



Service Desk

Quick Start Guide

Software version 4.20
Guide version 4.20.033120

ITarian
1255 Broad Street
Clifton, NJ 07013

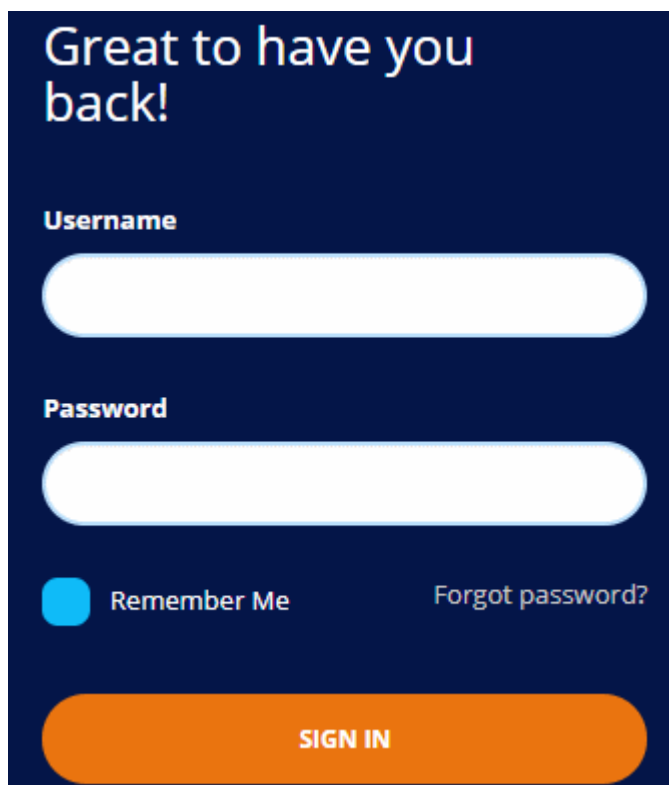
ITarian Service Desk - Quick Start Guide

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

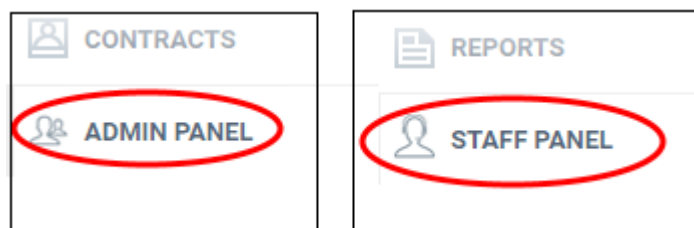
- Login to ITarian with your user name and password at <https://www.itarian.com/app/msp/login>.



The screenshot shows a login form on a dark blue background. At the top, it says "Great to have you back!". Below this are two input fields: "Username" and "Password". Under the "Password" field, there is a "Remember Me" checkbox (which is checked) and a "Forgot password?" link. At the bottom of the form is a large orange button labeled "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 <https://community.itarian.com/help/topic-452-1-946-13050-Introduction-to-ITarian.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 permissions and access rights that staff members have within the Service Desk interface.
- 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 are 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 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 ↕	STATUS ↕	MEMBERS ↕	DEPARTMENTS ↕
<input type="checkbox"/>	Account Admin	Active	1	3
<input type="checkbox"/>	Admin	Active	0	3
<input type="checkbox"/>	Technician	Active	1	3
<input type="checkbox"/>	Admin for material approval	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.
- 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

- 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 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

