



# Service Desk

## Quick Start Guide

Software version 4.20

Guide version 4.20.010820

ITarian  
1255 Broad Street  
Clifton, NJ 07013

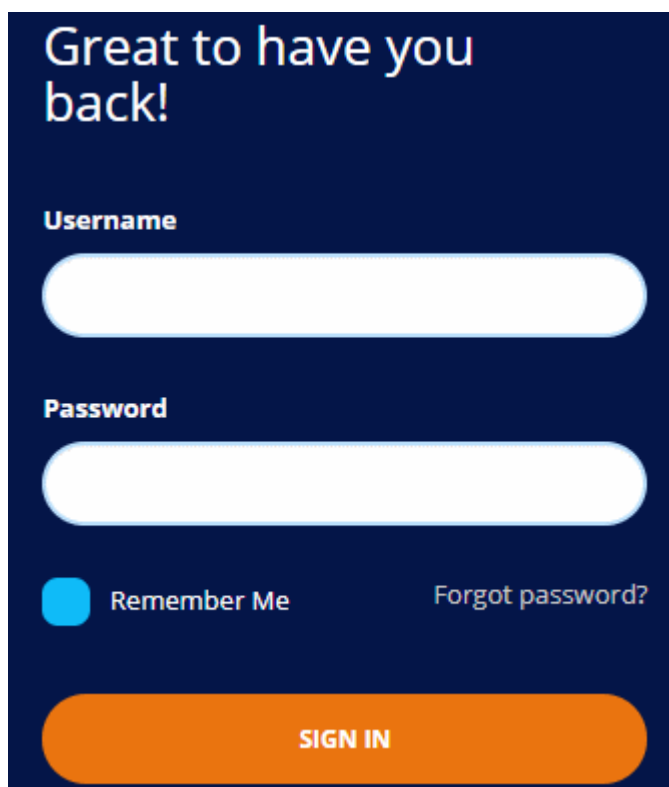
# ITarian Service Desk - Quick Start Guide

This tutorial explains how ITarian 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 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 ITarian with your user name and password at <https://www.itarian.com/app/msp/login>.



Great to have you back!

Username

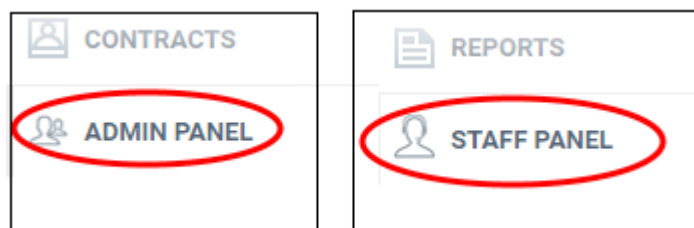
Password

Remember Me [Forgot password?](#)

**SIGN IN**

- 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 <http://help.comodo.com/topic-452-1-946-13095-Set-up-Two-Factor-Login-Authentication.html> in the ITarian admin guide for help with this.

