

**COMODO**  
CYBERSECURITY



# Dragon Platform

Software Version 3.30

## Service Desk Quick Start Guide

Guide Version 4.20.033120

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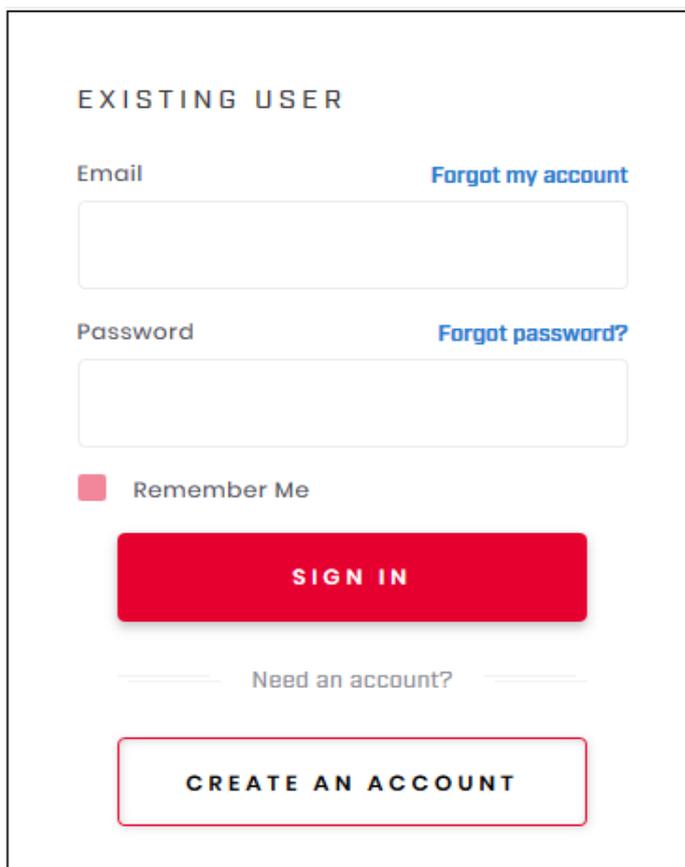
# Comodo Service Desk - Quick Start Guide

This tutorial explains how Comodo Dragon admins 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 Organizations**
- **Step 9 - Manage Tickets**
- **Step 10 - Manage Knowledgebase**
- **Step 11 - Access Control Settings**
- **Step 12 - Configure Auto-response Emails**
- **Step 13 - View Reports**

## Step 1 - Login to the Admin Console

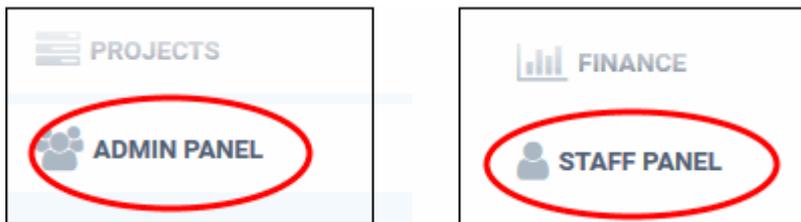
- Login to Comodo Dragon at <https://platform.comodo.com/app/login>



The screenshot shows a login form titled "EXISTING USER". It contains two input fields: "Email" and "Password". To the right of the "Email" field is a link "Forgot my account". To the right of the "Password" field is a link "Forgot password?". Below the "Password" field is a checkbox labeled "Remember Me". At the bottom of the form is a large red button labeled "SIGN IN". Below the "SIGN IN" button is a link "Need an account?". At the bottom of the form is a button labeled "CREATE AN ACCOUNT".

- Click 'Licensed Applications' > 'Service Desk'

- Service Desk will open at 'Staff Panel' > 'Open Tickets'.
- Click the link at the bottom of the left menu to switch between the staff and admin panels.



Admins can also setup two-factor authentication of user logins for additional security. See [Set up Two-Factor Login Authentication](#) for help with this.

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

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

- Roles determine the access rights of staff members and administrators in Service Desk.
- 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.

By default, service desk inherits three roles from Comodo Dragon:

- Account Administrator
- Administrator
- Technician
- Staff members added through CD are imported into Service Desk with the role assigned to them in CD. 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.
- Select the permissions and privileges that can be given to the members assigned with the role.
- Department Access - Choose which Service Desk departments are available to members with this role.
- Add admin notes if required then click 'Create 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 ticket category, by incoming mail, or by ticket filter. See '**Ticket Settings and Options**' in the admin guide for more help with this.
- 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:

Comodo One > Service Desk > Staff > Departments

## Departments

[Add New Department](#) [Make Public](#) [Make Private](#) [Delete](#)

