:** The date and time at which the most recent reply was received from the user.
- **Last Response:** The date and time of the most recent reply was sent or a note was posted by a staff member.
- **First Reply:** Date and time at which the first response was sent to the user by a staff member
- **Last Update:** The date and time at which the ticket was most recently updated
- **Asset Type:** The type of item which the ticket concerns. For example, 'Workstation', 'Printer', 'Server' etc. The asset type can be chosen when creating the ticket. This helps to determine the billing rate.
- **Ticket Type:** The broad class of issue as chosen by the user or staff member who created the ticket. The options available are 'Alert', 'Order' and 'Problem'.
- **Ticket Sub Type:** Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
- **Resolution:** A description of the fix/solution. Alternatively, this may contain a description of the steps taken so far, and those that remain, in order to bring about a fix. This is set by the staff member attending to the ticket.

### Ticket Workflow

- Click the 'Ticket Workflow' stripe
- This box only appears for multi-stage tickets. It shows all stages added to the ticket based on the ticket category.

Ticket Workflow <span style="float: right;">^</span>		
Name	Status	Action
Stage 1: Generate Quote	In Progress	<a href="#">✓ Complete</a>
Stage 2: Generate Purchase Order	In Progress	<a href="#">✓ Complete</a> <a href="#">↺ Revert stage</a>
Stage 3: Delivery of the Asset	Not Started	
Stage 4: Installation on premisis	Not Started	
Stage 5: Demo	Not Started	

- Specific departments and staff members can be assigned responsibility of each stage.
- Once a staff member has completed their stage, the ticket is auto-assigned to the next department/staff member.
- This process will continue till the final stage is completed and closed.
- A ticket can be moved to the previous stage by clicking 'Revert stage'.
- You have the option to send a notification to staff and the user whenever a ticket transfers from one stage to another. This must be configured in the ticket category. See **Ticket Process Options** in **Ticket Categories** for more details.

### Ticket actions

Click the 'Ticket Actions' stripe

- The ticket actions pane lets staff post replies, claim a ticket, re-assign a ticket, add materials, pause/resume a ticket and more.

Ticket Actions ^

Info! Reply posted successfully x

Post ReplyPost Internal NoteDept. TransferAssign Ticket

TO:

CC: [Add CC](#)

Collaborators: [Add Recipients](#)

Response: \*

<>

Start writing your response here. Use canned responses from the drop-down above

Attachments:

Signature:  None

Ticket Status:  Reopen on Reply

Resolution:  Set Reply as Resolution

- **Post a reply**
- **Post an internal note**
- **Change the department**
- **Reassign the ticket**
- **Initiate Quote generation for billable items**

### Post a reply for the ticket

- Click the 'Post Reply' tab

The screenshot shows the 'Post Reply' form with the following elements:

- Buttons:** Post Reply (circled in red), Post Internal Note, Dept. Transfer, Assign Ticket.
- TO:** Avantistude <avantistude@gmail.com>
- CC:** Add CC
- Collaborators:** Add Recipients
- Response:** Select a canned response
- Rich Text Editor:** Includes a toolbar with icons for bold, italic, underline, link, unlink, list, and image. The text area contains 'Recommend 'Scheduled Scanning''.
- Message:** Response is required (in red), Draft Saved
- Attachments:** Browse... No file selected.
- Signature:**  None
- Ticket Status:**  Reopen on Reply
- Resolution:**  Set Reply as Resolution
- Buttons:** Post Reply, Reset

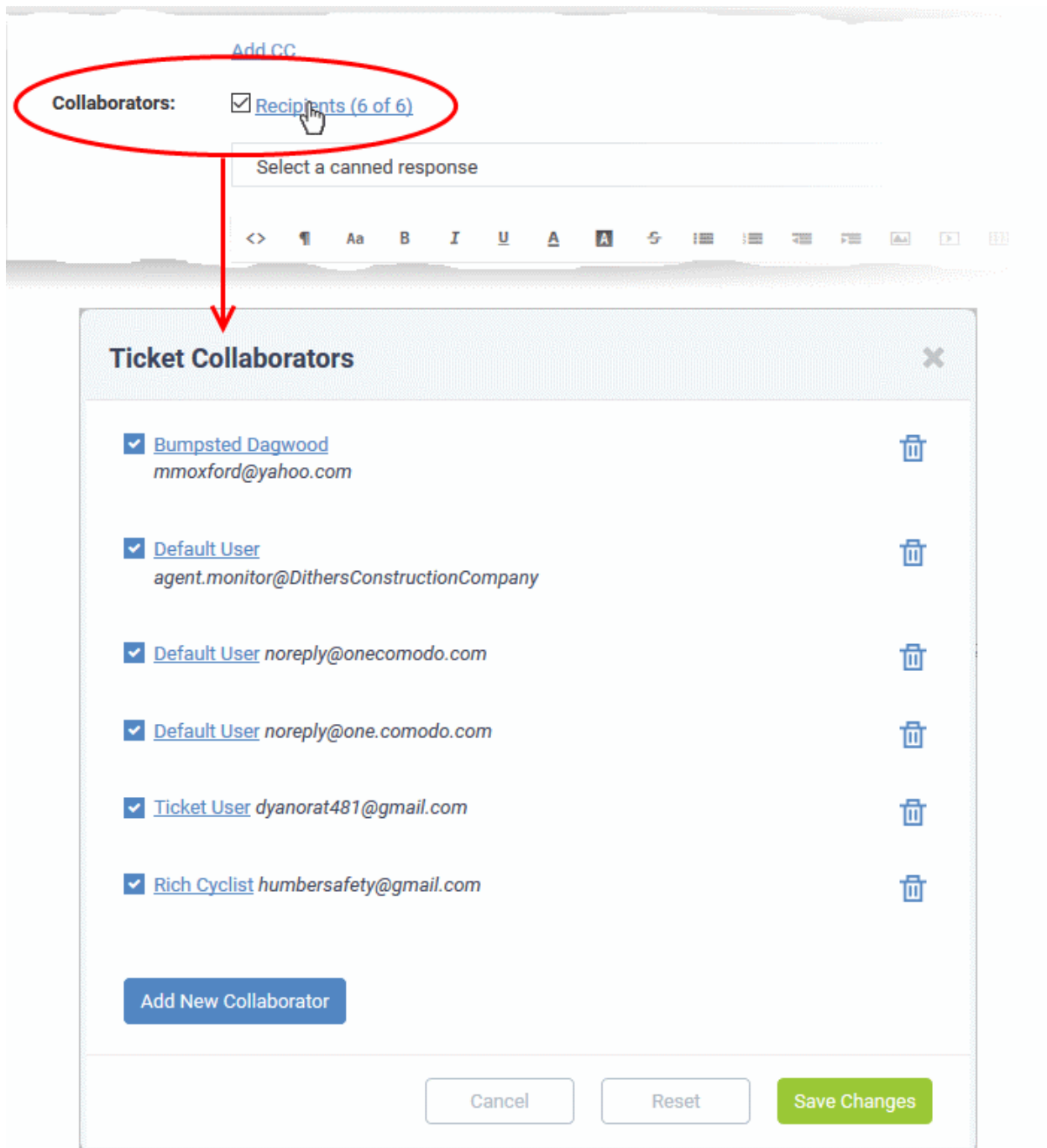
- **To:** The recipient's email address.
  - 'Do Not Email Reply' - the response is not emailed to the user. The user can view the response on the web portal.
- **CC** - Add more recipients for the response mail.
- **Collaborators:** Add people who also worked on the ticket as additional recipients.

**Note:** You can assign collaborators to a specific customer. These collaborators are automatically added to tickets belonging to the customer:

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of the customer to open its details interface
- Click the 'Name' of the customer in the upper panel
- Click the 'Settings' tab and scroll to the 'Automated Collaboration' section

See **Manage Customer Details** if you need more help with this.

- Click the 'Recipients' link to view and manage the list of collaborators:



- Click 'Add New Collaborator' to add additional collaborators
- You can add an existing user as a collaborator, or create a new user:

### Ticket #788: Add a collaborator ✕

**🔍** Search existing users or add a new user.

Search by email, phone or name

**Create New User:** Please provide all the details

Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

Click 'Save Changes' for your changes to take effect.

- **Response:** Type a reply in the text editor or select an option from the drop-down:

Elizabeth Ford <ran1221e@yahoo.com>

[Add CC](#)

**Collaborators:**  [Recipients \(6 of 7\)](#)

**Response: \***

Select a canned response ⌵

Select a canned response

Original Message

Last Message

----- Premade Replies -----

Acknowledgement

Contact Manager

Payment procedures

Ticket Paused

What is osTicket (sample)?

- **Original Message:** The first message sent by the user.
- **Last Message:** The most recent message sent by the user.
- **Canned Responses:** Send a preset response to the user. You can create canned responses in the knowledgebase section ('Staff Panel' > 'Knowledgebase' > 'Canned Responses'). See '**Canned Response**' for more.
- To clear the response from the editor, click the trash can icon at the top right side.
- **Attachments:** Click the 'Browse' button to add attachments to the response. To remove the attachment, click the file and select 'OK' in the confirmation screen.
- **Time Spent:** The timer shows the time spent on the current service session

The screenshot shows a form for posting a reply. It includes the following elements:

- Attachments:** A text box with a 'Browse...' button and the text 'No file selected.'
- Time Spent:** A digital timer showing '00:00:23' with a progress bar.
- Service Type:** A dropdown menu currently set to '-- Select --' and a 'Billable' checkbox.
- Signature:** A radio button selected for 'None'.
- Ticket Status:** A checkbox for 'Close on Reply'.
- Resolution:** A checkbox for 'Set Reply as Resolution'.
- Buttons:** A green 'Post Reply' button and a white 'Reset' button.

- Select 'Billable' to charge the customer for time spent on the issue.
- **Service Type:** Choose the kind of service offered during the session. The charges are calculated based on the time spent, asset type mentioned in the ticket, and the service contract you have with the customer company.
- **Signature:**
  - **None** - Means you can either send with no signature OR type a custom signature in the editor.
  - **'Dept. Signature'** - Use the signature of the department to which the ticket is assigned.
- **Ticket Status:** Select 'Close on reply' if your response will complete all possible work on the ticket. The ticket is automatically closed when the response is sent to the user.
- **Resolution:** Choose 'Set Reply as Resolution' if you want the message entered in the 'Response' field to be considered as the issue fix/solution.

The resolution field of a ticket indicates its current place in your workflow. It is a communication of ticket progress rather than a definitive ticket status like 'Closed', 'Open' etc. This option means your note will also become the ticket's current resolution status.

Example. A resolution status of 'Resolved' means a fix has been implemented and is ready for testing. A ticket status of 'Closed' means the resolution has been verified and no further work is required on the ticket.

- Click the 'Post Reply' button to respond to the ticket.

### Post an internal note

- Click the 'Post Internal Note' tab



Post Reply
Post Internal Note
Dept. Transfer
Assign Ticket

**Note Title:**

*Summary of the note (optional)*

**Internal Note:**

Rich text editor toolbar with icons for: Source, Bold, Italic, Underline, Text Color, Background Color, Undo, Redo, Bulleted List, Numbered List, Link, Image, Video, Table, Link, Unlink, and Delete.

Note details

**Attachments:**  No file selected.

**Ticket Status:**

**Resolution:**  Set Reply as Resolution

- **Note Title:** Enter a short summary of the note.
- **Note Details:** Enter any comments, notes, reminder or reason for pausing the ticket in the in the text editor
- **Attachments:** Click the 'Choose File' button to add attachments to the note.
- **Time Spent:** The timer shows the time spent on the current service session
  - Select 'Billable' to charge time spent on the ticket to the customer.
- **Service Type:** Choose the kind of service offered during the session from the drop-down. The charges for the current session are calculated from the time spent, the asset type that was worked on, and the SLA you have with the customer.
- **Ticket Status:** Select the state to which the ticket is to be changed, from the drop-down.
- **Resolution:** 'Set Reply as Resolution' - The message you type in the 'Response' field is the fix for the issue.

The resolution field of a ticket indicates its current place in your workflow. It is a communication of ticket progress rather than a definitive ticket status like 'Closed', 'Open' etc.

Example. A resolution status of 'Resolved' means a fix has been implemented and is ready for testing. A ticket status of 'Closed' means the resolution has been verified and no further work is required on the ticket.

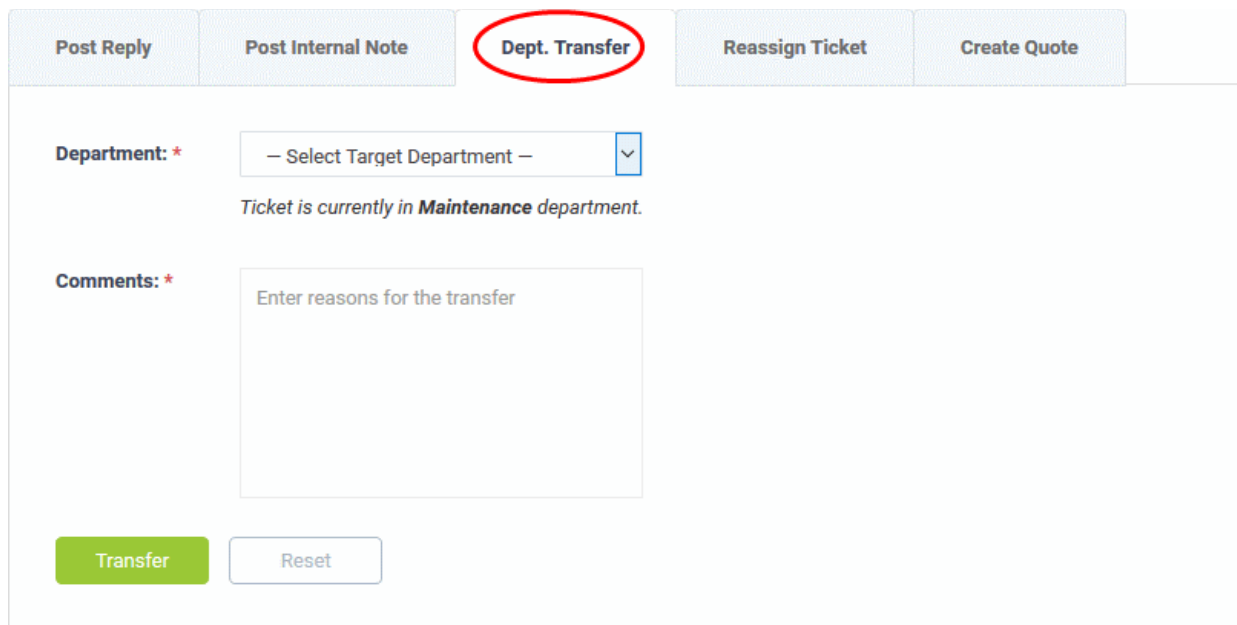
- Click the 'Post Note' button. The note is saved, the work time is added to the ticket and the status of the ticket will be changed as chosen from the 'Ticket Status' drop-down.

### Change the department

The ticket category determines the department to which the ticket is assigned. The category is chosen by the user when they first create the ticket.

You can change the department if required.

- Click the 'Dept. Transfer' tab in the 'Ticket Actions' pane to assign the ticket to another department. Note - department transfer is not available for 'Paused and 'Overdue' tickets.

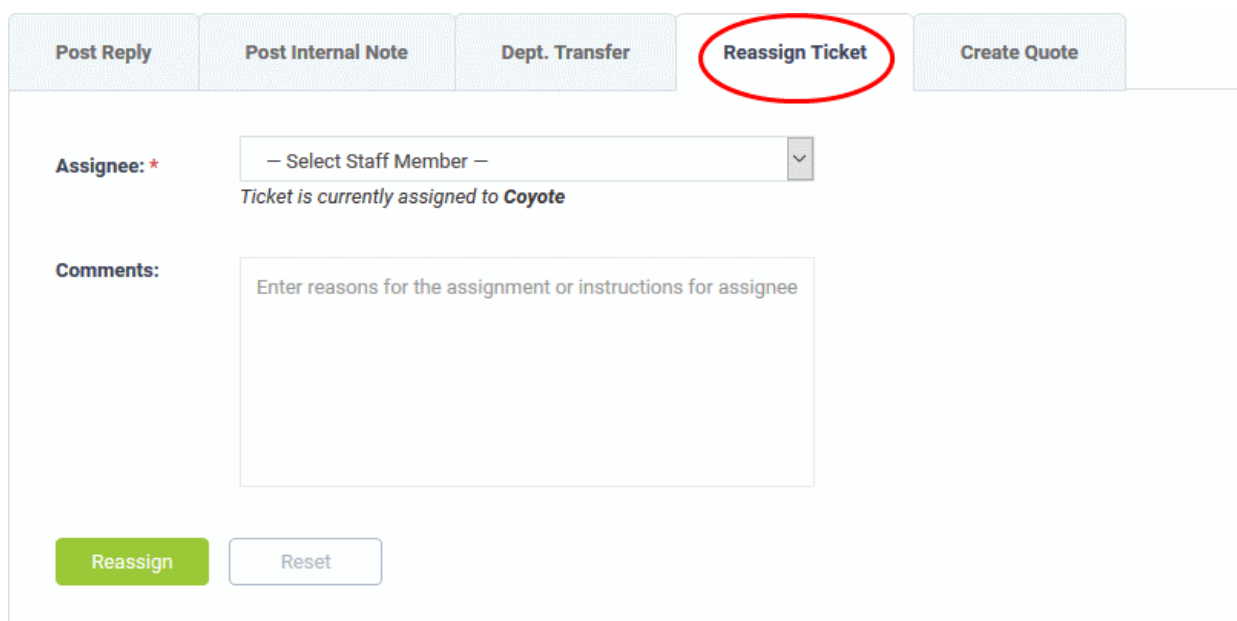


- **Department:** Select the department to which you want to reassign the ticket
- **Comments:** Enter any notes or reasons for changing the department.
- Click the 'Transfer' button to assign the ticket to a different department.

## Assign/Reassign a ticket

Tickets that are already assigned to a staff member can be re-assigned to a different staff member.

- Click the 'Assign Ticket' / 'Reassign Ticket' tab in the 'Ticket Actions' pane.



- **Assignee:** Select the staff member to whom you want to reassign/assign the ticket from the drop-down.
- **Comments:** Enter any notes or reason for changing the staff member.
- Click the 'Reassign' / 'Assign' button to assign the ticket to a different staff member.

### Initiate Quotes for Products/Services

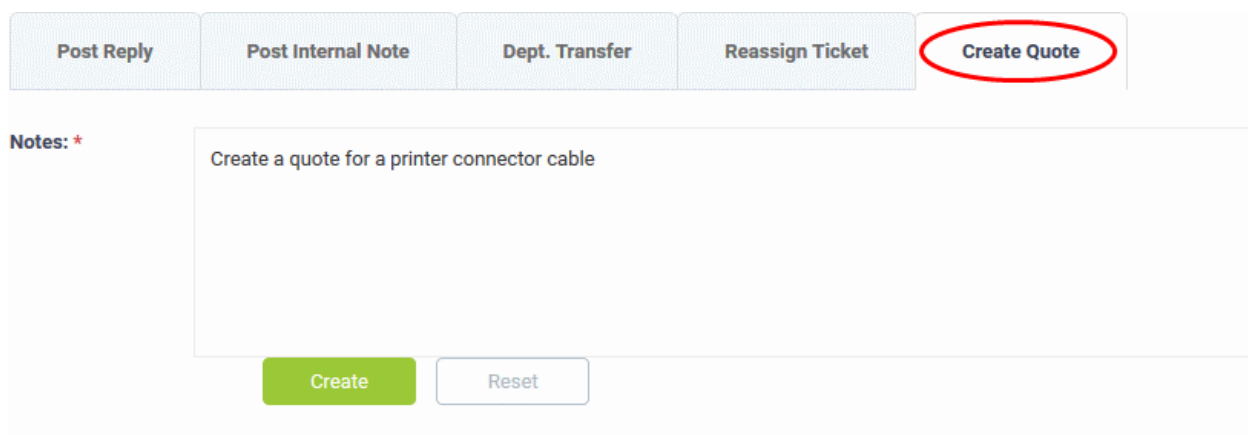
Comodo Quote Manager (CQM) allows you to generate price quotes for products and services (more details at <https://help.comodo.com/topic-289-1-778-10458-Comodo-Quote-Manager-Module.html>).

Quotes can also be generated by Service Desk tickets then pushed to Comodo Quote Manager.

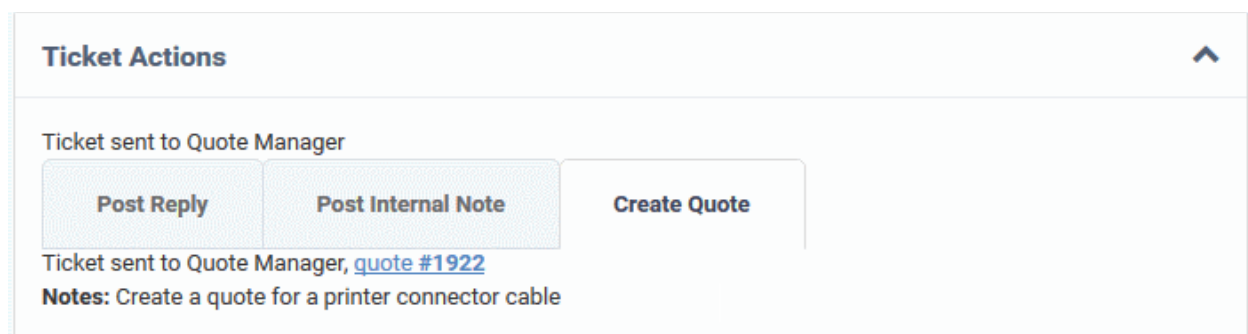
You must enable quotes in a department to use this feature. Go to 'Admin panel' > 'Staff' > 'Departments' > click on a department > enable the 'Quote' feature.

#### Initiate quotes from a ticket

- Ensure the quote feature is enabled for the department. Click 'Admin Panel' > 'Staff' > click department name > enable the 'Quote' feature.
- Ensure the ticket is assigned to you. If not, click 'Claim' to assign the ticket to yourself.
- Click the 'Ticket Actions' stripe to open the 'Ticket Actions' pane, if not already opened.
- Click the 'Create Quote' tab



- Enter a message in the 'Notes' field for the staff member attending the Quote Manager console.
- Click 'Create'
- A draft quote will be generated in the Quote Manager console:



- Click the '[Quote # NN](#)' link to view the draft quote in the Quote Manager console:

### View ticket threads

The 'Ticket Thread' pane contains a log of all actions taken on the ticket. Actions can be messages from the user, replies from staff, reassignments, addition of materials, status updates and more.

## **View ticket logs**

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Subject: <summary of the ticket>' stripe to open the 'Ticket Thread' pane.

## Subject: System going sluggish



Ticket Thread (18)

Sort by: Date

Internal Notes  Staff Posts  Client Posts

Herald

Fri, Jun 8 2018 12:21 pm

I would suggest to attend this after five in the evening, as I have a meeting.

INTERNAL

Spokes and Wheels

Fri, Jun 8 2018 12:18 pm

To change the fan

Spokes and Wheels

Fri, Jun 8 2018 12:12 pm

TO: <hertriumph@gmail.com>

BSA Mach will take care

INTERNAL

Spokes and Wheels

Fri, Jun 8 2018 12:10 pm

Ticket Assigned to bsamach

Mach, please fix a fan

Spokes and Wheels

Fri, Jun 8 2018 12:06 pm | Duration: 2 min(s) 15 sec(s) | Service Type: Onsite

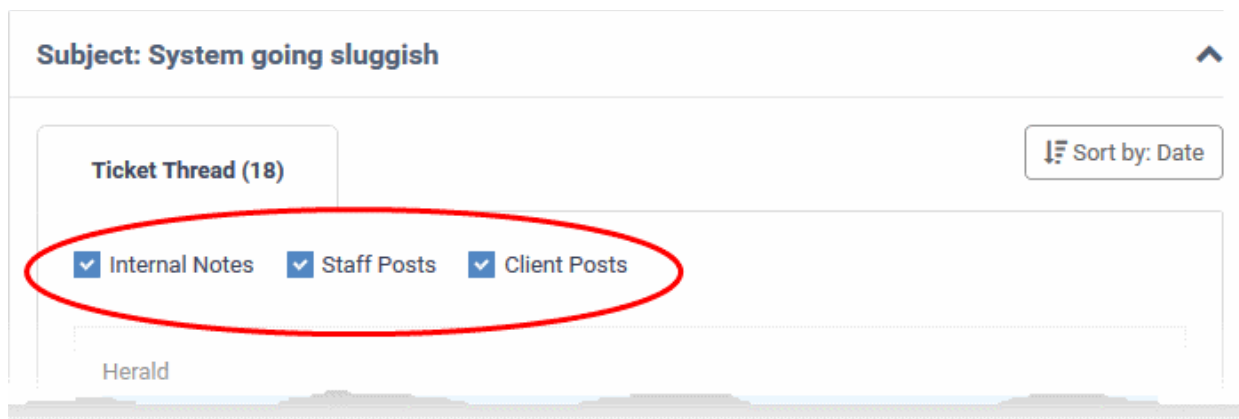
TO: <hertriumph@gmail.com>

Time Entry: 2018-06-08 12:16:00 - 2018-06-08 12:18:22 - 00:02:15 - not billable

We found heating issues. Trying to solve them

Show all threads

- The number beside the 'Ticket Thread' text shows how many actions have been taken on the ticket.
- The 'Ticket Thread' pane contains five actions by default. Click 'Show all threads' at the bottom to view all items.
- The header color of each action lets you easily identify the type of action:  
Yellow = Internal Notes - system events or internal notes  
Blue = Staff Posts - responses from end-users  
Orange = Client Posts - replies from staff to end-users
- Use the check boxes at the top to filter actions by type:




- Click 'Sort by Date' at the top right to sort the entries in ascending or descending chronological order.

### View materials / expense items added to the ticket

- The 'Materials Details' pane shows materials and expenses incurred when fixing the issue.
- Materials are added by staff members and must be approved by an administrator.
- The total cost of approved items is displayed at the bottom.
- If a material/expense item has been rejected then the reason is displayed under 'Status'.

### View the materials added to a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Material Details' stripe to open the 'Material Details' pane.

Material Details 		
Material Name	Material Cost	Material Status
1.RJ 45 Network Cable 2 meters	\$5.00	Awaiting
2.Meal	\$2.00	Awaiting
3.Cooling Fan	\$10.00	Awaiting
4.4 GB RAM	\$20.00	Approved
<b>Total Approved Material Cost: \$20.00</b>		



- Staff members can add items and their cost by clicking the 'Add Material' button at the top of the ticket. An administrator must approve the item before its cost is added to the ticket.
- See [Add Materials to the ticket](#) for more details.

### View and manage time spent on the ticket

- The 'Time Spent' pane shows the cumulative time spent by all staff on the issue so far. Billable time is shown on a separate row.
- Time spent is automatically recorded when the ticket is open. Staff can also manually add any 'on-site' time.
- Each service session on the ticket is shown as a separate row:

### View and manage time spent on a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Scroll down and expand the 'Time Spent' stripe

Time Spent (local time) <span style="float: right;">^</span>							
<a href="#">+ Add Work Time</a>							
Start	End	Time	Service Type	Staff	Billable	Manual	Action
2018-04-09 15:00:00	2018-04-09 15:30:00	00:30:00	Onsite	Coyote	✓	✓	 
2018-04-10 12:27:23	2018-04-10 12:28:21	00:00:37	Remote	Coyote			
2018-04-10 14:34:06	2018-04-10 15:11:18	00:31:49	Telephone	Coyote			
2018-04-10 15:11:21	2018-04-10 16:56:00	00:27:28	Remote	Coyote	✓		
2018-04-11 09:30:00	2018-04-11 09:40:00	00:10:00	Remote	Steam	✓	✓	
2018-04-11 09:30:00	2018-04-11 09:45:00	00:15:00	Onsite	transtar	✓	✓	
2018-04-11 10:29:27	2018-04-11 10:32:45	00:00:41	Telephone	Steam			
2018-04-11 10:43:12	2018-04-11 10:44:39	00:01:27	Telephone	Coyote			
Total Spent		01:57:02					
Total Billable		01:22:28					

**Start** - Date and time the session began

**End** - Date and time the session finished

**Time** - Length of the session

**Service Type** - The kind of service provided during the session. Possible values are:

- Onsite
- Remote
- Telephone

**Staff** - Name of the staff member who provided the support.

**Billable** - Whether or not the customer will be charged for the session.

**Manual** - Whether or not the any time was added manually by staff. For example, to cover time spent during a site visit.

**Action** - Controls for editing and removing a session:



- Edit the time spent



- Delete the item

There are two ways time spent can be added to a ticket:

- **Time-spent counter**
- **Manual Entry**

**The 'Time-Spent' Counter**



- The 'Time Spent' counter will automatically start when a staff member opens a ticket assigned to them. The counter is shown in the 'Time Spent' field near the bottom of the page:

Attachments  No file selected.

**Time Spent:** 00:00:23

Service Type: \*   Billable

Signature:  None

Ticket Status:  Close on Reply

Resolution:  Set Reply as Resolution

- Staff can pause, resume and reset the timer as required.
- After concluding a session, staff can choose the type of service provided and select whether the time is billable. See **Post a reply** and **Post an internal note** for more details.

Attachments  No file selected.

**Time Spent:** 00:01:03

Service Type: \*   Billable

Signature:  Onsite  
 Remote  
 Telephone

Ticket Status:

Resolution:  Set Reply as Resolution

## Manual Time Entry

- Staff assigned to the ticket can manually add time for themselves or for other staff members that have been added to the ticket. This is useful for recording time that was not automatically recorded. For example, time spent during an on-premise visit.
- Staff that are not assigned to the ticket can only add time for themselves.

- The option to manually add time must be enabled by an admin in 'Admin Panel' > 'Settings' > 'Tickets' (Under 'Time Settings'). See [Ticket Settings and Options](#) if you need help with this.

## Manually add time to a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'My Tickets', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Time Spent' stripe to open the 'Time Spent' pane
- Click the 'Add Work Time' link in the left-corner of the table

**Time Spent (local time)**

Start	End	Time	Service
2018-04-09 15:00:00	2018-04-09 15:30:00	00:30:00	Onsite
2018-04-10 08:00:00	2018-04-10 12:28:21	04:28:27	Remote



### Add Work Time

Staff:

Start Time:

End Time:

Duration:

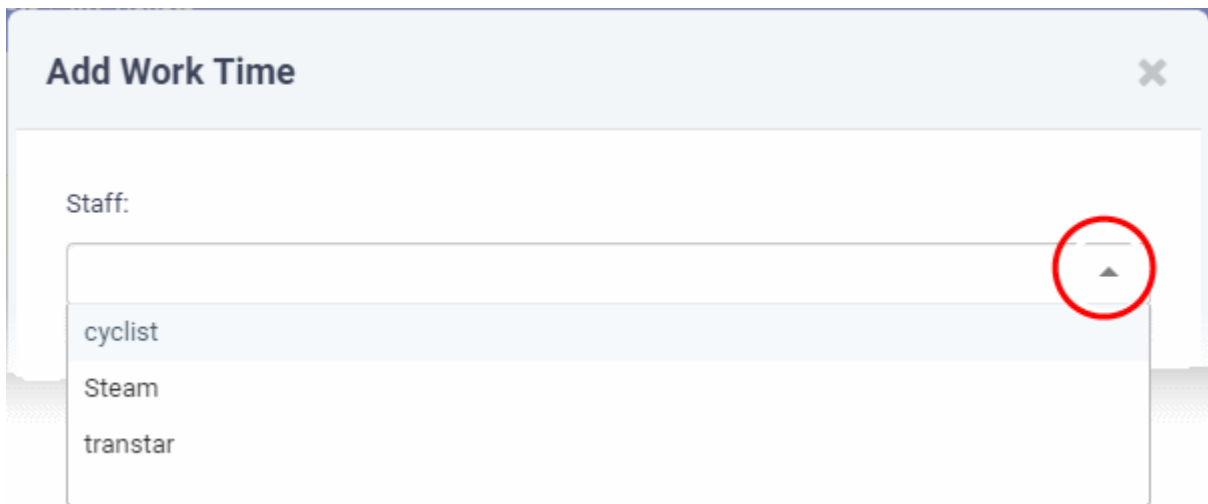
Service Type:

Is Billable:

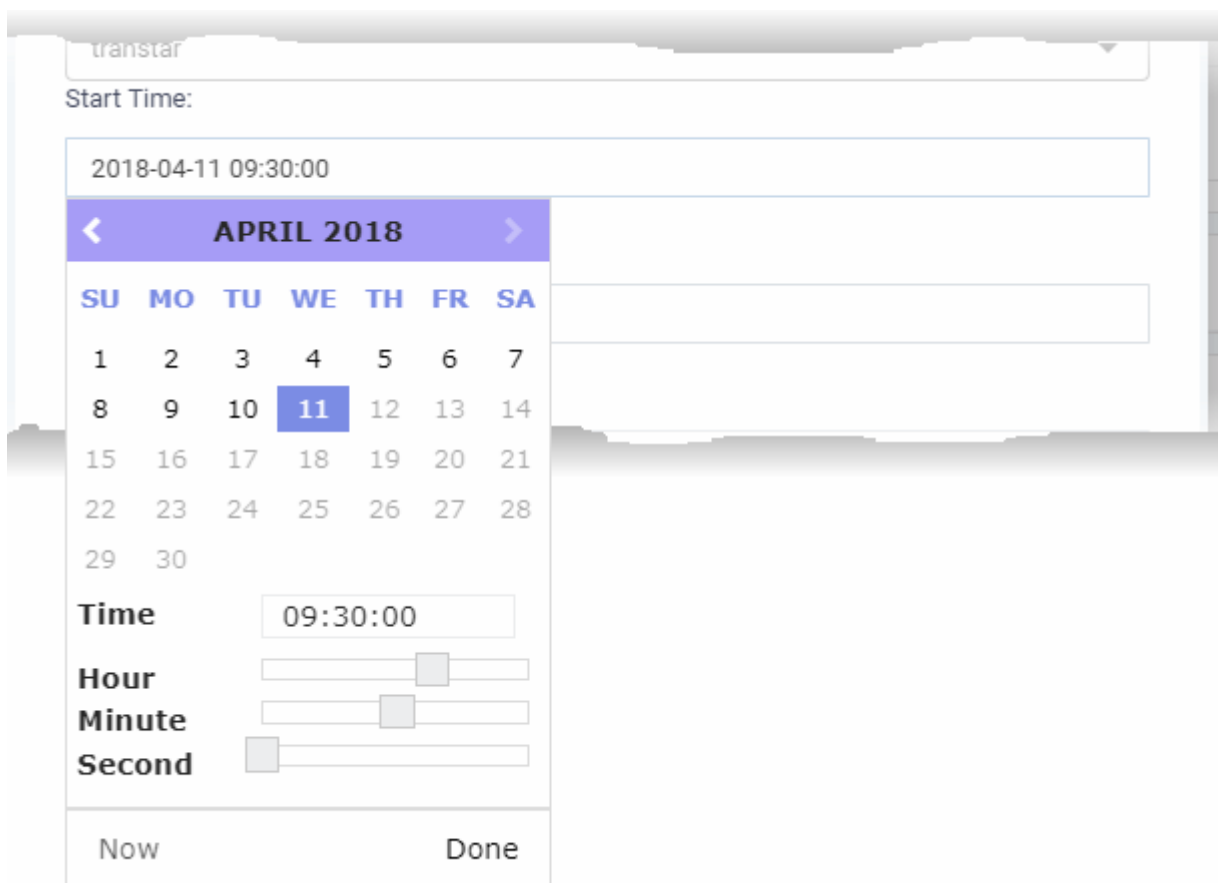
Comment

Cancel Save

**Staff** - The drop-down lists staff assigned and staff added to the ticket. Select the staff member for whom you want to add time.



