

Managing Requesters

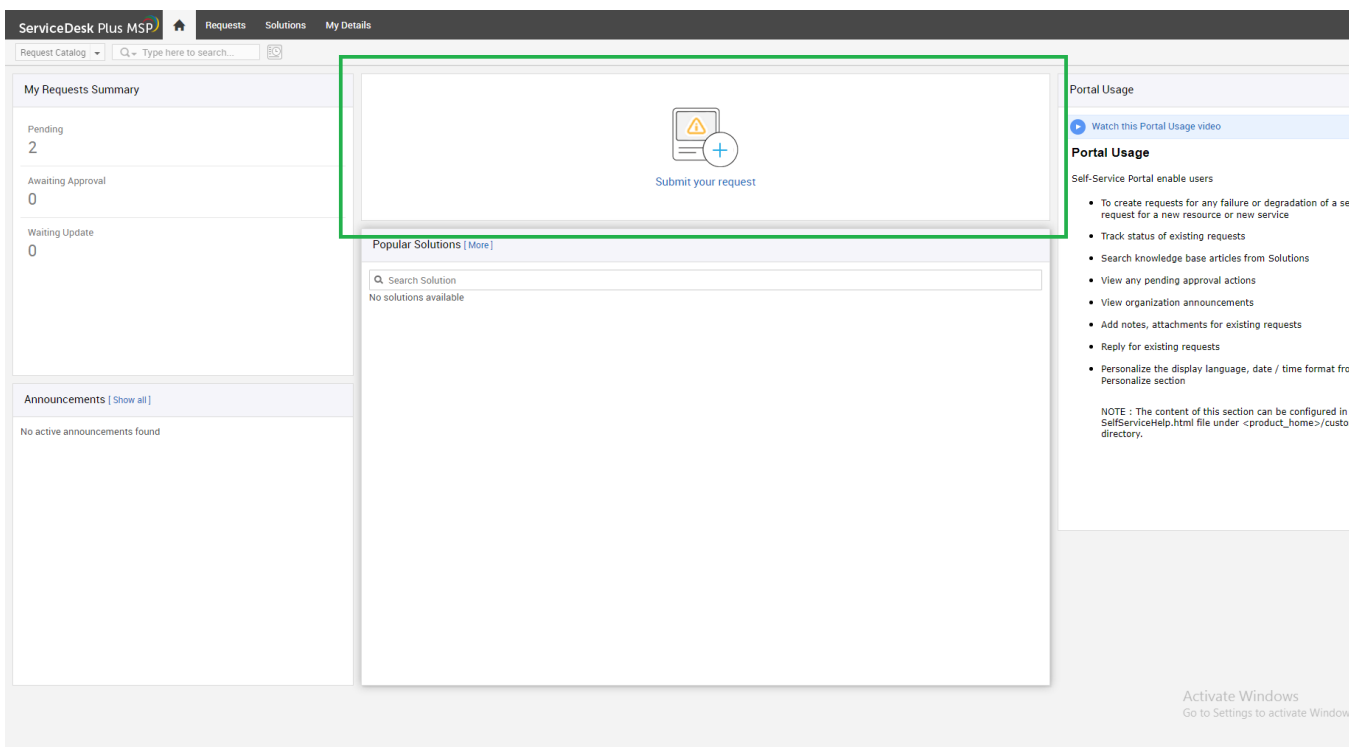
- [Adding a Support Requester](#)
- [Adding an Account Manager](#)
- [Removing a Support Requester](#)
- [Updating a Support Requester](#)

Adding a Support Requester

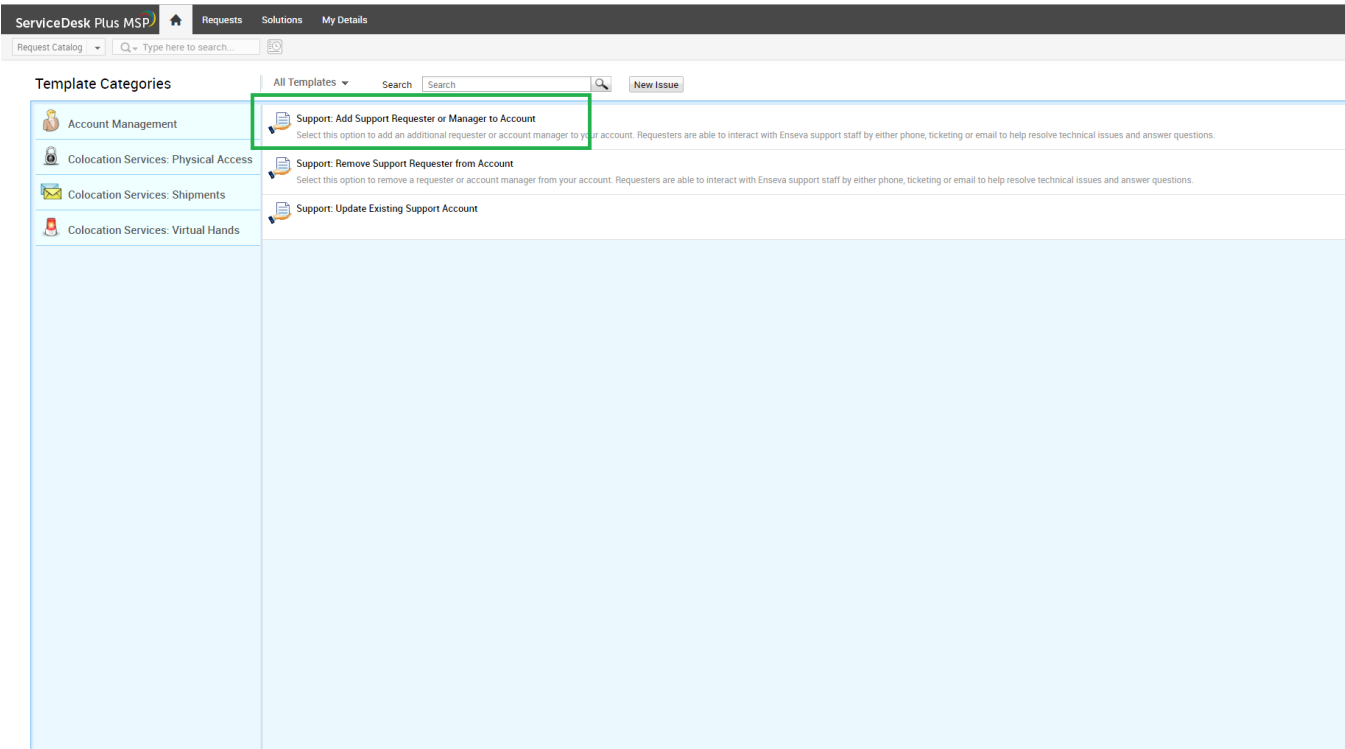
We all need tech support on occasion, and Enseva is here to help. A Requester is a person you allow to open technical support requests on behalf of your organization or company. You can add a new Requester using this tutorial.