### 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)
- Admin Dithers (0)
- Technician (2)
- Technician Org 1 (1)

**Department Signature:** ?

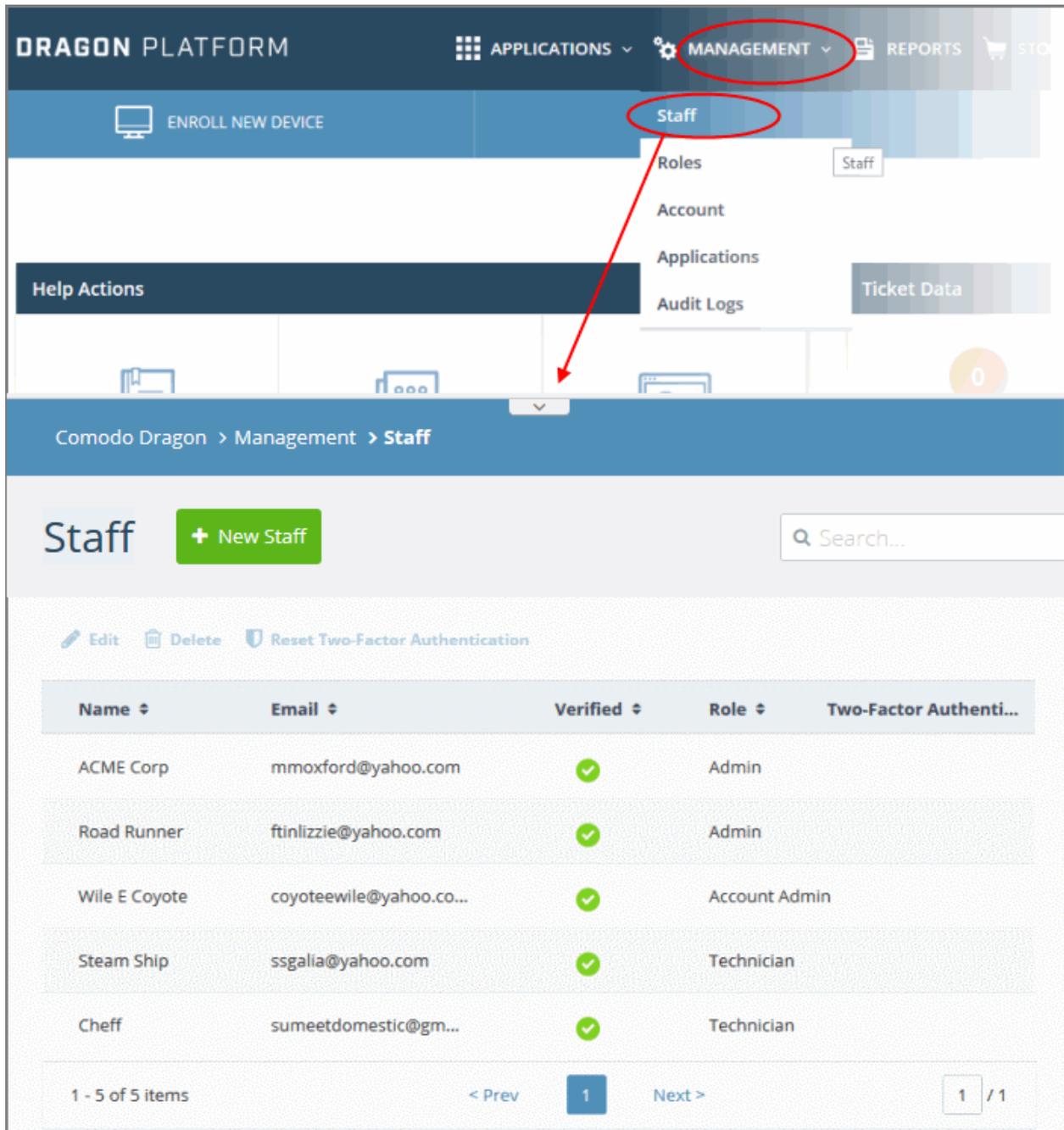
- Create a label for your new department. This is the minimum required to create a department to which staff can be assigned. You can accept the rest of the default settings and properly configure the department later if you wish.

- 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 <https://help.comodo.com/topic-457-1-990-14485-Email-Management.html> to read more.
- **Autoresponder Settings** - Configure auto-response emails sent to users whose tickets are assigned to this department. See <https://help.comodo.com/topic-457-1-990-14501-Autoresponder-Settings.html> for more details.
- **Alerts & Notices** - Select the recipients to whom alerts are sent. See <https://help.comodo.com/topic-457-1-990-14502-Configure-Alerts-and-Notices.html> 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.