**Start Time and End Time** - Click inside the 'Start Time' and 'End Time' fields then enter the date/time manually, or select the dates from the calendar. Click 'Now' to use the current date/time as the start or end time.



- Click 'Done' in the calendar after selecting the date and time.

**Duration** - This field is auto-calculated as the difference between the start and end times.

**Service Type** - Choose the service type offered during the session:

Duration:

00:20:00

Service Type:

— Select —

— Select —

Onsite

Remote

Telephone

- Specify whether the time is billable by selecting the checkbox
- Enter any comments in the 'Comment' text box. This will be added to ticket activity.
- Click 'Save'.

The time spent is added to the list.

### View and manage staff assigned to a ticket

- The staff box shows staff assigned to the ticket and the time they have spent on it.
- You can manually add staff as required.

### View and manage staff added to a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Scroll down and click the 'Staff' stripe.

Staff (1)					
Staff	Start	End	Time Zone	Action	
<a href="#">jacob</a>	2018-04-11 05:30:00	2018-04-11 10:00:00	GMT +05:18		

**Staff** - The name of the staff member added to the ticket. Click the name to edit the member's details

**Start** - The date and time at which the staff member started working on the ticket

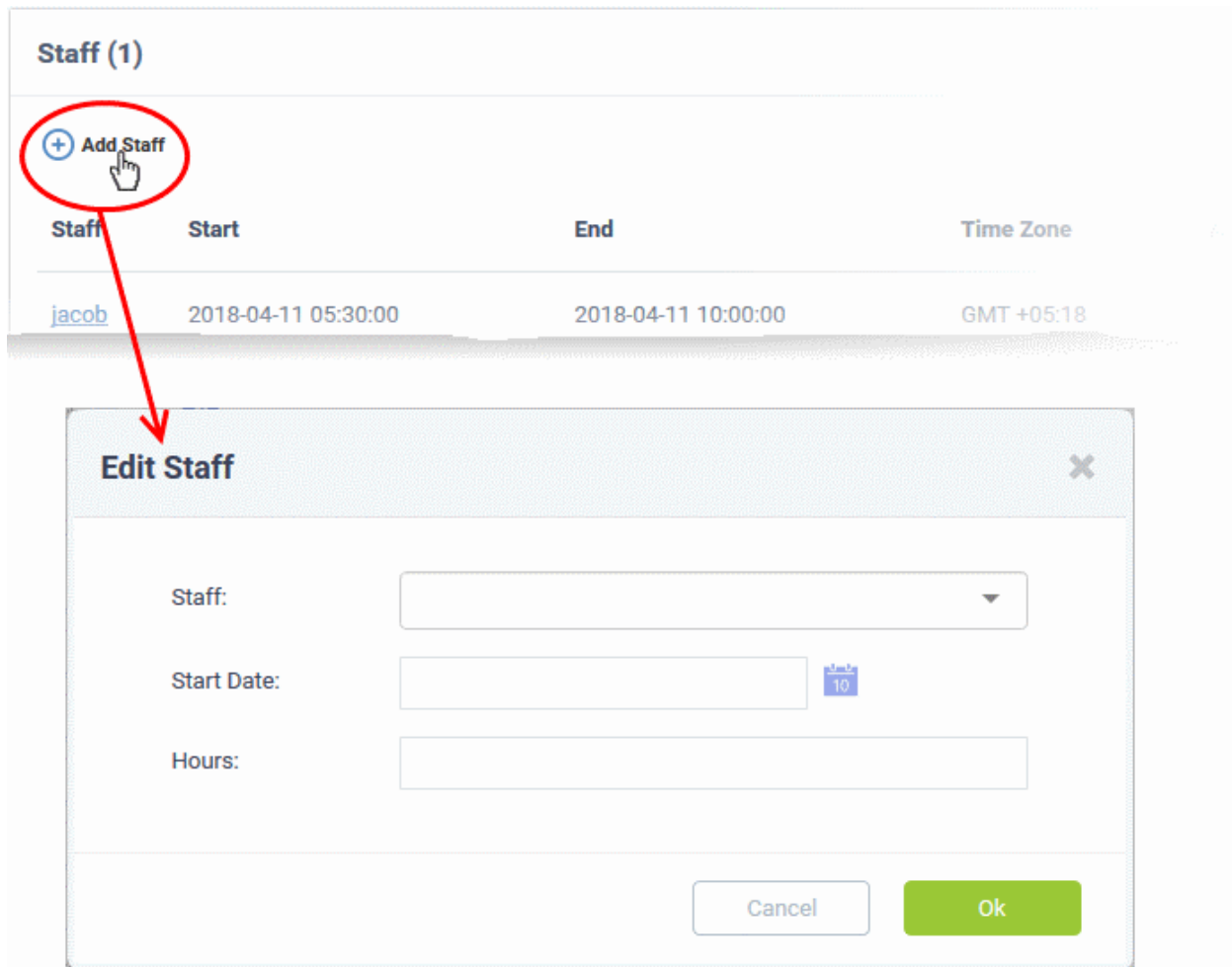
**End** - The date and time at which the staff member finished working on the ticket

**Time Zone** - The time zone of the staff member

**Action** - Controls for editing and removing staff

### Add a new staff to the ticket

- Click the 'Add Staff' at the top left of the table



- Choose the staff member from the drop-down

**Start Date:** Enter the date and time at which the staff member started working on the issue.

**Hours:** Enter the approximate period of time the staff member worked on the issue. This is only a rough indicator which will not be added to the actual time spent on the ticket.

- If required, you can manually add time to the ticket for the staff member **as described here**.
- Click 'OK'

The staff member is added to the ticket.

### Quickly edit, reassign, or add collaborators to a ticket

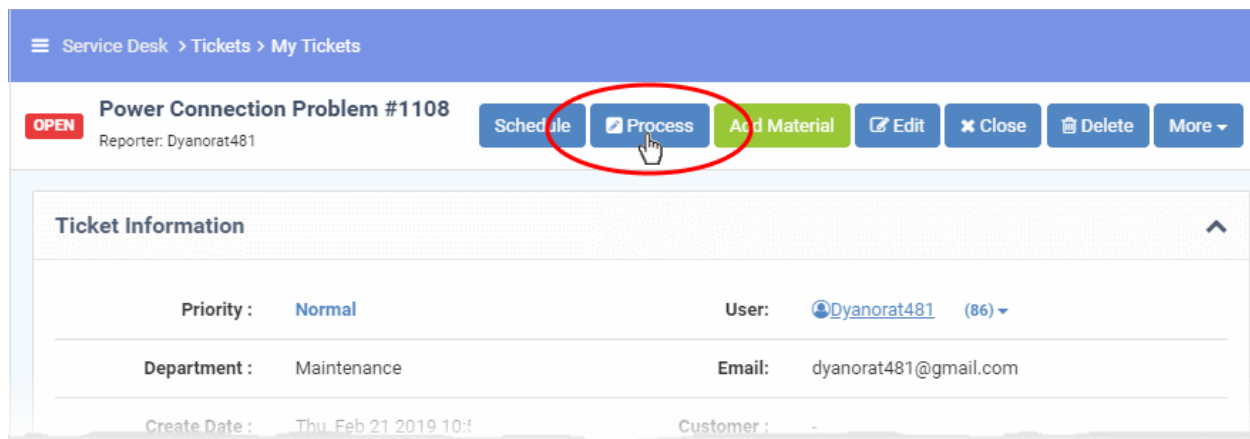
- The 'Process' feature lets you reassign a ticket, update user information, change ticket category/department, add collaborators, and more.
- This feature is available for all ticket categories except closed tickets.

**Tip:** You can also process a ticket without opening it. See **Edit, reassign, or add collaborators to a ticket in Manage Tickets** for more details.

### Use the process option

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'My Tickets', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open

- Click the 'Process' button at the top



Service Desk > Tickets > My Tickets

**OPEN** **Power Connection Problem #1108**  
Reporter: Dyanorat481

Schedule **Process** Add Material Edit Close Delete More ▾

### Ticket Information

Priority :	Normal	User:	<a href="#">Dyanorat481</a> (86) ▾
Department :	Maintenance	Email:	dyanorat481@gmail.com
Create Date :	Thu, Feb 21 2019 10:00	Customer :	-

## Tickets

**Process Ticket #1108**

**User Information:** Currently selected user  
**Dyanorat481** <dyanorat481@gmail.com> Change

Issue Summary:\*

Issue Description: Device does not power on

---

**Ticket Information:** Due date overrides SLA's grace period.

Ticket Source:

Category:

Sub Category Level 1:

Department:

SLA Plan:

Time Spent: 0 hrs 32 min

Due Date:  10

Time is based on your time zone (GMT+5.30)

Resolution:

---

**Assign The Ticket**

Assignee:

Ticket is currently assigned to **frontfork**

Comments:

---

**Collaborators**

Add New Collaborator

Process
Cancel

### User Information

- **User name:** The person who submitted the ticket, or on whose behalf the ticket was created by a staff member. This is pre-populated. Click 'Change' to select a different user.
- **Issue Summary:** Brief description of the issue. Update if required.
- **Issue Description:** Ticket description provided by the creator of the ticket. This is not editable.

### Ticket Information



- **Ticket Source:** The channel through which the ticket was created. The possible values are 'Phone', 'Email', 'Web', 'API' and 'Other'. This is pre-populated and can be updated if required
- **Category:** The help topic under which this ticket falls. This is pre-populated and can be updated if required. See '**Ticket Categories**' for more details.
- **Sub Category** - Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
- **Department:** The department to which the ticket is currently assigned. This is pre-populated and can be updated if required.
- **SLA Plan:** The service level plan associated with the ticket. Use the drop-down menu to change the plan if required. The option chosen here will prevail even if the SLA plan for the 'Ticket Category' and 'Department' is different.
- **Time Spent** - Cumulative time spent on the ticket by all contributing staff members. This total includes time recorded automatically during service sessions and time manually added by administrators/staff.
- **Due Date:** The date and time by which the ticket should be closed. Change the date and time if required. This will override the date generated by default.
- **Resolution** - A description of the fix/solution. Alternatively, this may contain a description of the steps taken so far, and those that remain, in order to bring about a fix. This is set by the staff member attending to the ticket. Change the resolution if required.

## Assign the Ticket

- **Assignee:** Person who is currently responsible for the ticket. You can change the assigned staff member if required.
- **Comments:** Enter instructions for the assignee or reasons for the assignment.

## Collaborators

- Add people who also worked on the ticket as additional recipients for ticket updates.
- Click 'Add New Collaborator' to associate new or existing users with the ticket.

**Ticket #1108: Add a collaborator** ✕

*🔍 Search existing users or add a new user.*

Search by email, phone or name

Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

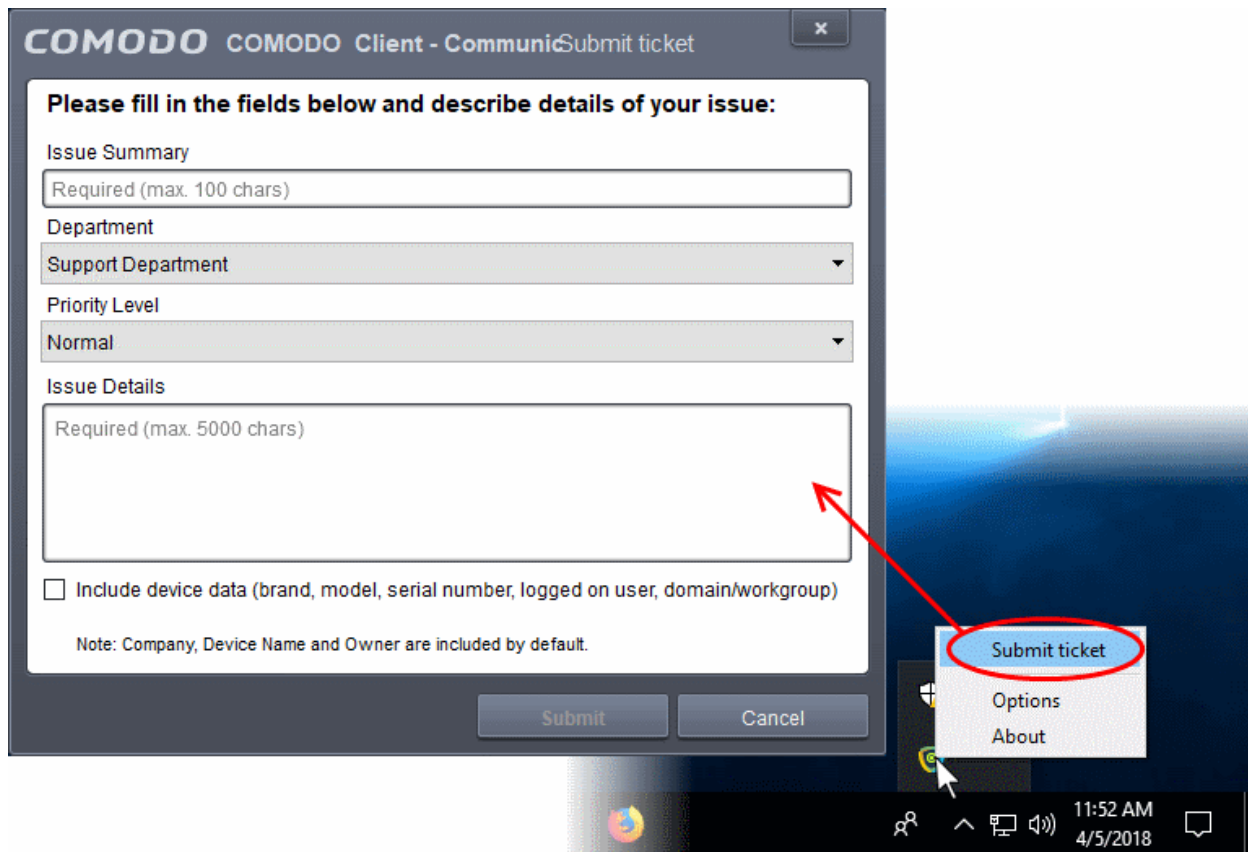
Register with Default Settings  
*Default timezone: GMT 5:30 - Asia/Calcutta*

- Type the first few letters of username/email address of existing users in the 'Search' box at the top and select the user to add an existing user/staff,
- Enter the email address, full name and other details, to add a new user.
- Click 'Add User'
- Repeat the process to add more collaborators
- Click the 'Process' button after you have made your changes. The ticket is updated per the new details.

### Take remote control of Windows or Mac endpoint

Remote control lets you make a remote desktop connection to the Windows or MAC device which generated a ticket. This helps staff solve issues, install third party software, or run system maintenance.

- 'Remote Control' is available only for tickets generated by Endpoint Manager (EM).
- There are two ways in which EM can add tickets to Service Desk:
  - **Automatic** - EM can monitor endpoints and generate a ticket if certain conditions are met. For example, generate a ticket if RAM usage exceeds 90%.
  - **Manual** - Endpoint users can create a ticket by right-clicking the EM system tray icon:



- You need to install 'Remote Control by ITarian' on their local computers (the computer they use to log into Service Desk).
  - You will be offered the opportunity to install this software when you attempt to takeover an endpoint for the first time.
- Once installed, you can take control of the endpoint from the ticket.
- The viewer also supports clip-board sharing so you can copy files between your computer and the endpoint.
- If the managed endpoint has a multi-monitor setup, you can view individual monitors or all monitors at once.

See the following sections for more help:

- [Download and install the remote control application](#)
- [Use the desktop application for remote control](#)

### Download and install the Remote Control application

There are two ways to download the remote control application

- [Download from Service Desk](#)
- [Download from the Comodo One console](#)

#### Download RC from Service Desk

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'My Tickets', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Remote Control' button

**Reminder:** The 'Remote Control' button is available only for tickets generated by Endpoint Manager.

The screenshot shows the Comodo One Service Desk interface. At the top, there is a navigation bar with 'Service Desk > Tickets > My Tickets'. Below this, a ticket card is displayed for 'Please fix VPN Connection problem #1107' with a red 'OPEN' status and 'Reporter: Dyanorat481'. A row of action buttons is visible: 'Remote Control', 'Schedule', 'Process', 'Add Material', 'Edit', 'Delete', 'More', and 'Close'. The 'Remote Control' button is circled in red, and a red arrow points from it to a modal window titled 'Remote Control by ITarian'. The modal window contains the following content:

**Remote Control by ITarian**

**Step 1**  
This operation requires Remote Control by ITarian to be installed. Use the below button to download it. Once it is installed, you will be able to get control of the devices using the 'Remote Control' button.

[Download Remote Control by ITarian](#)

**Step 2**  
Click this [link](#) to remote control a device.

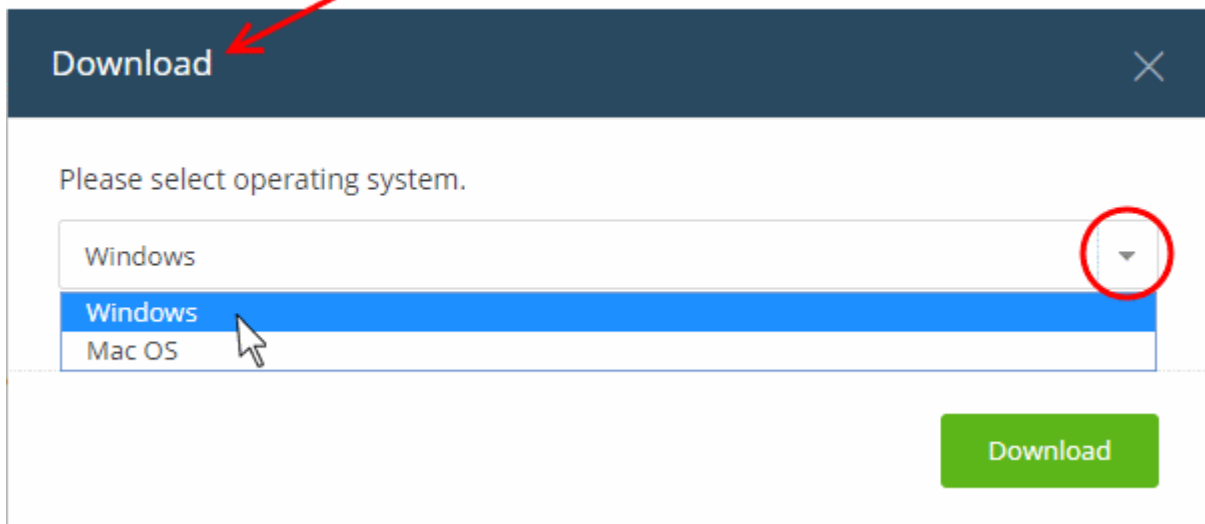
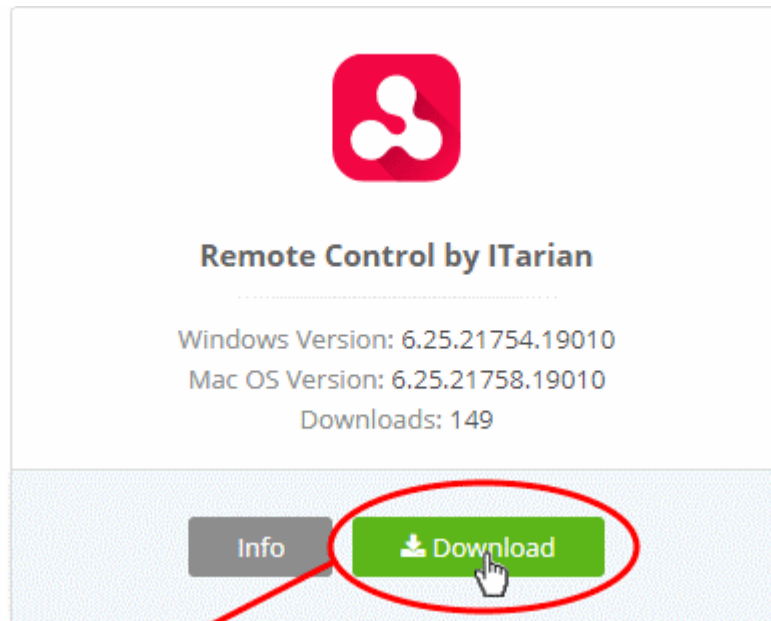
**Note**  
Please make sure that you have the latest version of the Remote Control by ITarian installed. If you need to update Remote Control by ITarian version, please download the new version from the link on Step 1.

- Click 'Download Remote Control by ITarian' under 'Step 1'

Next: **Install the application**

### Download RC from Comodo One Console

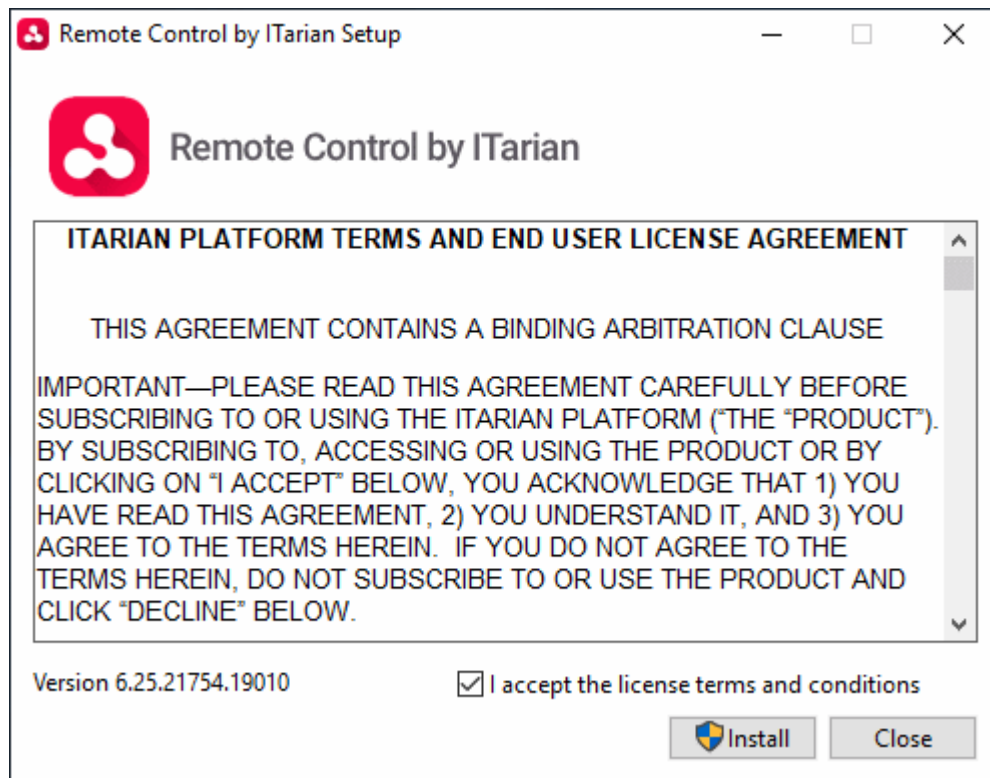
- Login to your Comodo One account and click 'Tools' at the top
- Click the 'Download' button in the 'Remote Control by ITarian' tile:



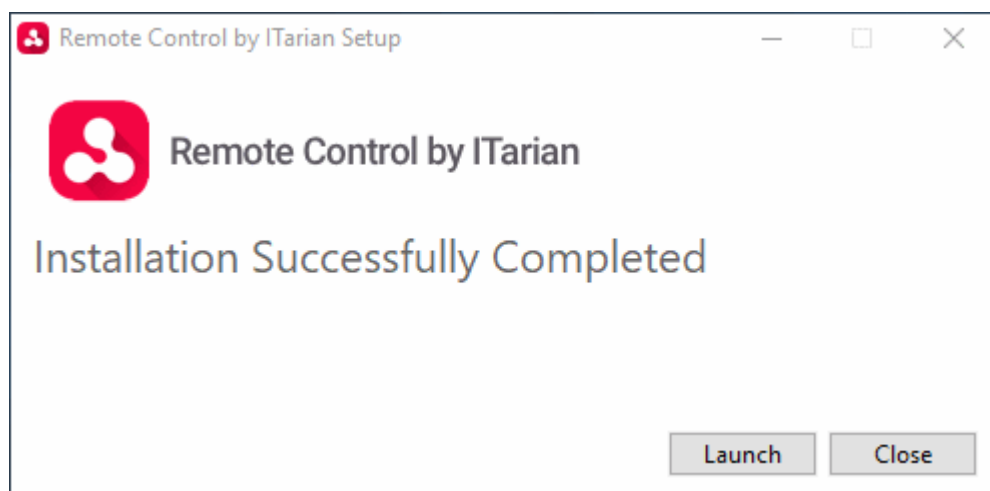
- Select the operating system of your admin machine, click 'Download' and save the setup file.

### Install the application

- Launch the set up file to start the installation wizard:



- You must read and accept the end user license agreement before continuing. After doing so, click 'Install' to start the installation.



- After installation is complete, click 'Launch' to start the application.

### Use the desktop application for remote control

- Once RC is installed, you can take remote control of a Windows / Mac endpoint from the 'Ticket Details' interface.

### Take remote control of a device

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'My Tickets', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Remote Control' button

**Reminder:** The 'Remote Control' button is available only for tickets generated by Endpoint Manager.

### Remote Control by ITarian

**Step 1**  
This operation requires Remote Control by ITarian to be installed. Use the below button to download it. Once it is installed, you will be able to get control of the devices using the 'Remote Control' button.

[Download Remote Control by ITarian](#)

**Step 2**  
Click this [link](#) to remote control a device.

**Note**  
Please make sure that you have the latest version of the Remote Control by ITarian installed. If you need to update Remote Control by ITarian version, please download the new version from the link on Step 1.

- Click 'link' under step 2:

Next, you need to select the application to open the link.

Open Remote Control ... - Application?

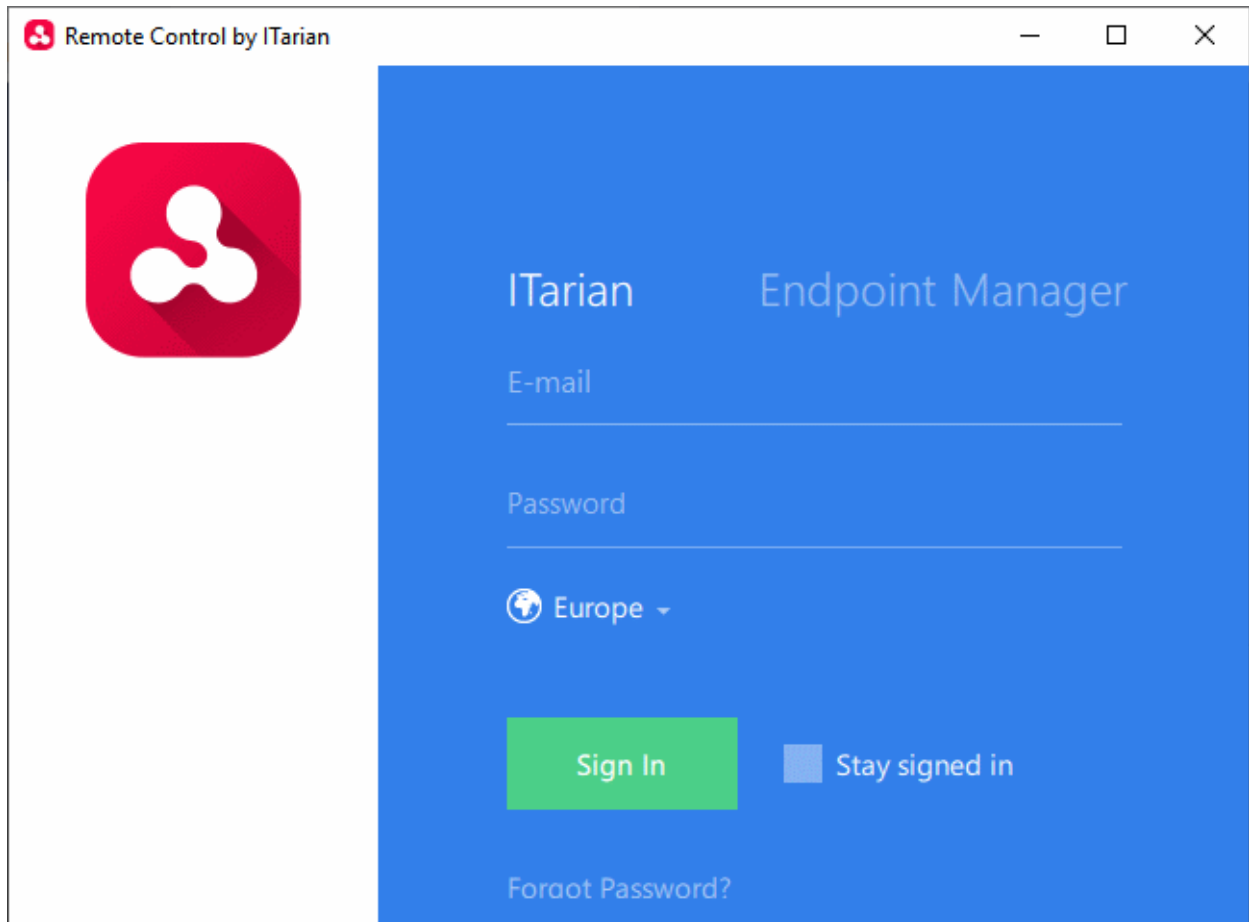
Always open these types of links in the associated app

[Open Remote Control ... - Application](#) [Cancel](#)

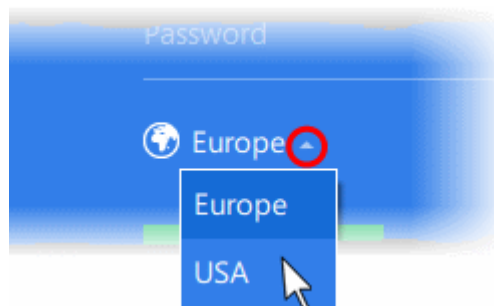
- Click 'Open Remote Control by ITarian'.

**Note** : If a newer version of the application is available, please download it to continue.

The RC application starts:

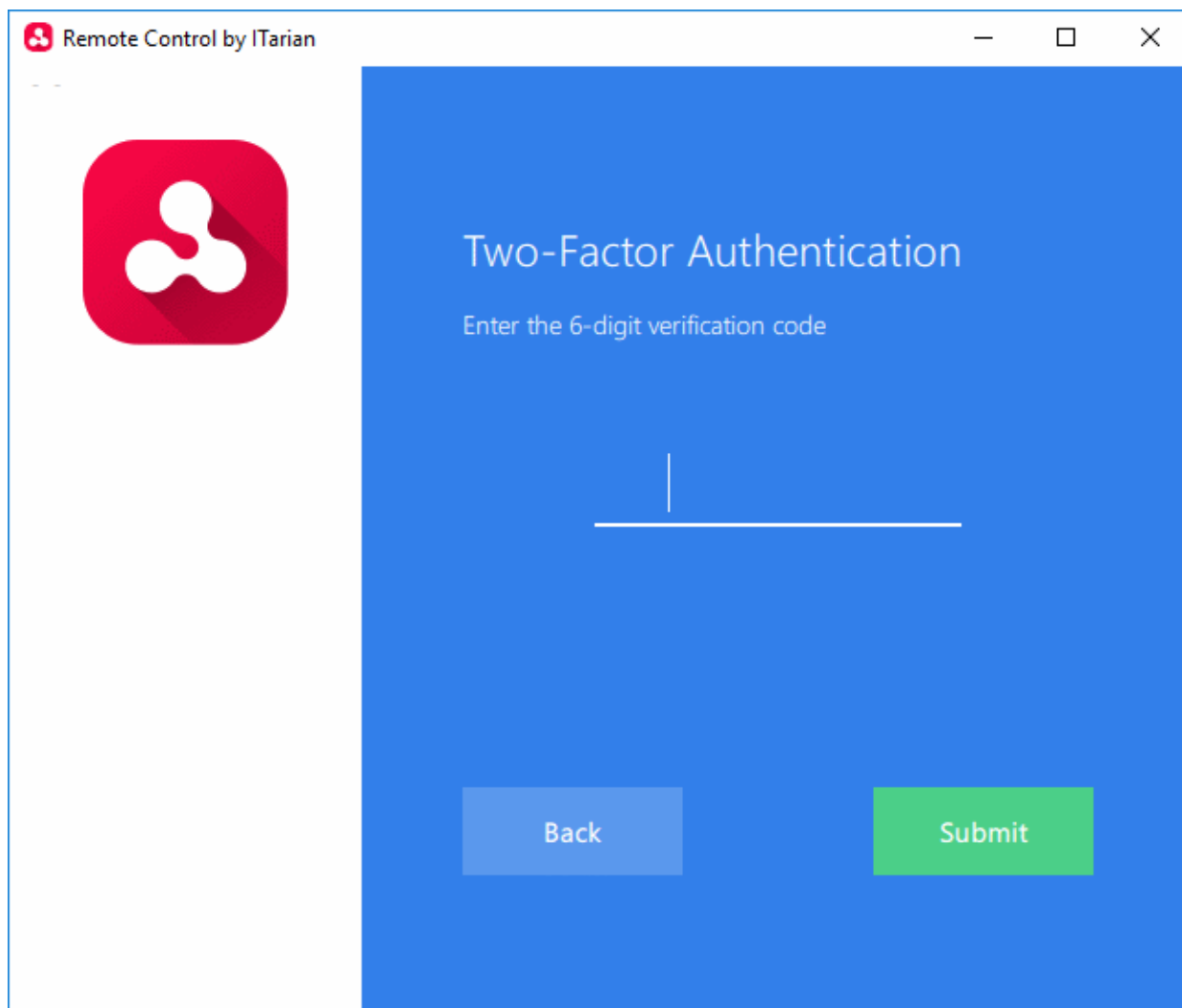


- Click the 'ITarian' tab then enter your C1 username and password
- The region selector allows you to choose the C1 hosted service closest to your location. Select the location nearest to you for the best performance / fastest connection.