Adding a Support Requester to Your Account

1. From your account home page, click on Submit your request .



2. Now, click on Support: Add Support Requester or Manager to Account .



3. You will be taken to the ticket screen you see below. We will review each section in the steps below.

ServiceDesk Plus MSP

RequestsMy Details

Request CatalogType here to search...🔍

Support: Add Support Requester or Manager to Account

Requester Details

NameDemo UserAsset(s)Search and associate assets here🔗

SiteSample Site

SubjectAdd Requester to Account

Description

Important: Adding a new requester to an account requires the approval of an account Manager.

Account Details (Required)
These fields provide basic information about the person being added to our support portal. All fields must be accurately completed prior to the requests implementation.

Additional Account Details (Optional)
These fields provide additional information about the person being added to our support portal but are not required. The Secondary E-Mail and Phone number fields can provide additional communication options should primary methods be unavailable.

Account Manager
Should the new requester need Account Manager permissions, complete the fields and the appropriate permissions the Account Manager should have.

Approval Permissions
Should the new requester have the ability to approve purchases on behalf of the organization in the form of new services or one-time service requests, complete the appropriate fields.

Request TypeRequest▼

Asset Details

Account Details (Required)

First Name

Last Name

Primary E-Mail Address

Primary Phone Number

Additional Account Details (Optional)

Employee ID

Secondary E-Mail Address

Secondary Phone Number

Account Manager

Configure new requester as account manager

--- Select Item ---▼

Account Manager Permissions

- ☐ Changes
- ☐ Problems
- ☐ Work Logs

Approval Permissions

Service Request Approver

--- Select Item ---▼

Purchase Approver

--- Select Item ---▼

Attachments : Attach file

Submit RequestResetCancel

- Note: You do not need to edit information in this area.

5. Enter the new user Account Details and Additional Account Details
Provide the relevant information about the new Requester you would like to add.
Note the fields marked as Required and Optional.

Asset Details	
<div>Account Details (Required)</div> <div>First Name</div> <div></div> <div>Last Name</div> <div></div> <div>Primary E-Mail Address</div> <div></div> <div>Primary Phone Number</div> <div></div>	<div>Additional Account Details (Optional)</div> <div>Employee ID</div> <div></div> <div>Secondary E-Mail Address</div> <div></div> <div>Secondary Phone Number</div> <div></div>

6. Select your settings for "Configure new requester as account manager"

Select No on the drop-down menu.

You do not need to make a selection on the Account Manager Permissions when adding Requesters.

Account Manager

Configure new requester as account manager

--- Select Item ---

Account Manager Permissions

☐ Changes

☐ Problems

☐ Work Logs

7. Under Approval Permission, select the options you prefer for the new Requester.

Account Manager

Configure new requester as account manager

--- Select Item ---

No

Yes

☐ Work Logs

Approval Permissions

Service Request Approver

--- Select Item ---

No

Yes

8. When you are finished, click Submit Request at the bottom.
You will receive a response within 24 hours confirming your request has been completed.