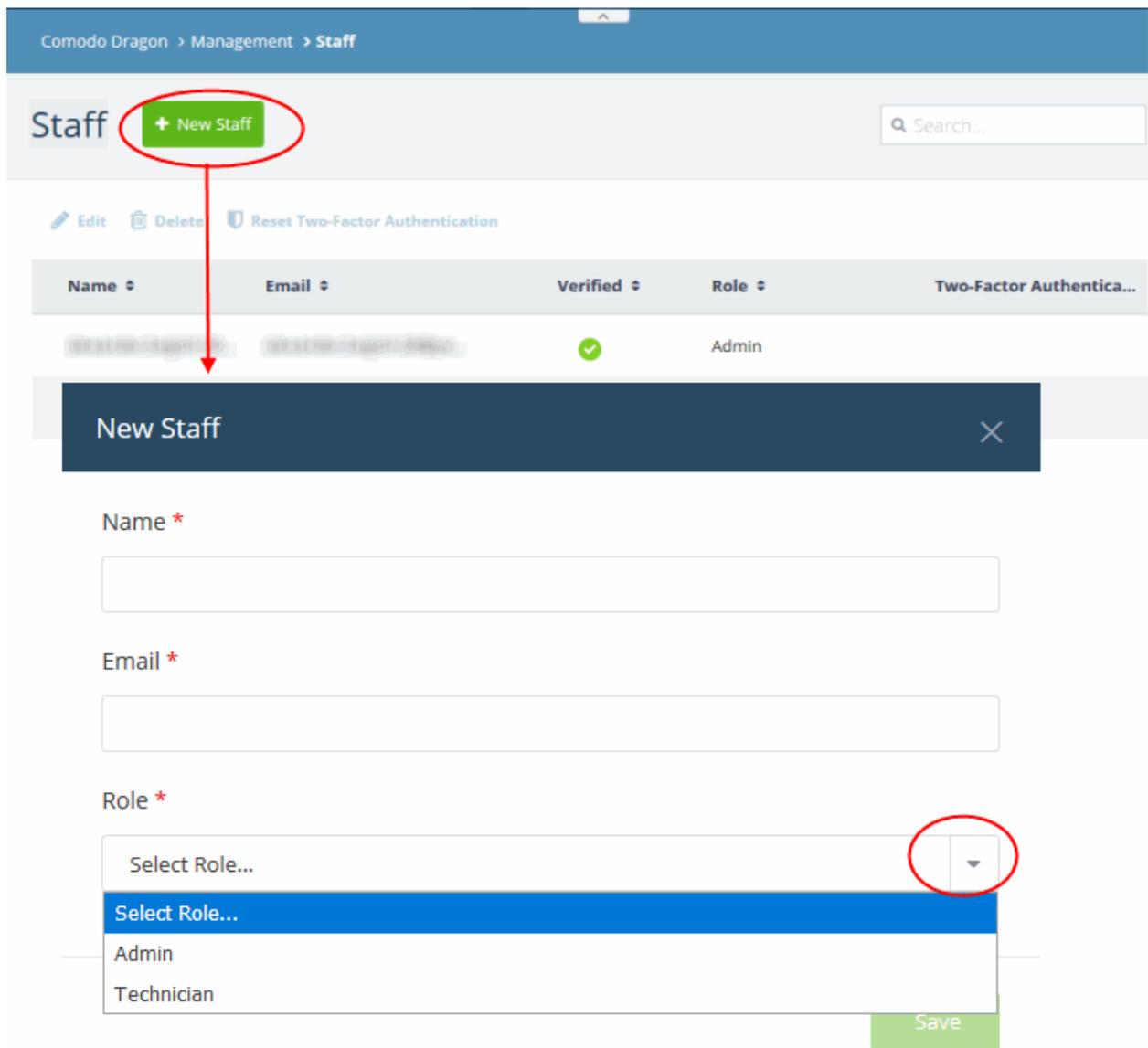
## Step 4 - Add new support staff

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 Dragon (CD) portal at <https://platform.comodo.com/app/login>:
  - Click 'Management' > 'Staff' > '+ New Staff' in the Comodo Dragon interface.
  - Staff created in CD are available in Service Desk and all other CD products (Endpoint Manager, Quote Manager etc).
- Staff created in CD 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 Dragon roles.
  - Staff will initially be given the same role in Service Desk as they have in CD.
  - 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 CD.
- Click 'Management' > 'Staff' > '+ New Staff' in the Comodo Dragon interface to get started:



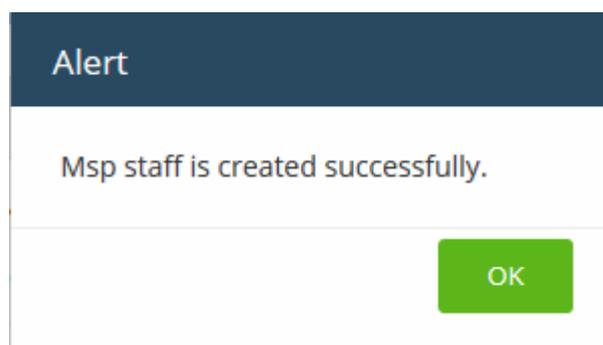
- Click 'New Staff' at the top.



**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 staff from the drop down. You can always change this later if required.
- Click the 'Save' button.

A confirmation is shown as follows:



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

- Click 'Admin panel' > 'Staff' > 'Staff Members'
- Click the name of the staff member.

The screenshot shows the 'Update Staff' form in the Comodo One Service Desk interface. The breadcrumb navigation at the top reads: Comodo One > Service Desk > Staff > Staff Members. The main heading is 'Staff Account'. The form is titled 'Update Staff' and contains the following fields:

- User Information**
- Username:** ssgalia@yahoo.com (with a help icon)
- Staff Name:** Steam Ship
- Email Address:** ssgalia@yahoo.com (with a help icon)
- Role:** Technician (dropdown menu)
- Department:** System Default – ( Support ) (dropdown menu)
- Phone Number:** (text input) and **Ext:** (text input)
- Mobile Number:** (text input)
- Staff's Signature:** Optional signature used on outgoing emails. (with a help icon). Below this is a large text area for the signature.

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

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

- **Role** - Service Desk role, as inherited from Comodo Dragon.
  - 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.