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

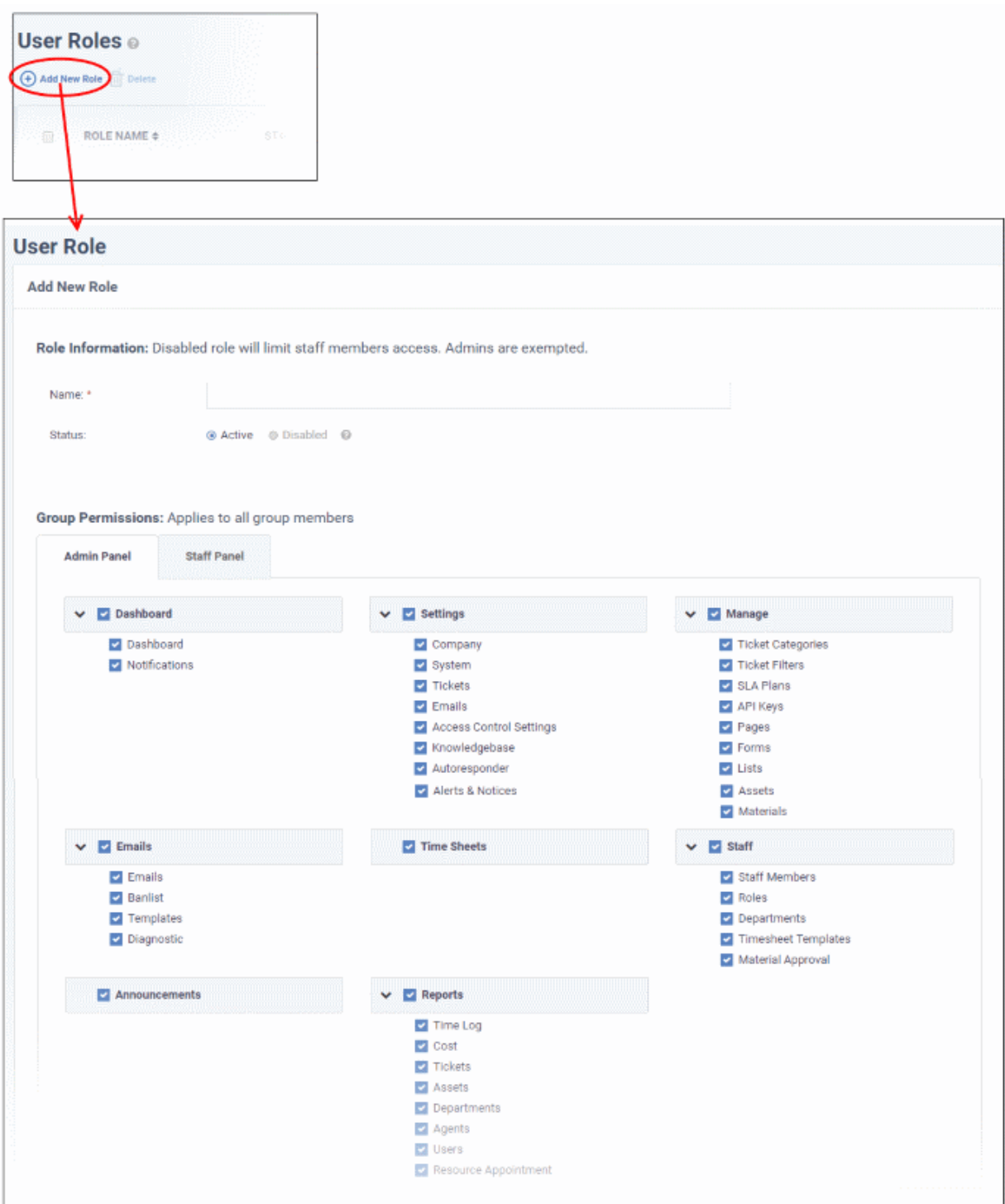
- Click 'Admin Panel' > 'Staff' > 'Roles'
- Roles determine the access rights of staff members and administrators in Service Desk.
- You can add new roles and change the role of a staff member at any time, so you may skip this step for now if required.
- However, before adding new support staff members, you may wish to create custom roles for them.

By default, service desk inherits three roles from ITarian:

- Account Administrator
- Administrator
- Technician
- Staff members added through ITarian will be imported into Service Desk with the role assigned to them in ITarian. 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 also have the option to create custom roles with modified permissions:

#### Create a new role

- Switch to the 'Admin Panel'.
- Click 'Staff' on the left then 'Role'.
- Click 'Add New Role' at the top.



**User Roles**

+ Add New Role Delete

ROLE NAME # ST

---

**User Role**

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
- Emails
- Access Control Settings
- Knowledgebase
- Autoresponder
- Alerts & Notices

**Manage**

- Ticket Categories
- Ticket Filters
- SLA Plans
- API Keys
- Pages
- Forms
- Lists
- Assets
- Materials

**Emails**

- Emails
- Banlist
- Templates
- Diagnostic

**Time Sheets**

**Staff**

- Staff Members
- Roles
- Departments
- Timesheet Templates
- Material Approval

**Announcements**

**Reports**

- Time Log
- Cost
- Tickets
- Assets
- Departments
- Agents
- Users
- Resource Appointment

- 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.

- 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 All](#) [Select None](#)

- Maintenance
- Sales
- Support

---

**Admin Notes:** Internal notes viewable by all admins.

Create Role
Reset
Cancel

- 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 will be 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 will also be assigned to the default department if they have not been routed to a different department. Tickets can be re-routed by a ticket category, by incoming mail settings, or by ticket filter settings. See **Ticket Settings and Options** in the admin guide 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

- Click 'Admin Panel' > 'Staff' > 'Departments'.
- Click 'Add New Department' at the top:

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 name 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'. If 'Private' is selected, the name of the department will not be visible on the customer-facing web portal. It will only be visible to admins/staff members.
- Select the service level agreement(SLA) for tickets assigned to this department. See the online help page at [https://help.comodo.com/topic-452-1-949-13140-Service-Level-Agreements-\(SLA\).html](https://help.comodo.com/topic-452-1-949-13140-Service-Level-Agreements-(SLA).html) if you want to read more about SLAs. You can configure this later if required.
- Select the settings for outgoing emails. See the online help page at <https://help.comodo.com/topic-452-1-949-13119-Email-Management.html> for more details.
- Configure auto-response emails to users whose tickets are assigned to this department. See the online help page at <https://help.comodo.com/topic-452-1-949-13135-Autoresponder-Settings.html> for more details.
- Select the recipients to whom alerts will be sent. See the online help page at <https://help.comodo.com/topic-452-1-949-13136-Configure-Alerts-and-Notices.html> for more details.
- In the 'Role Access' section, select members of other roles who can access tickets assigned to the department.