Submit Request

Reset

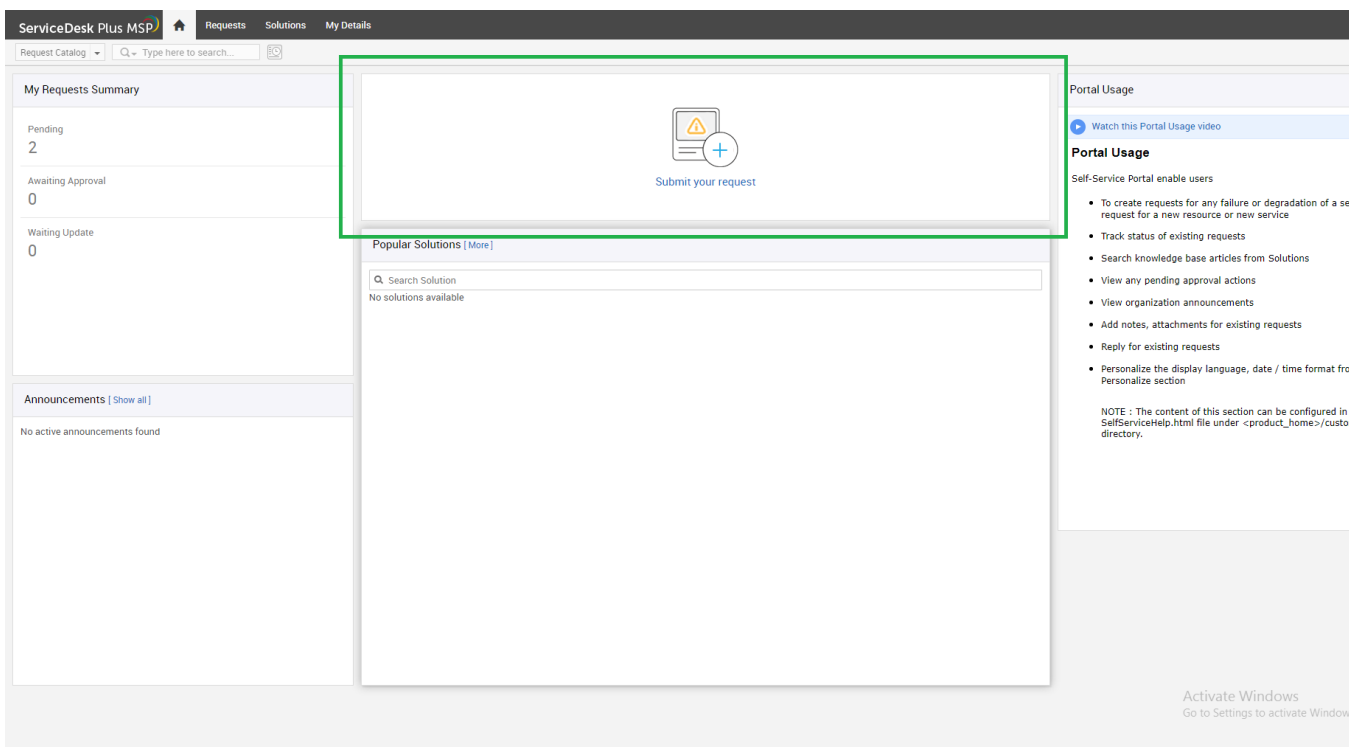
Cancel

Adding an Account Manager

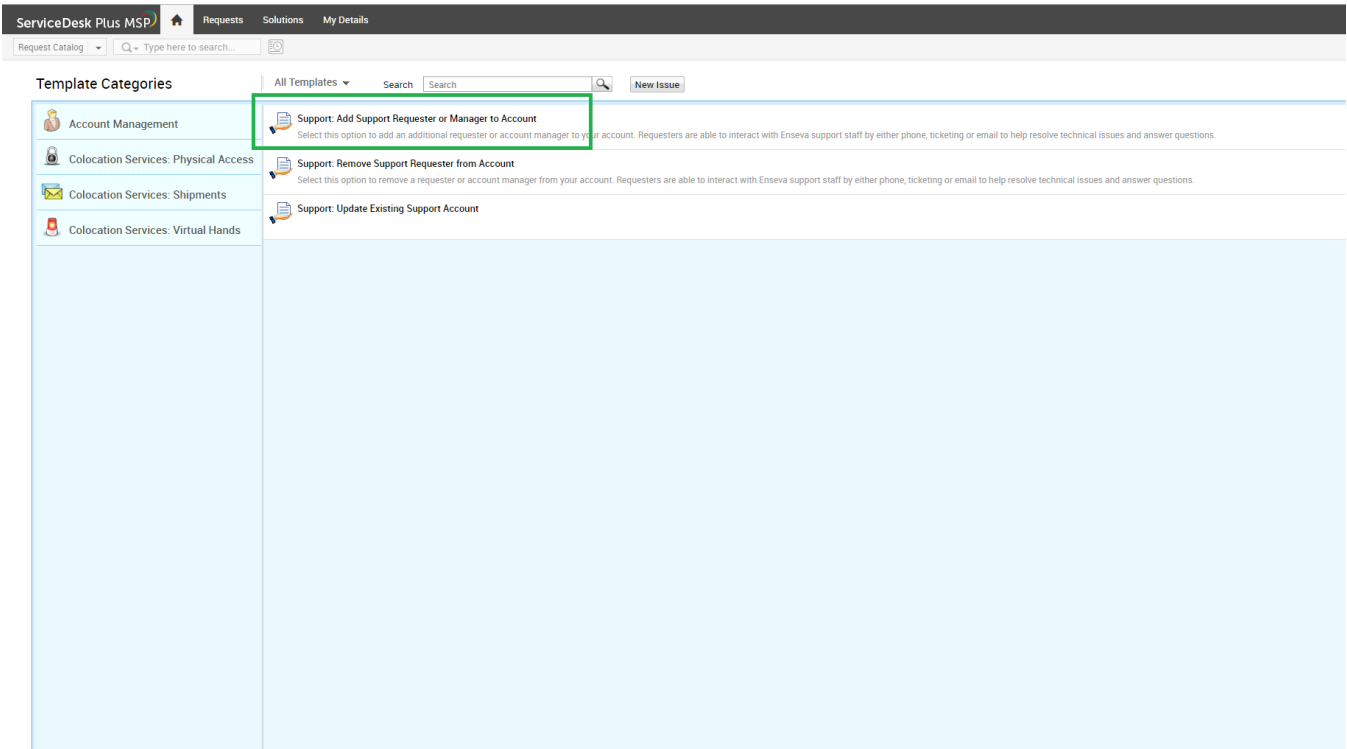
An Account Manager can be given access to make purchases, account changes, modify the level of access for other users and request technical assistance on behalf of your organization or company. You can add a new Account Manager and set their level of permission by following the steps below.