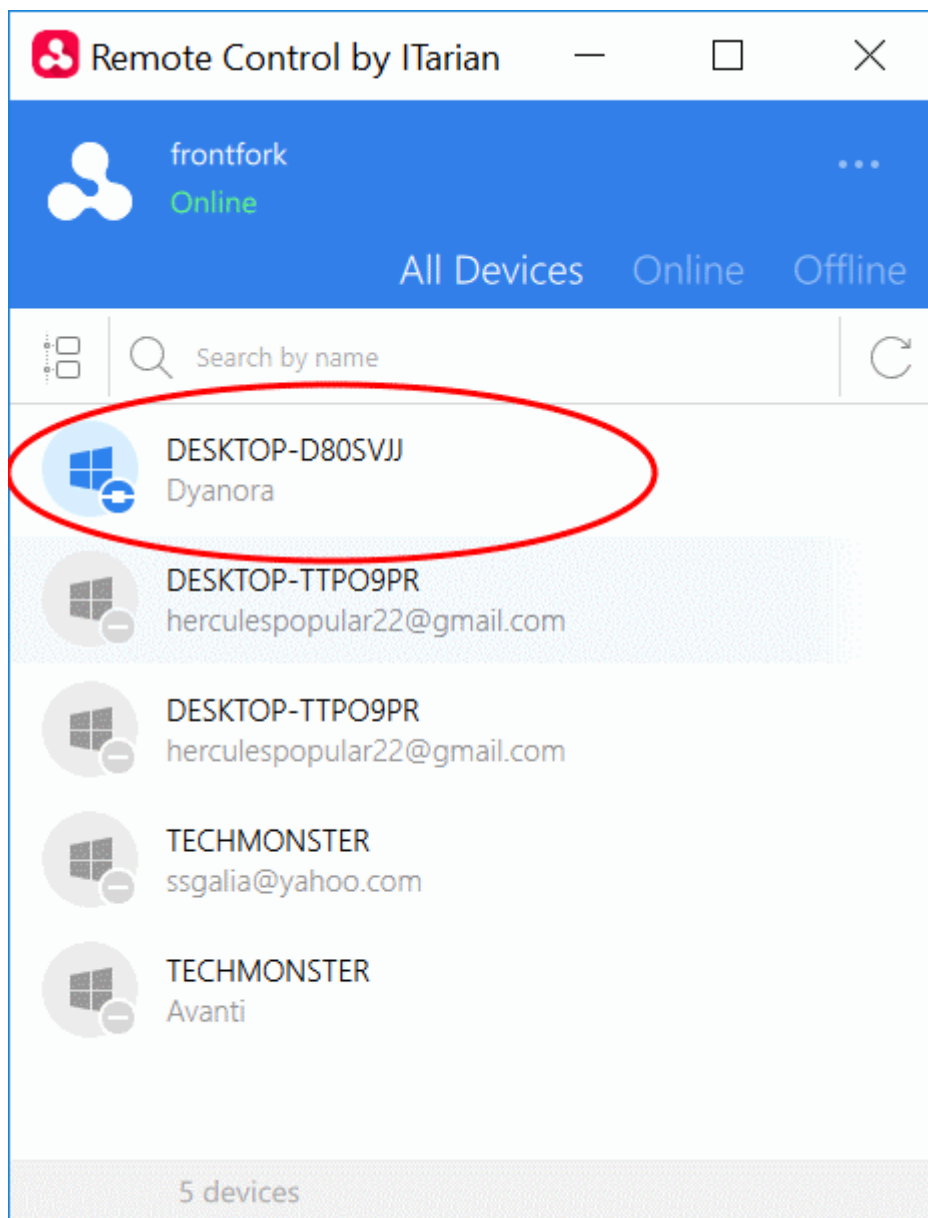
- Click 'Sign In'
- If 'Two-Factor Authentication' is enabled for your account, then you have to enter the authentication code generated in the 'Google Authenticator' app on your mobile device.







- Enter the code and click 'Submit'

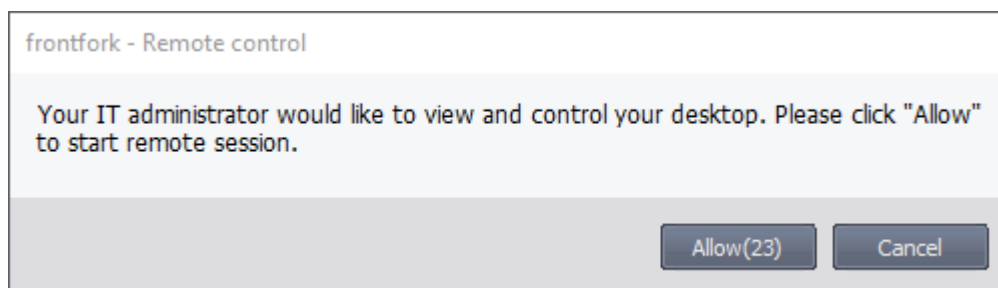
The application opens with a list of devices added to Endpoint Manager. The endpoint associated with the ticket is pre-selected for remote desktop connection:



**Tip:** Alternatively, you can launch the RC application from your desktop and select the target endpoint

- Double click the desktop shortcut  or the system tray icon 
- Login with your C1 username and password
- Select the device you want to manage

A request message is shown on the end-user desktop:

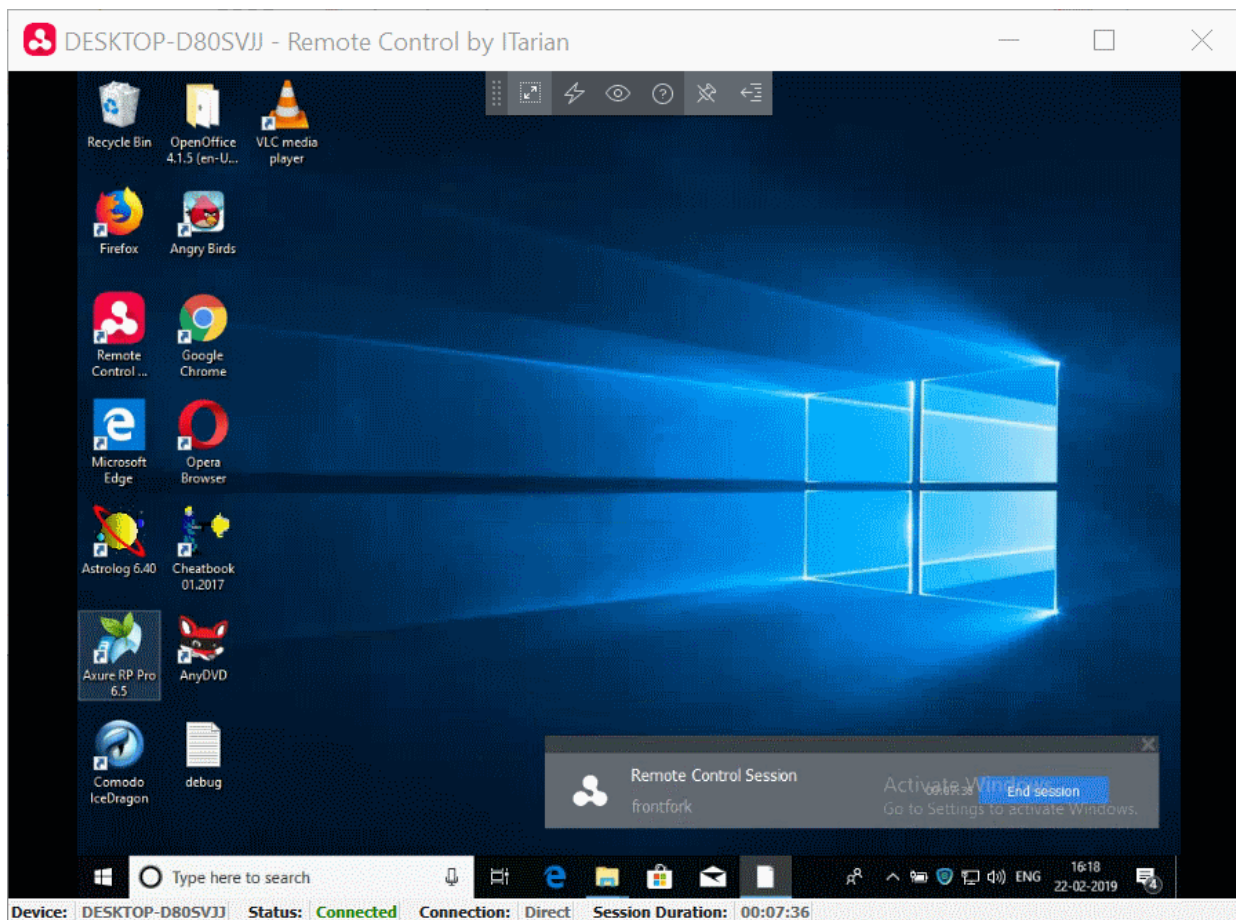


- The connection is established once the user clicks 'Allow', or if the does not respond within 30 seconds.
- The following notification appears once the session is active:



- The user can terminate the connection by clicking the 'End session' button.

The 'Remote Control' interface shows the desktop of the remote computer:

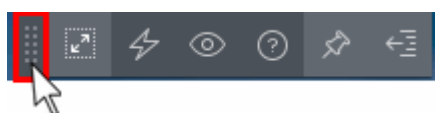


- You can now interact with the target device to perform tasks as required.
- The client interface contains the following menus and settings:



**Full Screen** - The remote desktop will cover your entire display, without the operating system's window-framing interface.

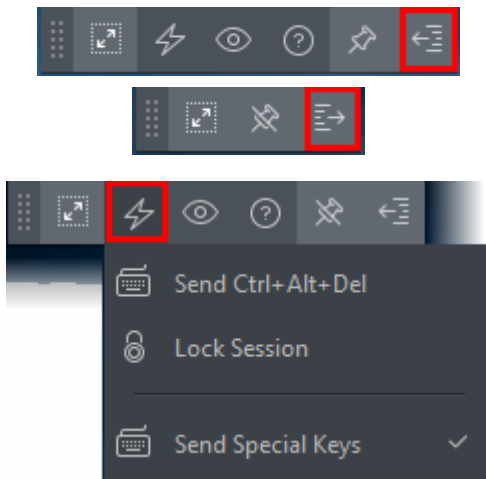
- Click the same icon to exit full screen mode



**Position** - Click and drag the tool bar to your preferred location.



**Pin** - Pin or unpin the tool bar to the title bar in full screen view.

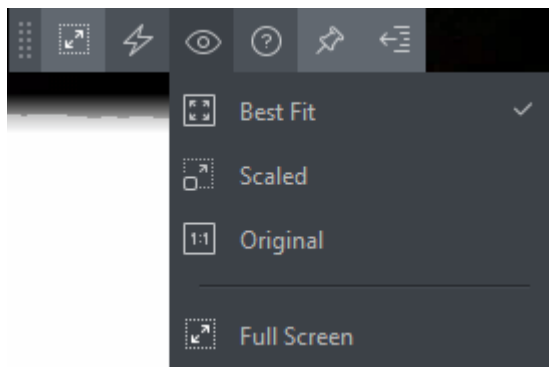


**Minimize/Maximize** - Show/hide tool bar options.

**Actions** - Send control commands to the endpoint.

- **Send Ctrl + Alt + Del** - (Applies only for Windows devices) Opens the Windows security screen. This lets you lock the computer, log the current user out of the remote machine, change passwords, view the local task manager or shut down/restart/hibernate the machine.
- **Lock Session** - Locks the managed endpoint. A password will be required to unlock the endpoint.
- **Send Special Keys** - If enabled, allows you to send key combination commands such as Ctrl+C, Windows + R and so on.

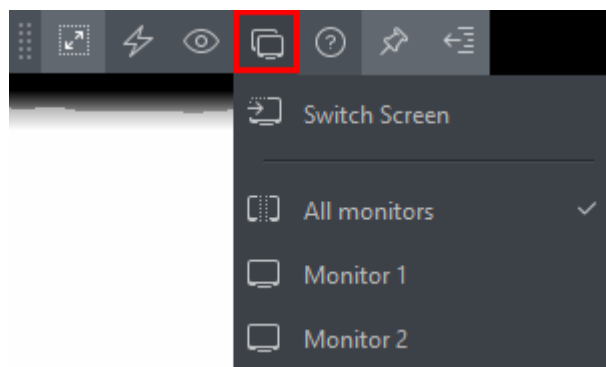
The special key combinations are dependent on the operating systems of the local (admin) device and the managed remote device. See the **list of available special key combinations** given below.



**View** - Change the display size of the remote desktop. The available options are:

- **Best Fit** - Automatically adjusts the screen resolution for the best visual experience.
- **Scaled** - Displays the target desktop with the resolution of the admin computer
- **Original** - Displays the target desktop at its own resolution
- **Full screen** - Displays the remote desktop in full screen view

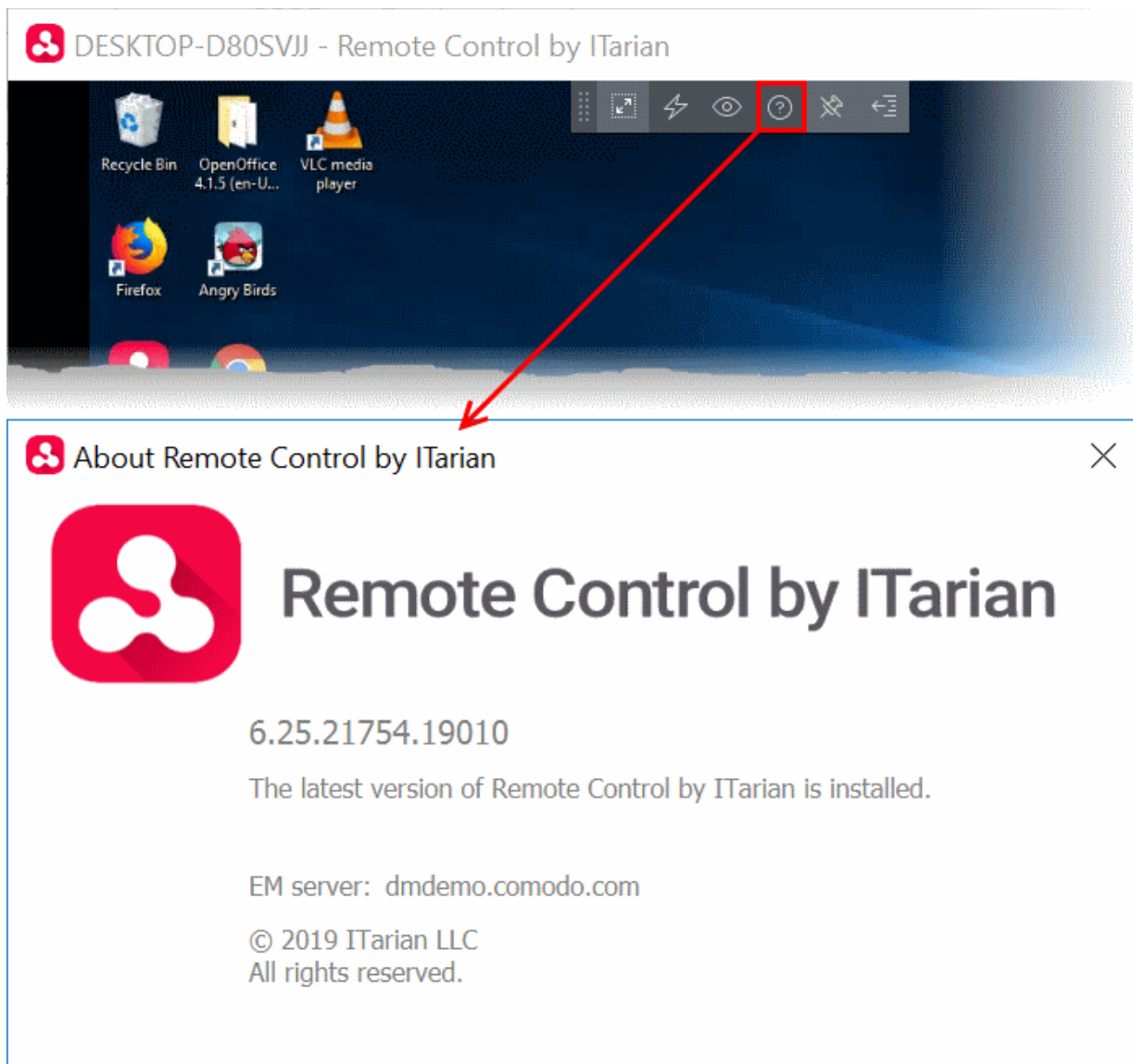
**Multi-Screen** - The multi-screen icon only appears if the target point endpoint has a multi-monitor setup. The drop-down shows all monitors connected to the endpoint and allows you to choose which to view.



- Select 'Switch Screen' to move to the next screen on the list
- Select 'All Monitors' to view all connected screens simultaneously

- Select an individual monitor to view it in stand-alone mode

**Help** - Shows the 'About Remote Control by ITarian' dialog which shows version number and copyright information.



## Special Key Combinations

Admin Device	Managed Remote Device	
	Windows	Mac OS
Windows	'Windows' key is sent only to the remote device Shortcuts in combination with 'Windows' key are applied only to the remote device	'Windows'/'Command' key is sent only to the remote device. Exceptions: <ul style="list-style-type: none"> <li>• Ctrl+Alt+Del</li> <li>• Win+L</li> </ul> PRINT SCREEN and NUMLOCK are not sent to remote device NumPad digit keys always behave as arrow-keys on Mac OS

		<p>'Context Menu' key is sent as zero scan code and appears as key 'a'.</p>
<p><b>Mac OS</b></p>	<p>All Shortcuts with 'Windows'/'Command' key are applied to the remote device, except 'Windows'/'Command' key+Esc</p> <p>Command+Tab - Switches between applications</p> <p>F11 - Shows desktop</p> <p>Ctrl +Up Arrow - Shows all Windows</p> <p>Ctrl+Down Arrow - Shows active application Window</p>	<p>If Apple is keyboard used: Media buttons (e.g. PLAY , STOP, MISSION CONTROL), POWER, EJECT keys and all system shortcuts with these keys are applied only to the local device.</p> <p>Shortcuts with COMMAND are applied to the remote device, except 'COMMAND' key+Esc</p> <ul style="list-style-type: none"> <li>• Command+Tab - Switches between applications</li> <li>• Ctrl +Up Arrow - Shows all Windows</li> <li>• Ctrl+Down Arrow - Shows active application Window</li> <li>• Fn+F11 - Shows desktop</li> <li>• Fn+F12 - Shows Dashboard or enable standard key in Keyboard settings</li> <li>• If non-Apple keyboard is used:</li> <li>• Shortcuts with WIN are applied to the remote device, except 'WIN' key+Esc</li> <li>• Command+Tab - Switches between applications</li> <li>• Ctrl +Up Arrow - Shows all Windows</li> <li>• Ctrl+Down Arrow - Shows active application Window</li> <li>• F11 - Shows desktop</li> <li>• F12 - Shows Dashboard</li> </ul>

- Full list of Windows keyboard shortcuts - <https://support.microsoft.com/en-us/help/12445/windows-keyboard-shortcuts>.
- Full list of MAC keyboard shortcuts - <https://support.apple.com/en-us/HT201236>.

### Add materials / expense items to the ticket

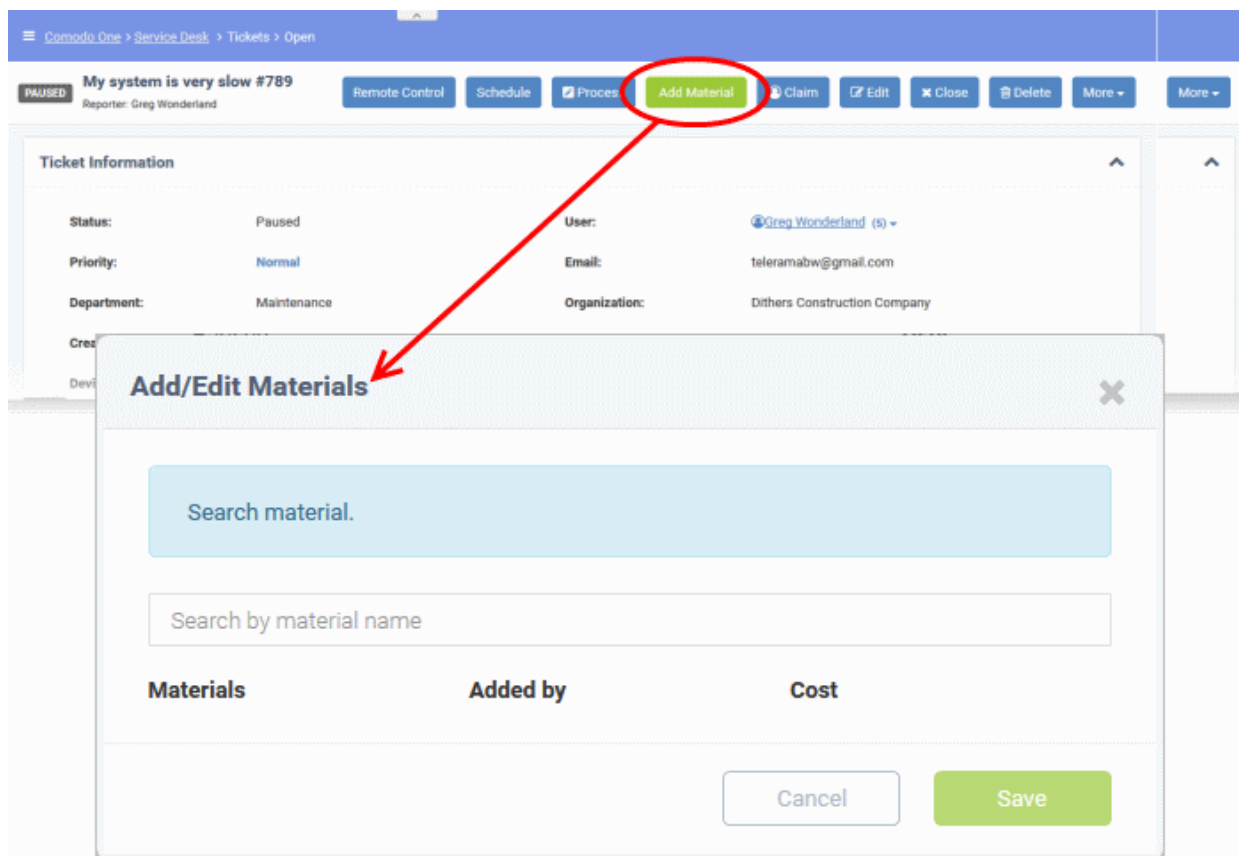
- Staff can add components, consumables and expenses to a ticket which were used when resolving an issue.
- Materials and expenses added to a ticket need to be approved by an administrator. Only then will they be charged to the customer.
- The 'Material Details' pane in the 'Ticket Details' interface shows all existing materials on the ticket.

**Tip:**


- Administrators can create a global inventory of materials.
- Click 'Admin Panel' > 'Manage' > 'Materials'.
- Materials added here will then be available for staff to add to a ticket.
- See [Manage Materials and Expense Types](#) for more details.

### Add a material or additional charges

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Add Material' button at the top:



- Start typing the name of the material in the search dialog. Select the material from the suggestions that appear.
- The material is added to the list.
- Enter the charge for the material in the 'Cost' field.
- Repeat the process to add more items
- Click 'Save' to add the list of items to the ticket
- You can view all materials on a ticket by expanding the 'Material Details' pane of the 'Ticket Details' screen:

Material Details 		
Material Name	Material Cost	Material Status
1.Meal	\$2.00	Awaiting
2.Cooling Fan	\$10.00	Awaiting
3.4 GB RAM	\$20.00	Approved
<b>Total Approved Material Cost: \$20.00</b>		

New items will have an approval status of 'Awaiting'.

- Admins can approve or reject expense items by going to 'Admin Panel' > 'Staff' > 'Material Approval'.
- See [Material Approval](#) if you need more help with this.

**Tip:** Staff can view the materials/expense items that they have added to a ticket by going to 'Staff Panel' > 'Tickets' > 'Materials'. See [View Details of Materials/Expense Items added to Tickets](#) in the previous section, [Manage Tickets](#), for more details.

### Create a schedule for the ticket

A task schedule allows you to pick a time-slot in the future to start a ticket. For example, you could create a schedule for task that involves an on-site visit.

- The schedule will be added to your calendar.
- You can view your calendar from the 'My Calendar' interface ('Staff Panel' > 'Calendars'). See [Manage Calendars](#) if you need more help with calendars.
- You can re-schedule a ticket at anytime. Your calendar will be updated according to the new schedule.

**Tip:** You can also create a schedule for a ticket without opening it. See [Schedule a Ticket](#) in [Manage Tickets](#) for more details.

### Create a schedule for the ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Schedule' button

Your calendar opens with the ticket details shown on the title bar:



Comodo One > Service Desk > Tickets > My Tickets

**My system is very slow #789**  
Reporter: Greg Wonderland

Remote Control | **Schedule** | Process | Add Material | Edit | Close | Delete | More

### Ticket Information

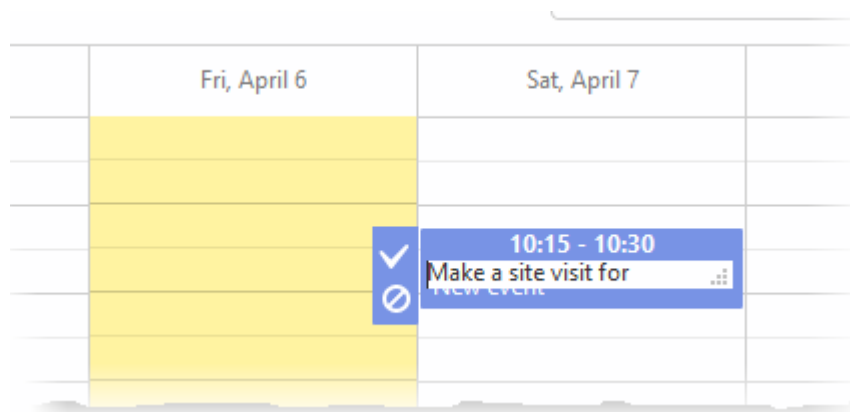
<b>Status:</b>	Open	<b>User:</b>	Greg Wonderland (5)
<b>Priority:</b>	Normal	<b>Email:</b>	teleramabw@gmail.com
<b>Department:</b>	Maintenance	<b>Organization:</b>	Dithers Construction Company
<b>Create Date:</b>	Thu, Apr 5 2018 2:37 pm	<b>Phone:</b>	-
<b>Device Name:</b>	DESKTOP-80165J0	<b>Source:</b>	Other (18.195.253.21)

### Ticket #789: My system is very slow

Day | Week | < 2 Apr 2018 - 8 Apr 2018 > | My Calendar

	Mon, April 2	Tue, April 3	Wed, April 4	Thu, April 5	Fri, April 6	Sat, April 7	Sun, April 8
9 <sup>00</sup>							
10 <sup>00</sup>							
11 <sup>00</sup>							
12 <sup>00</sup>							
13 <sup>00</sup>							
14 <sup>00</sup>							
15 <sup>00</sup>							
16 <sup>00</sup>							
17 <sup>00</sup>							
18 <sup>00</sup>							
19 <sup>00</sup>							

- The current week is shown by default. Use the '>' button to move to the next week / day
- Double-click on the time slot you want to assign to the ticket
- Enter a short description for the task.



- Click the tick mark  to save the schedule
- The appointment is added to the calendar. You can view your calendar from the 'My Calendar' interface.

### Create a Knowledge Base article from a ticket

- The 'Knowledgebase' is a repository of support articles, FAQs and useful information intended to assist end-users with answers to common issues.
- It allows users to identify and solve common issues by themselves without needing to create a support ticket.
- Apart from providing a better service to your users, knowledgebase items can also reduce staff workload.

### Add a knowledgebase article from a ticket

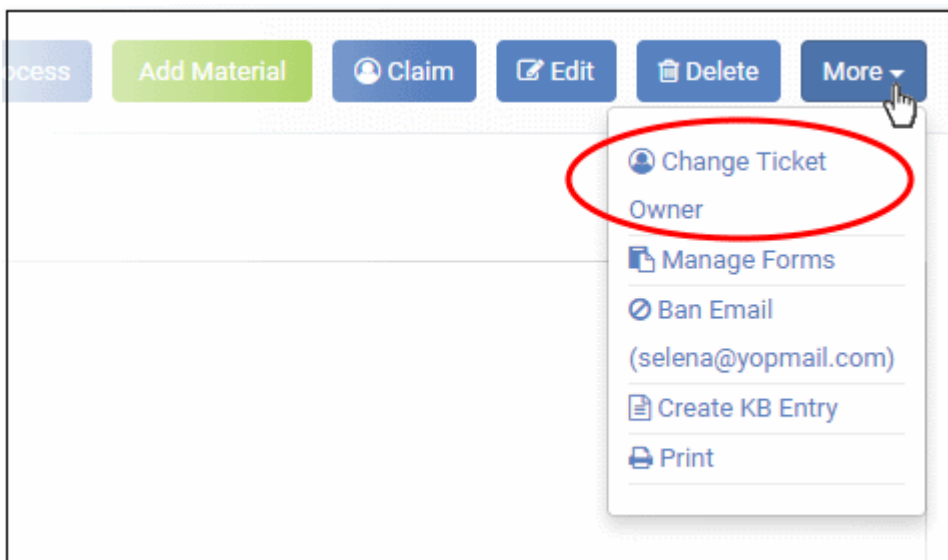
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click 'More' then 'Create KB Entry' from the options.

The screenshot shows the Comodo One Service Desk interface. At the top, the breadcrumb navigation reads 'Comodo One > Service Desk > Tickets > New Ticket'. Below this, the ticket title is 'My system is very slow #732' with a status of 'OPEN' and a reporter named 'john'. Action buttons include 'Schedule', 'Process', 'Add Material', 'Edit', 'Delete', and 'More'. A dropdown menu is open from the 'More' button, listing various actions: 'Change Ticket Owner', 'Release (unassign) Ticket', 'Mark as Overdue', 'Mark as Unanswered', 'Manage Forms', 'Ban Email', 'Ban Email (john@voicemail.com)', 'Create KB Entry' (highlighted with a red circle), and 'Print'. A red arrow points from the 'Create KB Entry' option to the 'FAQ' section below. The 'FAQ' section has a sub-section for 'Answer' and 'Question'. The 'Question' field contains 'My system is very slow'. Below it is a 'Category Listing' dropdown menu with the text 'FAQ category the question belongs to.' and a 'Select FAQ Category' dropdown. There are also radio buttons for 'Listing Type' with 'Public (publish)' and 'Internal (private)' options. At the bottom, there is a rich text editor for the 'Answer' with a toolbar and a preview area showing the question and answer text.

The **FAQ** screen will appear. This screen allows staff to select the category under which the FAQ will be placed. You can also specify articles which are related to the FAQ, and choose to make the FAQ 'Public' or 'Internal'. See **FAQ** for more details.

### Change the ticket owner

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'More' button and choose 'Change Ticket Owner'.



You can change to an existing user, or create a new user:


A screenshot of a dialog box titled 'Change user for ticket #789'. At the top, there is a search bar with the text 'Search existing users or add a new user.' Below the search bar is a text input field with the placeholder 'Search by email, phone or name'. Below the search field, there is a user profile card for 'Greg Wonderland' with the email 'teleramabw@gmail.com' and the company 'Dithers Construction Company'. To the right of the profile card is an 'Add New User' button. Below the profile card, there is a section titled 'Contact Information' with fields for 'Phone Number:' and 'Internal Notes:'. The 'Internal Notes' field contains the text 'Network connection'. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Continue'.

- Enter the user name or email address of an existing user in the search field. Select the user from the suggestions that appear. Click 'Continue'.
- Alternatively, create a new user by clicking the 'Add New User' button Complete the user details form:

**Change user for ticket #2**
✕

*🔍* Search existing users or add a new user.

Search by email, phone or name



**Hertriumph**  
hertriumph@gmail.com

Add New User

**Change user for ticket #2**
✕

*🔍* Search existing users or add a new user.

Search by email, phone or name

Email Address: \*

Full Name: \*

Phone Number:  Ext:

Internal Notes:

Register with Default Settings  
*Default timezone: GMT 5:30 - Asia/Calcutta*

Cancel
Reset
Add User

- Click 'Add User' to change the ticket owner.

**Tip:** New users will be added as a guest users.

- You can associate new users with a customer in the 'User Directory' interface ('Staff Panel' > 'Users' > 'User Directory' > Click on their username > Click the link next to 'Customer').
- See '**Add a user to a customer company**' in **Manage Users** more details.

## Claim / self-assign a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Claim' button

The screenshot shows the Comodo One Service Desk interface. At the top, there is a navigation breadcrumb: Comodo One > Service Desk > Tickets > My Tickets. Below this, the ticket status is 'PAUSED' and the title is 'Display not clear #787' with the reporter 'Greg Wonderland'. A row of action buttons includes 'Schedule', 'Process', 'Add Material', 'Claim' (circled in red), 'Edit', 'Delete', and 'More'. Below the buttons, ticket details are displayed in a grid:

Department:	Maintenance	Organization:	Dithers Construction Company
Create Date:	Wed, Apr 4 2018 2:45 pm	Phone:	-
Device Name:	-	Source:	Web (182.74.23.22)

Below the details, a 'Please Confirm' dialog box is open, asking 'Are you sure want to claim (self assign) this ticket?' with 'Yes' and 'Cancel' buttons. A red arrow points from the 'Claim' button to the dialog box.

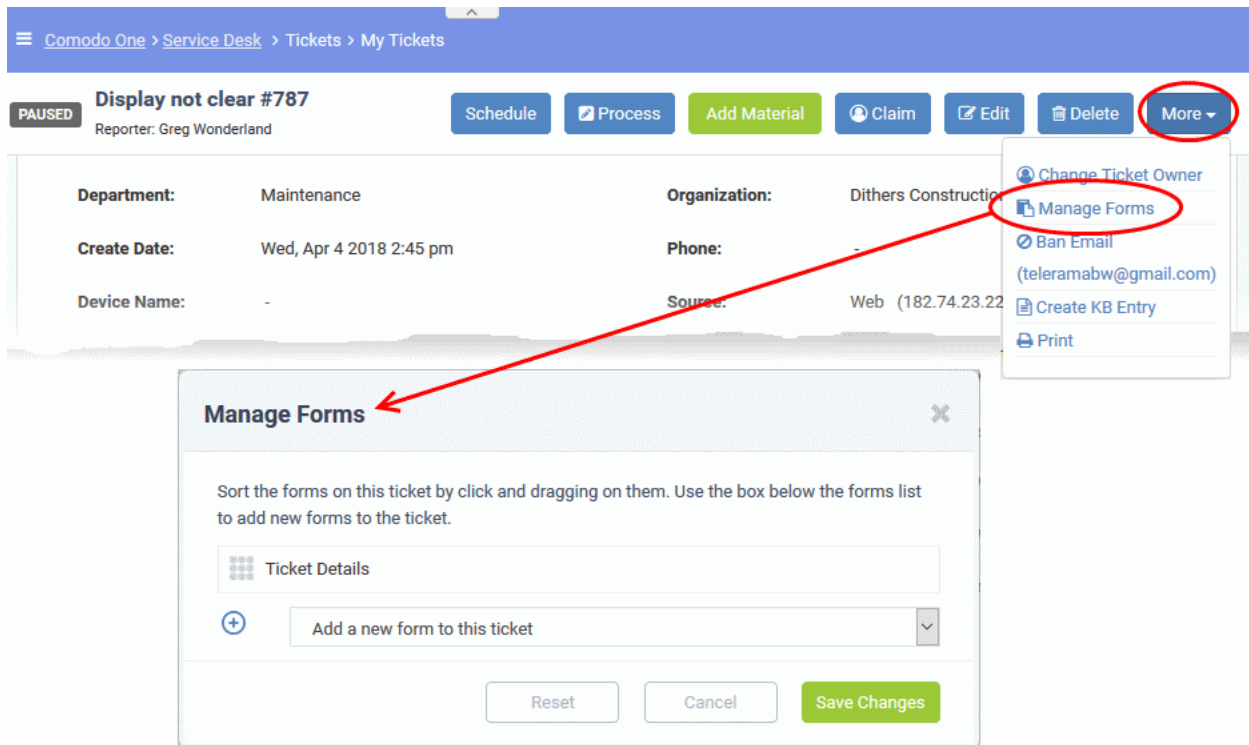
- Click 'Yes' in the confirmation screen to claim the ticket.