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



The screenshot shows the ITarian Service Desk interface. At the top, the 'MANAGEMENT' menu is circled in red. A dropdown menu is open, showing 'Customers' and 'Staff', with 'Staff' also circled in red. A red arrow points from the 'Staff' menu item to the 'Staff' page below. The 'Staff' page has a breadcrumb trail: 'Itarian > Management > Staff'. It features a '+ New Staff' button and a search bar. Below these are action buttons for 'Edit', 'Delete', and 'Reset Two-Factor Authentication'. A table lists staff members with columns for Name, Email, Verified, Role, and Two-Factor Authentication. The table contains three entries: 'Saddle and pedal' (Admin), 'region' (Technician), and 'frontfork' (Account Admin). At the bottom of the table, it shows '1 - 3 of 3 items' and navigation controls for 'Prev', '1', and 'Next'.

Staff List - Table of Column Descriptions

Column Header	Description
Name	The full name of the administrator or staff member
Email	The contact email address of the administrator or staff member
Verified	Whether or not the staff member has confirmed their email address by clicking the link in the verification email. Admins and staff can only login to ITarian after verifying their email address and creating a password.
Role	Click 'Management' > 'Roles' to add,view and edit roles and role permissions.
Two-Factor Authentication	Two factor authentication requires staff to provide a unique code in addition to username and password when logging in. See <b>Set up Two-Factor Login Authentication</b> in the ITarian

admin guide for help with this.

- 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

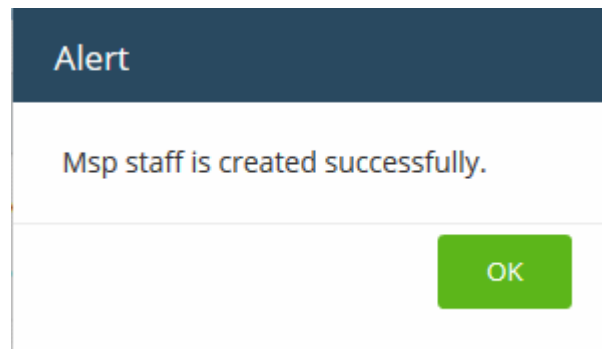
Technician

SD Role

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

- **Name** - First and last name admin/staff member.
- **Email** - Contact 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**

- 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:  ?

Staff Name:

Email Address:  ?

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.*

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

- **Role** - Service Desk role, as inherited from ITarian.
  - 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

- 'Ticket Categories' are help topics that are presented to end-users to help them more easily select the area with which they need assistance.
- For example, your help page might have a menu which says 'Please select the area we can help you with', and offer categories such as 'Billing', 'Account Changes' and 'Technical Support'.
- When combined with custom forms, ticket categories can route tickets to specific departments and be used to gather more precise information from end-users.
- You can create multiple stages for a category. This lets you set up a 'step-by-step' process for dealing with requests on a particular category. You can define the department, priority, SLA and assigned person for each stage. This helps route and prioritize the ticket at various stages of its life-cycle.

#### Add a new ticket category

- In the 'Admin Panel', click 'Manage' > 'Ticket Categories' then 'Add New Category' in the 'Ticket Categories' screen.

### Ticket Categories ?

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:**

### 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 can be published. You can change the status at any time using the 'Enable'/'Disable' links in the 'Ticket Categories' interface.
- **Type:** Select whether you want to make the category to available to both end users and staff or only to staff.

- **Public** - The category will be available on your customer-facing support portal for users to select when creating a ticket. It will also be available in the staff panel for staff to select when creating a ticket.
- **Private/Internal** - The category will be available only in the Staff Panel for selection by admins/staff members
- **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 used to create a new ticket if this category is selected. You can create and manage forms with custom fields from the 'Admin Panel' > 'Manage' > 'Forms' interface. See <https://help.comodo.com/topic-452-1-949-13143-Forms.html> if you need more help with this.
- **Thank-You Page:** Select 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-452-1-949-13142-Client-Portal-Pages.html> for help to configure client portal pages.
- **Auto-response:** Determines whether an auto-response email should be sent to the user. This setting overrules department auto-responder settings and global auto-responder settings.
  - For more details on managing templates for auto-response mails, see the help page at <https://help.comodo.com/topic-452-1-949-13150-Email-Templates.html>.
  - For more details on global auto-response settings, see <https://help.comodo.com/topic-452-1-949-13135-Autoresponder-Settings.html>.
  - For more details on department level auto-response settings, see <https://help.comodo.com/topic-452-1-949-13154-Departments.html>.