Adding an Account Manager to Your Account

1. From your account home page, click on Submit your request



2. Now click on Support: Add Support Requester or Manager to Account



3. You will be taken to the ticket screen you see below. We will review each section in the steps below.

ServiceDesk Plus MSP

RequestsMy Details

Request CatalogType here to search...🔍

Support: Add Support Requester or Manager to Account

Requester Details

NameDemo UserAsset(s)Search and associate assets here🔗

SiteSample Site

SubjectAdd Requester to Account

Description

Important: Adding a new requester to an account requires the approval of an account Manager.

Account Details (Required)
These fields provide basic information about the person being added to our support portal. All fields must be accurately completed prior to the requests implementation.

Additional Account Details (Optional)
These fields provide additional information about the person being added to our support portal but are not required. The Secondary E-Mail and Phone number fields can provide additional communication options should primary methods be unavailable.

Account Manager
Should the new requester need Account Manager permissions, complete the fields and the appropriate permissions the Account Manager should have.

Approval Permissions
Should the new requester have the ability to approve purchases on behalf of the organization in the form of new services or one-time service requests, complete the appropriate fields.

Request TypeRequest▼

Asset Details

Account Details (Required)

First Name

Last Name

Primary E-Mail Address

Primary Phone Number

Account Manager

Configure new requester as account manager

--- Select Item ---

Account Manager Permissions

- ☐ Changes
- ☐ Problems
- ☐ Work Logs

Additional Account Details (Optional)

Employee ID

Secondary E-Mail Address

Secondary Phone Number

Approval Permissions

Service Request Approver

--- Select Item ---

Purchase Approver

--- Select Item ---

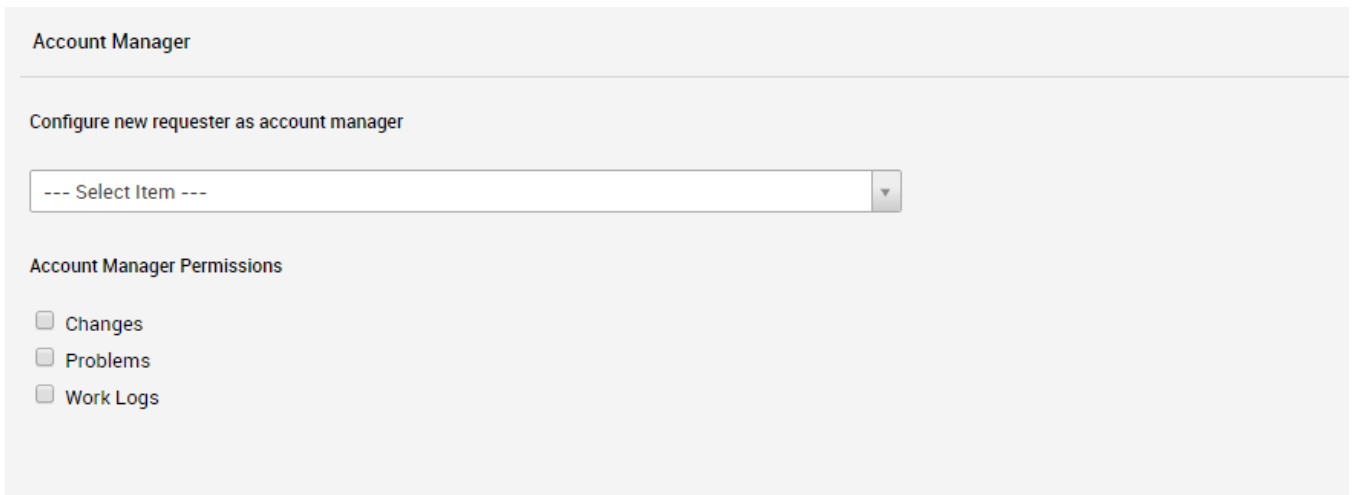
Attachments : Attach file

Submit RequestResetCancel

5. Under Account Details and Additional Account Details, provide the relevant information about the new Account Manager you would like to add. Note the fields marked as Required and Optional.