### Manage forms for a ticket

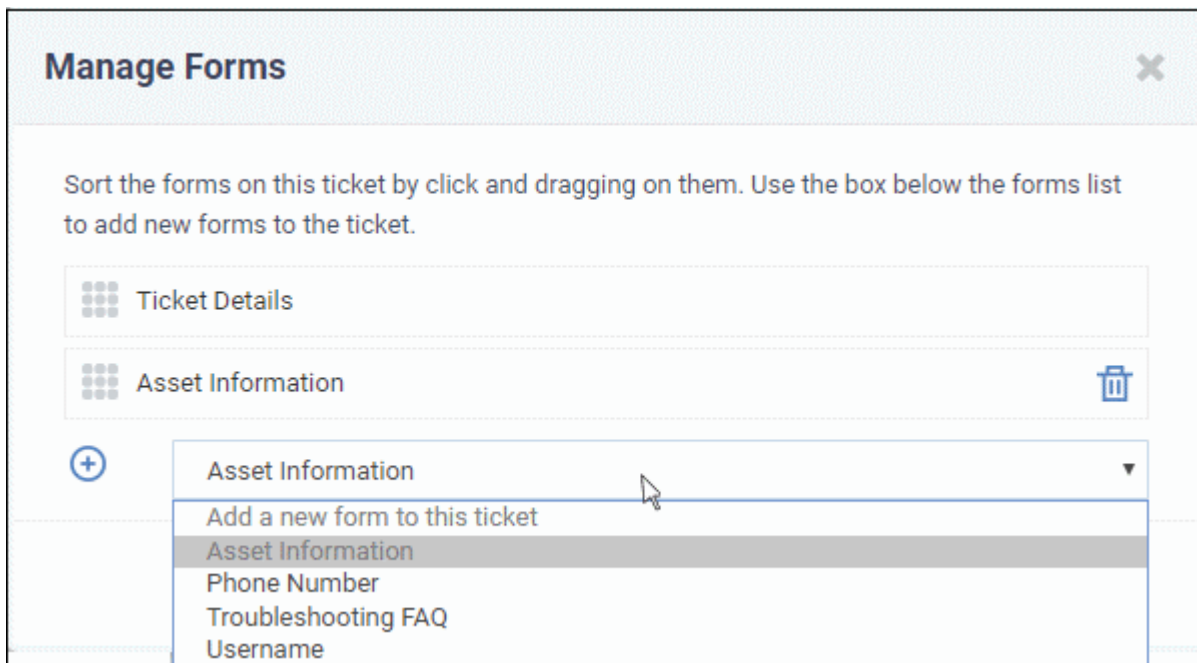
- Staff can add **custom form fields** to a ticket to request more details about the issue.
- Once added, the form can be completed by a staff member in the **ticket edit screen**, or by the user in the web portal.

### Manage the forms for a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'More' button and choose 'Manage Forms'.



- Select the form you want to add from the drop-down.
- Forms can be added by admins in 'Admin Panel' > 'Manage' > 'Forms' > 'Add Custom Form.' See **Forms** for more details.



- Click the 'Save Changes' button.

Staff members can view and complete the form in the **edit screen**. It will also be visible to the user in the web portal.

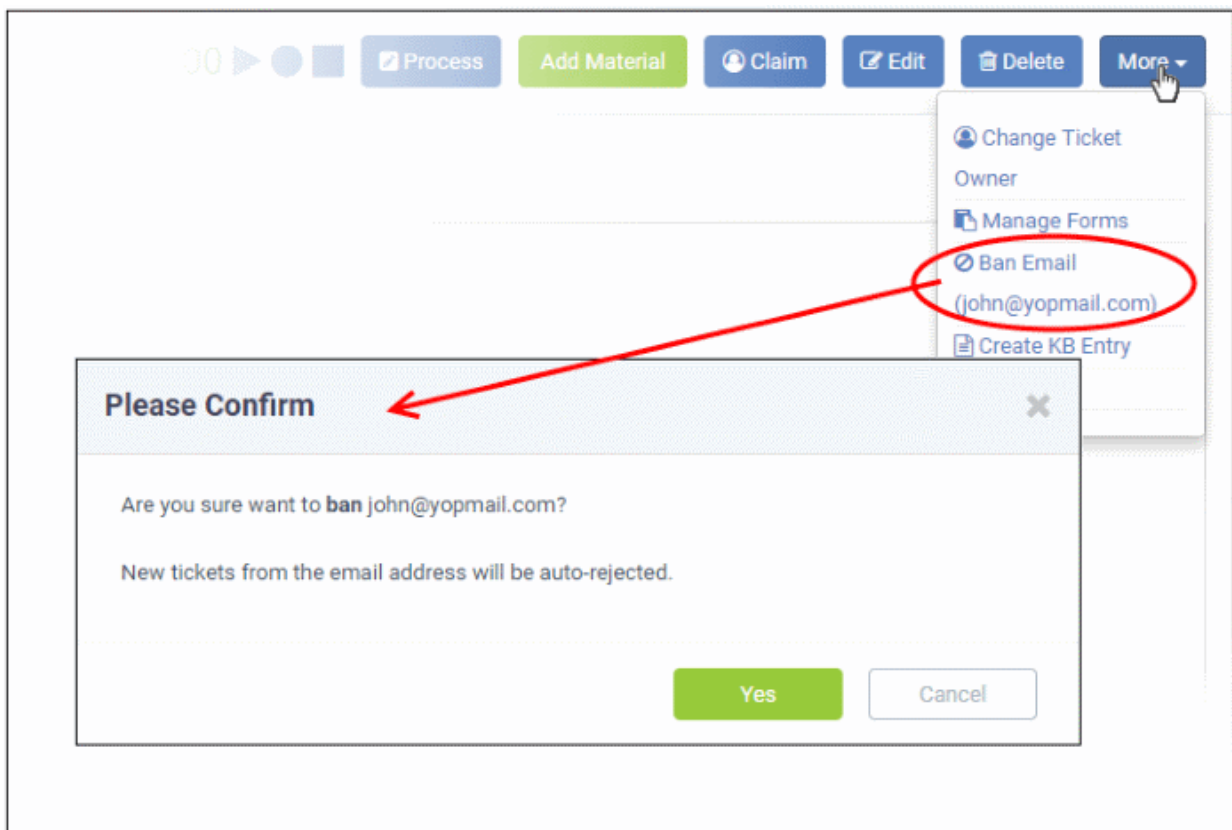
- Click the 'Save Changes' button at the bottom.

## Ban a user

Service Desk allows staff to ban users so they will no longer be able to create support tickets. Users can be blocked from the details screen of tickets that they have created.

- Open the 'Staff' panel (see last link on the left)

- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'More' drop-down at the top right and choose 'Ban Email'.



- Click 'Yes' in the confirmation dialog to ban the user.

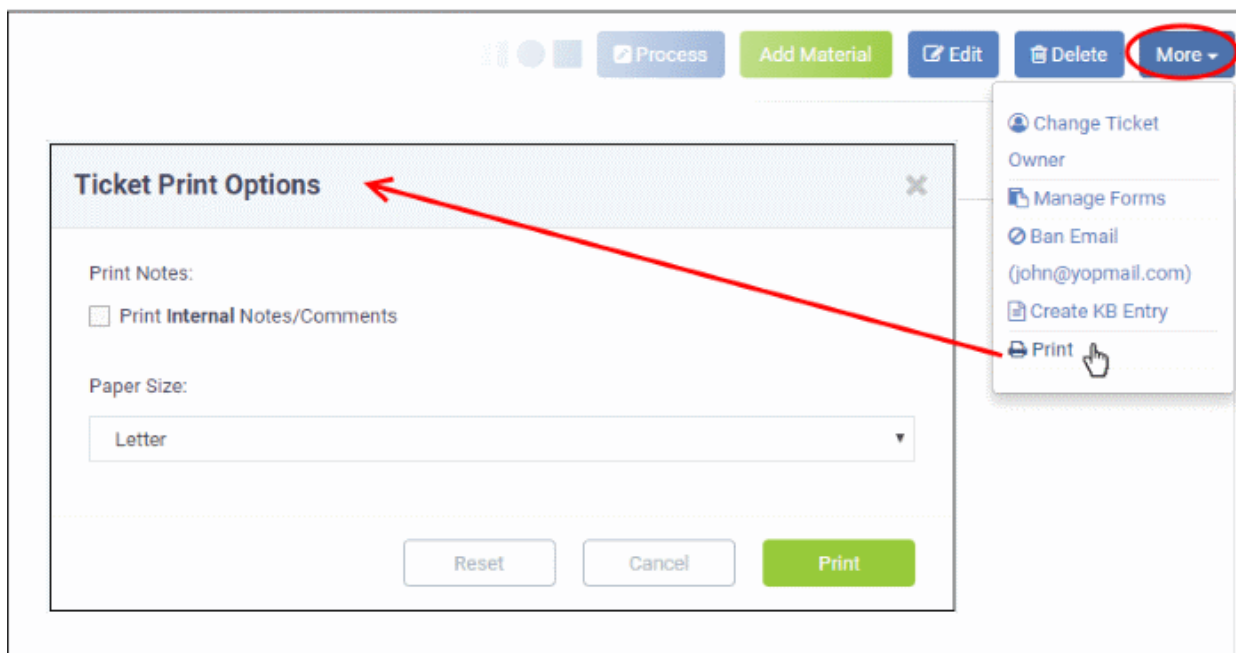
Though the user may still be able to login to the web portal, they will not be able to create new tickets.

## Print a ticket

Ticket print-outs contain all ticket activity as well as the time spent on the issue.

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click 'More' then 'Print' from the options:





- **Print Notes:** Select if internal notes and comments should be included in the print
- **Paper Size:** Select the size and click the 'Print' button.

A PDF of the selected ticket will be generated and shown:

# SUPPORT CENTER

Support Ticket System

---

**Coyote** 05/03/2017 2:52 pm GMT 5.30

**Ticket #22**

<b>Status</b>	open	<b>Name</b>	Blondie Dagwood
<b>Priority</b>	Normal	<b>Email</b>	sumeetdomestic@gmail.com
<b>Department</b>	Sales	<b>Phone</b>	917654983210
<b>Create Date</b>	04/20/2016 3:47 pm	<b>Source</b>	Phone (182.74.23.22)

<b>Assigned To</b>	Coyote	<b>Help Topic</b>	Asset Issue / Report a Problem
<b>SLA Plan</b>	Default SLA	<b>Last Response</b>	05/02/2017 10:08 am
<b>Due Date</b>	05/08/2017 10:15 am	<b>Last Message</b>	04/20/2016 3:47 pm

**Ticket Details**

**Asset Type** Printer

Time Spent ( GMT 5.30)						
Start	End	Time(h:m:s)	Staff	Billable	Manual	
2016-04-22 01:37:38	2016-04-22 01:38:42	00:01:04	Coyote	✓		
2016-04-22 01:41:37	2016-04-22 03:29:14	00:10:45	Coyote	✓		
2016-04-22 03:13:53	2016-04-22 03:23:53	00:10:00	Coyote	✓	✓	
2017-05-03 12:22:21	2017-05-03 12:31:52	00:09:31	Coyote	✓		
2017-05-03 12:22:21	2017-05-03 12:31:52	00:09:31	Coyote	✓		

- Save the file for your future reference and/or print the ticket from the pdf file.

## Edit a ticket

Basic ticket details can be updated at anytime from the 'Ticket Details' interface.

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Edit' button


The screenshot displays the 'Ticket Details' interface for a ticket titled 'System very slow #788'. The ticket status is 'PAUSED' and the reporter is 'Bumpsted Dagwood'. A toolbar at the top contains several action buttons: 'Remote Control', 'Schedule', 'Process', 'Add Material', 'Claim', 'Edit', 'Delete', and 'More'. The 'Edit' button is circled in red. Below the toolbar, the 'Ticket Information' section is visible, containing the following details:

<b>Status:</b>	Paused	<b>User:</b>	<a href="#">Bumpsted Dagwood (14)</a>
<b>Priority:</b>	Normal	<b>Email:</b>	mmoxford@yahoo.com
<b>Department:</b>	Maintenance	<b>Organization:</b>	Dithers Construction Company
<b>Create Date:</b>	Thu, Apr 5 2018 11:31 am	<b>Phone:</b>	913214569870
<b>Device Name:</b>	DESKTOP-D1OLOH4	<b>Source:</b>	Other (18.195.253.21)

## Update Ticket #788

### User Information: Currently selected user

User: **Bumpsted Dagwood**  
<mmoxford@yahoo.com>

 Change

### Ticket Information: Due date overrides SLA's grace period.


Ticket Source: \*

Category:

Department:

SLA Plan:

Time Spent: 0 hrs 30 min

Due Date:     *Time is based on your time zone (GMT+5.30)*

### Ticket Details: Please Describe Your Issue

Issue Summary: \*

Priority Level: \*

Asset Type:

Ticket Type:

Ticket Type Sub Category:

### Internal Note: Reason for editing the ticket (required)

Save

Reset

Cancel

## User Information

Details about the user who submitted the ticket, or on whose behalf the ticket was submitted. This user is also known

as the 'Owner' of the ticket. You change the ticket owner from this area.


Click the 'Change' button to specify a different owner.

- Enter the user name or email of an existing user in the search field. Select from the suggestions that appear.
- OR
- Click 'Add New User' to create a new user. Complete the new user form. New users are added as guests.

### Change user for ticket #788 ✕

**🔍 Search existing users or add a new user.**

Search by email, phone or name



**Bumpsted Dagwood**  
mmoxford@yahoo.com  
Dithers Construction Company

**Add New User**

---

**Contact Information**

Phone Number: 913214569870

Internal Notes:

**Cancel** **Continue**

### Ticket Information

Ticket information is fetched automatically from the system. You can change these details as required.

**Ticket Information:** Due date overrides SLA's grace period.

Ticket Source: \*

Category:

Department:

SLA Plan:

Time Spent: 0 hrs 30 min

Due Date:     *Time is based on your time zone (GMT+5.30)*

Ticket Summary: Please Describe Your Issue

- **Ticket Source:** The channel through which the ticket was created. Change the source if required.
- **Category:** The help topic under which this ticket falls. You can change the ticket category if required.
- **Department:** The department to which the ticket is currently assigned. You need to change the department if the ticket is assigned to a staff member in a different department.
- **SLA Plan:** The service level plan associated with the ticket. This depends on the category to which the ticket belongs. You can also manually change the SLA plan if required.
- **Time Spent:** The cumulative time spent by all staff on the ticket. This includes time measured by the counter and time that was manually entered.
- **Due Date:** The date and time by which the ticket should be closed. Due dates may be auto-generated by the ticket category, department or SLA plan. You can change the due date as required, overriding the existing date.

### Ticket Details

- **Issue Summary:** The description that was entered when the ticket was created. Change this if required.
- **Priority Level:** Ticket criticality. This is pre-selected, depending on the chosen ticket category. Change the priority if you want.
- **Asset Type:** The type of item that the ticket concerns. For example, 'Workstation', 'Server', 'Printer', 'Mobile'. Change the asset type using the drop-down if required.
- **Type:** The kind of the request. The possible values are 'Alert', 'Order' and 'Problem'. Change the type using the drop-down, if required.
- **Sub Type:** Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'. Change the sub-category, if required.

### Internal Note

- Enter a reason for updating ticket details.
- Click the 'Save' button to update the ticket

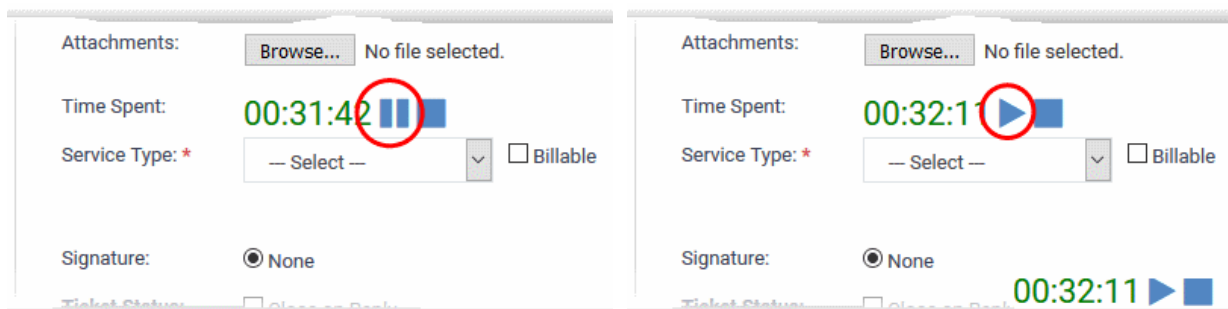
### Pause and resume a Ticket

Tickets can be paused and resumed by staff. Paused tickets can only be resumed by the same staff member or by an administrator.

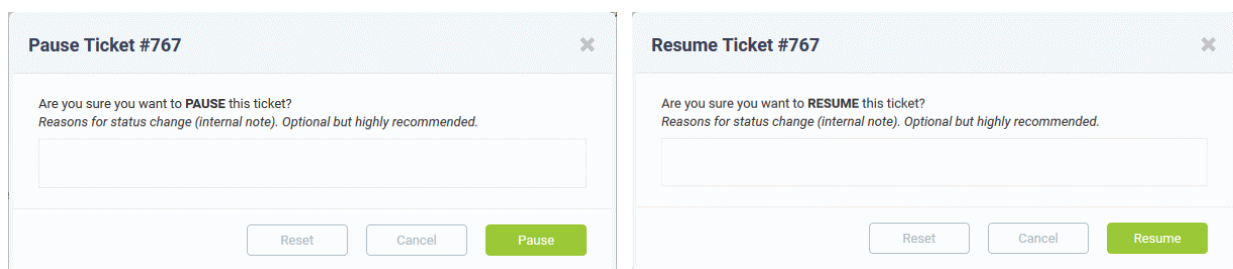
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Ticket Actions' stripe to open the 'Ticket Options' pane, if not already opened.

The time spent counter shows the time spent during the current support session.

- Click the 'Pause' or 'Resume' button depending on the ticket status.



The respective internal note screen will be displayed.



- Click the Pause button after entering the reason.
- Click the Resume button after entering the reason.

## Close / reopen tickets

You can close tickets if all tasks are complete. All billable time will be assigned to the customer. If required, staff members can reopen closed tickets.

- Only tickets with 'Open' status can be closed. 'Paused' tickets cannot be closed. If required, you can resume the ticket and close it. See **Pause and resume** a ticket if you need help with this.
- Staff members can only close tickets that are assigned to them
- Admins can close tickets assigned to any staff member
- You can also add a resolution status when you close a ticket.

You can close a ticket in two ways:

1. Manually - Click the 'Close' button at the top of the interface. See the explanation given below.
2. Close a ticket after sending a reply. See **Post a reply** for more details.

### Manually close a ticket

- Open the 'Ticket Details' screen of the ticket, if it is not already opened
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open

- Click the 'Close' button

The screenshot displays the Comodo One Service Desk interface. At the top, a ticket titled "System very slow #788" is shown with a red "OPEN" status tag and the reporter "Bumpsted Dagwood". A toolbar contains several action buttons: "Remote Control", "Schedule", "Process", "Add Material", "Edit", "Close", "Delete", and "More". The "Close" button is circled in red, and a red arrow points from it to a dialog box titled "Close Ticket #788".

The "Ticket Information" section shows the following details:

Status:	Open	User:	Bumpsted Dagwood (14)
Priority:	Normal	Email:	mmoxford@yahoo.com
Department:	Maintenance	Organization:	Dithers Construction Company

The "Close Ticket #788" dialog box contains the following text:

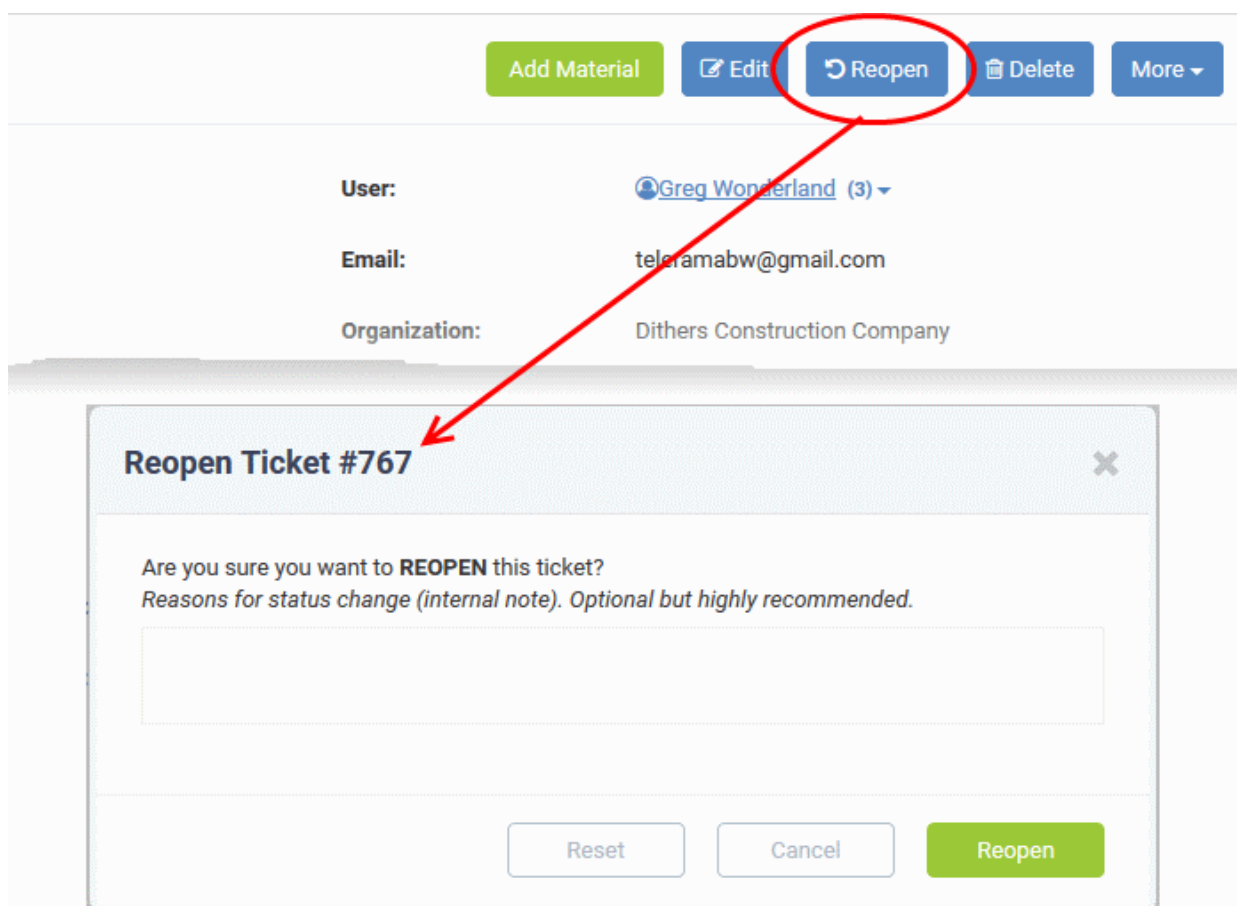
Are you sure you want to **CLOSE** this ticket?  
Reasons for status change (internal note). Optional but highly recommended.

Below the text is a text input field. At the bottom of the dialog are three buttons: "Reset", "Cancel", and "Close".

- Enter the reason and click 'Close'

## Re-open a closed ticket

- Click 'Staff Panel' > 'Tickets' > 'Closed'
- Click the ticket number to open the ticket details interface.
- Click 'Reopen'
- The 'Reopen Ticket' dialog appears:



- Enter a reason for reopening then click the 'Reopen' button.

Staff members can now resume work on the ticket.

### Remove a Ticket

You can delete a ticket as follows:

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to remove
- Click the 'Delete' button from the ticket details interface



The screenshot displays a ticket titled "System very slow #788" with the reporter "Bumpsted Dagwood". The ticket is currently "Open" with a "Normal" priority and is assigned to "Bumpsted Dagwood (14)". The department is "Maintenance" and the organization is "Dithers Construction Company". The email address is "mmoxford@yahoo.com".

A red circle highlights the "Delete" button in the top action bar. A red arrow points from this button to a "Please Confirm" dialog box. The dialog box contains the following text:

**Please Confirm**

Are you sure you want to DELETE this ticket?

Deleted tickets CANNOT be recovered, including any associated attachments.

Please confirm to continue.

Buttons: Yes (green), Cancel (white)

- Click 'Yes' in the confirmation screen.

Please note when a ticket is deleted, it cannot be recovered.

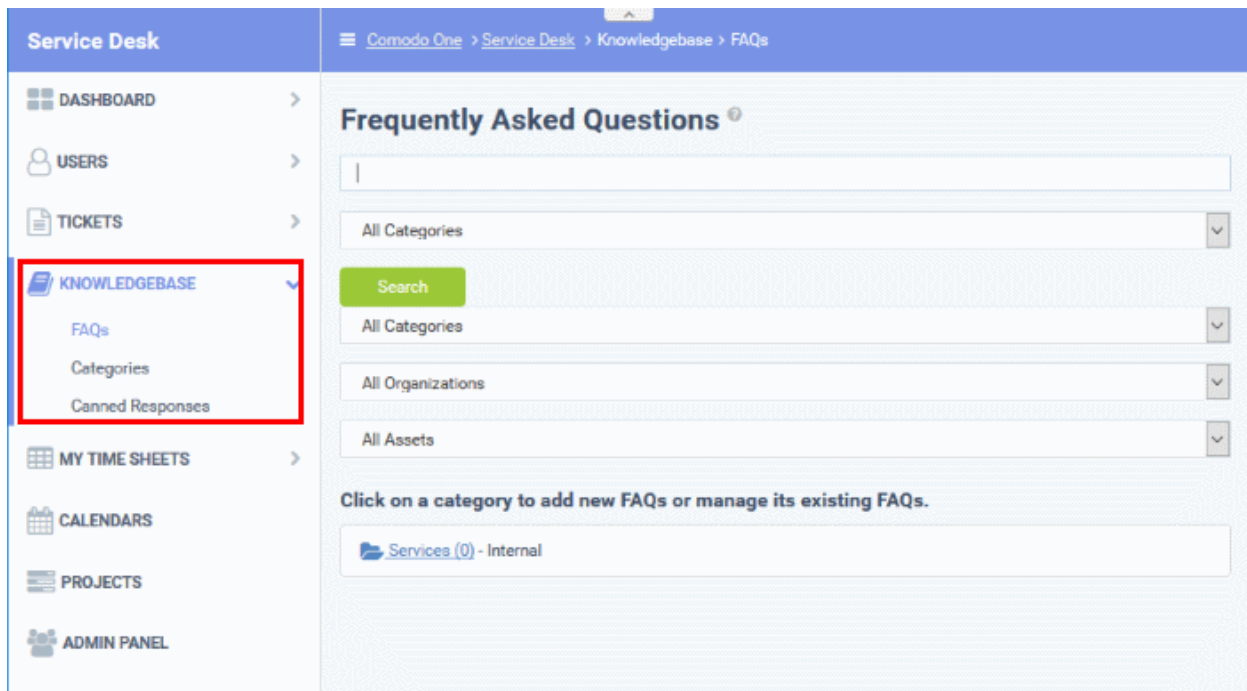
## 3.4 Manage Knowledgebase

Click 'Staff Panel' > 'Knowledgebase'

- The knowledgebase feature allows staff to create documents which contain solutions to commonly faced problems. These can be used to form a body of reference for users and fellow staff members alike.
- There are two types of FAQ - 'Public' and 'Internal'. While public FAQs are intended for customers/end-users, internal FAQs are intended for staff members and administrators. FAQs are grouped under different categories for easy reference.
- Canned responses are stock replies to common questions which can be quickly inserted into ticket responses by staff.
- The knowledgebase and canned responses can be enabled or disabled by admins at 'Admin Panel' > 'Settings' > 'Knowledgebase'.

**View, manage and add knowledgebase items:**

- Open the staff panel (see the last link on the left)
- Click 'Knowledgebase'



The following sections explain more about:

- **FAQs**
- **Categories**
- **Canned Responses**

### 3.4.1 FAQs

- Click 'Staff Panel' > 'Knowledgebase' > 'FAQs' to open the FAQ section.

Staff can post solutions to common issues in the FAQ section of the web-portal. These documents help end-users to find answers without raising a support ticket, allowing staff to prioritize more important issues.

- FAQs are grouped into different categories. New FAQs must be added to an existing category.
- New categories can be created in the 'Categories' section ('Staff Panel' > 'Knowledgebase' > 'Categories'). See **'Manage FAQ Categories'** for more details.
- To edit an FAQ, click 'Staff Panel' > 'Knowledgebase' > 'FAQs' > Open an FAQ category > Open a specific FAQ > Click 'Edit FAQ'
  - You can edit an FAQ's content, change the FAQ's title and change the category to which it belongs.
  - You can add links to relevant ticket categories.
  - You can choose to keep FAQs internal (so they can be viewed by only by staff members) or make them public (so they can be viewed by users in the web portal under the 'Knowledgebase' tab).
- You can add tickets to FAQs. The questions and responses in the ticket thread will be shown in the FAQ.
- You can publish, unpublish or delete an FAQ by using the 'Options' drop-down at the bottom of the view ticket interface.
- To open the FAQ screen, click 'Staff Panel' > 'Knowledgebase' > 'FAQs'

Service Desk > Knowledgebase > FAQs

## Frequently Asked Questions <sup>?</sup>

|  All Categories

All Categories

All Customers

All Assets

Click on a category to add new FAQs or manage its existing FAQs.

- [Asset Issue \(0\) - Internal](#)
- [Services \(1\) - Internal](#)
- [Request Accessories \(1\) - Public](#)

### Filter Options

The upper part of the FAQ screen allows you to filter and search for FAQs:

- Filters let you search for specific FAQs and/or narrow results by category, customer or asset.
- Clear any filters and click 'Search' again to view the full list. Alternatively, click the 'FAQs' link on the left.

The lower part of the screen displays all existing FAQ categories. The numbers in parentheses indicate how many FAQs are in the category. Please see the following links for more details:

- [View a FAQ](#)
- [Add a FAQ to a category](#)
- [Edit a FAQ](#)
- [Publish / Unpublish a FAQ](#)
- [Remove\\_FAQ](#)

### View an FAQ

- Click 'Staff Panel' > 'Knowledgebase' > 'FAQs'
- Click a category

All Assets

Click on a category to add new FAQs or manage its existing FAQs.

- Asset Issue (0) - Internal
- Services (3) - Internal**
- Request Accessories (1) - Public

Service Desk > Knowledgebase > FAQs

## Frequently Asked Questions

Category Name : Services - Internal

Category Description : System is slow

Last updated 09/17/2018 4:35 pm

+ Add New FAQ   Edit Category   Delete Category

- Please fix VPN Connection problem - Internal
- Power Connection Problem - Internal
- Second Monitor [Suspicious Files Folder for John] MONITORING Triggered on TECHMONSTER of ( frontfork ) - Internal

All FAQs in the category are shown.

- Click an FAQ to see it in full and to view further options
- Hover your mouse over an FAQ to view a summary of the ticket:

The screenshot shows a web interface for managing FAQs. At the top, there are three buttons: 'Add New FAQ', 'Edit Category', and 'Delete Category'. Below these is a list of FAQ categories, including 'Please fix VPN Connection problem - Internal', 'Power Connection Problem', and 'Second Monitor Problem - Internal'. A modal window is open over the 'Power Connection Problem' entry, displaying the following content:

**Question :** Power Connection Problem

**Attachment :**

**Question:**  
Device does not power on

**Answer:**  
Hi Dyanorat481,

Your ticket #1108 created on Thu, Feb 21 2019 10:56am is in Support department. We will give troubleshooting instructions over phone first

**Answer:**  
We will come there

Last updated : Mon, Feb 25 2019 11:11am

[View](#) | [Attachments \(0\)](#) | [Edit](#)

- Click the 'View' link to view the full FAQ page
- Click the 'Attachments' link to view supporting documents and images added to the FAQ
- Click the 'Edit' link to modify FAQ content, change FAQ category, add attachments and specify related ticket categories.

### Add an FAQ to a category

- Click the name of the category to which you want add a FAQ.

All FAQs in the category will be displayed. You can edit or delete category from this screen also. See '**Manage Categories**' for more details.

- Click 'Add New FAQ'

The 'Add New FAQ' screen will be displayed.



### Answer

- Enter the solution for the question in the text field.

### Attachments

- Click 'Choose File' to add attachments to the FAQ. Attachments you add here will be available for download from the FAQ.

### Categories

- Select help topics that should be listed as 'related' in the FAQ. This will also help users to locate the FAQ if they search by ticket category in the web portal.

### Internal Notes

- Add notes for the FAQ that are for internal purpose only.

Click the 'Add FAQ' button at the bottom.

The 'FAQ successfully added' screen will be displayed.

Comodo One > Service Desk

FAQ added successfully

### Frequently Asked Questions

All Categories Check cat Edit FAQ

Listing Type : (Public)

Question : My computer is taking too much time to process a request.(Published)

Answer : The reasons could be:

1. You may have opened too many applications
2. The current RAM may not be able to support multiple applications for its size

Try the following:

1. Restart the computer
2. Check if virus is affecting the performance. Install a good antivirus software and run to remove any virus.

If the above do not work, please raise a ticket.

Attachments :

Categories :

Last updated : 12/20/2017 4:27 pm

Options:

Select Action

Go

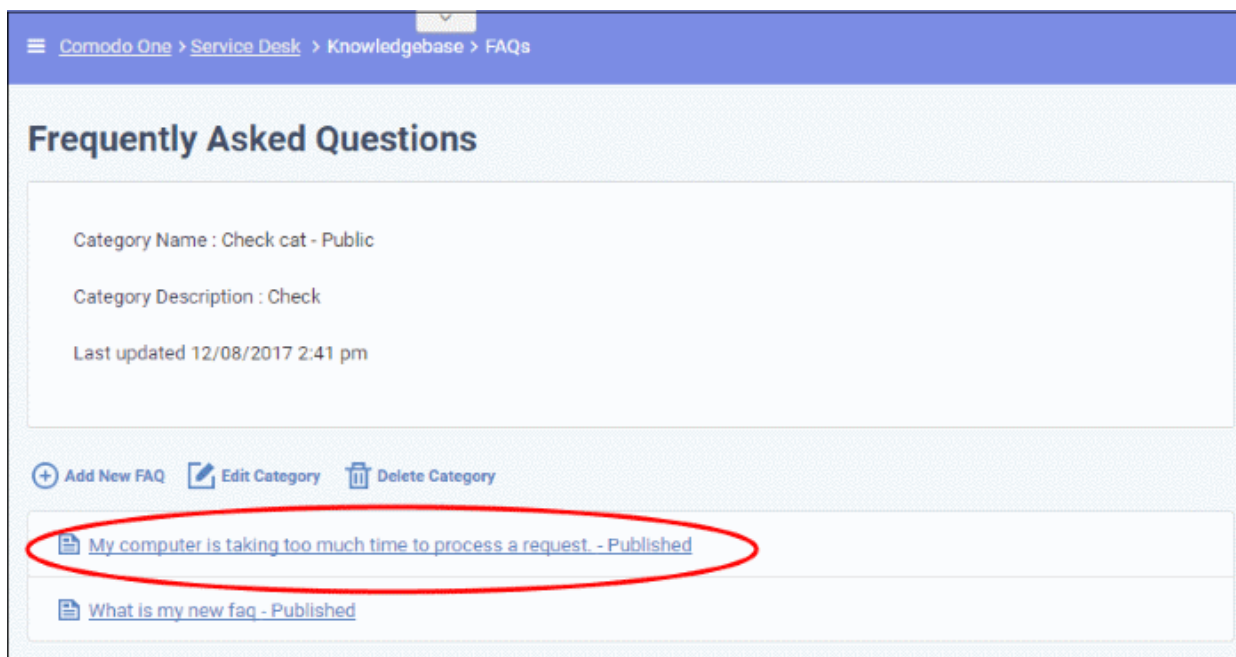
From the screen you can also edit, publish, unpublish or delete the FAQ using the 'Options' drop-down.

### Edit an FAQ

FAQs can be edited to update answers, change ticket categories, add/remove internal notes and more. This is useful to add answers for FAQs that are generated from tickets.