### 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 email.
  - 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 email templates.
  - You can create new template sets in 'Admin Panel' > 'Emails' > 'Templates'.
  - See <https://help.comodo.com/topic-452-1-949-13150-Email-Templates.html> 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 administrators to:

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



- **Stage Name:** Enter a label for the ticket stage
  - **Department:** The department to which tickets in this category are assigned.
  - **Priority:** Urgency level of the ticket in this category. The options are Low, Normal, High and Critical. Please note the priority level configured in **Ticket Details** overrides this setting.
  - **SLA Plan:** Service level agreement which applies to tickets in this category. The setting here overrides the SLA Plan configured for the selected **Department**.
  - **Auto-assign To:** The person or team who is responsible for completing tickets in this category. Please note the assignments configured in **Ticket Details** will override this setting.
  - **Admin Notes:** Add comments about the category. These are internal, and not be visible in the client portal.
- Click 'Add Stage', to create a new stage for the ticket category
  - Click the 'Add Category' button at the bottom of the screen for the settings done in the page to take effect.

See <https://help.comodo.com/topic-452-1-949-13138-Ticket-Categories.html> if you need more help with this.

### Step 6 - Enroll Users

- Click > 'Staff Panel' > 'Users' > 'User Directory'
- 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 the online help page at <https://help.comodo.com/topic-452-1-949-13131-User-Registration-Settings.html> for more details.

#### Enroll new users

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

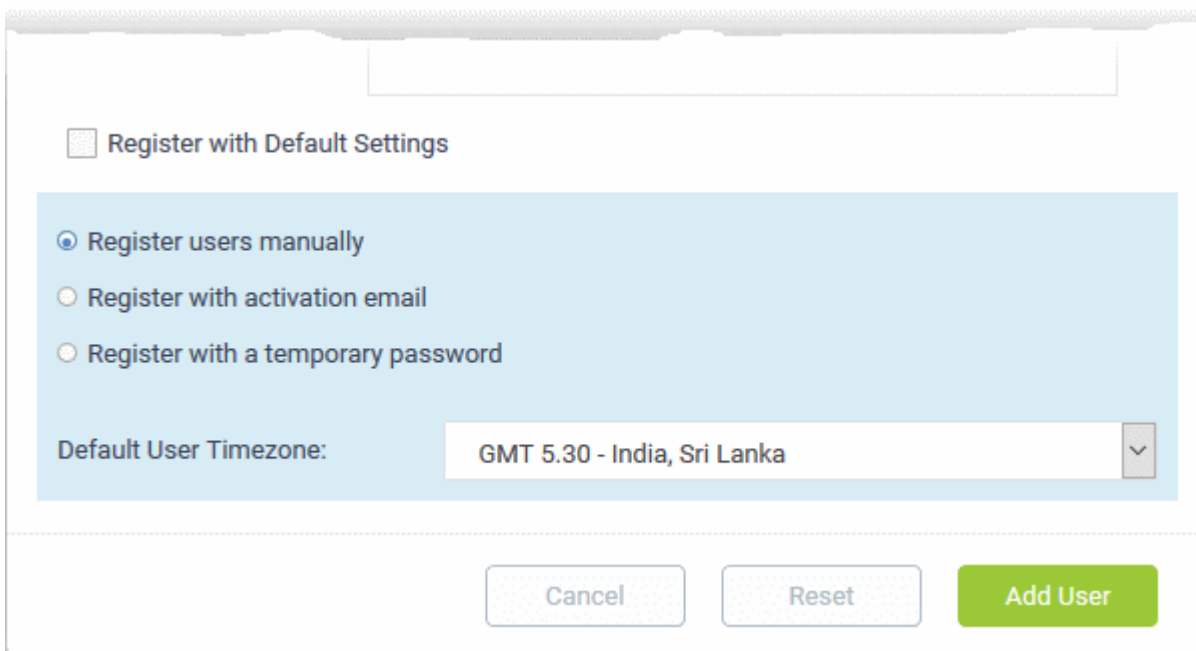


The screenshot shows the 'User Directory' interface. At the top, there are buttons for '+ Add New User' (circled in red), 'Import', 'Export to CSV', and 'Delete'. Below these is a table header with columns for 'NAME', 'EMAIL', and 'STATUS'. A modal window titled 'Create New User' is open, containing the following fields:

- Email Address: \*
- Full Name: \*
- Phone Number: (with an 'Ext:' field)
- Internal Notes:
- Register with Default Settings
- Default timezone: GMT -5.00 - Eastern Time (US & Canada), Bogota, Lima

At the bottom of the modal are 'Cancel', 'Reset', and 'Add User' buttons.

- **Email Address:** User's email address. After registration, users can login to your support web portal using the email address as username.
- **Full Name:** First name and last name of the user.
- **Phone Number:** The contact number of the user.
- **Internal Notes:** Enter any comments regarding the user.
- **Register with Default Settings:** Select whether the registration should use the settings in 'Admin Panel' > 'Settings' > 'Users'
  - Leave selected if you want to use the default settings.
  - Deselect to choose a different registration method.
  - See <https://help.comodo.com/topic-452-1-949-13131-User-Registration-Settings.html> if you need more help with this.



Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

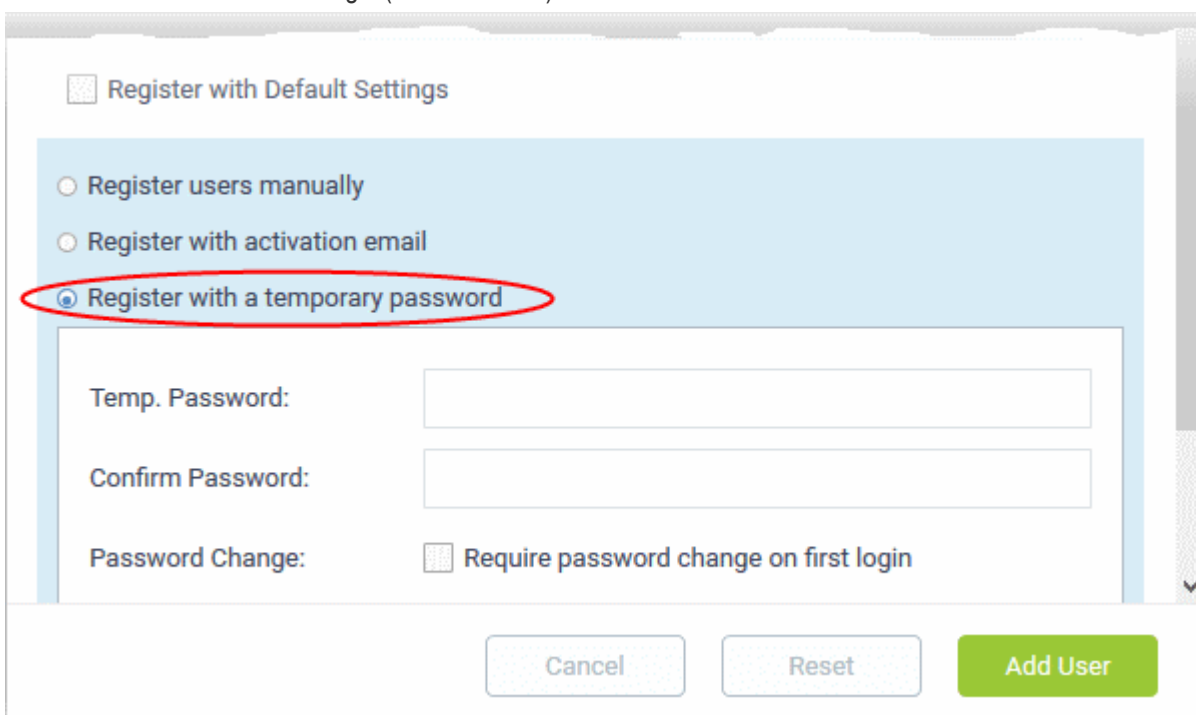
Default User Timezone: GMT 5.30 - India, Sri Lanka

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
- **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):



Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

Temp. Password:

Confirm Password:

Password Change:  Require password change on first login

Cancel Reset Add User

- **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 your selection above. After a user is registered, you can manage their account and assign them to a customer company.

You can also import users from a .CSV file by clicking the 'Import' button. The process of enrolling users is the same as explained above. See the help page at <https://help.comodo.com/topic-452-1-949-13168-Manage-Users-and-Customers.html> for more details.

### 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 ITarian Interface** (preferred)

Customers added to ITarian are fully managed, which means they are also available in other ITarian modules (Service Desk, Endpoint Manager, Dome Shield).