- 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

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. See [https://community.itarian.com/help/topic-452-1-949-13140-Service-Level-Agreements-\(SLA\).html](https://community.itarian.com/help/topic-452-1-949-13140-Service-Level-Agreements-(SLA).html) to read more.
- **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://community.itarian.com/help/topic-452-1-949-13148-Setup-your-Support-Email-Addresses.html>.
- **Autoresponder Settings** - Configure auto-response emails sent to users whose tickets are assigned to this department. See <https://community.itarian.com/help/topic-452-1-949-13135-Autoresponder-Settings.html> for more details.
- **Alerts & Notices** - Select the recipients to whom alerts are sent. See <https://community.itarian.com/help/topic-452-1-949-13136-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 ITarian portal at <https://www.itarian.com/app/msp/login>.
 - Click 'Management' > 'Staff' > '+ New Staff' in the ITarian interface.
 - Staff created in ITarian are available in Service Desk and all other ITarian products (Endpoint Manager, Quote Manager etc).
- Staff created in ITarian 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 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, with 'Staff' also circled in red. A red arrow points from the 'Staff' menu item to the 'New Staff' button on the Staff management page. The Staff page includes a table with the following data:

Name	Email	Verified	Role	Two-Factor Authenticat...
Saddle and pedal	brooksleather@gmail.com		Admin	
region	cmail1@yaopmail.com		Technician	
frontfork	herculespopular22@gmal...	<input checked="" type="checkbox"/>	Account Admin	

- 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

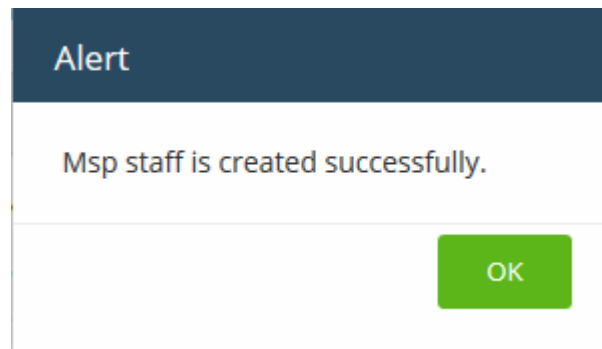
Technician

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: 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 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

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"/>	Access Issue	1	Active	Public
<input type="checkbox"/>	Asset Issue	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 <https://community.itarian.com/help/topic-452-1-949-13143-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://community.itarian.com/help/topic-452-1-949-13128-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://community.itarian.com/help/topic-452-1-949-13135-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://community.itarian.com/help/topic-452-1-949-13150-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://community.itarian.com/help/topic-452-1-949-13110-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://community.itarian.com/help/topic-452-1-949-13138-Ticket-Categories.html> for more details.