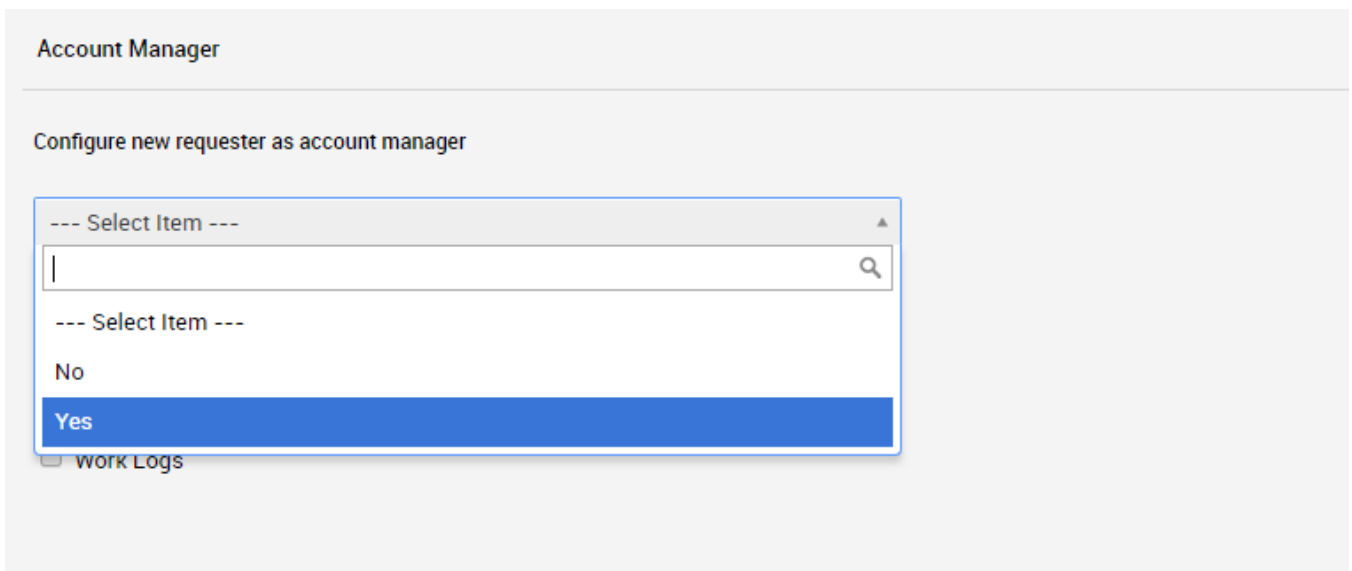
Asset Details	
<div>Account Details (Required)</div> <div><div>First Name</div><div></div></div> <div><div>Last Name</div><div></div></div> <div><div>Primary E-Mail Address</div><div></div></div> <div><div>Primary Phone Number</div><div></div></div>	<div>Additional Account Details (Optional)</div> <div><div>Employee ID</div><div></div></div> <div><div>Secondary E-Mail Address</div><div></div></div> <div><div>Secondary Phone Number</div><div></div></div>

6. In the Account Manager section, under "Configure new requester as account manager" select Yes on the drop-down menu.



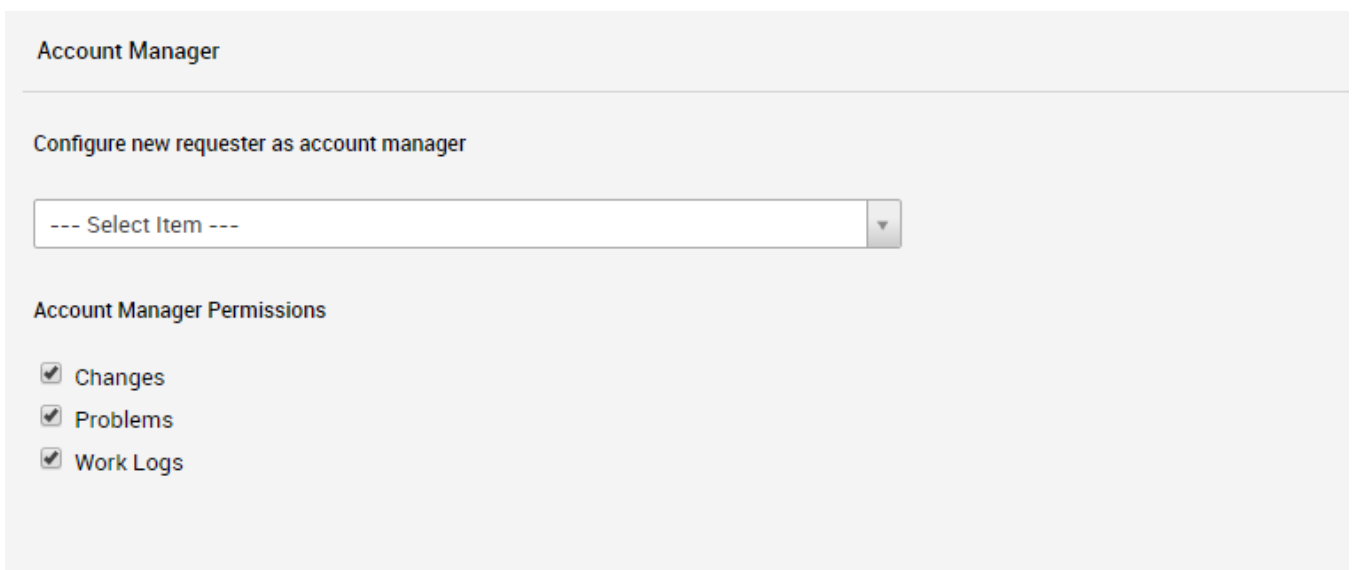
The screenshot shows the 'Account Manager' section of a web interface. Under the heading 'Configure new requester as account manager', there is a dropdown menu with the text '--- Select Item ---'. Below this, under the heading 'Account Manager Permissions', there are three unchecked checkboxes labeled 'Changes', 'Problems', and 'Work Logs'.

7. Under "Account Manager Permissions" select the check boxes for the permissions you would like to set for the new Account Manager.



This screenshot shows the same 'Account Manager' section, but the dropdown menu for 'Configure new requester as account manager' is open. The menu displays '--- Select Item ---' at the top, followed by a search bar, another '--- Select Item ---' placeholder, and two options: 'No' and 'Yes'. The 'Yes' option is highlighted in blue. The 'Work Logs' checkbox under 'Account Manager Permissions' is partially visible at the bottom.

8. Under Approval Permission, select the options you prefer for the new Account Manager.



The screenshot shows the 'Account Manager' section with the 'Configure new requester as account manager' dropdown menu closed. Under the heading 'Account Manager Permissions', all three checkboxes are now checked: 'Changes', 'Problems', and 'Work Logs'.

Approval Permissions

Service Request Approver

--- Select Item ---

Select Item

No

Yes

9. When you are finished, click Submit Request at the bottom. You will receive a response within 24 hours confirming your request has been completed.