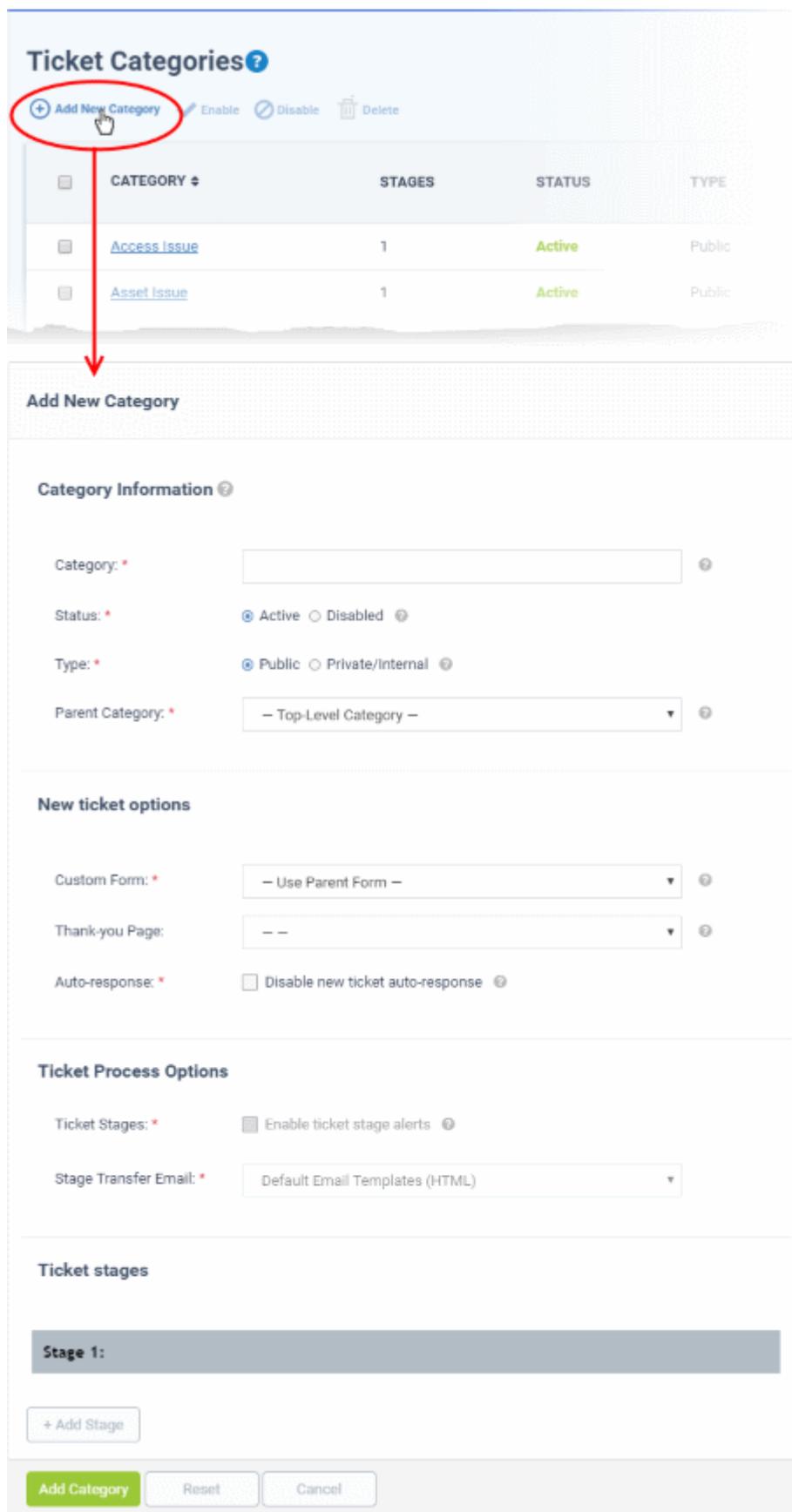
## Step 5 - Add Ticket Categories

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'



## 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 <https://help.comodo.com/topic-457-1-990-14509-Forms.html> 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 <https://help.comodo.com/topic-457-1-990-14494-Company-Profile-and-Support-Portal-Settings.html> 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 <https://help.comodo.com/topic-457-1-990-14501-Autoresponder-Settings.html> 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 <https://help.comodo.com/topic-457-1-990-14516-Email-Templates.html> 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 <https://help.comodo.com/topic-457-1-990-14476-Appendix-2---Ticket-Priorities.html> 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 <https://help.comodo.com/topic-457-1-990-14504-Ticket-Categories.html> for more details.