Step 6 - Enroll Users

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

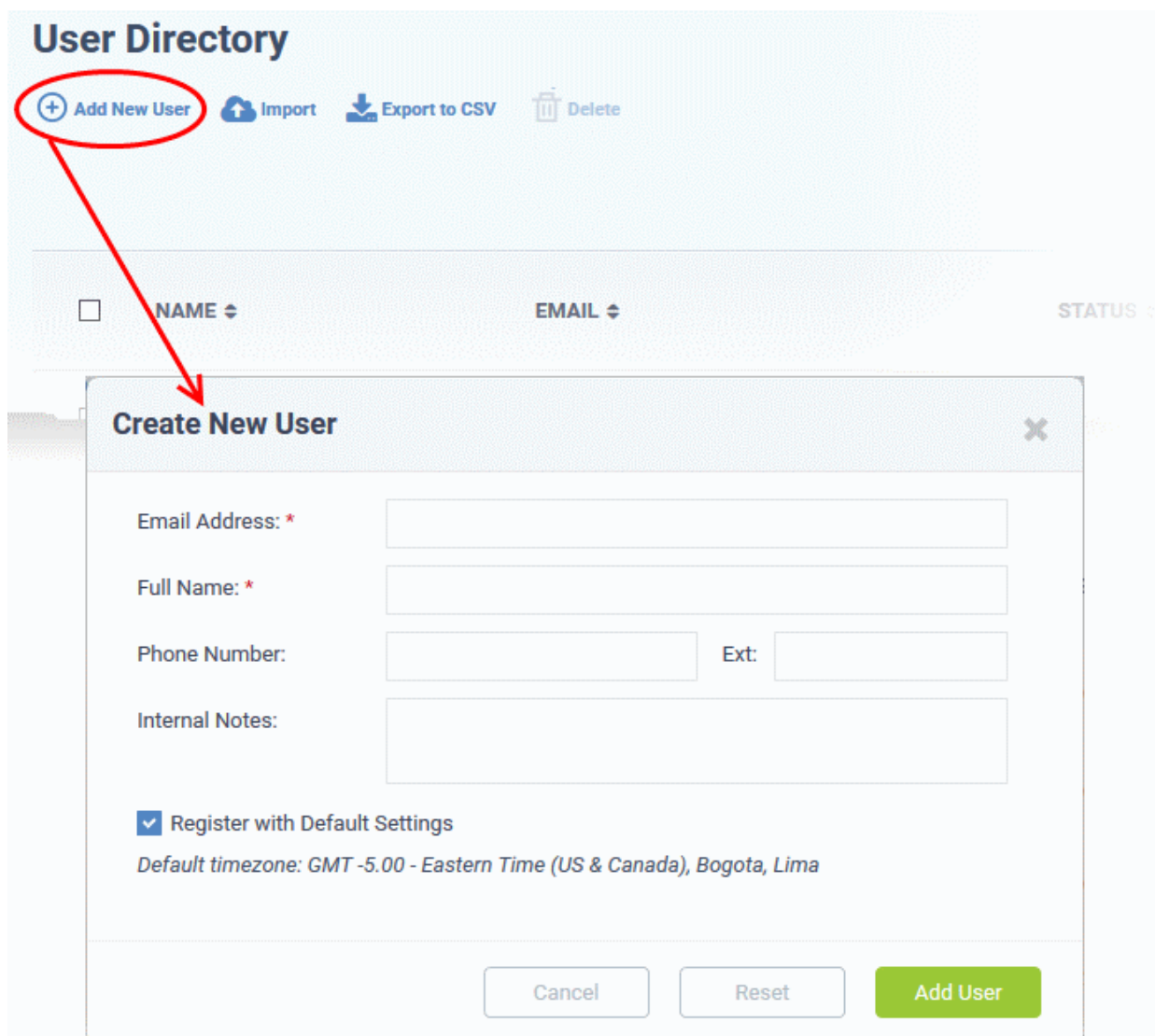
- 'Users' are the individuals who submit tickets to your support team. They can submit tickets via your support center, by email, or direct from an Endpoint Manager device.
 - Your client portal URL has the format <https://company-name.servicedesk.comodo.com>.
 - Users that self-enroll will be sent an account activation mail
- Admins can also manually enroll new users:
- Click 'Staff Panel' > 'Users' > 'User Directory' > 'Add New User' OR 'Import'
- All users, 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://community.itarian.com/help/topic-452-1-949-13131-User-Registration-Settings.html> 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:



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 three buttons: 'Cancel', 'Reset', and '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 <https://community.itarian.com/help/topic-452-1-949-13143-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.