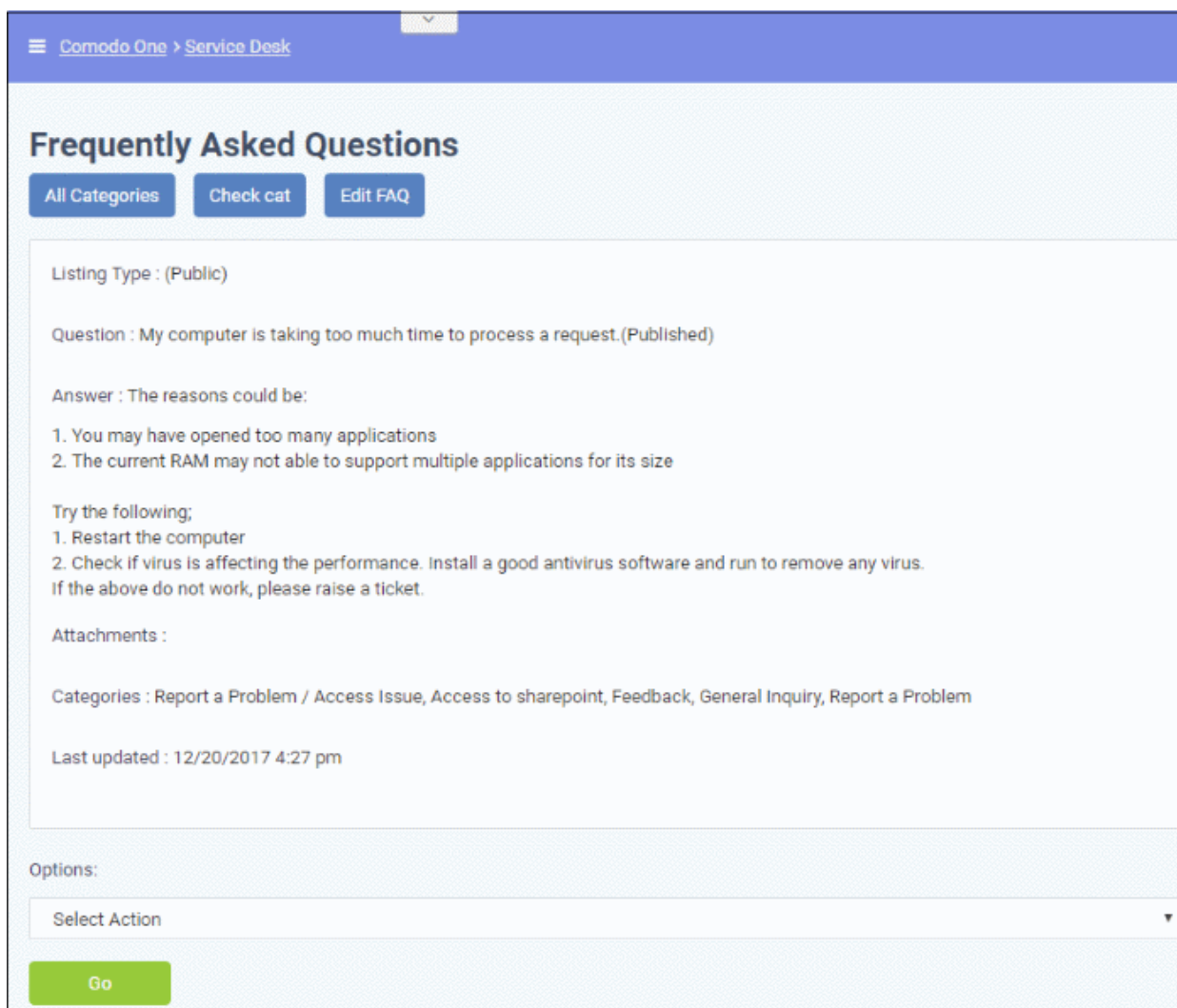
- Click 'Knowledgebase' on the left then 'FAQs'
- Click the category in which the 'FAQ' that you want to edit is placed.

The list of FAQs in the category will be displayed.



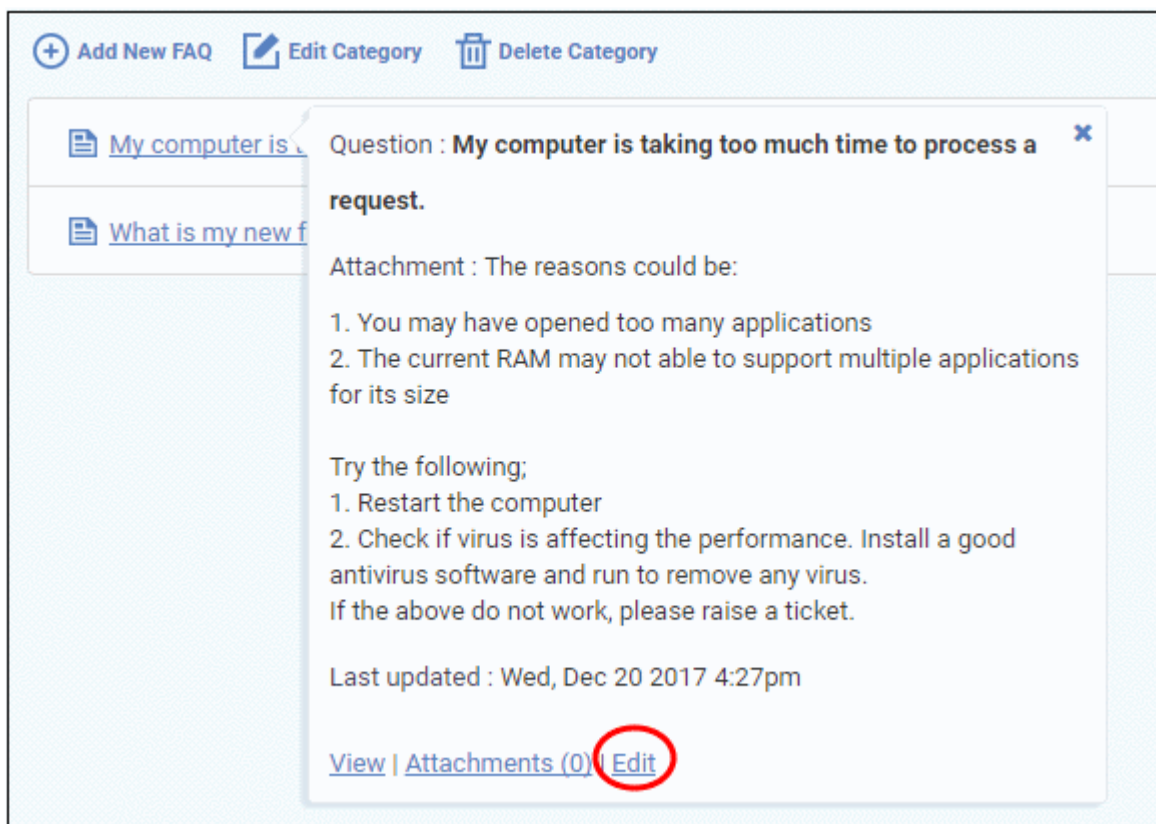
- Click the 'FAQ' that you want to edit.

The 'FAQ' details screen will be displayed.





- Click the 'Edit FAQ' button at the top
- Alternatively, place the mouse cursor on the 'FAQ' name and click the 'Edit' link from the tool-tip.



The 'Update FAQ' screen will be displayed.



The form is similar to 'Add New FAQ' form. For descriptions of parameters to be entered in the form, see the [explanation of adding a new FAQ](#).

- Edit the 'FAQ' and when done, click the 'Save Changes' button.

## Publish / Unpublish an FAQ

'Internal' FAQs can only be viewed by staff members. 'Public' (aka 'Published') FAQs will be available in the web portal for end-users to view.

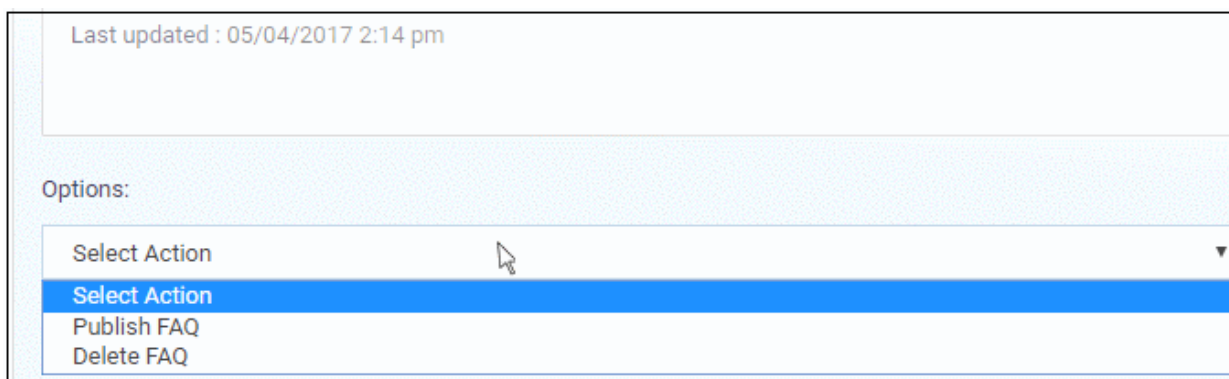
- Click the name of the category from the ;FAQ' interface

The list of FAQs in the category will be displayed.

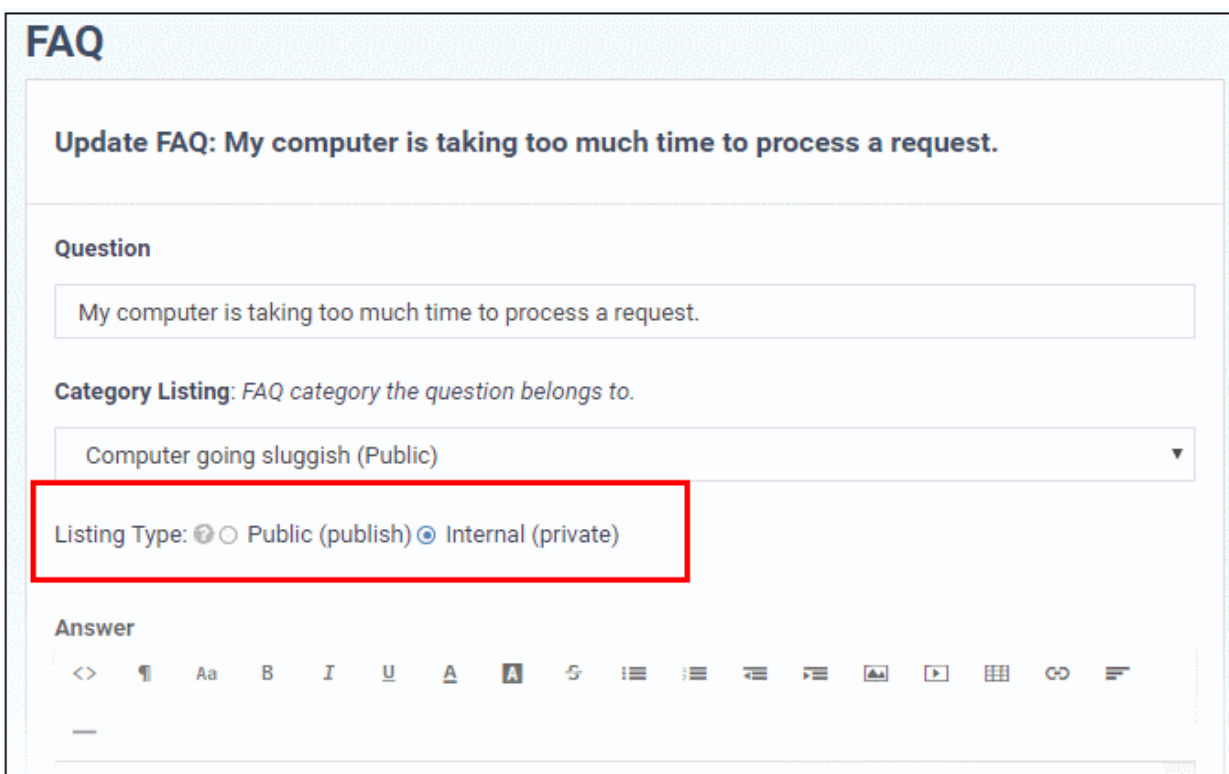
- Click the FAQ that you want to publish/unpublish

The 'FAQ' details screen will be displayed.

- To unpublish a published FAQ and make it internal, select 'Unpublish' from the Options drop-down
- To publish an internal FAQ and allow it to be viewed by end-users, select 'Publish' from the Options drop-down
- Click 'Go' below the 'Options' drop-down.



Alternatively, open the 'Update FAQ' for the question by clicking 'Edit FAQ' button at the top and change the 'published' status of the FAQ. See the [explanation of editing a FAQ](#) for more details.



## Remove an FAQ

FAQs that are no longer needed can be removed from Service Desk.

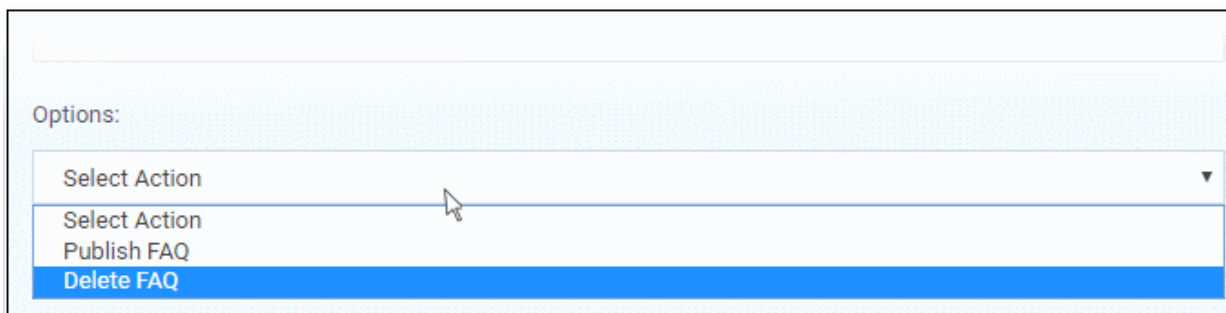
- Click the name of the category from the FAQ interface

The list of FAQs in the category will be displayed.

- Click the FAQ that you want to delete

The 'FAQ details' screen will be displayed.

- Select 'Delete FAQ' from the 'Options' drop-down and click the 'Go' button.



The 'FAQ' will be deleted from the category.

## 3.4.2 Manage FAQ Categories

Click 'Staff Panel' > 'Knowledgebase' > 'Categories'

- Frequently Asked Questions (FAQs) can be added to categories of your choice. New FAQs must be added to an existing category.
- Categories can be made 'Public' or 'Internal'. Individual FAQs can also be made 'Public' or 'Internal'.
  - 'Public' category + 'Internal' FAQ = FAQ is internal.
  - 'Public' category + 'Public' FAQ = FAQ is published to end-users.
  - 'Internal' category + 'Internal' FAQ = FAQ is internal.
  - 'Internal' category + 'Public' FAQ = FAQ is internal.
- Select the checkbox next to a category and click 'Make Public' to publish it.
- Select the checkbox next to a category and click 'Make Internal' to make it category private.

NAME	TYPE	FAQS	LAST UPDATED
<a href="#">Computer going sluggish</a>	Public	1	05/04/2017 12:57 pm
<a href="#">Requests for Quotes</a>	Public	1	04/26/2016 5:52 pm
<a href="#">Internet Connection</a>	Public	1	05/30/2016 4:22 pm
<a href="#">Printer Issues</a>	Public	1	05/30/2016 4:24 pm

## Column Headers

- **Name:** The name of the category. Click a name to open its **update screen**.
- **Type:** Indicates whether the category is published or internal.
- **FAQs:** Displays the total number of FAQs available under the category. Click a number to open the respective 'FAQ Category' screen. See '**FAQs**' for more details.
- **Last Updated:** The date and time at which the category details was edited and updated.

From the interface, a staff member can:

- **Add a new category**
- **Edit a category**
- **Delete a category**
- **Mark a category as public or private**

## Add a new category

- Click the 'Add New Category' link at the top

The screenshot shows the 'FAQ Categories' management interface. At the top, there is a table with columns for 'NAME', 'TYPE', 'FAQS', and 'LAST UPDATED'. A red circle highlights the '+ Add New Category' button, with a red arrow pointing to the 'Add New Category' dialog box that appears below. The dialog box contains the following fields and options:

- Add New Category**
- Category information**
- Category Type**:  Public (publish)  Private (internal)
- Visible for role**:  All  Only Selected
- Role**: [Text input field]
- Visible for Customer**:  All  Only Selected
- Customer**: [Text input field]
- Category Description**: Summary of the category. [Rich text editor]
- Internal Notes**: [Text area]
- Buttons**: Add, Reset, Cancel

The 'Add New Category' dialog appears.

- **Category Type**: Select whether the FAQ category should be marked as 'Public' or 'Private'. By default it will be 'Private'.
- **Visible for Role**: Specify which staff roles can view the FAQs in the category. Select 'All' to let all staff view them. Choose 'Only Selected' to restrict visibility to certain staff roles.
- **Visible for Customer**: Specify which customer's users are allowed to view the FAQs in this category. Select 'All' to allow any customer's users to view them. Choose 'Only Selected' to restrict

visibility to users of certain companies.

- **Category Name:** Enter a short, descriptive name for the FAQ category.
  - **Category Description:** Enter a brief description for the category.
  - **Internal Notes:** Add notes that can be viewed by staff and admins.
- Click the 'Reset' button to clear the fields.
  - Click the 'Add' button to save the category.

### Edit a category

- Open 'Staff Panel' > 'Knowledgebase' > 'Categories'
  - Click on a category name to edit the category
- OR
- Open 'Staff Panel' > 'Knowledgebase' > 'FAQs'
  - Click on a category name then click 'Edit Category'

All Assets

Click on a category to add new FAQs or manage its existing FAQs.

- Asset Issue (0) - Internal
- Services (3) - Internal
- Request Accessories (1) - Public**

### Frequently Asked Questions

Category Name : Request Accessories - Public

Category Description : For users requesting accessories

Last updated 02/25/2019 10:50 am

+ Add New FAQ **✎ Edit Category** 🗑 Delete Category

📄 Need a mousepad - Internal

The 'Update Category' screen appears. The form is similar to 'Add New Category' form. See the **explanation of adding a new category** for descriptions of the settings on this page.

### Update Category: Request Accessories

*Category information* ?

**Category Type** :  Public (publish)  Private (internal)

**Visible for role** :  All  Only Selected

Role

**Visible for Customer** :  All  Only Selected

Customer

Category Name: Short descriptive name.

Request Accessories

Category Description: Summary of the category.

<> ¶ Aa B I U A **A** ↺ ☰ ☷ ↶ ↷ 🖼️ ▶ 📄 🔗 ⌵

For users requesting accessories

#### Internal Notes

- Edit the category as required and click the 'Save Changes' button.

### Delete a category

- Select the category and click 'Delete' at the top.



NAME	TYPE	FAQS	LAST UPDATED
Computer going sluggish	Public	1	05/04/2017 12:57 pm
<input checked="" type="checkbox"/> Requests for Quotes	Public	1	04/26/2016 5:52 pm
Internet Connection	Public	1	05/30/2016 4:22 pm
Printer Issues	Internal	1	05/30/2016 4:24 pm

- Alternatively, open 'Knowledgebase' > 'FAQs' page, click the FAQ category to be deleted and click 'Delete Category' from the FAQ list page.

Click on a category to add new FAQs or manage its existing FAQs.

- Computer going sluggish (1) - Public
- Requests for Quotes (1) - Public

Comodo One > Service Desk > Knowledgebase > FAQs

### Frequently Asked Questions

Category Name : Requests for Quotes - Public

Category Description : FAQs related to generating price quotes for products, services and software.

Last updated 04/26/2016 5:52 pm

- Click 'Yes, Do it!' in the confirmation screen.

**Please Confirm**

Are you sure you want to **DELETE** selected categories?  
Deleted entries **CANNOT** be recovered, including any associated FAQs

**Note:** Removing a category will also delete the FAQs under it.

### Mark a category as public or private

- Click 'Staff Panel' > 'Knowledgebase' > 'Categories' to open the 'Categories' interface

The screenshot shows the 'FAQ Categories' interface with the following table:

NAME	TYPE	FAQS	LAST UPDATED
<a href="#">Computer going sluggish</a>	Public	1	05/04/2017 12:57 pm
<a href="#">Requests for Quotes</a>	Public	1	04/26/2016 5:52 pm
<input checked="" type="checkbox"/> <a href="#">Internet Connection</a>	Public	1	05/30/2016 4:22 pm
<a href="#">Printer issues</a>	Internal	1	05/30/2016 4:24 pm

- To publish a category, select it and click the 'Make Public' button.
- To make a category as private, select it and click the 'Make Internal' button.
- In the confirmation screen, click the 'Yes, Do it!' button.

The confirmation dialog box contains the following text:

**Please Confirm**

Are you sure want to make selected categories **private** (internal)?

Buttons: Cancel, Yes, Do it!

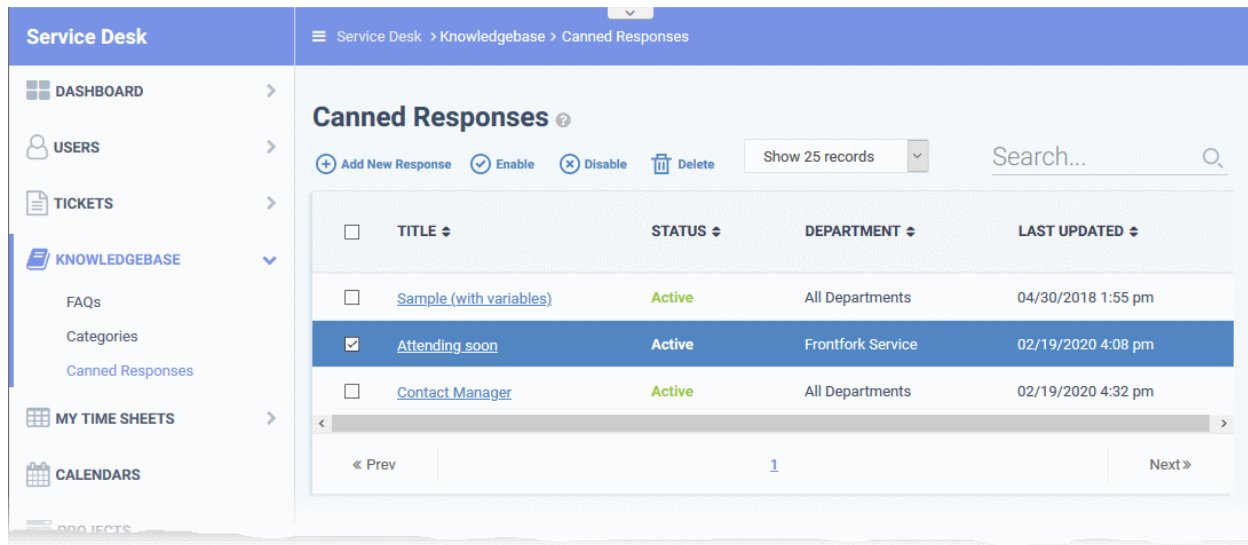
### 3.4.3 Canned Responses

Click 'Staff Panel' > 'Knowledgebase' > 'Canned Responses'

- Canned responses are saved answers to common problems that your staff can quickly paste into a ticket.
- Admins should enable canned responses at 'Admin Panel' > 'Settings' > 'Knowledgebase' interface. See [Knowledge Base Settings and Options](#) for help to do this.
- You can automatically send a canned response in reply to certain tickets. You can set this behavior at 'Admin Panel' > 'Manage' > 'Ticket Filters'.
  - See [Ticket Filters](#) if you need help to send a canned response to tickets which satisfy certain criteria.
- [The canned responses interface](#)
- [Create a new canned response](#)
- [Edit a canned response](#)
- [Remove a canned response](#)

### The canned responses interface

- Open the staff panel (see the last link on the left)
- Click 'Knowledgebase' > 'Canned Responses'



- **Title:** The name of the response.
  - Click the name of a canned response to update it. See **Edit a canned response** if you need help with this.
- **Status:** Indicates whether the response is active or disabled. Staff can only view and use 'active' responses when answering a ticket. See **Ticket Actions** in **Ticket Details** for more details.
- **Department:** The Service Desk department to which the canned response is assigned. The response is only available for use on tickets assigned to this department.
- **Last Updated:** Date and time the response was most recently edited.

### Create a new canned response

- Open the staff panel (see the last link on the left)
- Click 'Knowledgebase' > 'Canned Responses'
- Click 'Add New Response'

Service Desk > Knowledgebase > Canned Responses

## Canned Responses

[+ Add New Response](#) [✓ Enable](#) [✗ Disable](#) [🗑 Delete](#)

<input type="checkbox"/>	TITLE ↕	STATUS ↕
<input type="checkbox"/>	<a href="#">Sample (with variables)</a>	Active
<input type="checkbox"/>	<a href="#">Attending soon</a>	Active
<input checked="" type="checkbox"/>	<a href="#">Contact Manager</a>	Active

### Add New Canned Response

#### Canned Response Settings

Status:  Active  Disabled

Department :

All Departments

#### Canned Response: Make the title short and clear

Title

Canned Response \* [\(Supported Variables\)](#)

**Rich Text Editor:** <> | **B** **I** **U** **A** **A** | **☰** **☰** **↶** **↷** **🖼** **▶** **📄** **🔄** **—** **🗑**

Canned Attachments (optional) ⓘ

No file selected.  
You can upload up to 10 attachments per canned response.

#### Internal Notes: Notes about the canned response

|

- **Status:**
  - **Active:** The canned response is available for staff to use when responding to a ticket.
  - **Disabled:** The canned response is not available to staff.
- **Department:** Assign the response to a specific Service Desk department. The response is only available for use on tickets assigned to this department. Choose 'All Departments' to make it available to all.
- **Title:** Enter a brief description of the canned response. This should tell staff members about the contents of the actual response.
- **Canned Response:** Enter the reply text in the space provided. You can also insert variables into the text to fetch relevant information from the database.
  - See **Variables available for use in a message** for help to view the list of variables that can be used in a message.
- **Canned Attachments:** Add attachments to the response. Please take care to reference the attachment in your response text. Click the 'Browse' button to upload your files. You can attach a maximum of 10 files per response.
- **Internal Note:** Add remarks about the response for internal purposes.
- Click the 'Add Response' button to save the reply text.

## Variables available for use in a message

- Variables are dynamic fields which you can add to canned responses. The values of the variables are drawn from the ticket data and from your support portal. For example:

%{ticket.dept} - Inserts the name of the department to which the ticket is assigned.

- Place your mouse over 'Supported Variables' to view a list of variables you can use in the response content:

The screenshot shows a 'Canned Response' editor with a tooltip titled 'Ticket Variables' open. The tooltip contains the following information:

Please note that non-base variables depend on the context of use.

Base Variables		Other Variables	
%{ticket.id}	Ticket ID (internal ID)	%{message}	Incoming message
%{ticket.number}	Ticket number (external ID)	%{response}	Outgoing response
%{ticket.email}	Email address	%{comments}	Assign/transfer comments
%{ticket.name}	Full name – see <i>name expansion</i>	%{note}	Internal note ( <i>expandable</i> )
%{ticket.subject}	Subject	%{assignee}	Assigned staff/team
%{ticket.phone}	Phone number   ext	%{assigner}	Staff assigning the ticket
%{ticket.status}	Status	%{url}	ITarian Service Desk's base url (FQDN)
%{ticket.priority}	Priority	%{reset_link}	Reset link used by the password reset feature
%{ticket.asset}	Asset type		
%{ticket.category}	Category	Name Expansion	
%{ticket.subcategory}	Subcategory	.first	First Name
%{ticket.assigned}	Assigned staff and/or team	.middle	Middle Name(s)
%{ticket.create_date}	Date created	.last	Last Name
%{ticket.due_date}	Due date	.full	First Last
%{ticket.close_date}	Date closed	.legal	First M. Last
%{ticket.client_link}	Client's ticket view link	.short	First L.
%{ticket.staff_link}	Staff's ticket view link	.formal	Mr. Last
		.shortformal	F. Last
		.lastfirst	Last, First
Expandable Variables (See Wiki)			
%{ticket.topic}	Help topic		
%{ticket.dept}	Department		
%{ticket.staff}	Assigned/closing staff		
%{ticket.team}	Assigned/closing team		
Scheduled Reports Variables			
%{report.type}	Report type name		
%{recipient.name}	Recipient name		
%{report.datetime_from}	Report filter time (FROM)		
%{report.datetime_to}	Report filter time (TO)		

- Insert the variables into the content where required. For example 'Your ticket has been assigned to %

{ticket.assigned} in the %{ticket.dept} department.'

### Expandable Variables:

- Expandable variables are variables to which you can add certain terms to fetch very specific information:

Variable	Description	Format
{ticket.client_link}	Client's ticket view link	.legal
{ticket.staff_link}	Staff's ticket view link	.short
<b>Expandable Variables (See Wiki)</b>		
{ticket.topic}	Help topic	.formal
{ticket.dept}	Department	.shortformal
{ticket.staff}	Assigned/closing staff	.lastfirst
{ticket.team}	Assigned/closing team	
<b>Scheduled Reports Variables</b>		
{report.type}	Report type name	
{recipient.name}	Recipient name	

The possible extended variables are given below:

### Topic

{ticket.topic.name} - The ticket category to which the ticket belongs.

{ticket.topic.parent} - The parent category to the category to which the ticket belongs.

### Department

{ticket.dept.name} - The department to which the ticket is assigned.

{ticket.dept.manager} - The person in-charge of the department to which the ticket is assigned.

{ticket.dept.signature} - The signature message configured for the department.

{ticket.dept.emailAddress} - The contact email address of the department to which the ticket is assigned.

### Staff

{ticket.staff.name} - The staff member or the admin to whom the ticket is assigned.

{ticket.staff.dept} - The department to which the staff member belongs.

{ticket.staff.TZoffset} - The date and time at which the ticket is assigned to the staff member.

{ticket.staff.email} - The email address of the staff member to whom the ticket is assigned.

{ticket.staff.signature} - The signature message of the staff member

## Edit a canned response

- Open the staff panel (see the last link on the left)
- Click 'Knowledgebase' > 'Canned Responses'
- Click the canned response you want to update

Service Desk > Knowledgebase > Canned Responses

## Canned Responses ?

<input type="checkbox"/>	TITLE ↕	STATUS ↕
<input type="checkbox"/>	<a href="#">Sample (with variables)</a>	Active
<input type="checkbox"/>	<a href="#">Attending soon</a>	Active
<input type="checkbox"/>	<a href="#">Contact Manager</a>	Active

**Update Canned Response**

### Canned Response Settings

Status:  Active  Disabled

Department :

Frontfork Service

### Canned Response: Make the title short and clear

Title

Attending soon

Canned Response \* ([Supported Variables](#))

We have received your request, The issue will be attended soon by %{ticket\_staff.name}

Thanks.  
Your friendly neighborhood support team.

- Edit the parameters as required
- The 'Update Canned Response' screen is similar to the 'Add a New Canned Response' screen. See **above** for descriptions of the fields
- Click the 'Save Changes' button for your modifications to take effect.

### Remove a canned response

Canned responses that are no longer of use, can be removed from Service Desk.

- Open the staff panel (see the last link on the left)
- Click 'Knowledgebase' > 'Canned Responses'
- Select the canned response you want to remove
- Click 'Delete' at the top

The screenshot shows the 'Canned Responses' management interface. At the top, there are navigation links: 'Service Desk > Knowledgebase > Canned Responses'. Below this, the title 'Canned Responses' is displayed with a help icon. Action buttons include '+ Add New Response', 'Enable', 'Disable', and 'Delete'. A search bar and a 'Show 25 records' dropdown are also present. A table lists the responses with columns for 'TITLE', 'STATUS', 'DEPARTMENT', and 'LAST UPDATED'. The 'Contact Manager' response is selected. A confirmation dialog box is open, asking 'Are you sure you want to DELETE selected canned responses?' and warning that deleted items cannot be recovered. The dialog has 'No, Cancel' and 'Yes, Do it!' buttons.

TITLE	STATUS	DEPARTMENT	LAST UPDATED
<input type="checkbox"/> Sample (with variables)	Active	All Departments	04/30/2018 1:55 pm
<input type="checkbox"/> Attending soon	Active	Frontfork Service	02/19/2020 4:08 pm
<input checked="" type="checkbox"/> Contact Manager	Active	All Departments	02/19/2020 4:32 pm

- Click 'Yes, Do it!' to confirm the removal

## 3.5 Manage Projects

Click 'Staff Panel' > 'Projects'

- Service desk projects allow staff to plan delivery time-lines for larger scale tasks which may involve multiple sub-tasks.
- Each task can be assigned a total duration, completion percentage and billable time.
- You can also create sub-tasks and associate a task with one or more tickets.
- Projects are displayed as a Gantt chart, allowing you to easily track overall progress.



PROJECT NAME	DURATION (HRS)	COMP	TIME SPENT	BILLABLE TIME	START DATE	END DATE
abc	1	0	00:00:00	00:00:00	04/12/2016	01/01/1970
<a href="#">Scan Computers</a>	50	63.8	62:07:09	61:58:09	04/28/2016	05/02/2016
<a href="#">Setup a printer at customer network</a>	58	10	06:49:38	01:01:38	05/03/2016	05/08/2016
test	1	0	00:00:00	00:00:00	09/13/2016	01/01/1970
<a href="#">setup printer</a>	2	3	00:04:38	00:01:02	12/20/2016	12/20/2016
<a href="#">Setup External Konumail Device</a>	2	17.5	01:06:00	00:00:00	01/04/2017	01/04/2017

### Column Headers

- **Project Name** - The project label.
- **Duration** - The total duration of a project is the combined duration of its individual tasks.
- **Completion** - The overall completion rate is calculated from the completion percentage of the project's individual tasks
- **Time Spent** - Total time spent in individual tasks, sub tasks and tickets.
- **Billable Time** - Total billable time spent in individual tasks, sub tasks and tickets.
- **Start Date** - Date at which the project was started, or is due to start.
- **End Date** - Date and which the project was completed, or is due to be completed. Completion date is calculated from the total duration of individual tasks in the project.