## Step 6 - Enroll Users

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

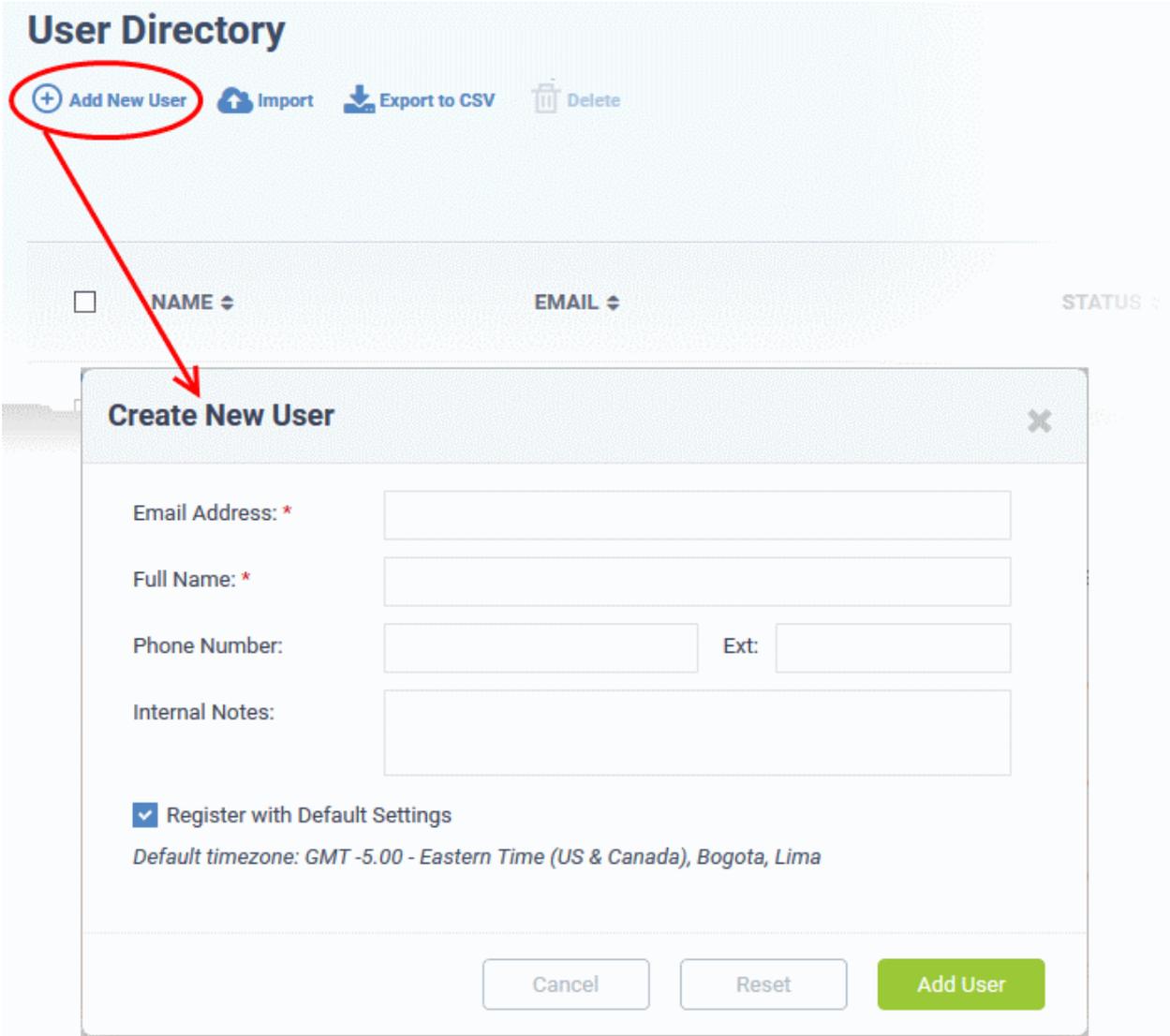
- 'Users' are the individuals who submit tickets to your support team. They can submit tickets via your support center, by email, or direct from an Endpoint Manager device.
  - Your client portal URL has the format <https://company-name.servicedesk.comodo.com>.
  - Users that self-enroll will be sent an account activation mail
- Admins can also manually enroll new users:
- Click 'Staff Panel' > 'Users' > 'User Directory' > 'Add New User' OR 'Import'
- All users, whether self-enrolled or manually enrolled, can be added to customer companies as explained in [step 7](#).
- You can set the default registration method for manually enrolled users in 'Admin Panel' > 'Settings' > 'Users'. See the online help page at <https://help.comodo.com/topic-457-1-990-14497-User-Registration-Settings.html> for more details.
- This section explains how to add individual users:

### 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 <https://help.comodo.com/topic-457-1-990-14509-Forms.html> 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 <https://help.comodo.com/topic-457-1-990-14497-User-Registration-Settings.html> 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