Submit Request

Reset

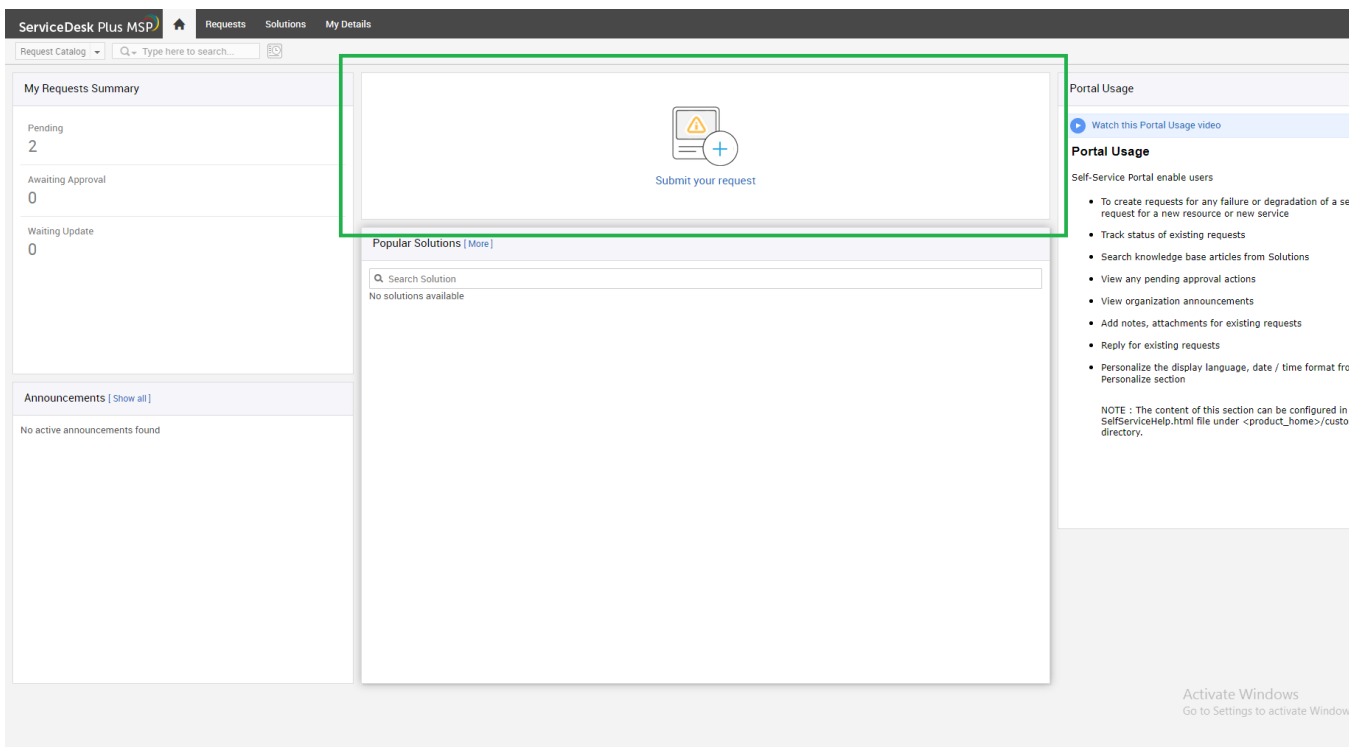
Cancel

Removing a Support Requester

Any time roles change in your organization, you may need to change who has access to your Enseva account. In order to do so, you can remove a Requester or Account manager using the process in this tutorial.

Removing a Support Requester from Your Account

1. Start by clicking "Submit your request" from your account home page.



2. Next, click on "Support: Remove Requester from Account"

ServiceDesk Plus MSP

RequestsSolutionsMy Details

Request CatalogType here to search...

Template Categories

Account Management

Colocation Services: Physical Access

Colocation Services: Shipments

Colocation Services: Virtual Hands

All Templates

Search

New Issue

Support: Add Support Requester or Manager to Account

Support: Remove Support Requester from Account

Support: Update Existing Support Account

3. You'll see the following screen with a description of the steps to complete your request.

The screenshot shows the 'ServiceDesk Plus MSP' interface. The top navigation bar includes 'Requests', 'Solutions', and 'My Details'. Below the navigation bar is a search bar labeled 'Request Catalog' and a text input field 'Type here to search...'. The main content area is titled 'Support: Remove Support Requester from Account'. It contains several sections: 'Requester Details' with fields for 'Name' (filled with 'Demo User'), 'Site' (filled with 'Sample Site'), and 'Subject' (filled with 'Remove Support Requester from Account'); an 'Asset(s)' field with a search icon; a 'Description' field with a rich text editor containing the text: 'This request will remove a representative from Enseva's Support Portal. They will no longer be able to submit support requests on behalf of your organization. Important: Removing a requester from an account requires the approval of an account Manager. Account Details (Required) These fields provide basic information about the person being removed from our support portal. All fields must be accurately completed prior to the requests implementation.'; an 'Asset Details' section with a sub-section 'Account Details (Required)' containing fields for 'First Name', 'Last Name', and 'Primary E-Mail Address'; and an 'Attachments' section with an 'Attach file' button. At the bottom of the form are three buttons: 'Submit Request', 'Reset', and 'Cancel'.

4. Fill out the required details for the Requester you wish to remove.

This is a close-up of the 'Account Details (Required)' section of the form. It contains three text input fields: 'First Name', 'Last Name', and 'Primary E-Mail Address'. Each field is currently empty.

5. When you are finished, click Submit Request at the bottom.

You will receive a response within 24 hours confirming your request has been completed.