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

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

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

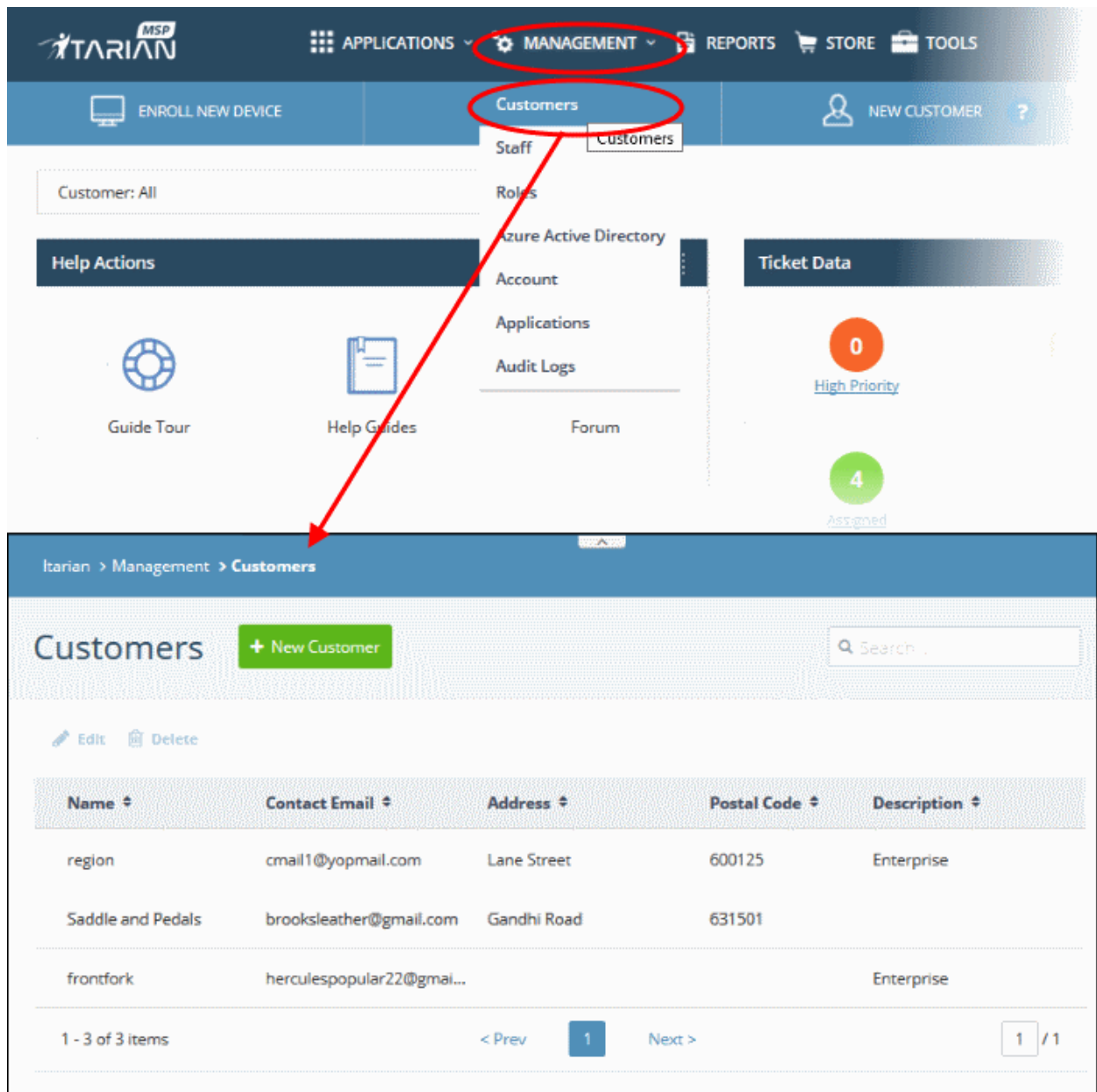
#### Add a new customer

- **Add a customer in ITarian**
- **Add a customer in Service Desk**

#### Add a customer in the ITarian interface

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

- Log in at <https://www.itarian.com/app/msp/login>
- Click 'Management' > 'Customer'
- The interface shows any existing customers added to ITarian:



- Click the 'New Customer' button

The screenshot displays the ITarian MSP Service Desk interface. At the top, the navigation bar shows 'Itarian > Management > Customers'. Below this, the 'Customers' section header is visible, along with a green '+ New Customer' button circled in red. A red arrow points from this button to a 'New Customer' modal form. The modal form contains the following fields:

- Name \*
- Contact Email \*
- Address \*
- Postal Code \*
- Description

At the bottom of the modal, there are 'Cancel' and 'Save' buttons.

Name	Contact Email	Address	Postal Code
region	cmail1@yopmail.com	Lane Street	600125

- 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

Service Desk > Users > Customers

## Customers

+ Add New Customer
Export to CSV
Delete
Search...

CUSTOMER ID	NAME	USERS	CREATED
1	<a href="#">frontfork</a>	1	04/30/2018 1:55 pm

### Add New Customer

Complete the form below to add a new customer.

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

Name: \*

Web Domain: \*

Address:

Phone:  Ext:

Website:

Internal Notes:

- **Name:** Enter a label for the customer company.
- **Web Domain:** Enter the name of the email domain used for the 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 <http://help.comodo.com/topic-452-1-949-13179-Manage-Customers.html> in the Service Desk admin 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:



The screenshot shows the 'User Page' for Alexander Dagwood. The user's details are: Name: Alexander Dagwood, Email: hertriumph@gmail.com, Status: Locked (Pending), Created: 04/25/2016, Updated: 02/25/2019. The 'Customer' field is set to 'Add Customer', which is circled in red. A modal window titled 'Customer for Alexander Dagwood' is open, showing a search field for existing customers and a form to create a new customer with fields for Name, Web Domain, Address, Phone, Website, and Internal Notes. The modal also has 'Cancel', 'Reset', and 'Add Customer' buttons.

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.

Search by name

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

Name: \*

Web Domain: \*

Address:

Phone:  Ext:

Website:

Internal Notes:

- See <http://help.comodo.com/topic-452-1-949-13179-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

Service contracts allow you to specify billing rates, contracted hours and fees for your customer organizations. Tickets that you work on for the customer will reference the rates specified in the contract.