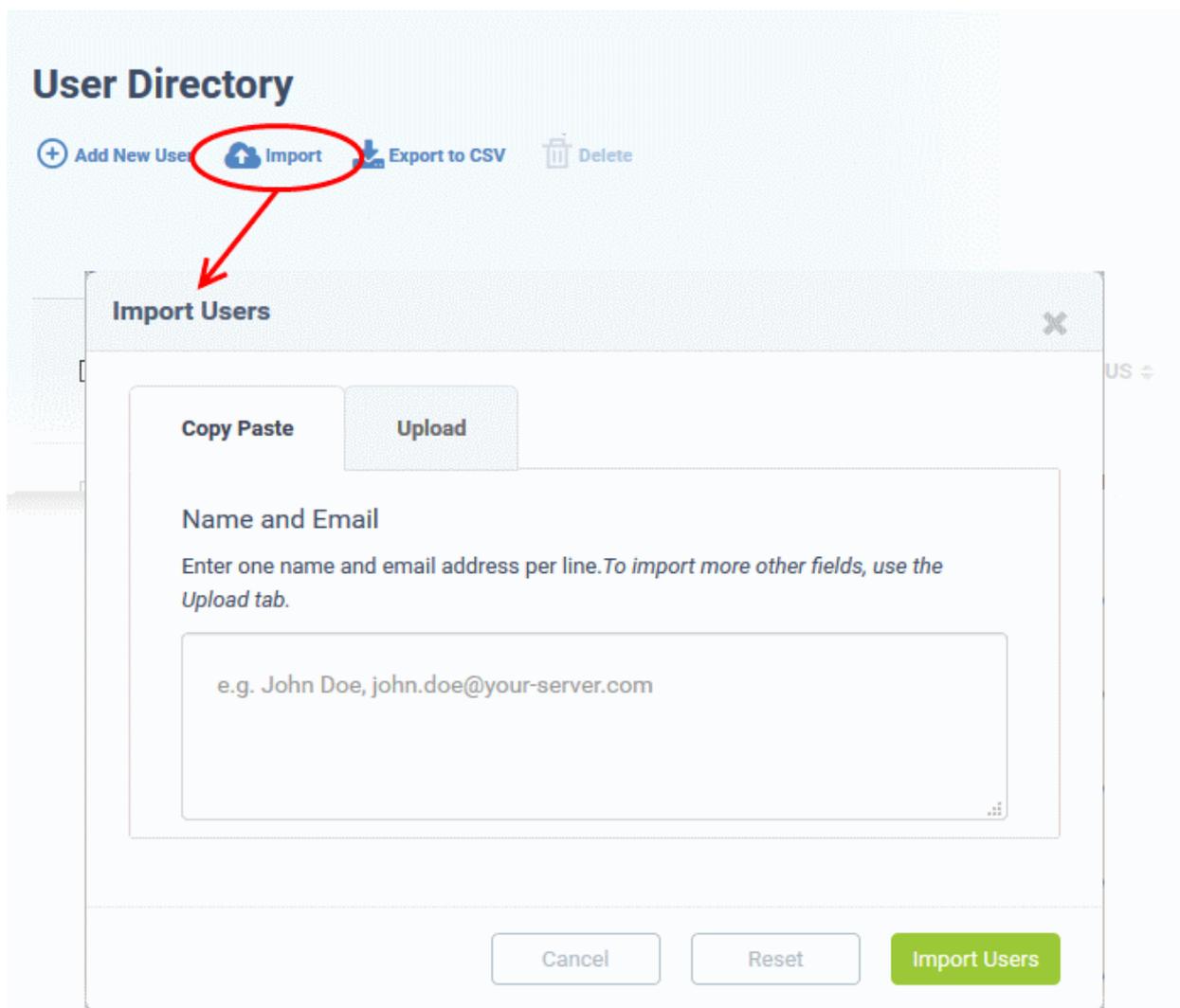
Cancel Reset Add User

- **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 <https://help.comodo.com/topic-457-1-990-14497-User-Registration-Settings.html> 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 customers from the 'User Directory' interface.

There are two options to add a customer:

- **Create a customer in the Comodo Dragon Interface** (preferred)  
Customers that are added to CD are fully managed, meaning they will be available for selection in all integrated modules (Service Desk, Endpoint Manager, Dome Shield).
  - Click 'Management' > 'Customer' > 'New Customer' to create a customer in CD.
- Create a customer in Service Desk.  
Customers added to Service Desk itself will not be visible in the CD interface nor available to other CD

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.