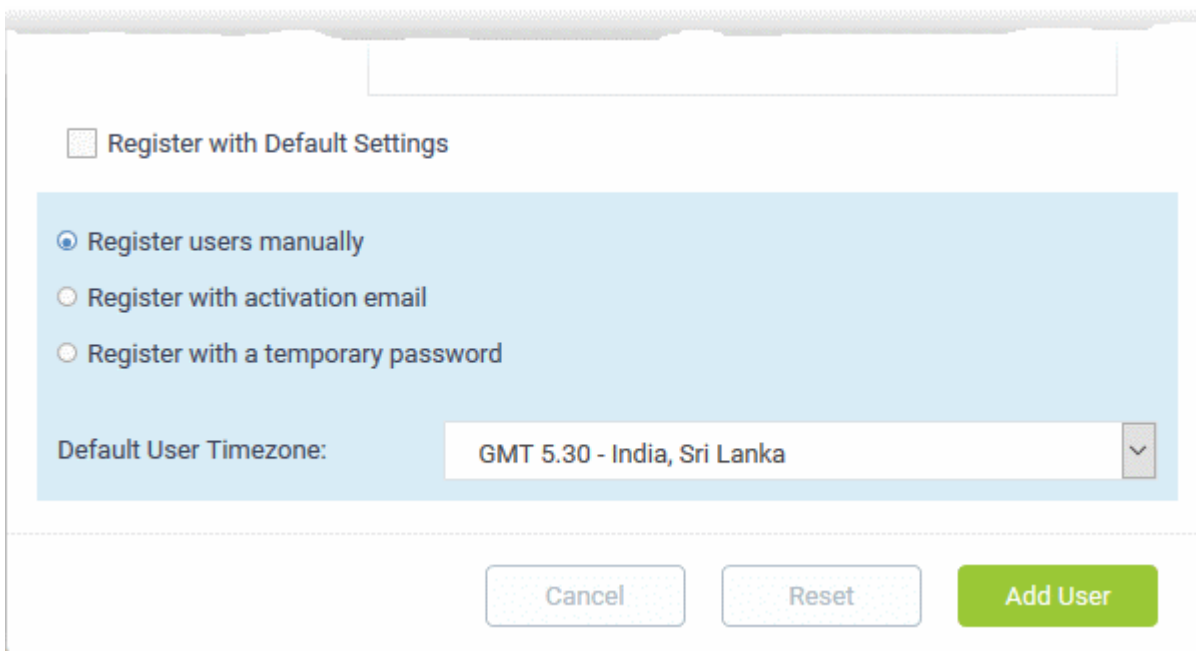
Full Name: Enter the user's first and last names.

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://community.itarian.com/help/topic-452-1-949-13131-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'.



The screenshot shows a registration form with the following elements:

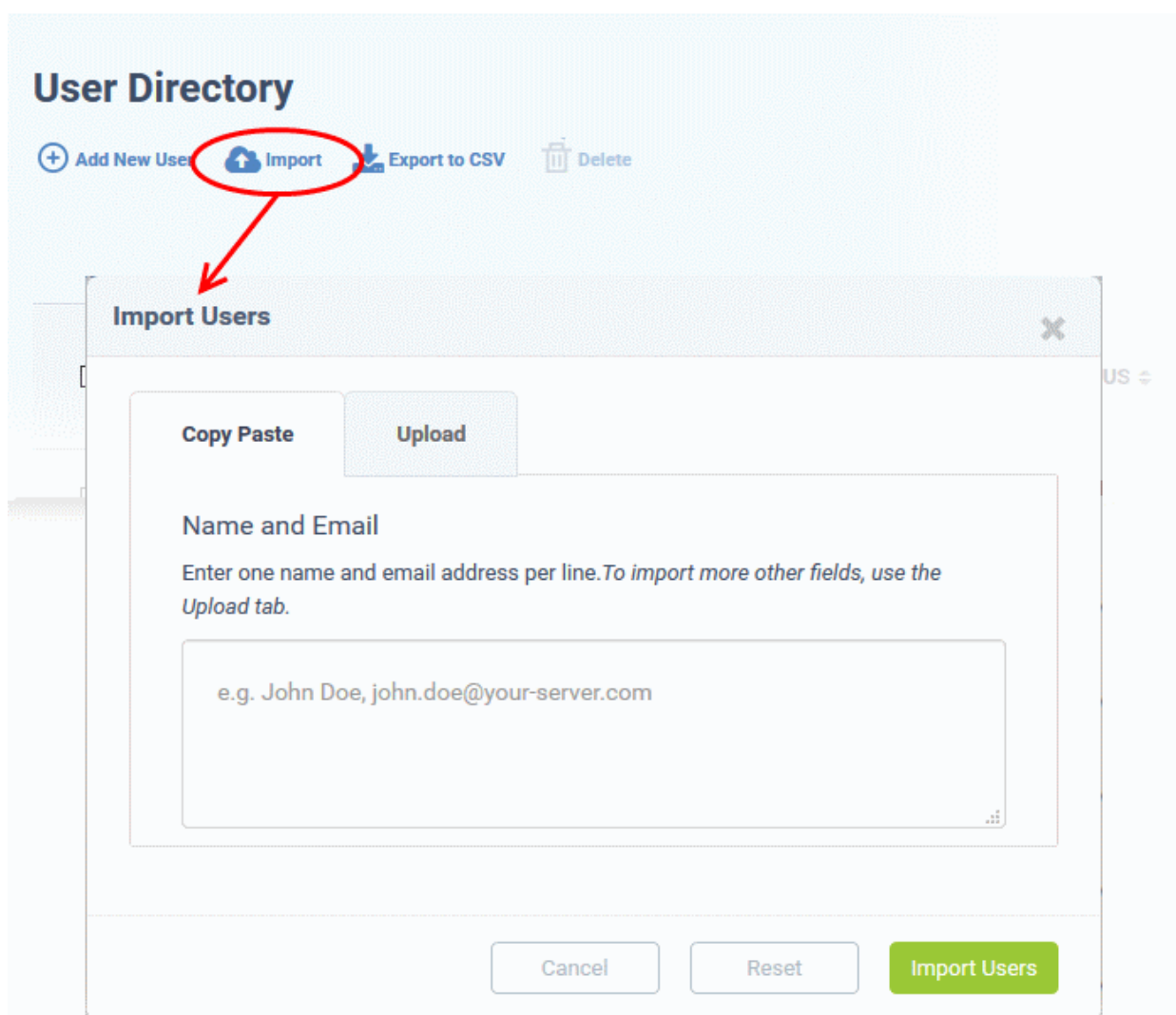
- A checkbox labeled "Register with Default Settings" which is currently unchecked.
- A light blue highlighted section containing three radio button options:
 - Register users manually
 - Register with activation email
 - Register with a temporary password
- A label "Default User Timezone:" followed by a dropdown menu showing "GMT 5.30 - India, Sri Lanka".
- At the bottom, there are three buttons: "Cancel" (disabled), "Reset" (disabled), and "Add User" (active, green).

- **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://community.itarian.com/help/topic-452-1-949-13131-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 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.