Contracts can include:

- A contract fee (weekly/bi-weekly/monthly/yearly)
- Pre-paid service hours per billing cycle. These hours are covered by the fee. (optional)
- A charging plan which bills custom rates for work on specific assets (e.g. printers, laptops, mysql etc), or work of a specific type (telephone, on-site, remote). (optional)

Time spent on tickets for the customer which fall within the number of pre-paid hours will be covered by the contract fee.

- Hours which exceed the pre-paid hours will be charged at the customer-specific asset rate as specified in the selected charging plan.
  - Charging plans can be created in 'Admin Panel' > 'Manage' > 'Charging' interface. See

<https://help.comodo.com/topic-452-1-949-13147-Manage-Charging-Plans.html> for more details.

- If the contract does not have a charging plan, then the default charging plan is applied.
  - The default charging plan can be managed in 'Admin Panel' > 'Manage' > 'Charging'.
  - See <https://help.comodo.com/topic-452-1-949-13147-Manage-Charging-Plans.html> if you need help with this.
- For more details on service contracts, see <https://help.comodo.com/topic-452-1-949-13186-Contracts.html>

**Create a contract:**

- Click 'Admin Panel' > 'Finance' > 'Contracts', in the left-hand menu
- Click 'Add Contract' at the top


## 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




- Complete the form as follows:

#### General Information

- **Contract Name** - Enter a short label for the contract. For example, you may want to name the

contract after the company it is for.

- **Customer** - Choose the company for whom you are creating the contract.
- **Contract Details** - Enter a short description for the contract
- **Start Date** - Click the calendar icon to specify the date from which the contract is effective
- **End Date** - Click the calendar icon to specify the date the contract ends

### Contract Parameters

- **Fee** - Enter the subscription fee for the services you provide (optional).
  - 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 no standard subscription fee will be charged. The charges for the service sessions will be calculated based on other parameters defined in the contract
- **Billing Period** - Enter the subscription period. The available options are:
  - 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 can distribute pre-paid hours over different support service types if required (including on-site, remote and telephone support).

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

Prepaid Hours:	<input type="text"/>	<input type="checkbox"/> Unlimited ?
	<input type="checkbox"/> Distribute prepaid hours to service types	
Onsite:	<input type="text"/>	<input type="checkbox"/> Unlimited ?
Remote:	<input type="text"/>	<input type="checkbox"/> Unlimited ?
Telephone:	<input type="text"/>	<input type="checkbox"/> 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

### Charging Method

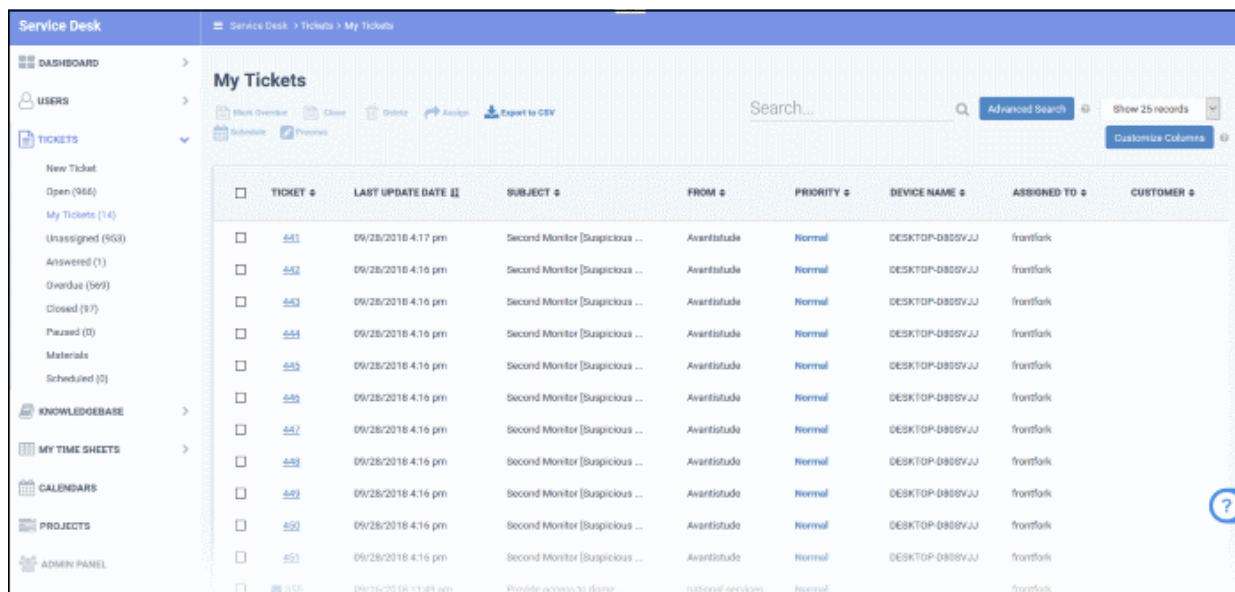
- **Charging** - Select a 'Charging plan' for the contract. If you do not want to choose a charging plan at this moment, select 'Not now'.
  - Charging plans can be created in the admin panel. Click 'Admin Panel' > 'Manage' >

'Charging' > 'Add New Charging'.