From the Projects interface, staff members can:

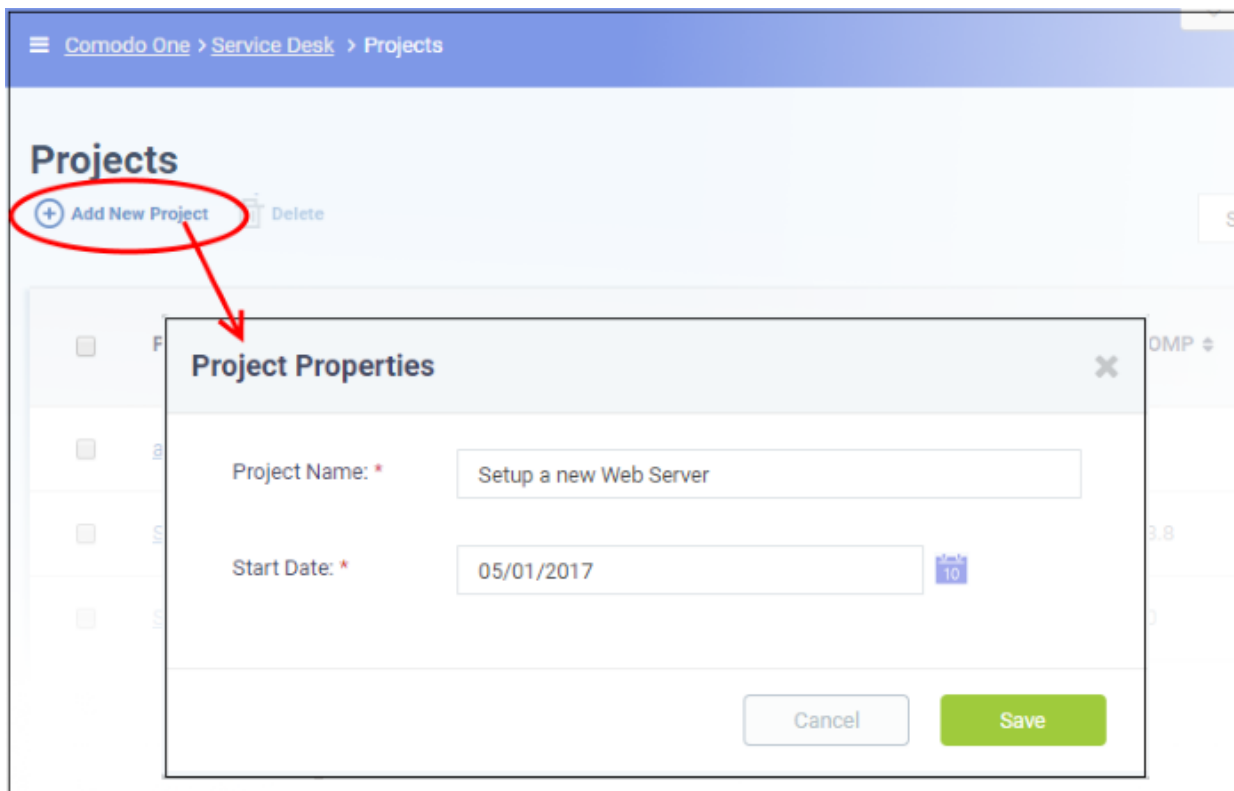
- **Create a new project and add Tasks and Sub Tasks**
- **View the project status and update it**
- **Remove a project**

### Creating a new Project

Staff members can create new projects and integrate tasks to it. You should specify a duration for each task/sub-task.

#### Create a new project

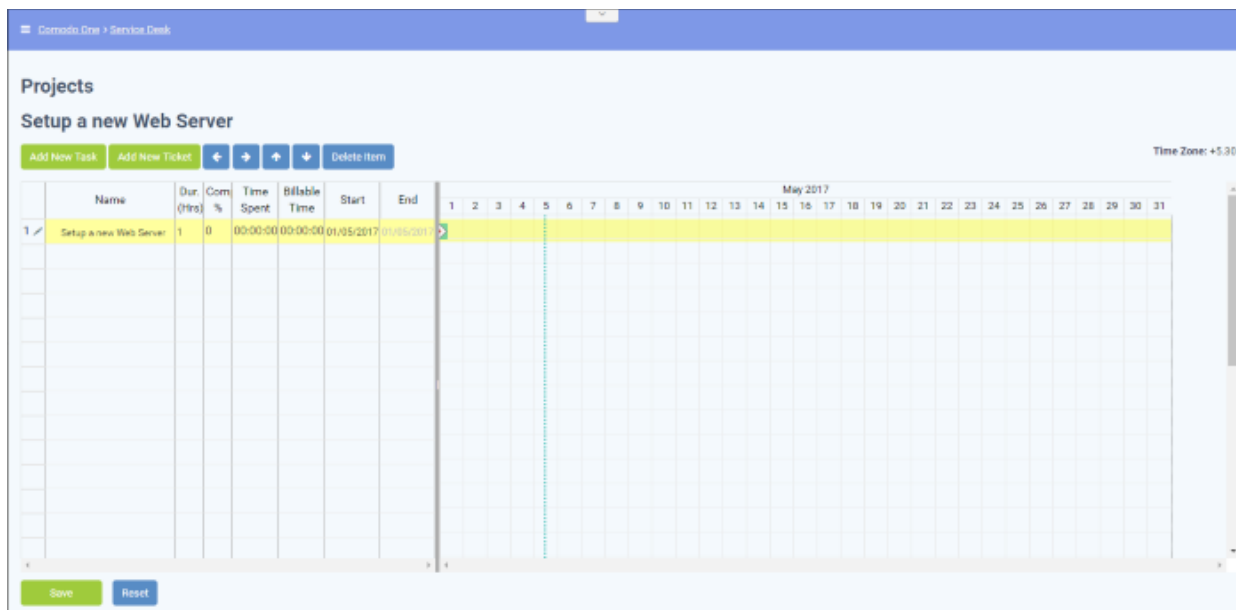
- Click 'Add New Project' from the 'Projects' interface



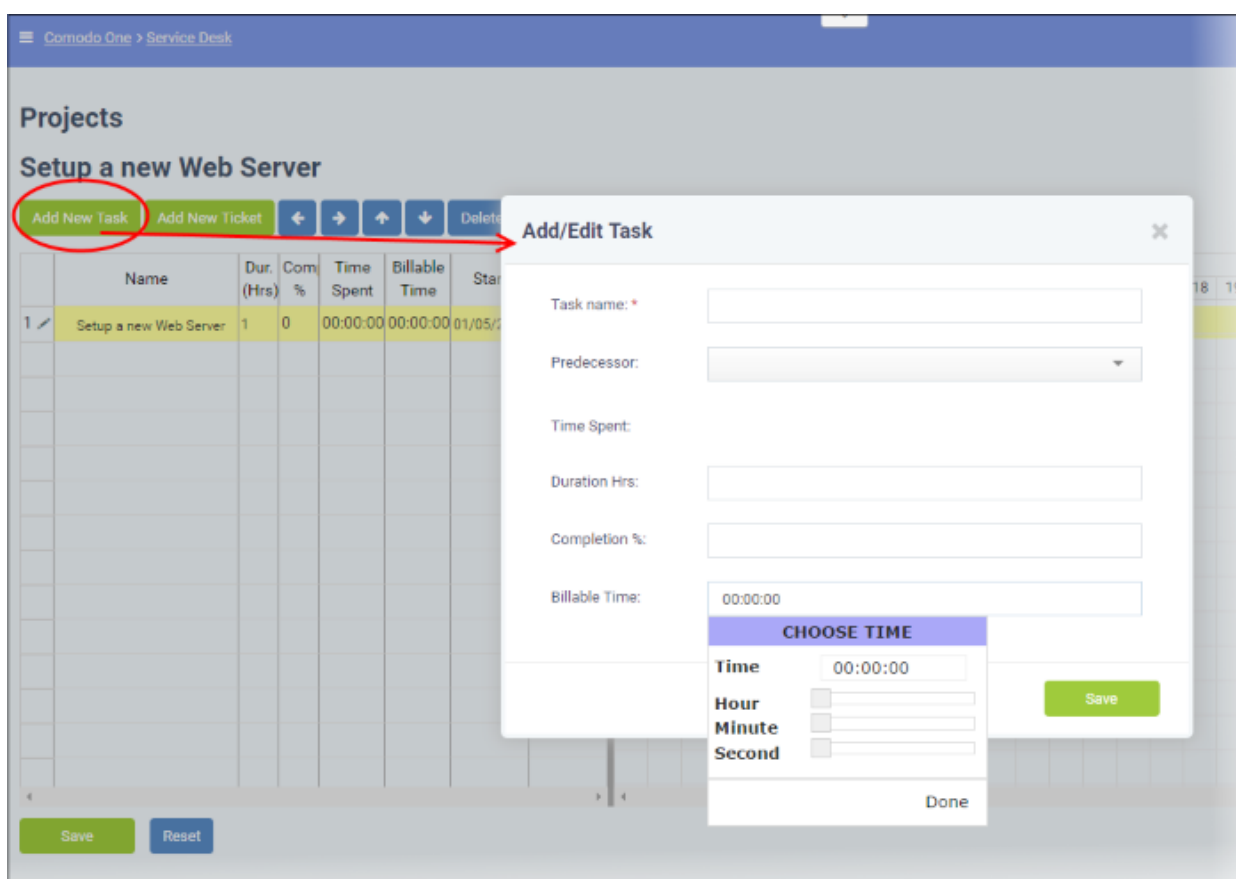
The Project Properties dialog will appear.

- Enter a name for the project
- Enter the project start date by clicking the calendar icon beside 'Start Date'
- Click 'Save'

A new project will be created and the project page will be displayed. The project title will be added as the root task to the project. You can add sub-tasks at required hierarchy levels and associate tickets with them.



- To add a sub-task:
  - Select the root task and click the 'Add New Task' button at the top



The 'Add/Edit Task' dialog will appear.

- Enter the name of the task
- Predecessor (optional). Select a task which must be completed before the new task can begin.
- Enter the time required (in hours) to complete the task in the 'Duration' field
- If the task is in-progress, enter the completion percentage in the 'Completion %' field

The time spent field will be automatically populated from the entered values.

### Add/Edit Task ✕

Task name: \*

Predecessor:

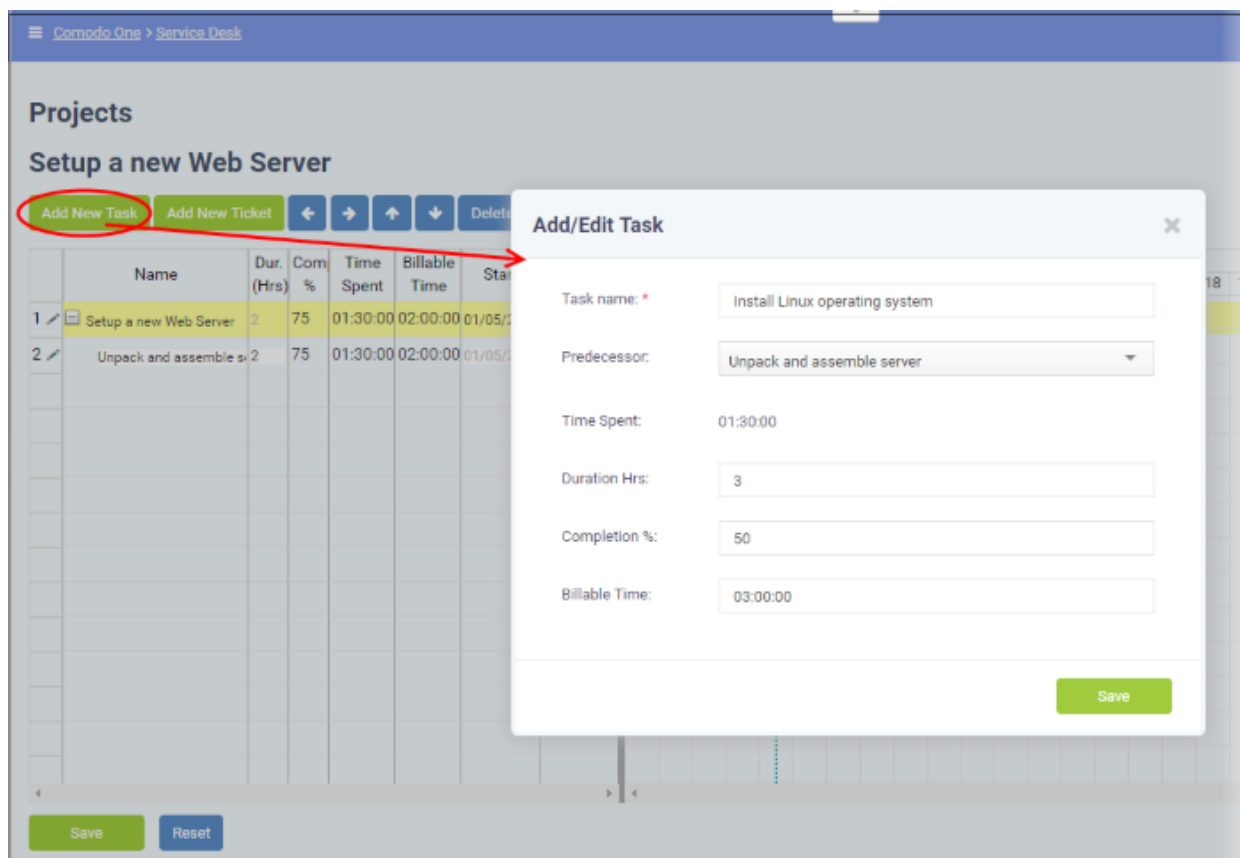
Time Spent: 01:30:00

Duration Hrs:

Completion %:

Billable Time:

- Enter the quantity of chargeable hours in the 'Billable Time' field using the sliders and click 'Save'.
- Repeat the process to add more tasks.
- To add another main task, select the project and click 'Add New Task'. This will create a sibling task.



The 'Add/Edit Task' dialog will appear.

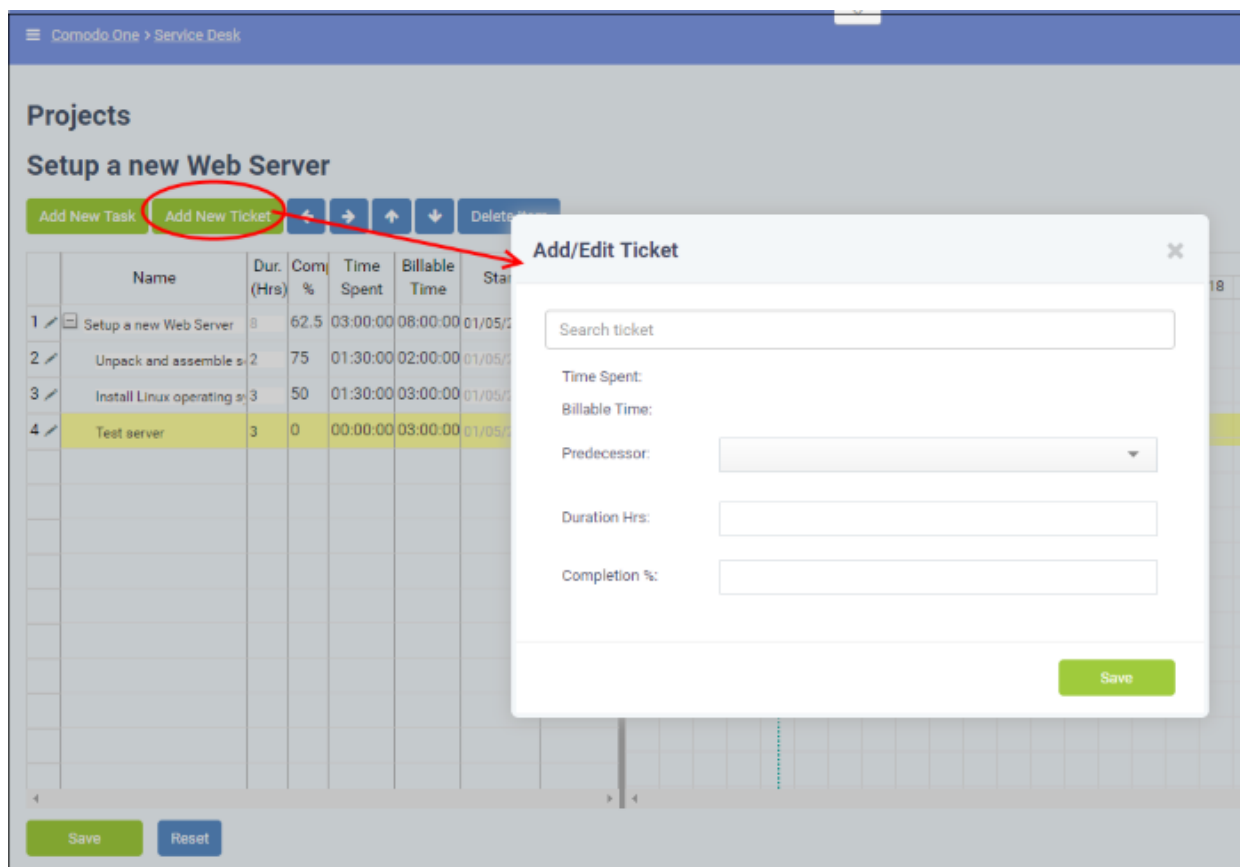
- Enter the name for the task
- Enter the predecessor to continue from the previous task/subtask.
- Enter the time duration required (in hours) to complete the task in the 'Duration' field
- If the task is in-progress, enter the completion percentage on it in the 'Completion %' field

The time spent field will be automatically populated from the entered values.

- Enter the quantity of chargeable hours in the 'Billable Time' field using the sliders and click 'Save'.
- Repeat the process to add more tasks.
- To add a sub-task to a main-task:
  - Select the parent level task
  - Click the 'Add New Task' button and repeat the process as outlined **above**.

The duration and completion percentage of the parent task will be updated as per the figures entered in the corresponding fields of all sub-tasks.

- To link a ticket to a task
  - Select the task/sub-task to which the ticket is to be linked and click 'Add New Ticket' button



The Add/Edit ticket dialog will appear.

- Enter the ticket number or subject of the ticket in the 'Search Ticket' field and choose the ticket to be added from the drop-down options. Please note that the time spent will be displays the actual time spent based on the duration hrs and completion percentage entered.
- Enter the predecessor to continue from the previous task/subtask.

The time spent and billable time will be automatically populated for the progress of the ticket so far.

- Enter the duration for the ticket completion and the completion percentage in the respective fields.

### Add/Edit Ticket ✕

**Ticket #23**

Time Spent: 22:58:09

Billable Time: 22:58:09

Predecessor: ▼

Duration Hrs:

Completion %:

Save

- Click 'Save'.

The ticket will be linked to the task.

Name	Dur. (Hrs)	Comp. %	Time Spent	Billable Time	Start	End
1 Setup a new Web Server	15	66.7	25:58:09	27:58:09	01/05/2017	02/05/2017
2 Unpack and assemble	2	75	01:30:00	02:00:00	01/05/2017	01/05/2017
3 Install Linux operating	3	50	01:30:00	03:00:00	01/05/2017	01/05/2017
4 Test server	10	75	22:58:09	22:58:09	01/05/2017	02/05/2017
5 Ticket #23	10	75	22:58:09	22:58:09	01/05/2017	02/05/2017

The time spent on the task and the billable time will be fetched from the ticket details and automatically updated. You can also add sub-tickets to a task/sub-task, which is processed concurrently with the main tickets. The duration and completion percentage of the sub tickets will not count towards the total duration and completion percentage of the

project.

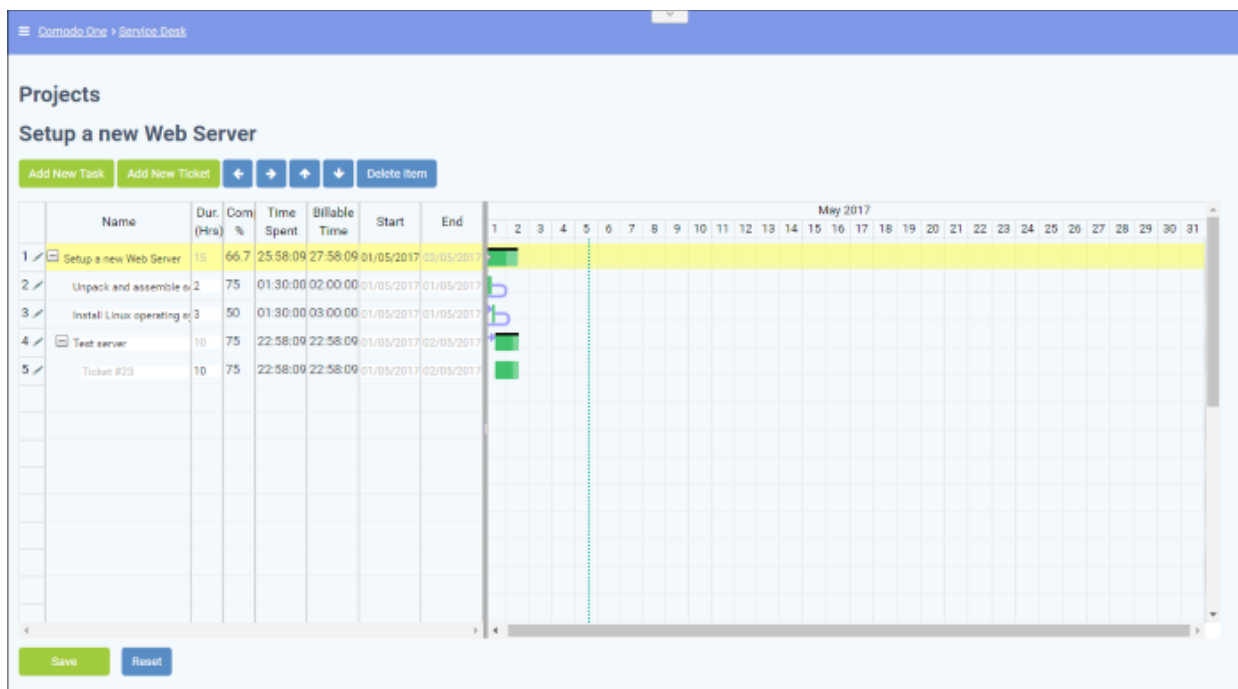
- To delete a task, sub-task, ticket or a sub-ticket, select the item and click 'Delete Item' at the top.
- Click 'Save' in the project viewer interface to save your changes.

## Viewing Project Status and Updating it

Administrators or staff members can view the status of individual tasks and sub-tasks, tickets and sub-tickets and overall progress of a project from the Project Viewer interface.

### To view a project

- Open the Projects interface by clicking 'Projects' on the left from the 'Staff Panel'
- Click a project name to open the project time-line:



The tasks, sub-tasks, tickets and sub-tickets added to the project are displayed as a tree structure in the first column. The left hand side pane shows the details of each item and the right hand side pane shows progress of each item as a Gantt chart.

Project Viewer - Column Descriptions			
Column Header	Parent level Task	Child Task	Tickets/Sub Tickets
Duration	The total duration of a parent level task is the combined duration of its child tasks and tickets.	Duration of the individual task, as entered while adding/editing it or the combined duration of the tickets linked to it.  Note: Sub tickets are excluded for calculation of duration.	Duration of the ticket
Completion	The total completion status of a parent level task is calculated from the completion percentages of child tasks and tickets.	The completion percentage of individual task or the combined completion percentages of tickets linked to it.  Note: Sub tickets are excluded for calculation of completion	Completion percentage of individual ticket



		status.	
Time Spent	Total time spent in child tasks and tickets.	Time spent on individual task or the combined time spent on tickets linked to it, excluding the sub-tickets.  Note: Sub tickets are excluded for calculation of time spent.	Time spent on individual ticket
Billable Time	Total billable time spent in child tasks and tickets.	Billable time spent on individual task or the combined billable time spent, from tickets linked to it, excluding the sub-tickets.  Note: Sub tickets are excluded for calculation of billable time spent.	Billable time spent on individual ticket
Start	Date at which the task was started, or is due to start.	Date at which the task was started, or is due to start.	Date at which the ticket was started.
End	Date and which the task was completed, or is due to be completed. Completion date is calculated from the total duration of child tasks.	Date at which the individual task was completed, or is due to be completed. Completion date is calculated from the duration of the individual task or the total duration of tickets linked to it.	Date at which the individual ticket was completed, or is due to be completed.

- To add a new item, click the respective button from the top right and enter the details of the item in the 'Add/Edit Task' or 'Add/Edit Ticket' dialog. For more details, see the explanation [above](#).

### To edit/update a task

- Click the pencil icon at the left of the item or double click on the respective bar in the Gantt chart.

The Add/Edit Task dialog will appear for the respective task.

### Parent Level Task

**Add/Edit Task** ✕

Task name: \*

Predecessor:

Time Spent: 25:58:09

Duration Hrs: 15

Completion %: 66.7

Billable Time: 27:58:09

### Child Level or Terminal Task

**Add/Edit Task** ✕

Task name: \*

Predecessor:

Time Spent: 01:30:00

Duration Hrs:

Completion %:

Billable Time:

- Task Name** - Displays the name of the task. You can change the name of the task by directly editing the field.

The 'Time Spent', 'Duration Hrs', 'Completion %' and 'Billable Time' are automatically populated from the sums

- Task Name** - Displays the name of the task. You can change the name of the task by directly editing the field.

- Predecessor** - Displays the previous task/sub-task from which the present task has to be

of the respective values in the child tasks.

- Click 'Save' for your changes to take effect

continued.

- **Time Spent** - Displays the actual time spent based on the duration hrs and completion percentage entered.
- **Duration** - Allows you to update the time duration required (in hours) to complete the task
- **Completion %** - Allows you to update the completion percentage

The time spent field will be automatically populated from the entered values.

- **Billable Time** - Allows you update the billable time spent on the task
- Click 'Save' for your changes to take effect

The duration and completion percentage will automatically be updated for the parent task to which the child task is linked.

- Click 'Save' in the 'Projects' interface

#### To update a ticket or a sub-ticket

- Click the pencil icon at the left of the item or double click on the respective bar in the Gantt chart.

The 'Add/Edit Ticket' dialog will appear for the respective task.

- To change the ticket item linked to the task, enter the new ticket number/subject of the ticket in the Search Ticket field.
- To change the Duration, directly enter the new duration in the Duration field
- To change the completion percentage, enter the new completion level in the Completion % field

The 'Time Spent' and 'Billable Time' are fetched from the ticket and are uneditable.

- Click 'Save' for your changes to take effect.

The duration and completion percentage will automatically be updated for the task to which the ticket is linked.

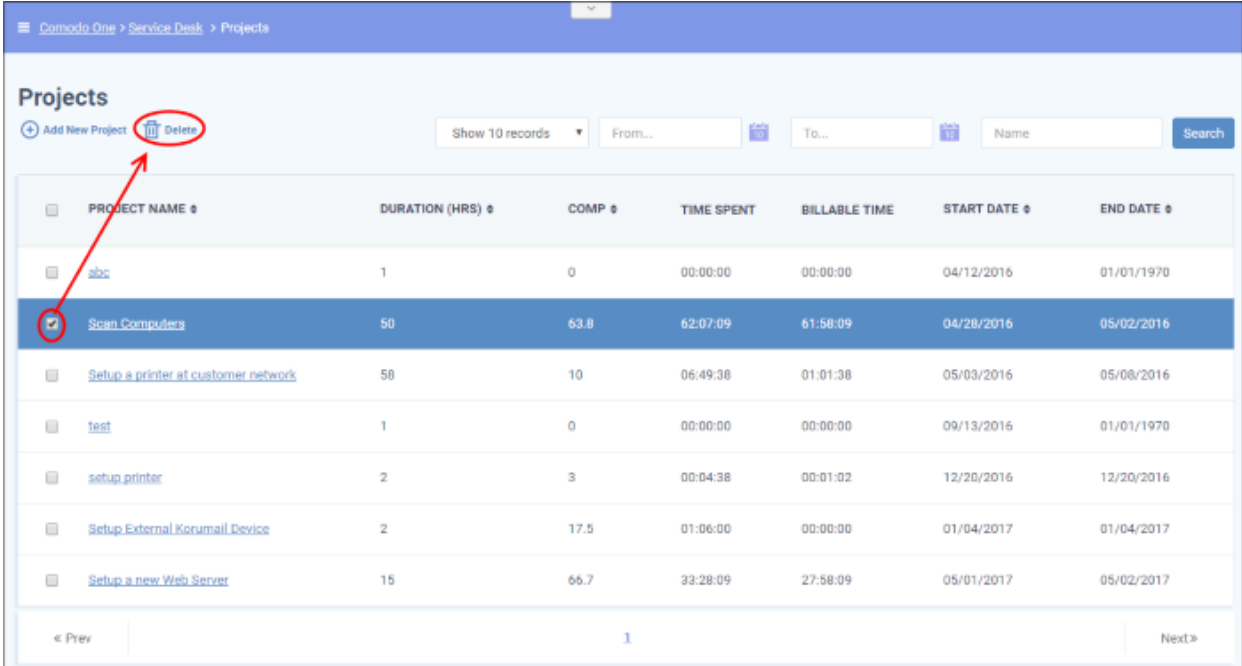
- Click 'Save' in the 'Projects' interface

### Removing a Project

Projects that are completed or no longer required, can be removed from Service Desk.

#### To remove project(s)

- Open 'Projects' interface by clicking the 'Projects' tab from the 'Staff Panel'
- Select the project(s) to be removed and click 'Delete'



Comodo One > Service Desk > Projects

### Projects

[Add New Project](#) **Delete** Show 10 records From... To...  Search

<input type="checkbox"/>	PROJECT NAME	DURATION (HRS)	COMP	TIME SPENT	BILLABLE TIME	START DATE	END DATE
<input type="checkbox"/>	abc	1	0	00:00:00	00:00:00	04/12/2016	01/01/1970
<input checked="" type="checkbox"/>	Scan Computers	50	63.8	62:07:09	61:58:09	04/28/2016	05/02/2016
<input type="checkbox"/>	Setup a printer at customer network	50	10	06:49:38	01:01:38	05/03/2016	05/08/2016
<input type="checkbox"/>	test	1	0	00:00:00	00:00:00	09/13/2016	01/01/1970
<input type="checkbox"/>	setup printer	2	3	00:04:38	00:01:02	12/20/2016	12/20/2016
<input type="checkbox"/>	Setup External Korumail Device	2	17.5	01:06:00	00:00:00	01/04/2017	01/04/2017
<input type="checkbox"/>	Setup a new Web Server	15	66.7	33:28:09	27:58:09	05/01/2017	05/02/2017

< Prev 1 Next >

A confirmation dialog will appear.

### Please Confirm

Are you sure you want to DELETE selected projects?

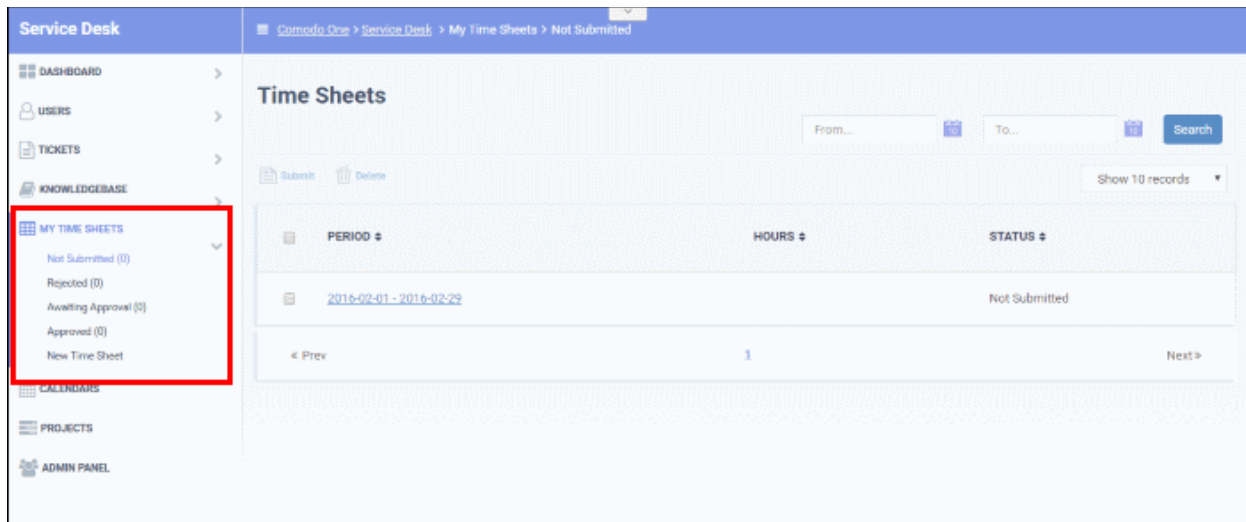
- Click 'Yes, Do it!' to remove the project

## 3.6 Manage Staff Time Sheets

Service Desk allows staff members to maintain time sheets so that administrators may evaluate their performance and track their working hours.

- Staff can create time sheets for different time periods and can import tasks from tickets they have worked on.
- Completed time sheets can be submitted to administrators for approval.
- In turn, administrators can approve, reject or edit the time sheet. Rejected time sheets can be updated by staff and re-submitted for approval.

To open the time sheets interface, click 'My Time Sheets' on the left in the Staff Panel.



The links under 'My Time Sheet' allow you to filter which time sheets are shown:

- **Not Submitted** - Displays time sheets that are yet to be submitted for administrator approval. These sheets can be updated/edited at anytime and submitted.
- **Rejected** - Displays time sheets that were submitted but rejected by the administrator. Clicking on a time sheet allows you to view administrator notes, edit the sheet and re-submit for approval.
- **Awaiting Approval** - Displays time sheets that were submitted but have yet to receive a response from an administrator. You can only view the sheet but not edit the details
- **Approved** - Displays time sheets that have been approved by an administrator. Clicking on a time sheet allows you to view notes from the administrator and the details in the sheet. You cannot edit or delete the sheets.
- **New Time Sheet** - Allows you to create a new sheet. See [Adding a New Time Sheet](#) for details.

### Column Headers

The column headers are the same for all views:

- **Period** - Displays the date range of the time period covered by the time sheet. Clicking a date range opens the sheet and allows you to view the entries and update/edit the tasks/time spent. See [Updating a Time Sheet](#) for more details.
- **Hours** - Total hours spent by you on tickets and other tasks within the time-sheet period.
- **Status** - Indicates the status of the sheet, whether it is yet to be submitted for approval, awaiting for approval, rejected or approved.

### Sorting Options

- Click a column header to sort items in ascending/descending order.

### Search Options:

You can search for time sheets that fall within a specified date range under the chosen category.

- To search for time sheets enter the 'From' date and 'To' date using the calendar icons beside the respective fields and click 'Search',
- To clear the results and display all items, clear the 'From' and 'To' fields and click the 'Search' button again or simply click the respective category link.

The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. You can navigate to different pages by clicking 'Next' and 'Prev'.

The following sections explain more about:

- [Adding a Time Sheet](#)

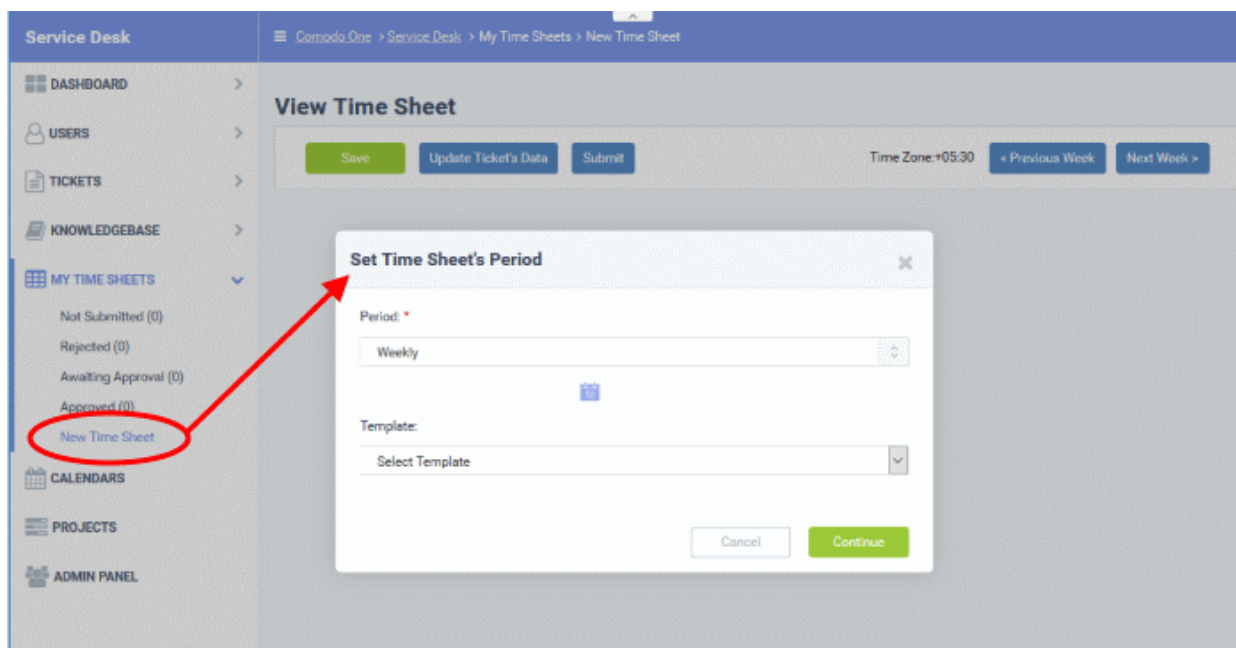
- **Updating a Time Sheet**
- **Submitting a Time Sheet for approval**
- **Deleting a Time Sheet**

### Adding a Time Sheet

A staff member can add new time sheet by specifying the time period to be covered. Once created, staff can add tasks they have attended to and the time spent on them. The sheet can then be submitted to an administrator for approval.