Submit Request

Reset

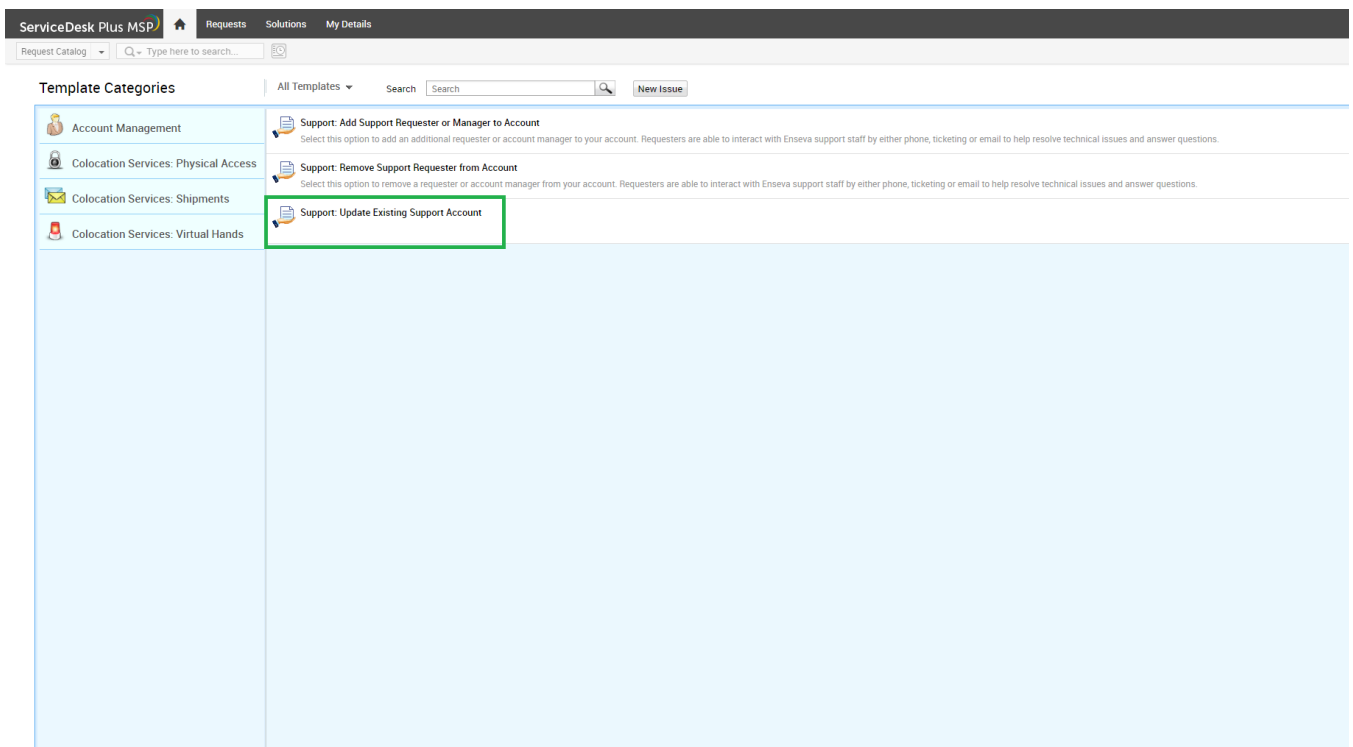
Cancel

Updating a Support Requester

It is important security practice to maintain control over who has access to your Enseva account. In order to manage the level of access provided to those who manage your account, you can update these settings at any time using the steps below.

Updating a Support Requester or Account Manager

1. From your account home page, click on Submit your request.



2. Now, click on **Support: Update Existing Support Account**

ServiceDesk Plus MSP

RequestsSolutionsMy Details

Request CatalogType here to search...

Support: Add Support Requester or Manager to Account

Requester Details

Name

Demo User

Asset(s)

Search and associate assets here

Site

Sample Site

Subject

Add Requester to Account

Description

Important: Adding a new requester to an account requires the approval of an account Manager.

Account Details (Required)
These fields provide basic information about the person being added to our support portal. All fields must be accurately completed prior to the requests implementation.

Additional Account Details (Optional)
These fields provide additional information about the person being added to our support portal but are not required. The Secondary E-Mail and Phone number fields can provide additional communication options should primary methods be unavailable.

Account Manager
Should the new requester need Account Manager permissions, complete the fields and the appropriate permissions the Account Manager should have.

Approval Permissions
Should the new requester have the ability to approve purchases on behalf of the organization in the form of new services or one-time service requests, complete the appropriate fields.

Request Type

Request

Asset Details

Account Details (Required)

First Name

Last Name

Primary E-Mail Address

Primary Phone Number

Additional Account Details (Optional)

Employee ID

Secondary E-Mail Address

Secondary Phone Number

Account Manager

Configure new requester as account manager

--- Select Item ---

Account Manager Permissions

☐ Changes

☐ Problems

☐ Work Logs

Approval Permissions

Service Request Approver

--- Select Item ---

Purchase Approver

--- Select Item ---

Attachments: Attach file

Submit Request

Reset

Cancel

3. You will be taken to the ticket screen you see below. We will review each section in the steps below.

ServiceDesk Plus MSP

Requests

Solutions

My Details

Request Catalog

Q

Type here to search...

Support: Update Existing Support Account

Requester Details

Name

Demo User

Asset(s)

Search and associate assets here

Site

Sample Site

Subject

Update existing requester information and/or permissions.

Description

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U

This request will remove an Account Manager from **Enseva's** Support Portal. They will no longer be able to submit support requests or authorize **purchases** on behalf of your organization.