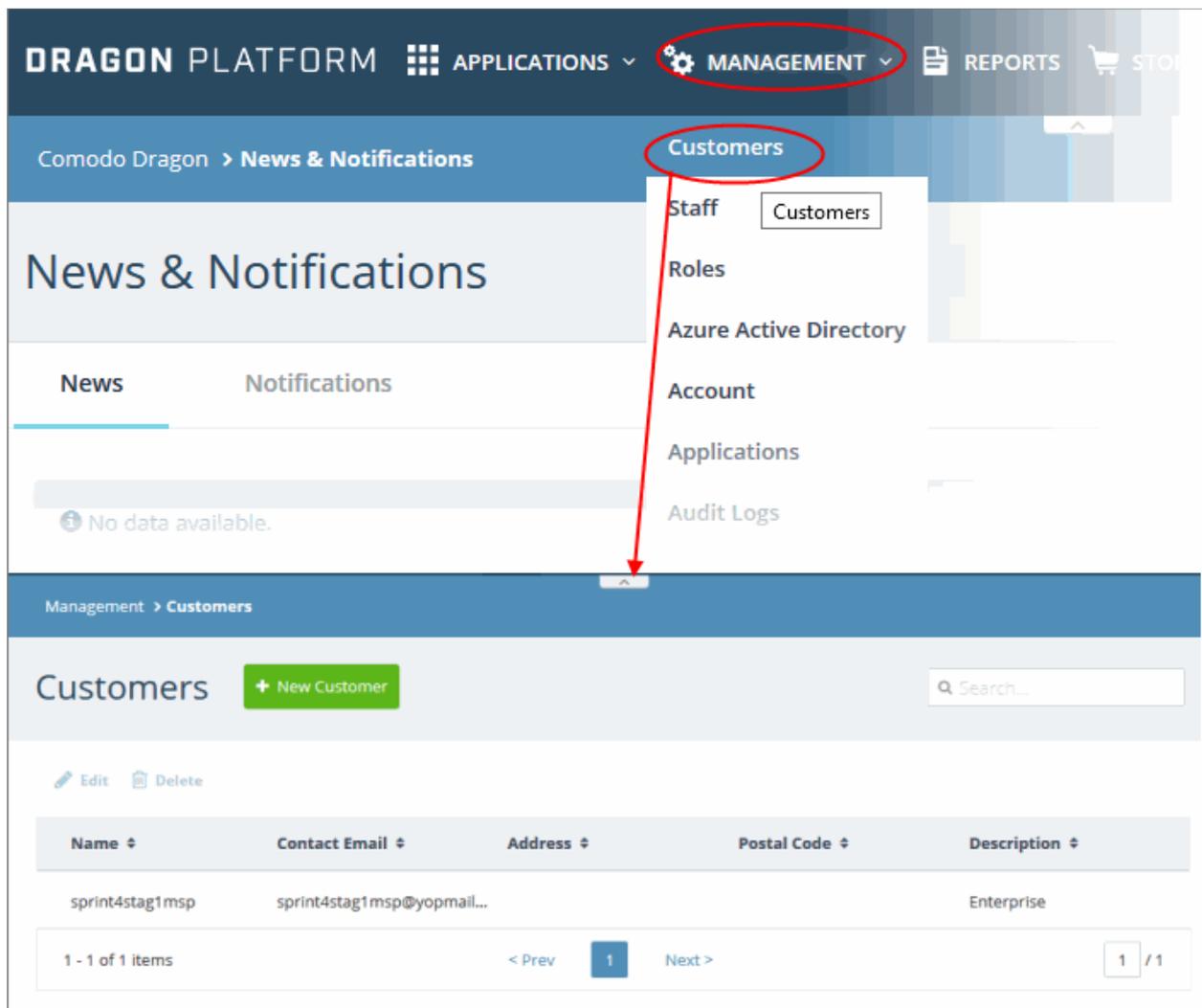
### Add a new customer

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

### Add a customer from the CD interface

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

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



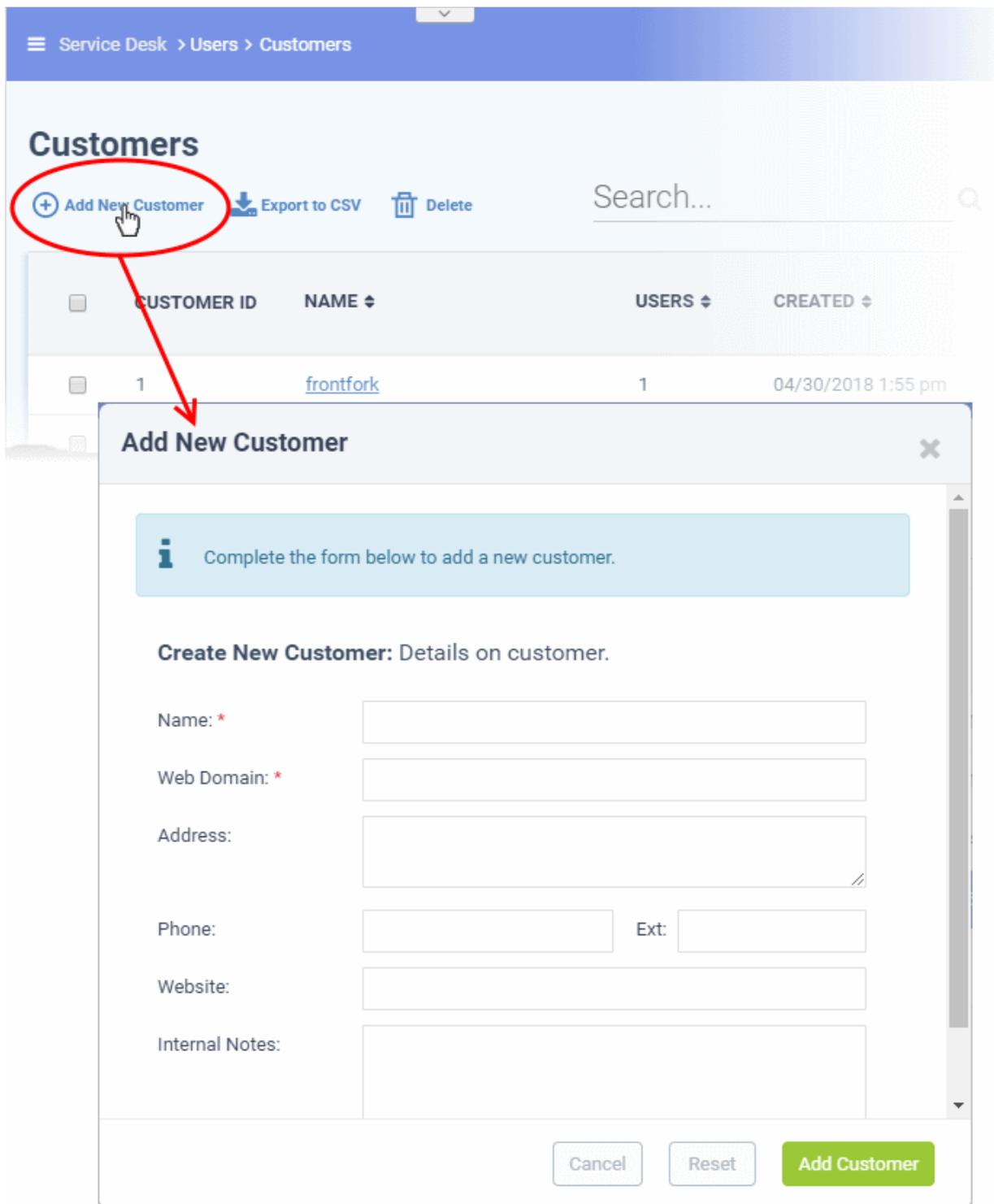
- Click the 'New Customer' button:

The screenshot displays the 'Customers' management page. At the top, there is a navigation breadcrumb 'Management > Customers'. Below this, the page title 'Customers' is shown next to a green '+ New Customer' button, which is circled in red. A search bar is located to the right of the title. Below the title, there are 'Edit' and 'Delete' icons. A modal window titled 'New Customer' is open, containing the following fields: 'Name \*', 'Contact Email \*', 'Address \*', 'Postal Code \*', and 'Description'. Each of the first four fields has a red asterisk indicating it is mandatory. The 'Description' field is optional. At the bottom of the modal, there are 'Cancel' and 'Save' buttons. A pagination indicator '1 / 1' is visible on the right side of the modal.