#### To add a new time sheet

- Click 'New Time Sheet' link from the 'My Time Sheets' section



- Select the period from the 'Period' drop-down. The available options are:
  - Weekly - Allows you to select current week or any previous/forth coming week starting from Sunday to Saturday, by clicking the calendar icon beside it.
  - First Half of Month - Allows you to include the first fortnight of the current month or any month.
  - Second Half of Month - Allows you to include the second fortnight of the current month or any month.
  - Monthly - Allows you to include a full month from 1<sup>st</sup> to 30<sup>th</sup>/31<sup>st</sup> of the current month or any month.
    - Click 'Done' after selecting your preferred period.
- Select the time sheet template, if required, from the 'Template' drop-down. The templates that are available here are configured in the Admin panel under 'Staff' > **Timesheet Templates**
- Click 'Continue' after selecting the template (if required) and date range to be covered by the sheet.

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Misc <a href="#">Add New Line</a>								
Total								

A new sheet will be added for the date range with a status of 'Not Submitted'. You can update activities on the sheet and click 'Save'. See [Updating Time Sheet](#) for more details.

### Updating a Time Sheet

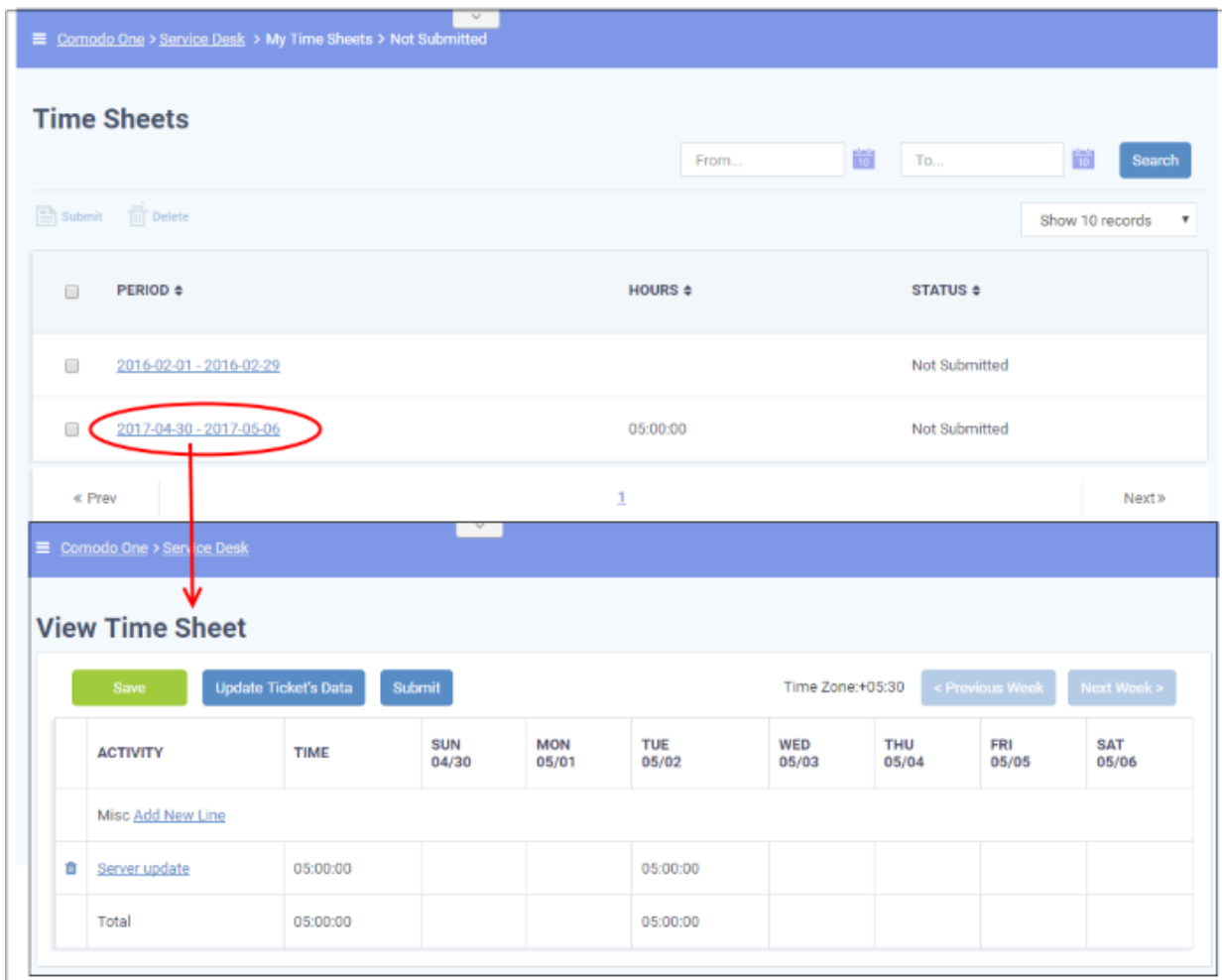
Staff can add tasks and time spent to a time-sheet in two ways:

- Import details from tickets they have worked on
- Manually add tasks and time spent

#### To update a time sheet

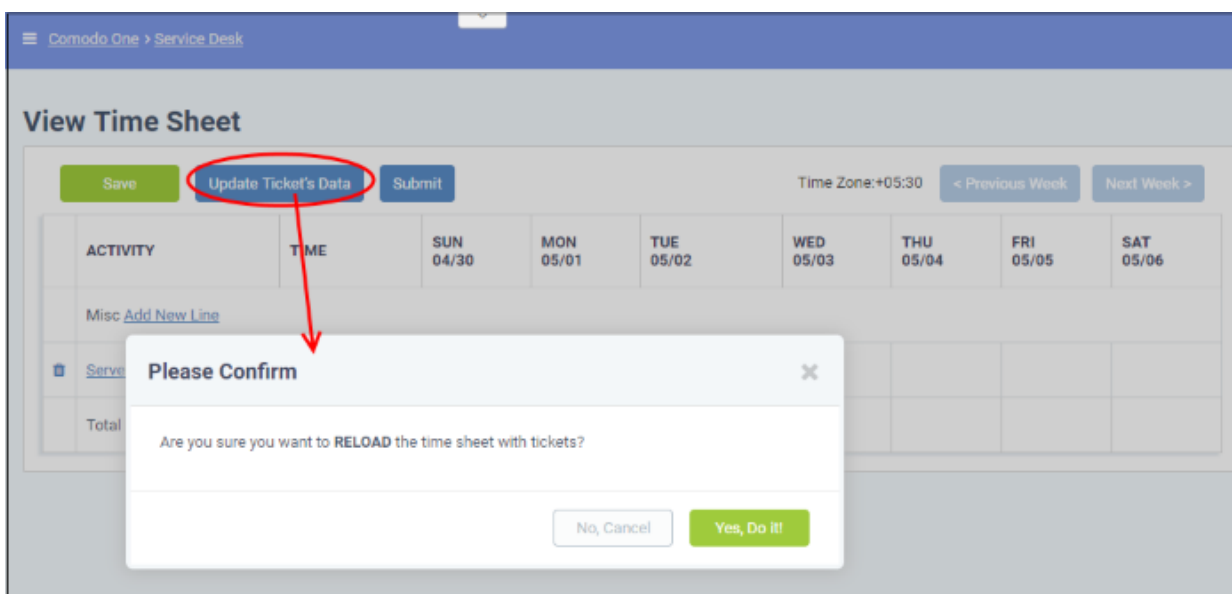
- Open the 'Time Sheets' interface by clicking 'My Time Sheets' from the Staff Panel
- Click the time sheet category to be updated

**Note:** Only the time sheets under the 'Not Submitted' and 'Rejected' categories can be edited.



The edit time-sheet screen will open. This displays each activity on a separate row along with the total time spent on an activity and the time spent per day on an activity. The screen displays the first week within the period by default. To view details about other weeks, use the 'Previous Week' and 'Next Week' buttons at the top.

- To import the tickets you worked on and time spent, within the time period, click the 'Update Ticket's Data' button.

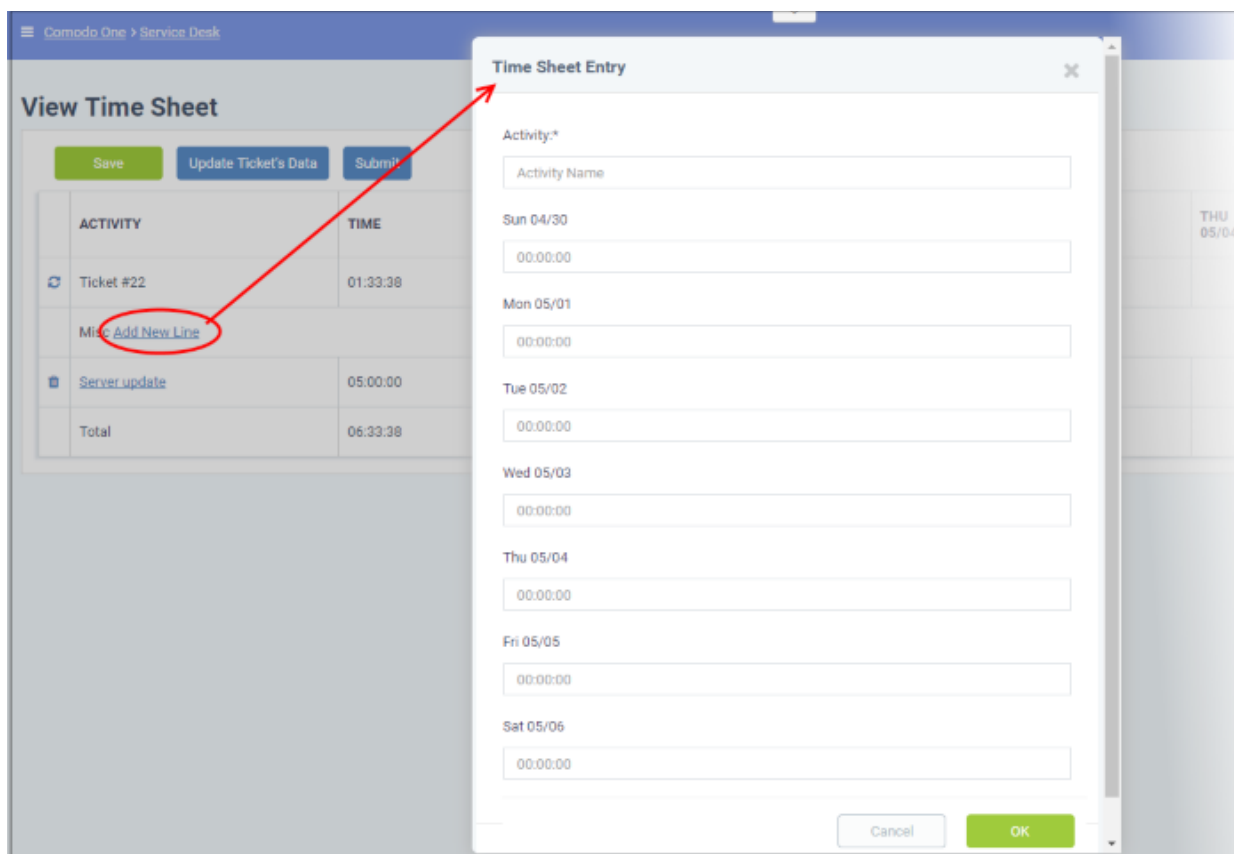


- Click 'Yes, Do it!' in the confirmation dialog

The sheet will be automatically updated with all tickets and time spent covered by the time sheet period. You can repeat this process during the time period to update the sheet with the latest details.

View Time Sheet								
<input type="button" value="Save"/> <input type="button" value="Update Ticket's Data"/> <input type="button" value="Submit"/>			Time Zone:+05:30			<input type="button" value=" &lt; Previous Week"/> <input type="button" value=" Next Week &gt;"/>		
ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38				01:33:38			
Misc <a href="#">Add New Line</a>								
<a href="#">Server update</a>	05:00:00			05:00:00				
Total	06:33:38			05:00:00	01:33:38			

- Click Save for your changes to take effect
- To manually add an activity, click 'Add New Line'



The 'Time Sheet Entry' dialog will appear.

- Enter the name of the Activity in the Activity field
- Enter the time spent on the activity on a day, by clicking inside the field below the day and selecting the hours, minutes and seconds from respective sliders.



- Click 'Done'.
- Repeat adding the time for each day you worked on the same activity
- Click 'OK' in the 'Time Sheet Entry' dialog.

The activity will be added to the list.

**View Time Sheet**

Save Update Ticket's Data Submit Time Zone: +05:30 < Previous Week Next Week >

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38				01:33:38			
Misc <a href="#">Add New Line</a>								
<a href="#">Server update</a>	05:00:00			05:00:00				
<a href="#">Windows OS update</a>	18:00:00		07:00:00	05:00:00	06:00:00			
Total	24:33:38		07:00:00	10:00:00	07:33:38			

- Click 'Save' for your changes to take effect

You can update the activity at any time by clicking on it.

- To remove an activity, click the trash can icon beside it.
- To submit the sheet for administrator approval, click the 'Submit' button from the top

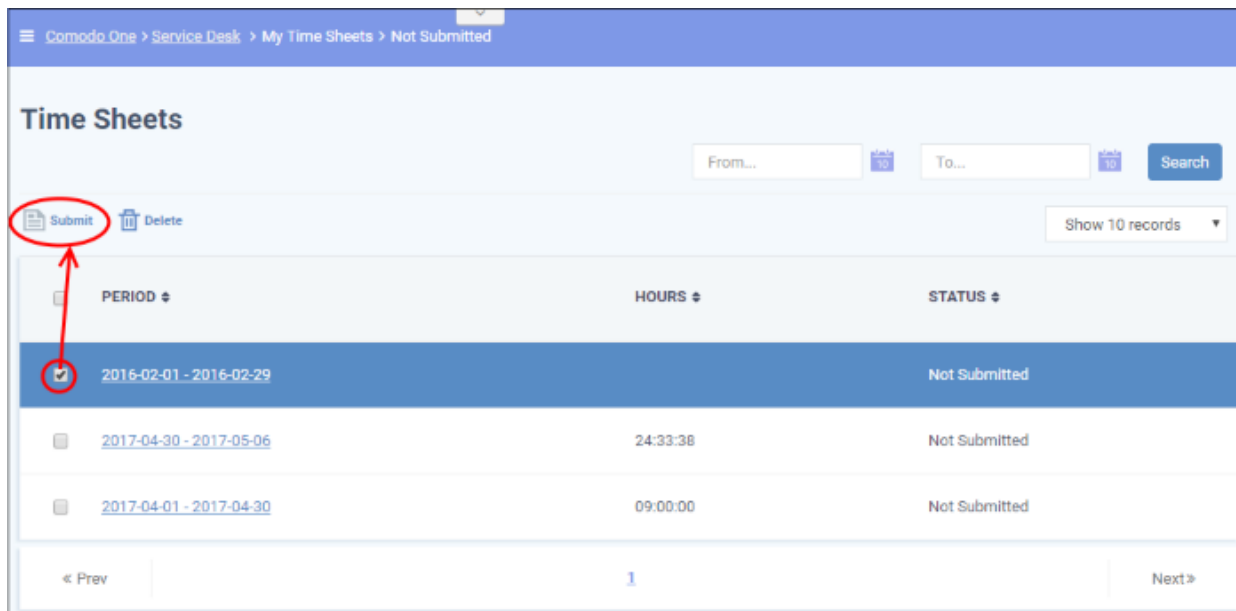
## Submitting a Time Sheet for Approval

Staff members can forward completed time sheets for approval by the administrator. Once submitted, the time sheet will move to the 'Awaiting Approval' category. The administrator can accept or reject the time sheet and can leave comments. You can view approved or rejected time sheets by looking under the respective category. Rejected time sheets can be updated and re-submitted for approval.

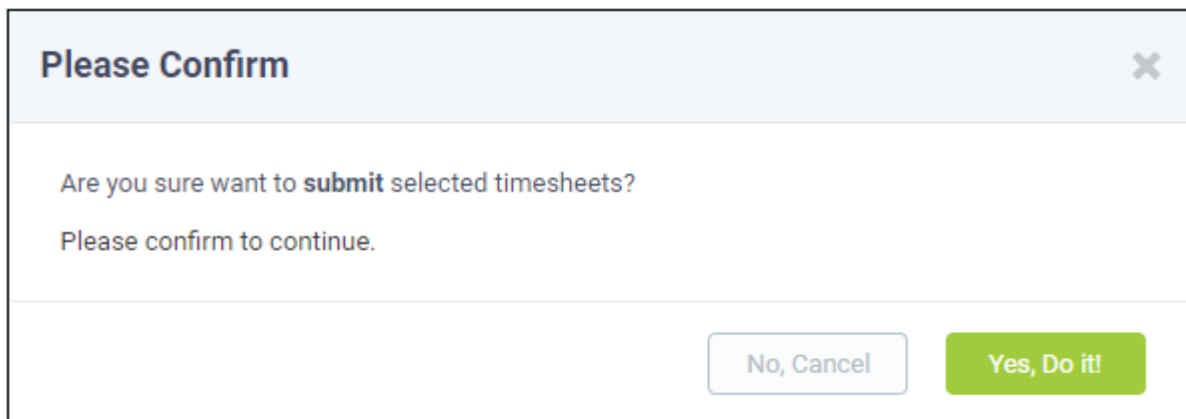
**Note:** Only 'Not Submitted' and 'Rejected' time sheets can be submitted for approval.

## To submit time sheet(s)

- Click 'Not Submitted' on the left under 'My Time Sheets' in the staff panel
- Select the time sheet(s) to be submitted and click 'Submit'



A confirmation dialog will appear.



- Click 'Yes, Do It!' in the confirmation dialog.
- Alternatively, to submit a single sheet, open the sheet by clicking on it and click 'Submit' from the top.

**View Time Sheet**

Save **Update Ticket's Data** Submit Time Zone:+05:30 < Previous Week Next Week >

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38				01:33:38			
Misc <a href="#">Add New Line</a>								
<a href="#">Server update</a>	05:00:00			05:00:00				
<a href="#">Windows OS update</a>	18:00:00		07:00:00	05:00:00	06:00:00			
Total	24:33:38		07:00:00	10:00:00	07:33:38			

## Deleting a Time Sheet

Time sheets that are no longer needed, can be removed from the list by the staff member.

**Note:** Only the time sheets under Not Submitted and Rejected categories can be removed.

### To remove time sheet(s)

- Click 'Not Submitted' or 'Rejected' on the left under 'My Time Sheets' in the staff panel
- Select the time sheet(s) to be removed and click 'Delete'

**Time Sheets**

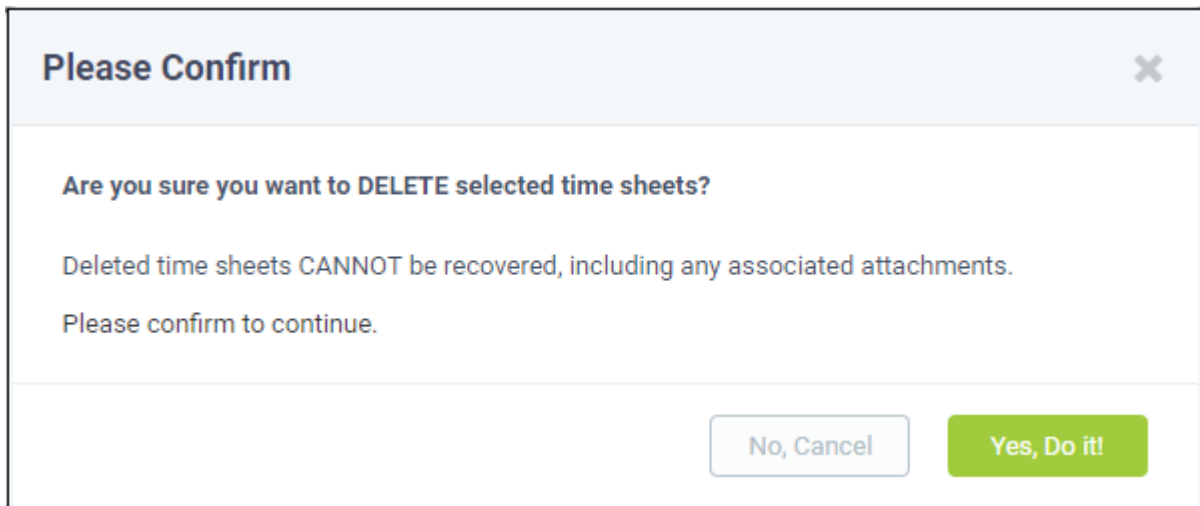
From... To... **Search**

**Submit** **Delete** Show 10 records ▾

<input type="checkbox"/>	PERIOD	HOURS	STATUS
<input checked="" type="checkbox"/>	<a href="#">2016-02-01 - 2016-02-29</a>		Not Submitted
<input type="checkbox"/>	<a href="#">2017-04-30 - 2017-05-06</a>	24:33:38	Not Submitted
<input type="checkbox"/>	<a href="#">2017-04-01 - 2017-04-30</a>	09:00:00	Not Submitted

« Prev 1 Next »

A confirmation dialog will appear.



- Click 'Yes, Do It!' in the confirmation dialog.

## 3.7 Manage Calendars

Click 'Staff Panel' > 'Calendars'

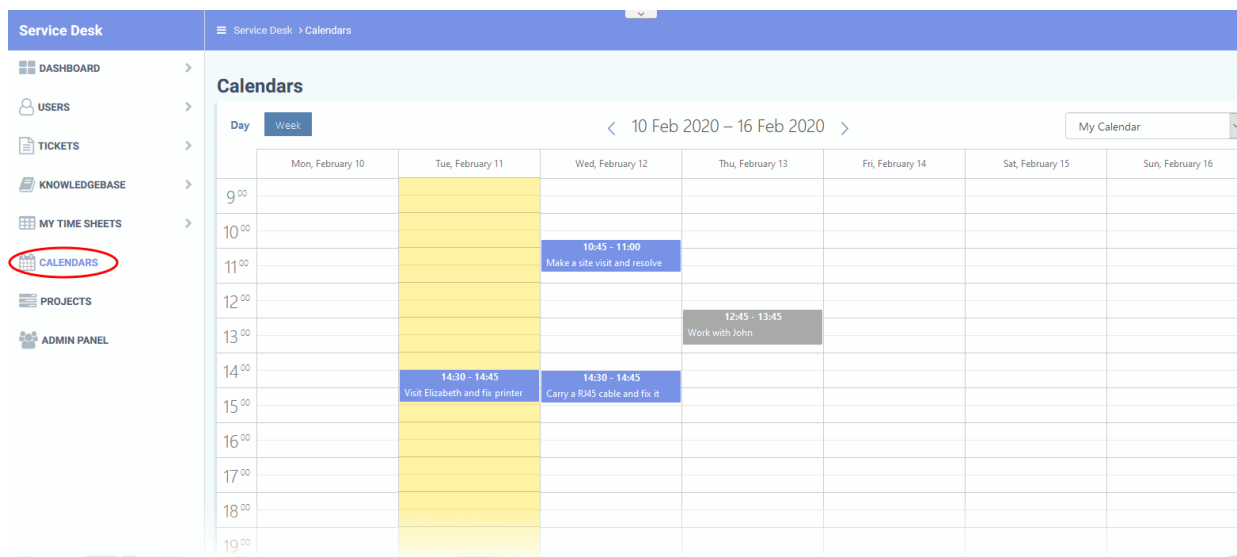
- Service Desk allows admins and staff to manage appointments and schedule events.
- Calendar appointments can be shared with other admins/staff members. This is useful when collaborating on tasks.
- You can also view and manage the calendars of other staff in order to create better and more transparent workflows.
- There are two ways to add schedules and appointments to your calendar:
  - From Tickets - Schedules are added when creating or working on tickets. For example, you could create a schedule for task that involves an on-site visit. For more details, see [Create a Schedule for the Ticket](#) in the section [Ticket Details](#).
  - Manual - You can manually add an appointment to your calendar.

Following sections explain about:

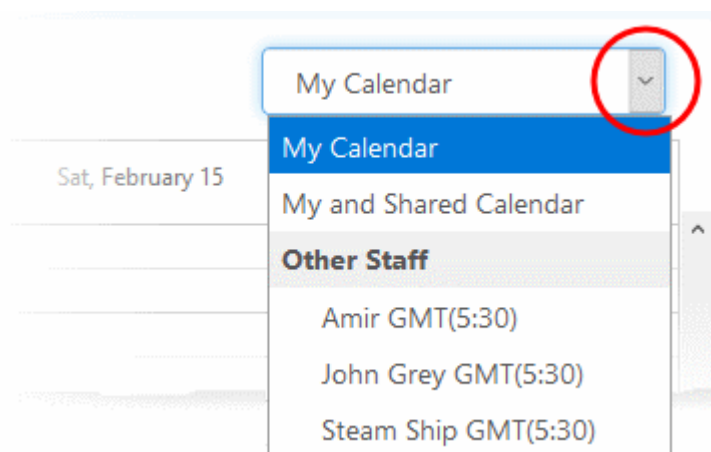
- [The calendars interface](#)
- [Create a manual calendar entry for an appointment](#)
- [Reschedule or edit an appointment](#)

### The calendars interface

- Open the 'Staff' panel (see last link on the left)
- Click 'Calendars' on the left
- By default, the current week is shown.
- Use the Day and Week buttons at the top left to switch between 'Day' and 'Week' views
- Use the '<' and '>' buttons to move to the previous / next week / day.



Click the drop-down at top-right to select calendar you want to view:



**My Calendar** - Displays calendar events scheduled for you. The entries include:

- Events you manually added
- Scheduled events created in tickets assigned to you
- Events scheduled for you by admins and other staff members

**My and Shared Calendar** - Events scheduled for you as above + events marked as shared.

- Blue background - Events scheduled for you
- Gray background - Shared events

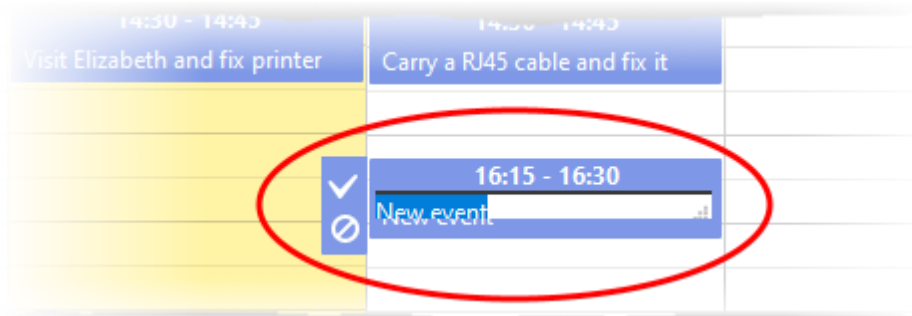
**Other Staff** - Admins only. Choose the staff member whose calendar you want to view.

### Create a manual calendar entry for an appointment

- Open the 'Staff' panel (see last link on the left)
- Click 'Calendars' on the left
- Choose 'My Calendar' from the drop-down at top-right to create an event for yourself
- Admins only - Click the drop-down menu and choose a staff member from 'Other Staff'. You can create events for other staff.

Day	Mon, February 10	Tue, February 11	Wed, February 12	Thu, February 13	Fri, February 14
9 <sup>00</sup>					
10 <sup>00</sup>					
11 <sup>00</sup>			10:45 - 11:00 Make a site visit and resolve		
12 <sup>00</sup>					
13 <sup>00</sup>				12:45 - 13:45 Work with John	
14 <sup>00</sup>					
15 <sup>00</sup>		14:30 - 14:45 Visit Elizabeth and fix printer	14:30 - 14:45 Carry a RJ45 cable and fix it		
16 <sup>00</sup>					
17 <sup>00</sup>					
18 <sup>00</sup>					
19 <sup>00</sup>					

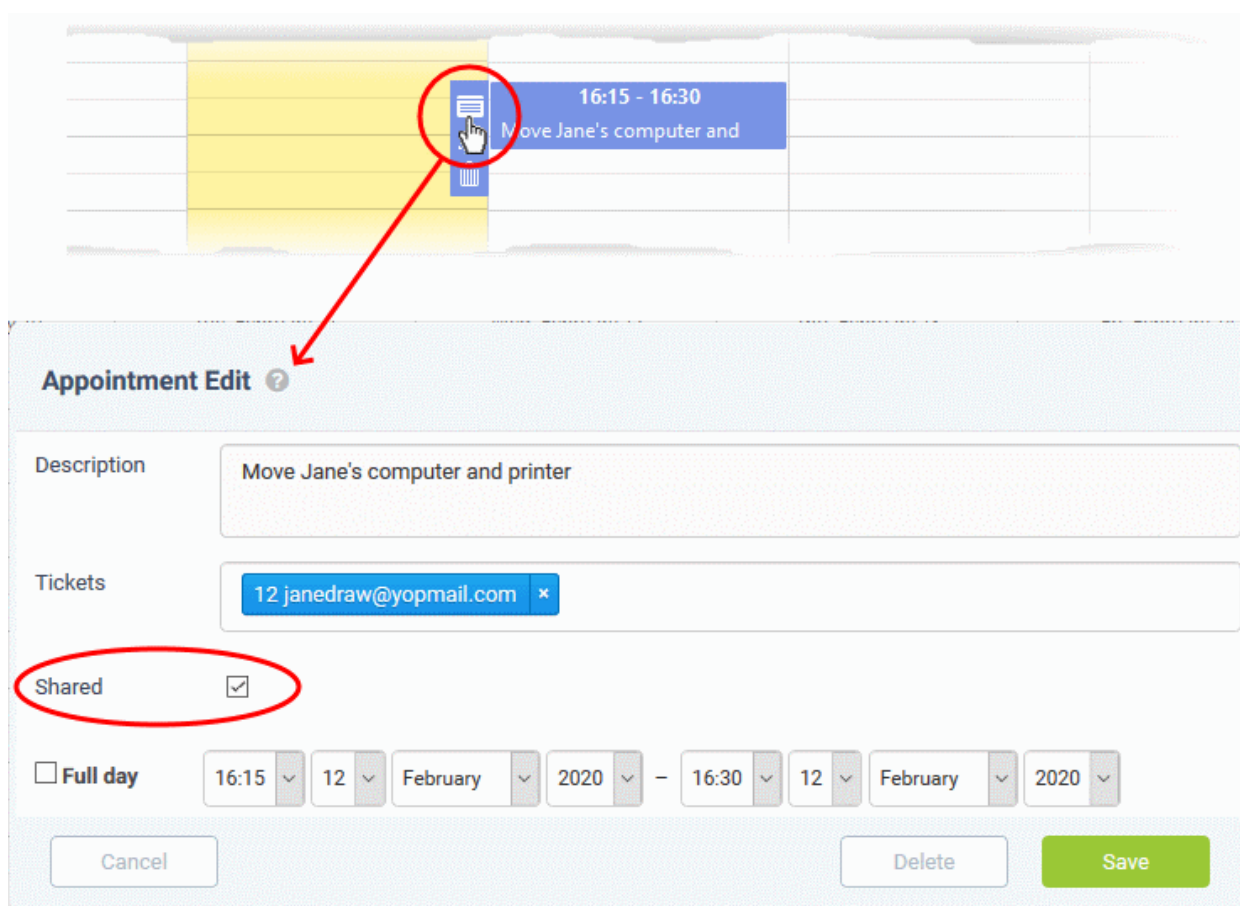
- Double-click on the time-slot which you wish to schedule for the ticket



- Enter a short description of the task
- Click the tick mark  to save the entry

**Share an event with others:**

- Click on the event
- Click the 'Edit' icon that appears on the left (the top icon of the three)
- Enable the 'Shared' check-box



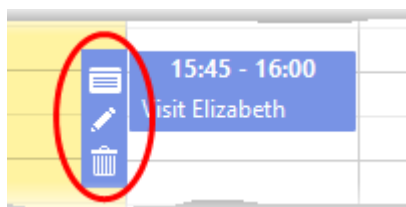
- Click 'Save'.

## Reschedule or edit an appointment

You can edit calendar entries to change the description, associate tickets, change the date/time, mark as shared, and more.

### View/manage details of a calendar entry

- Open the 'Staff' panel (see last link on the left)
- Click 'Calendars' on the left
- Choose 'My Calendar' or 'My and Shared Calendar' from the drop-down at top-right
  - Or choose another staff member from 'Other Staff' (admins only)
- Click on the event you want to view or manage



 - Opens the 'Appointment Edit' dialog. The 'Edit' dialog lets you:

- View and modify event description
- Associate tickets with the event
- Share or unshare the event

- View and change the scheduled time of the event

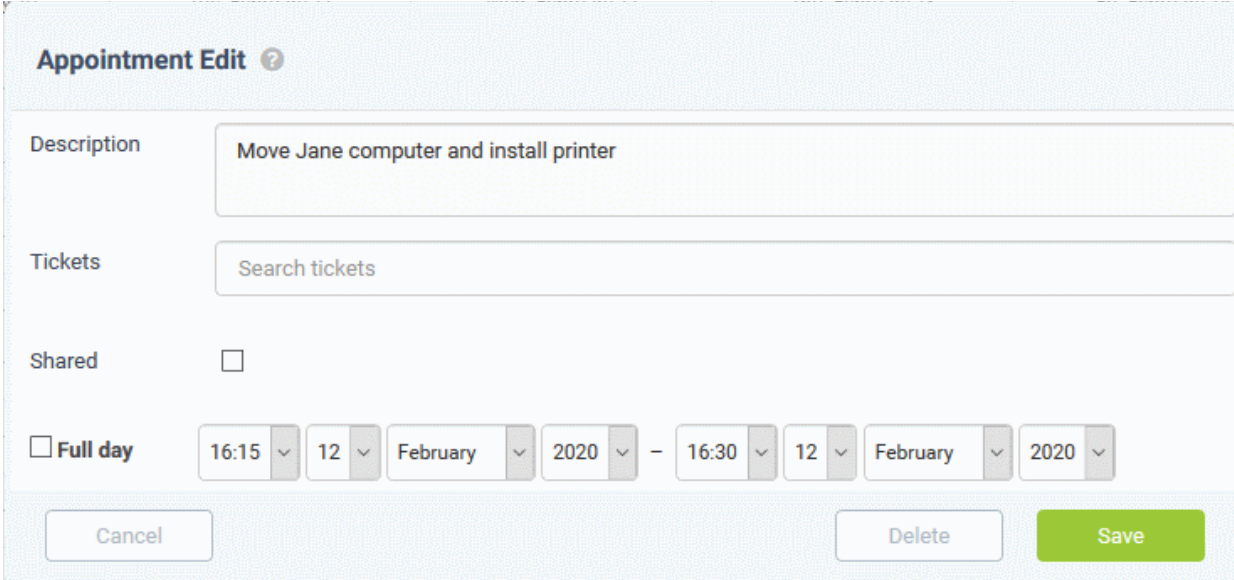
See **Edit details of an appointment** for more details

 - Edit the description of the event.