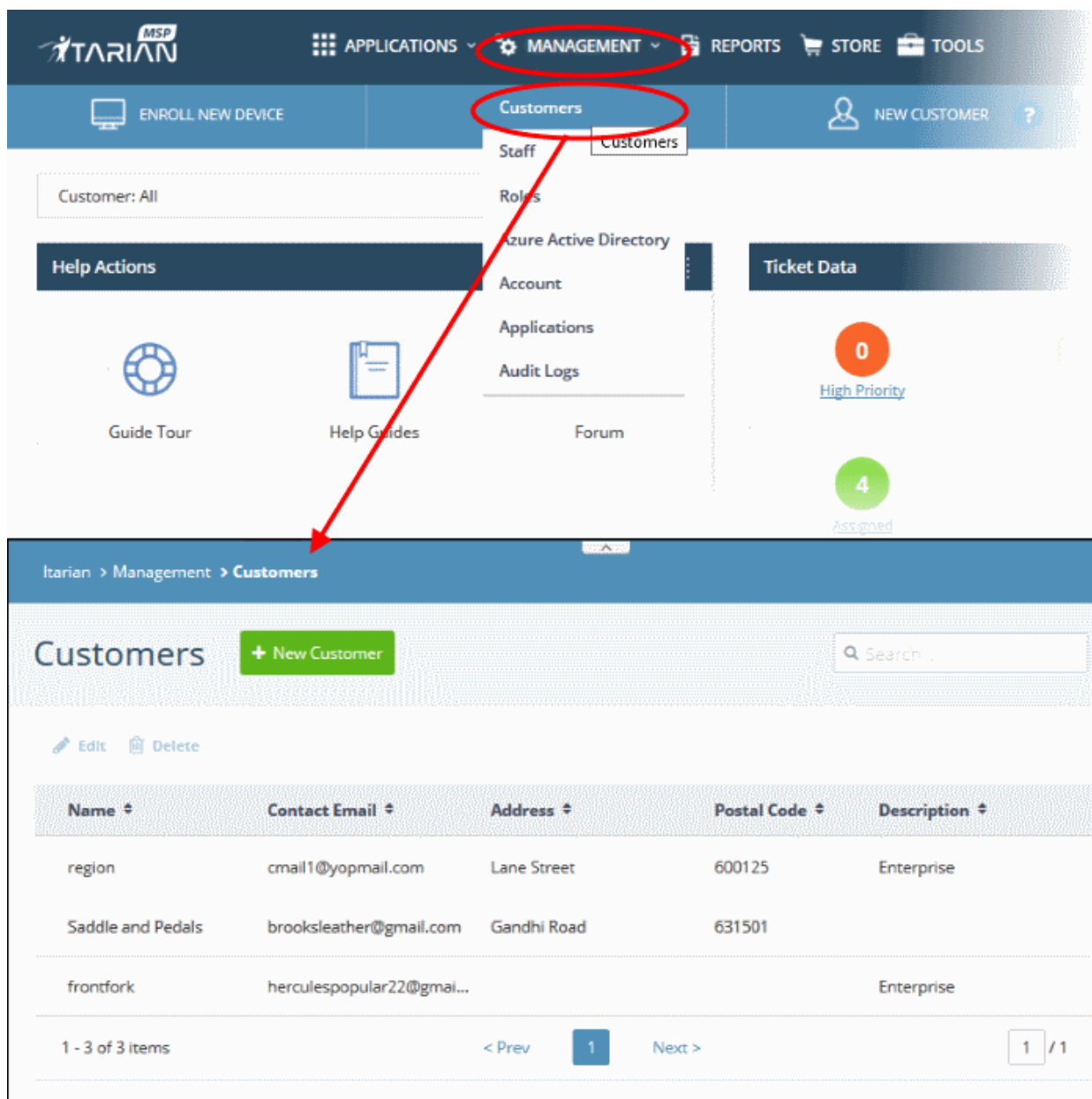
Add a new customer

- **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:



The screenshot shows the ITarian MSP interface. The 'MANAGEMENT' menu is circled in red, and the 'Customers' option is also circled in red. A red arrow points from the 'Customers' option to the 'Customers' page. The 'Customers' page shows a list of customers with columns for Name, Contact Email, Address, Postal Code, and Description. There are three customers listed: 'region', 'Saddle and Pedals', and 'frontfork'. A '+ New Customer' button is visible at the top of the page.

Name	Contact Email	Address	Postal Code	Description
region	cmal1@yopmail.com	Lane Street	600125	Enterprise
Saddle and Pedals	brooksleather@gmail.com	Gandhi Road	631501	
frontfork	herculespopular22@gmail...			Enterprise

- Click the 'New Customer' button

The screenshot displays the ITarian Service Desk interface. At the top, the navigation bar shows 'Itarian > Management > Customers'. Below this, the 'Customers' section header is visible, 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. The 'Save' button is highlighted in green.

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	frontfork	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 <https://community.itarian.com/help/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 as follows:

Name : Alexander Dagwood	Status : Locked (Pending)
Email : hertriumph@gmail.com	Created : 04/25/2016 1
Customer : Add Customer	Updated : 02/25/2019 :

The 'Add Customer' link 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.