- 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



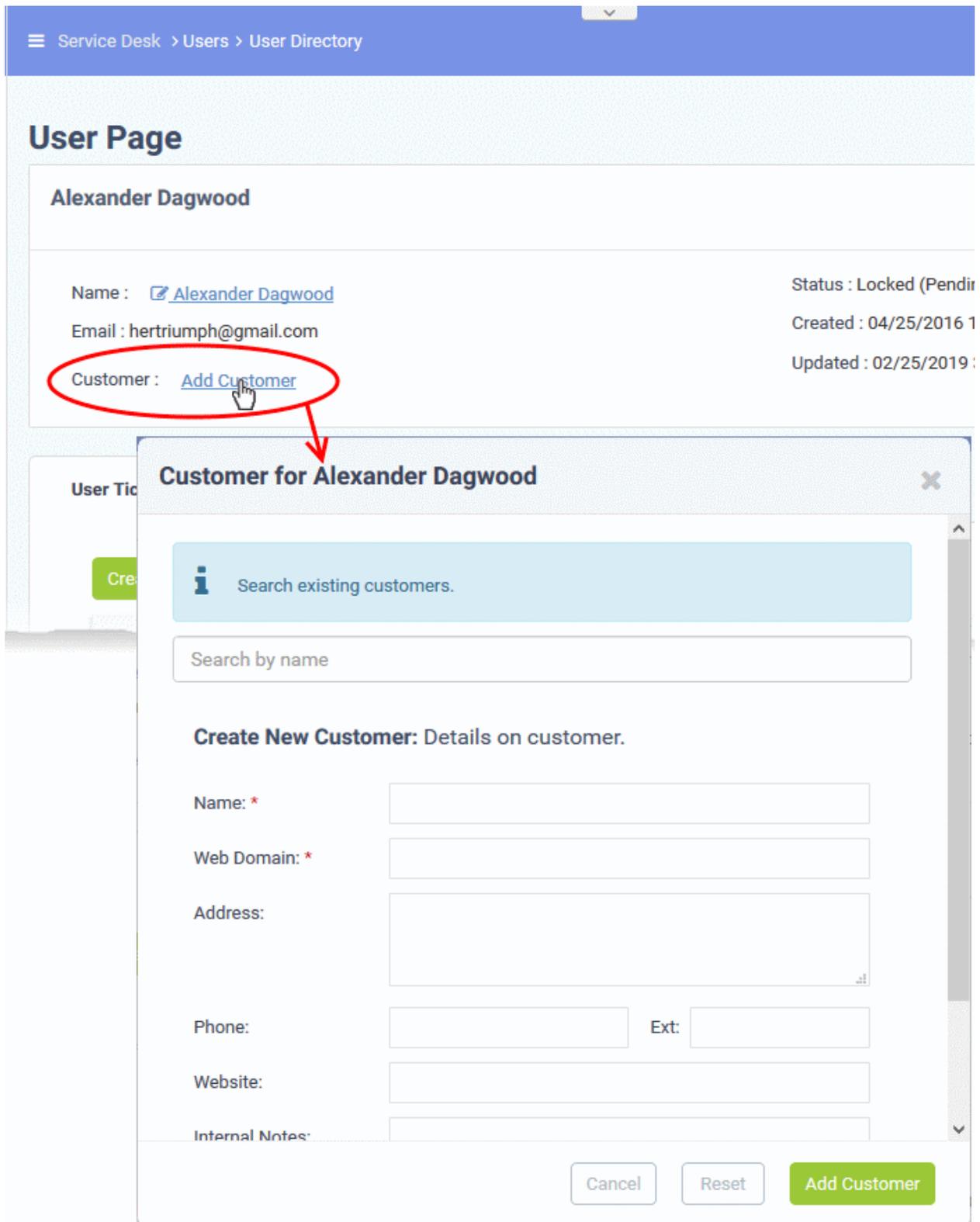
- **Name:** Enter a label for the customer company.
- **Web Domain:** Enter the domain that the customer uses for employee email. For example, enter 'example.com' if the customer's employees have email addresses like alice@example.com.
  - Service Desk creates two new users with email addresses in this 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 regarding the customer.
- After completing the form, click the 'Add Customer' button

Staff members can now configure its customer settings, users and billing rates. See <http://help.comodo.com/topic-457-1-990-14545-Manage-Customers.html> for more details.

### 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.

  
 **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.

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

Name: \*

Web Domain: \*

Address:

Phone:  Ext:

Website:

Internal Notes:

- See <http://help.comodo.com/topic-457-1-990-14545-Manage-Customers.html> 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 <https://help.comodo.com/topic-457-1-990-14513-Manage-Charging-Plans.html>.
- See <https://help.comodo.com/topic-457-1-990-14477-Appendix-3---How-Charging-Works-in-Service-Desk.html> to read more on how charges are calculated for customers, based on contracts and charging plans.
- For more details on service contracts, see <https://help.comodo.com/topic-457-1-990-14552-Manage-Contracts.html>.

#### 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 <https://help.comodo.com/topic-457-1-990-14513-Manage-Charging-Plans.html> 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:

TICKET	LAST UPDATE DATE	SUBJECT	FROM	PRIORITY	DEVICE NAME	ASSIGNED TO	ORGANIZATION
353	09/14/2018 12:03 pm	Provide access to dome ...	national services	Normal		frontfork	
354	09/14/2018 11:48 am	Service required for printer	region	Normal		frontfork	
285	09/14/2018 11:29 am	Generate the third party ...	Avantistude	Normal	DESKTOP-080SVJJ		
352	09/14/2018 9:47 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
351	09/14/2018 9:42 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
350	09/14/2018 9:39 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
349	09/14/2018 9:38 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
348	09/14/2018 9:37 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
347	09/14/2018 9:37 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
346	09/14/2018 9:34 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
345	09/14/2018 9:33 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		

- 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 <http://help.comodo.com/topic-457-1-990-14535-Manage-Tickets.html> to know 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 <https://help.comodo.com/topic-457-1-990-14496-Ticket-Settings-and-Options.html> 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.

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 <https://help.comodo.com/topic-457-1-990-14536-Manage-Knowledgebase.html> for more.

### 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 the online help page at <https://help.comodo.com/topic-457-1-990-14499-Access-Control-Settings.html>.

### 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 the online help page at <https://help.comodo.com/topic-457-1-990-14485-Email-Management.html>

### 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, organization, 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.

# 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.

## About Comodo Cybersecurity

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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