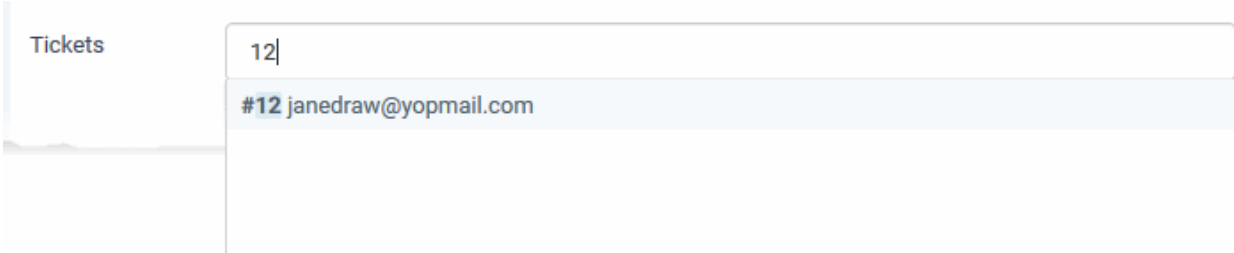
 - Remove the event

## Edit details of an appointment

- Click the 'Details' icon  to view and manage details of the ticket.



- **Description** - The description of the event. You can change the description if required.
- **Tickets** - View tickets associated with the event and add new tickets. This is optional. You can add multiple tickets to a calendar entry.
  - Start typing the first few letters of the ticket number, username/email of the user that created the ticket or the subject of the ticket.
  - Select the ticket you want to associate with the event from the search results:



- Repeat the process to add more tickets
- **Shared** - Makes the event visible to all admins/staff members when they select 'My and Shared Calendar' from the drop-down.
- **Time Period** - Shows the date/time of the event.
  - Simply change the values in the drop-downs to reschedule the event.
  - Select 'Full day' if you expect the event to last the full working day.
- Click 'Save' after making your changes



# Appendix 1 - Field Types in Custom Forms and Custom Lists

Field Type	How the field will be displayed in the target form
Short Answer	Single line text box
Long Answer	Multi line text box
Date and Time	Displays date field with calendar icon to choose a date. If configured for time, displays a drop-down that shows time at intervals of 15 minutes, for the user to choose the time.
Phone number	Displays single line text field for entering phone number. If configured, shows an additional box for 'Extension' number
Check box	Displays a checkbox for the field.
Choices	<p>Displays a drop-down for the user to choose an option. The options to be shown are to be configured from the 'Forms' interface.</p> <p>Example:            Field Label = Mode of Service            Options = Site Visit, Remote Access</p> <p>'Choices' is an alternative to ' Custom Lists'. Choices can be used to create an ad-hc drop-down for a form, rather than creating a custom list under the 'Lists' interface and choosing it for the field in a custom form.</p>
Section Break	Allows you to insert a break in the form between sections in a single form.
Built-in lists	Displays a drop-down menu with options defined in the selected built-in list
Custom Lists	Displays a drop-down menu with options defined in the custom list

## Appendix 2 - Ticket Priorities

The priority levels you assign to a ticket are at your discretion. However, here are some general definitions which may help you to decide priorities within your setup:

- Low - Customer is not experiencing loss of functionality or system errors. For example, these may be general use questions, suggestions or future enhancement requests.
- Normal - Customer has loss of non-critical functionality. Customer can function and there are workarounds available. Customer issue may even be covered by existing documentation.
- High - Customer product/service is functioning in severely reduced capacity. Significant impact to the customer's operating and productivity. Potential loss of data or interruption of service.
- Critical - Customer product/service is completely down or not functioning. Customer has experienced loss of production data and no workaround is possible.

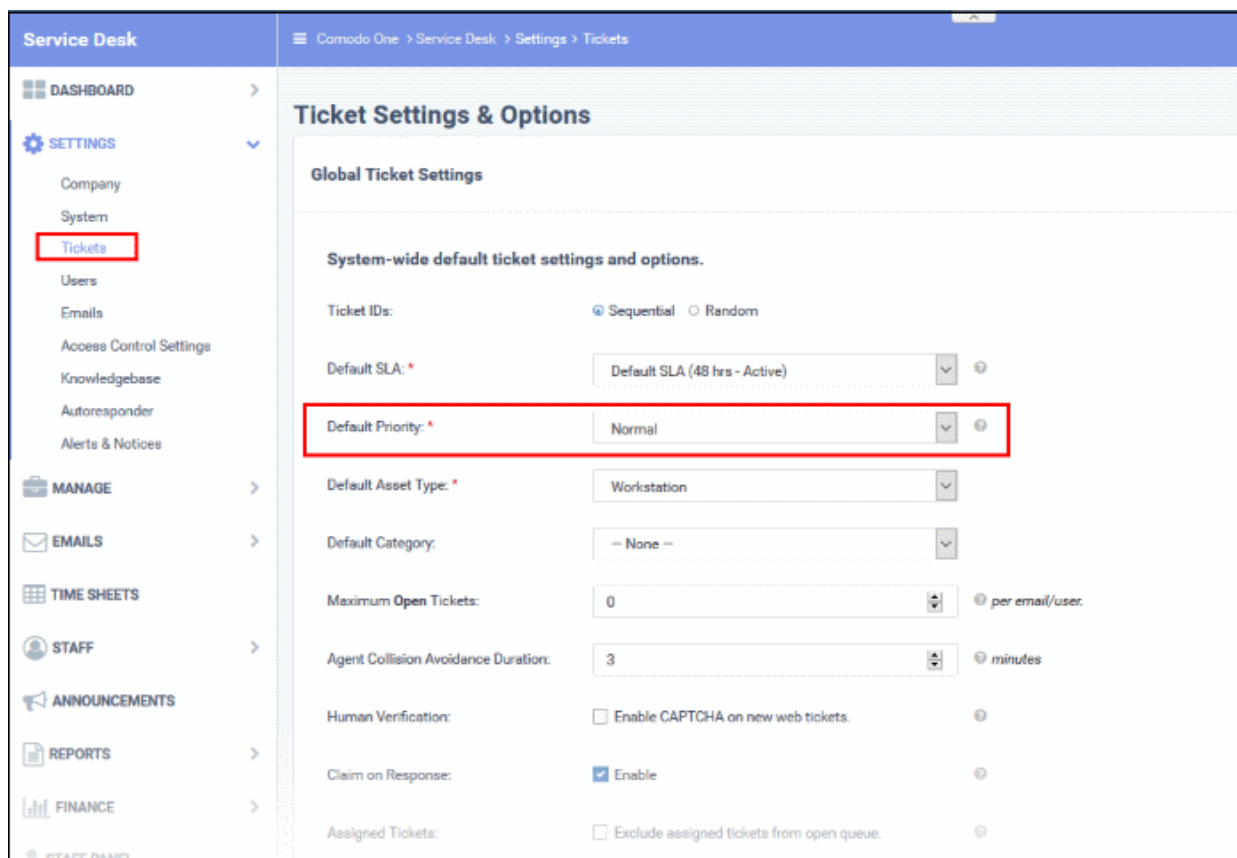
In the examples above, ticket priorities are determined by the severity of the customer's issue. As a company, however, the priority you assign to a particular ticket may also be influenced by other factors, including the importance of the customer or whether the ticket is badly overdue.

Under default settings in Service Desk, all new tickets have a priority level of 'Normal'. There are a variety of ways to set ticket priority in Service Desk. You can also use priorities as a management tool by creating filters which apply actions to tickets with a certain priority level.

The following sections show you the various places where you can set ticket priority in Service Desk. Please note, you should be in the 'Admin' panel to configure most of these settings.

- **Set default priority**
- **Assign ticket priority based on ticket category**
- **Apply actions based on ticket priority**
- **Set the priority of tickets sent to a specific email address**
- **Manually set ticket priority**

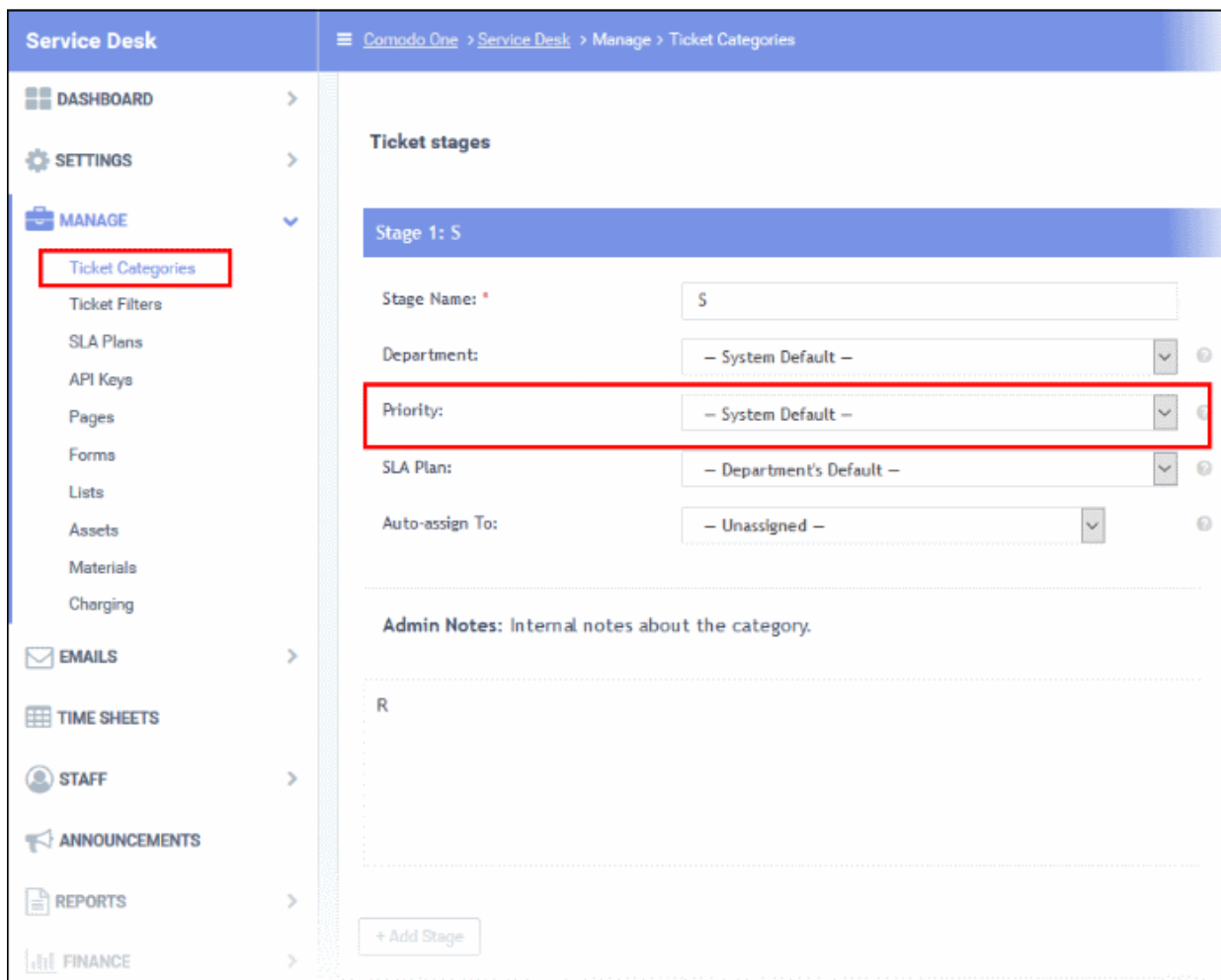
First, you can set default ticket priority in 'Settings' > 'Tickets':



The priority you assign here will be applied system-wide to new tickets. The default priority can be superseded by settings you make in other areas of the interface.

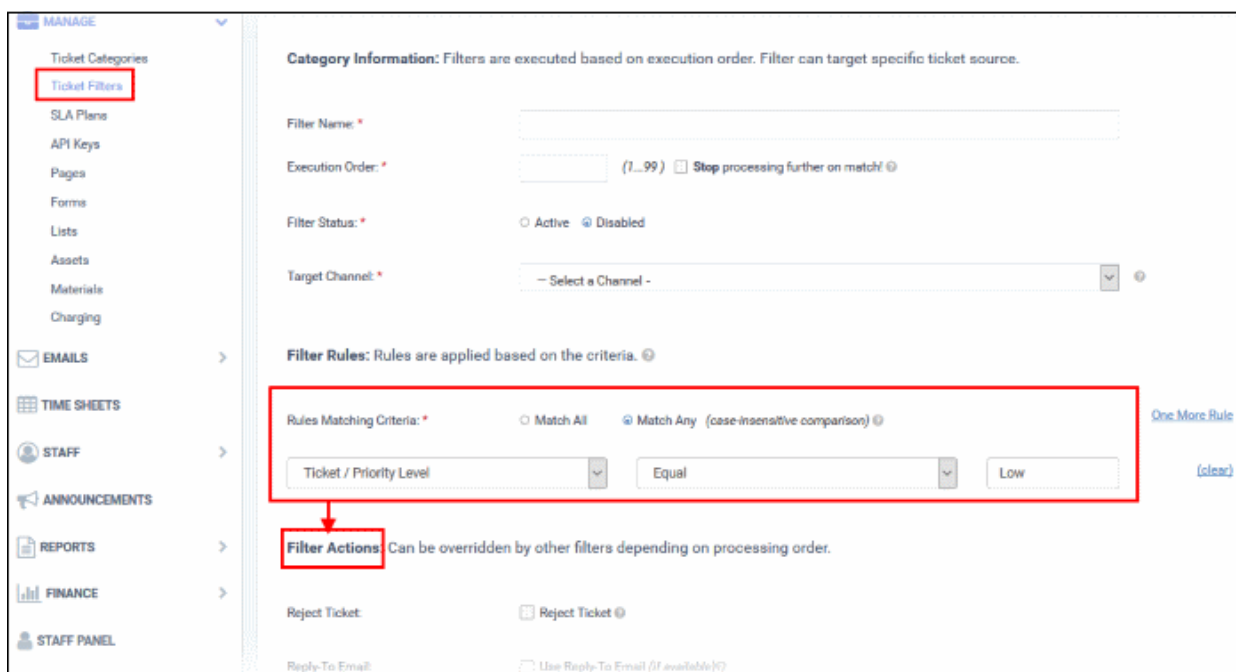
For example, you may want to assign a specific priority to tickets created after a customer picks a certain ticket category on your support portal. You can also, independently, choose the priority of tickets sent to your support email address. Your staff can, of course, manually change the priority of a ticket after they have evaluated the issue.

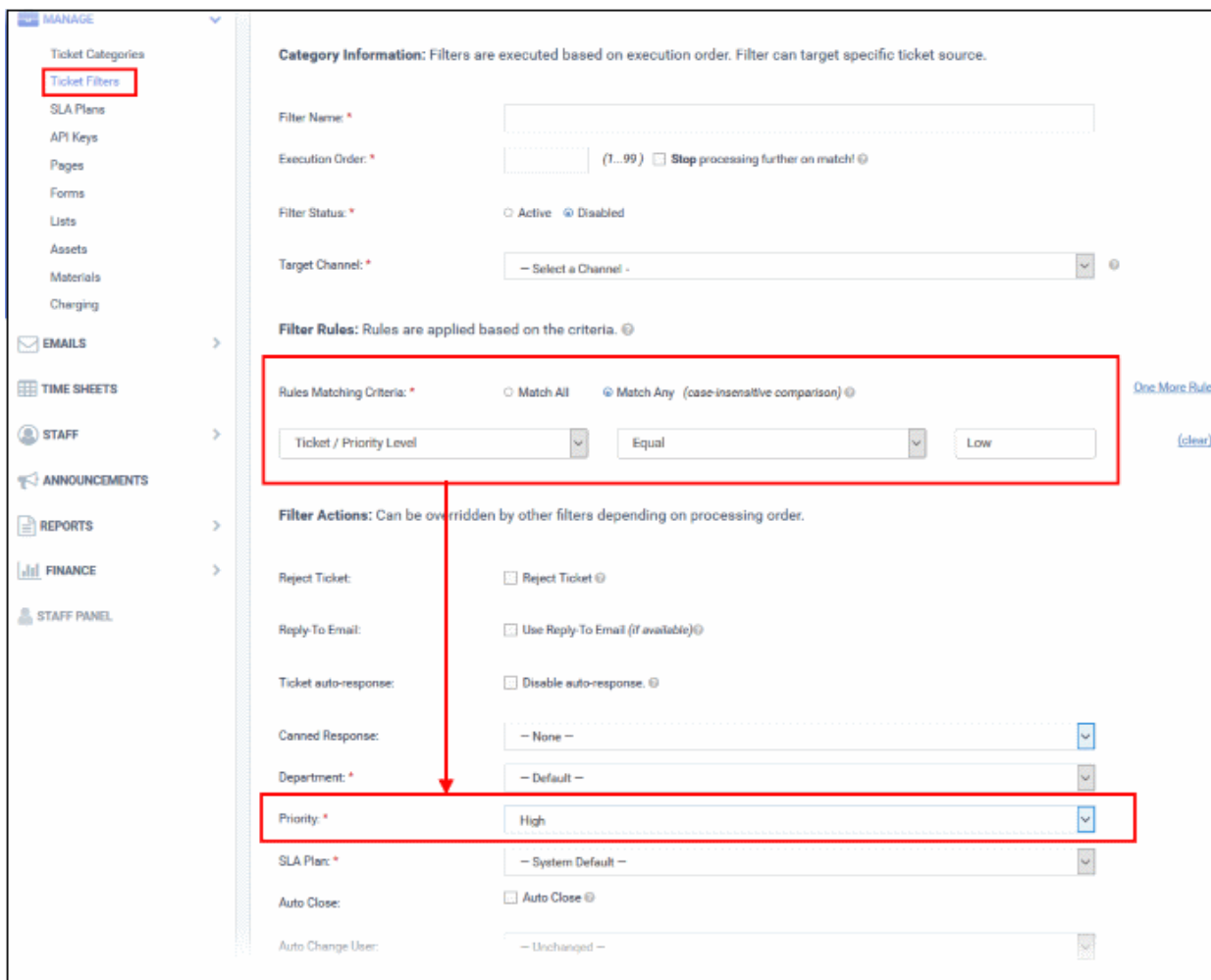
Secondly, you can specify the priority of tickets in ticket category stages. You can set the priority of tickets created when customers choose a specific ticket category on your support website.



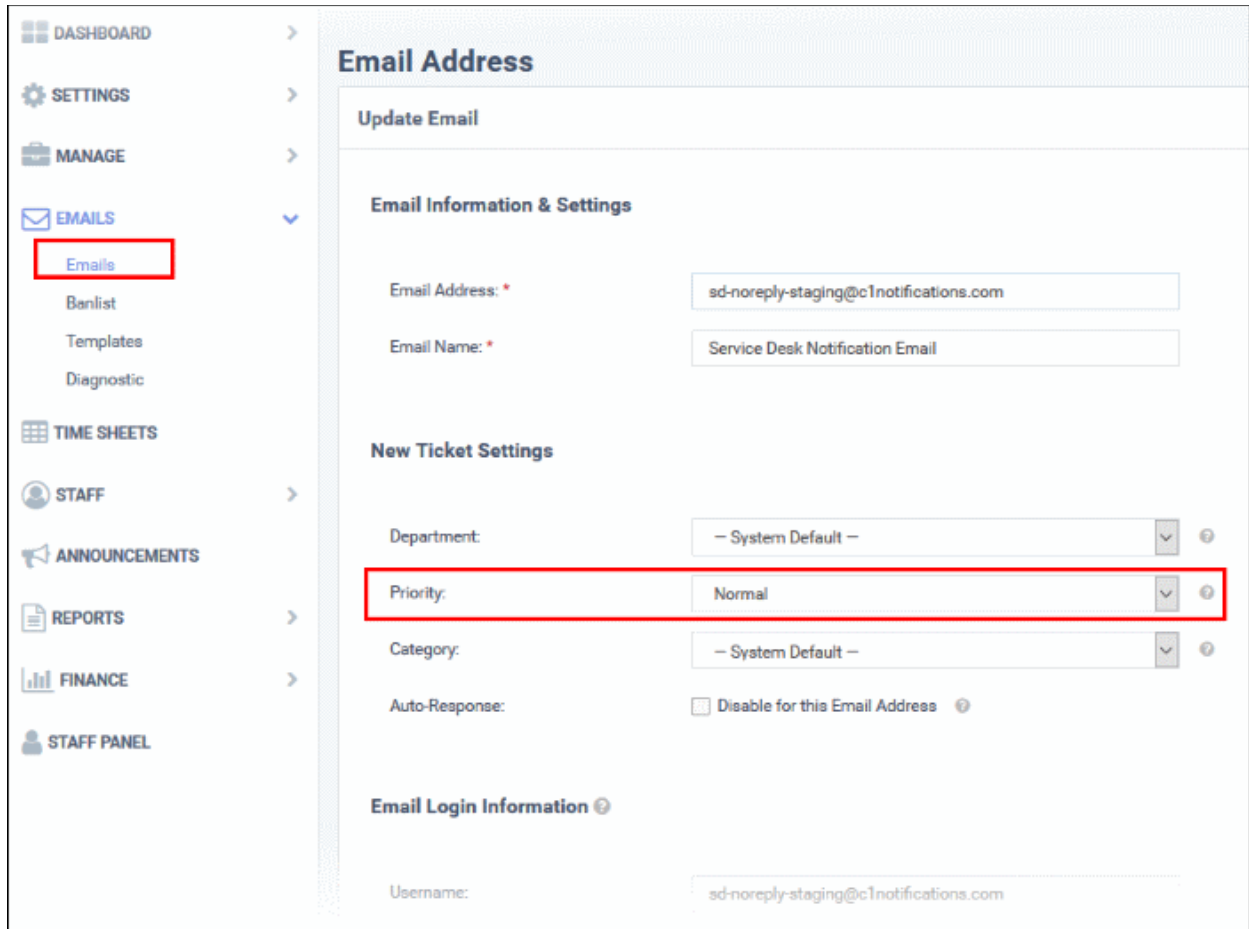
Thirdly, you can create rules in the 'Filters' section which:

- Apply actions to tickets based on their priority  
AND/OR
- Apply priority to tickets which meet certain criteria

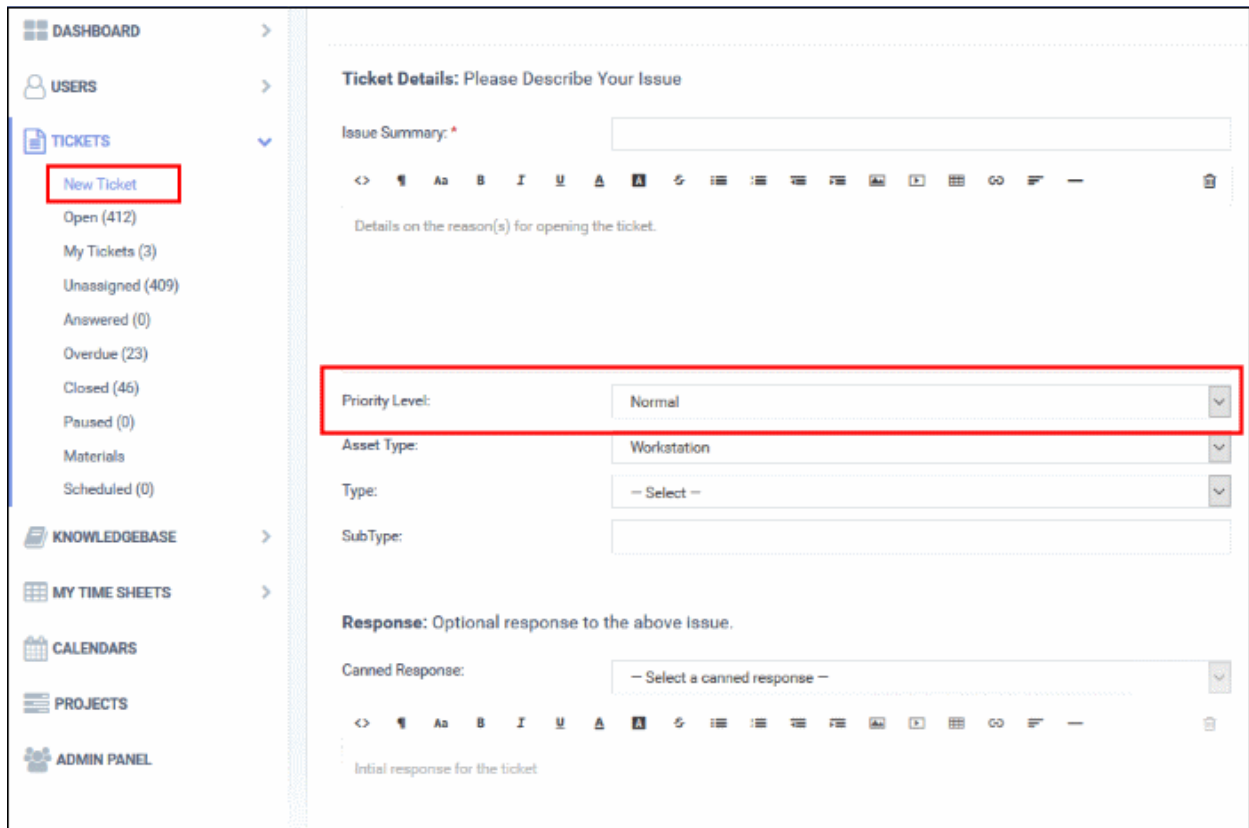




The 'Emails' section also lets you set the priority of tickets generated when a customer sends an email to a specific address:



Finally, staff can manually set priority when creating (or working on) a ticket:



# Appendix 3 - How Charging Works in Service Desk

- [Charging explained](#)
- [Charging flowchart](#)
- [Example charging scenarios](#)

## Charging explained

There are three components you need to consider when billing your customers - **contracts**, **charging plans** and **global asset rates**:

### 1) **Contracts** ('Admin Panel' > 'Finance' > 'Contracts').

An agreement between your organization and a customer which details the charges you will levy for your services. You can configure the following items in a contract:

- **Contract Fee** (optional). A fixed charge for a billing cycle (weekly, bi-weekly, monthly or annual). The contract fee will always be charged on top of any charging plans and/or global asset rates.
- **Prepaid Hours** (optional). Specify how many hours of work your company will provide at no charge for the contract fee. You can set different pre-paid hours for each type of service (telephone, remote, on-site). If the time spent exceeds the pre-paid hours then only the excess time will be subject to charge.
- **Charging Plan** (optional). See next item.

### 2) **Charging Plans** ('Admin Panel' > 'Manage' > 'Charging').

A template applied to a contract which lets you define custom hourly rates for your services. Charging plan rates are applied after prepaid hours have been used up. You can configure the following in a charging plan:

- **Default Hourly Rate** (mandatory). An hourly charge which is applied to sessions not covered by a variable rate.
- **Variable Rates** (optional). Special rates for specific types of work. Variable rates are implemented by constructing a conditional rule. Work which meets the criteria will be charged at the rate you set. For example, you might want to charge a different rate for on-site visits, or for work on a particular type of asset, or for work that exceeds a certain length of time.

### 3) **Global Asset Rates** ('Admin Panel' > 'Manage' > 'Charging' > Open the 'Default Charging' plan).

Independent of a contract, you can set hourly charges for work on specific asset types. Your staff adds the asset to a ticket and the customer is charged the global rate. Assets are items like workstations, servers, printers, routers etc. Global asset rates are only charged after any prepaid hours and charging plans have been processed.

- View and edit global asset rates - Click 'Admin Panel' > 'Manage' > 'Charging' - open the 'Default Charging' plan
- View and create assets - Click 'Admin Panel' > 'Manage' > 'Assets'

See [Manage Charging Plans](#) to read more about charging plans and global asset rates.

## Charging Flowchart

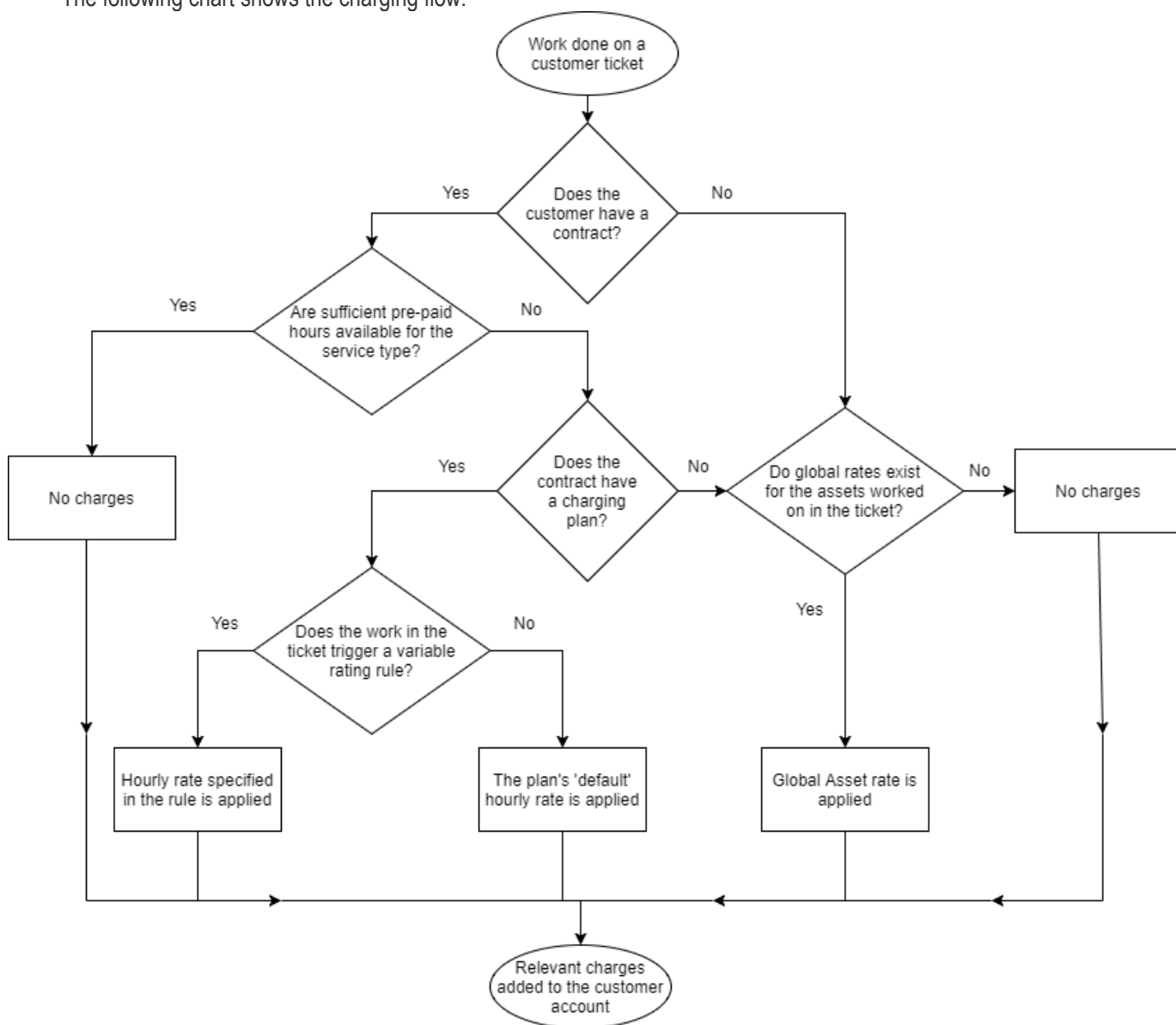
When a ticket is closed, charges are calculated for the session as explained below:

- Service Desk first checks whether a contract exists for the company.
- If no contract exists then Service Desk charges any global asset rates that apply to items in the ticket. If no global rates are set for items in the ticket then no charge is made.
- If a contract exists:
  - Service Desk first processes any pre-paid hours. If pre-paid hours are available then the time is not charged.

- If pre-paid hours are not set or have been exhausted, then Service Desk checks whether a charging plan has been applied to the contract.
- If a charging plan exists, then Service Desk first checks the 'Variable Rate' rules.
  - If the work matches a variable rule then the hourly rate specified in the rule is applied.
  - The 'default rate' is applied to all work which does not match a variable rate rule.
- If there is no charging plan then Service Desk applies any global asset rates that are relevant to the ticket. If no global rates are set for the assets worked on in the ticket then no charge is made.

**Note.** Charges for any materials added to a ticket are additional to the rates explained above.

The following chart shows the charging flow:



**Note:**

- A single ticket which contains work on multiple assets and service types may accrue charges from a mix of global rates and charging plan rates.
- If time spent exceeds the pre-paid hours for a service, then only the excess time will be subject to charge.

### Example charging scenarios



The following table shows how charging is applied for different customer types:

CONTRACT			CHARGING PLAN		GLOBAL ASSET RATES	Result
Fee set	Prepaid Hours		Default rate set	Variable rates set		
	Unlimited	Limited				
✓	✗	✗	✗	N/A	✗	Customer is charged only the fee at the interval you specify. Unlimited work on any asset for the flat-rate fee. Customer will not be charged additional rates.
✓	✓	N/A	N/A	N/A	N/A	Same as above. Unlimited pre-paid hours over-rides charging plans and global asset rates.
✓	✗	✓	✗	N/A	✗	Customer is charged the fee at the interval you specify. Prepaid hours are covered by the fee.  When pre-paid hours are exhausted, the extra hours worked will not be charged as no rates have been set.
✓	✗	✓	✗	N/A	✓	Customer is charged the fee at the interval you specify. Pre-paid hours are included in the fee. After pre-paid hours are used up, customer is charged at global asset rate.  If the service involves an asset which does not have a global rate, then the extra hours for that asset type will not be charged
✓	✗	✗	✓	✗	N/A	Customer is charged the fee at the interval you specify.  The time spent on all service sessions is charged at the default hourly rate in the charging plan.
✓	✗	✓	✓	✗	N/A	Customer is charged the fee at the interval you specify. Pre-paid hours are included in the fee. After pre-paid hours are used up, customer is charged at the default hourly rate in the charging plan.
✓	✗	✓	✓	✓	N/A	Customer is charged the fee at the interval you specify. Pre-paid hours are included in the fee. After pre-paid hours are used up, customer is charged at the variable rate for specific types of work, and the default hourly rate for all other types of work.

## Read More:

- **Contracts** - See **Manage Contracts**
- **Charging plans** - See **Manage Charging Plans**
- **Global asset rates** - See **Default Charging Plan** in **Manage Charging Plans**

# About Comodo Security Solutions

Comodo Security Solutions is a global innovator of cybersecurity solutions, protecting critical information across the digital landscape. Comodo provides complete, end-to-end security solutions across the boundary, internal network and endpoint with innovative technologies solving the most advanced malware threats. With over 80 million installations of its threat prevention products, Comodo provides an extensive suite of endpoint, website and network security products for MSPs, enterprises and consumers.

Continual innovation and a commitment to reversing the growth of zero-day malware, ransomware, data-breaches and internet-crime distinguish Comodo Security Solutions as a vital player in today's enterprise and home security markets.

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In a world where preventing all cyberattacks is impossible, Comodo Cybersecurity delivers an innovative cybersecurity platform that renders threats useless, across the LAN, web and cloud. The Comodo Cybersecurity platform enables customers to protect their systems and data against even military-grade threats, including zero-day attacks. Based in Clifton, New Jersey, Comodo Cybersecurity has a 20-year history of protecting the most sensitive data for both businesses and consumers globally. For more information, visit [comodo.com](https://www.comodo.com) or our [blog](#). You can also follow us on [Twitter](#) (@ComodoDesktop) or [LinkedIn](#).

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