- You can associate a contract with a charging plan at any time.
- If you do not apply a charging plan then the rates in the default charging plan are applied.
- The default charging plan can be managed Admin Panel > Manage > Charging interface.
- See <https://help.comodo.com/topic-452-1-949-13147-Manage-Charging-Plans.html> if you need more help with charging plans.
- Charging plan rates kick in after any pre-paid hours have been exhausted.
- Click 'Save' after completing the form. The new contract will be added and will take effect from the specified start date.

## 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	CUSTOMER
441	09/28/2018 4:17 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
442	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
443	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
444	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
445	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
446	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
447	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
448	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
449	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
450	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
451	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-0806VJU	frontfork	
455	09/16/2018 11:49 am	Provide access to share...	national services	Normal		frontfork	

- 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 <https://help.comodo.com/topic-452-1-949-13169-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-452-1-949-13169-Manage-Tickets.html> for help with this.

## Step 10 - Manage the 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:

- 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.

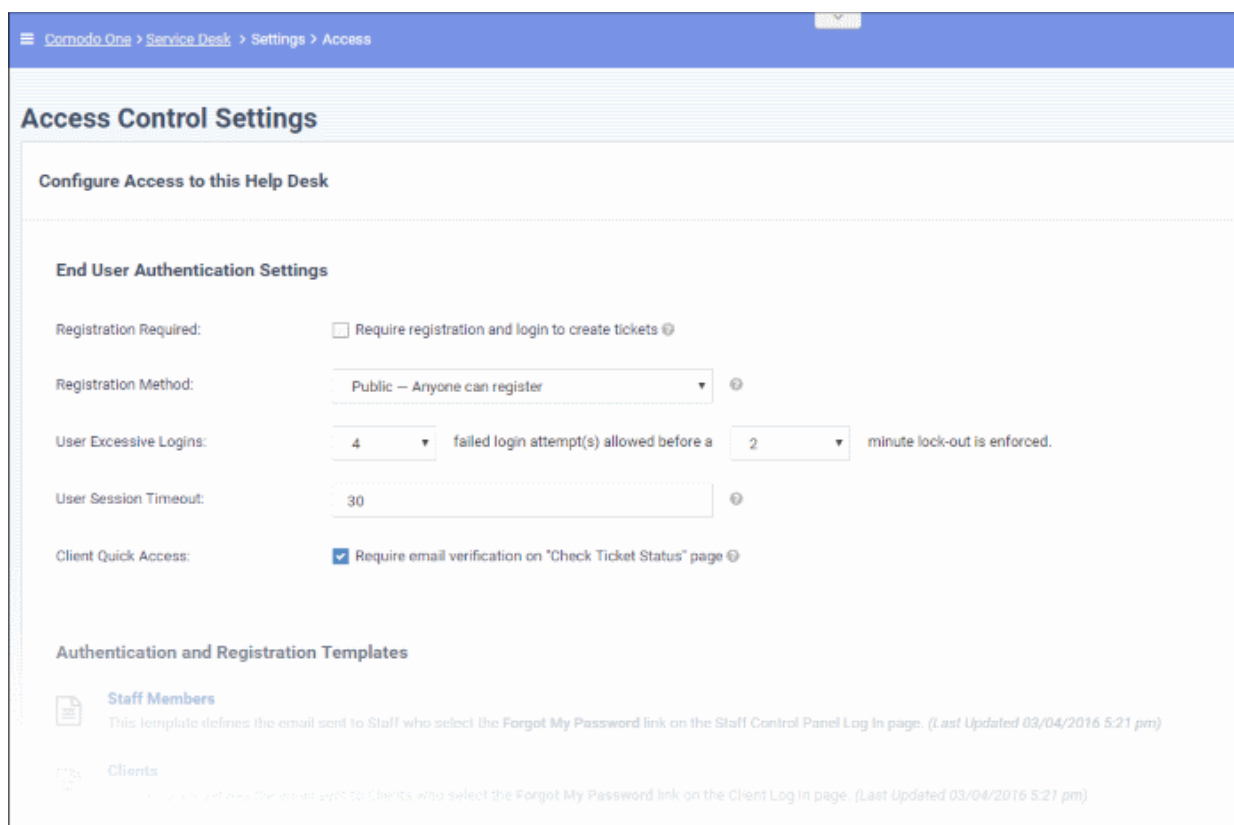
For more information about creating FAQs, see the online help page at <https://help.comodo.com/topic-452-1-949-13169-Manage-Tickets.html>.

### 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-452-1-949-13133-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 Ona &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-452-1-949-13119-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 ITarian

The comprehensive and powerful ITarian IT operating platform helps you simplify operations, boost productivity, and better utilize IT resources. It includes all the essential IT management tools, including remote monitoring and management, remote access and control, service desk and ticketing, and patch management. For free.

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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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