Customer for Alexander Dagwood

Search existing customers.

Search by name

Create New Customer: Details on customer.

Name: *

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

Buttons: Cancel, Reset, Add Customer


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 <https://community.itarian.com/help/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

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://community.itarian.com/help/topic-452-1-949-13147-Manage-Charging-Plans.html>.
- See <https://community.itarian.com/help/topic-452-1-949-13111-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://community.itarian.com/help/topic-452-1-949-13186-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://community.itarian.com/help/topic-452-1-949-13147-Manage-Charging-Plans.html> if you need more help with this.

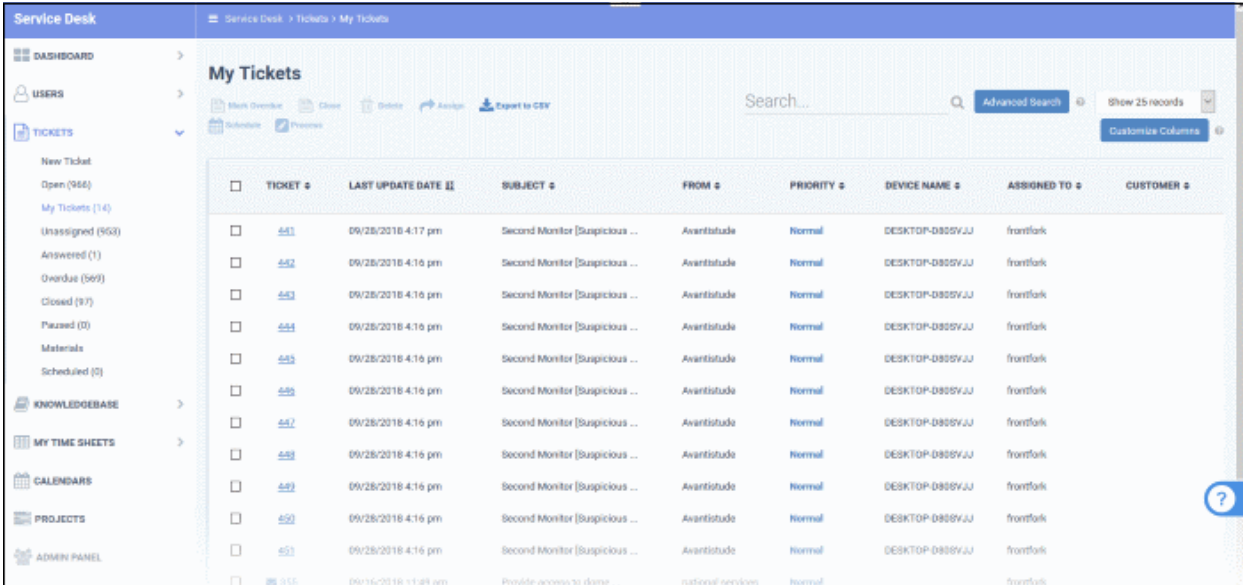
Charging plan rates are only applied after prepaid hours have been used.

- **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	CUSTOMER
441	09/28/2018 4:17 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
442	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
443	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
444	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
445	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
446	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
447	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
448	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
449	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
450	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
451	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
452	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
453	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
454	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
455	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
456	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
457	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
458	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
459	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
460	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
461	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
462	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
463	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
464	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
465	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
466	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
467	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
468	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
469	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
470	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
471	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
472	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
473	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
474	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
475	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
476	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
477	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
478	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
479	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
480	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
481	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
482	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
483	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
484	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
485	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
486	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
487	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
488	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
489	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
490	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
491	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
492	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
493	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
494	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
495	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
496	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
497	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
498	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
499	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	
500	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D805VJU	frontfark	

- 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://community.itarian.com/help/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

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

- The structure of your tickets can be customized as required in 'Admin Panel' > 'Settings' > 'Tickets'. See <https://community.itarian.com/help/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.

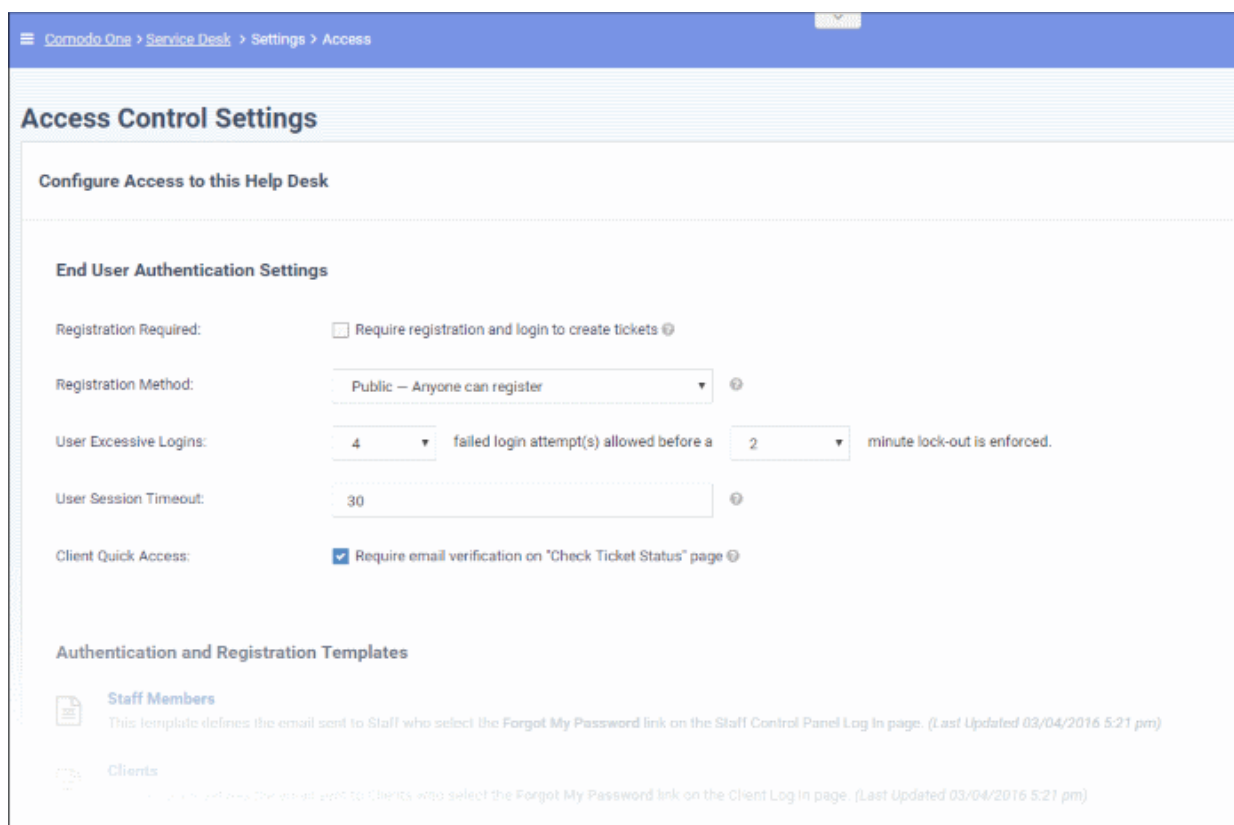
For more information about creating FAQs, see the online help page at <https://community.itarian.com/help/topic-452-1-949-13170-Manage-Knowledgebase.html>.

Step 11 - Access Control Settings

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

Open the interface:

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



For more details, see the online help page at <https://community.itarian.com/help/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
Comodo Ona <sd-noreply@c1notifications.com >	Normal		08/27/2016	03/25/2017 2:47 pm

For more details see the online help page at <https://community.itarian.com/help/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.

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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