Important: Updating a requester requires the approval of an account Manager.

Account Details (Required)
These fields provide basic information about the person being added to our support portal. All fields must be accurately completed prior to the requests implementation.

Additional Account Details (Optional)
These fields provide additional information about the person being added to our support portal but are not required. The Secondary E-Mail and Phone number fields can provide additional communication options should primary methods be unavailable.

Account Manager
Should the new requester need Account Manager permissions, complete the fields and the appropriate permissions the Account Manager should have.

Approval Permissions

Asset Details

Account Details (Required)

First Name

Last Name

Additional Account Details (Optional)

Employee ID

Secondary E-Mail Address

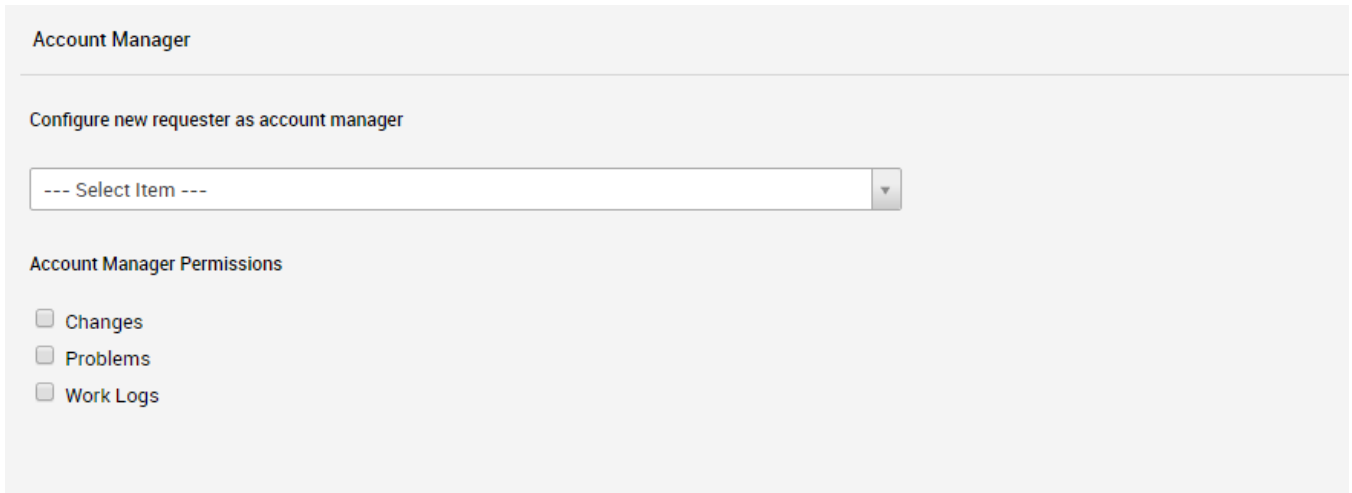
Activate Windows

Go to Settings to activate Window

4. At the top of the request form you will see basic instructions on how to use this form. Note: You do not need to edit information in this area.

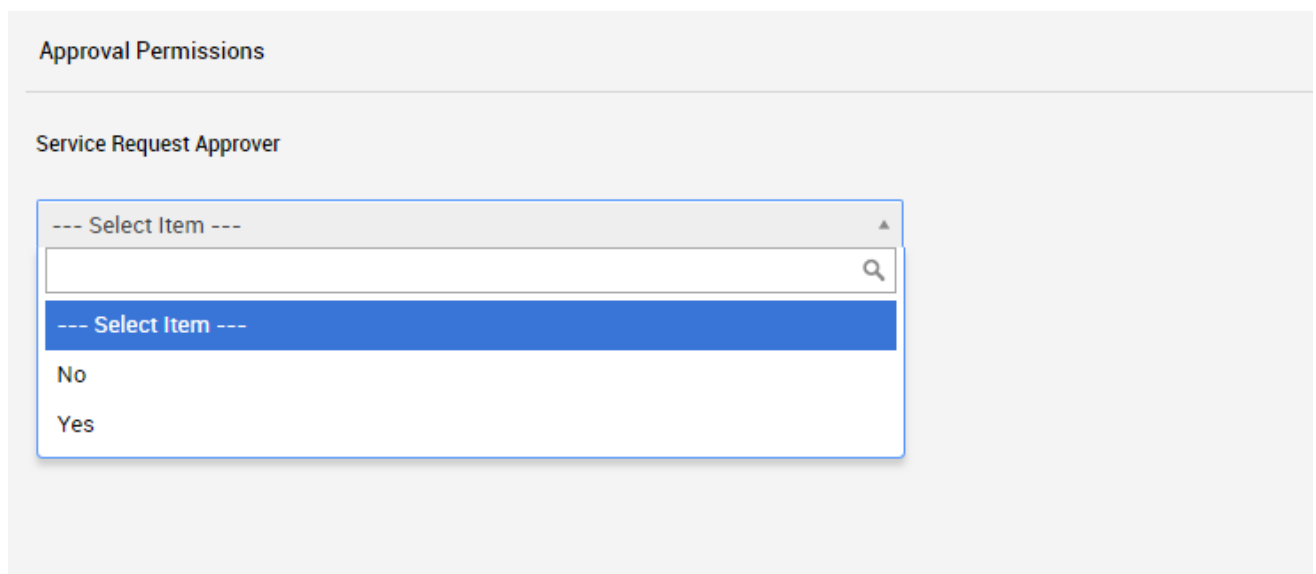
Asset Details	
<div>Account Details (Required)</div> <div><div>First Name</div><div></div></div> <div><div>Last Name</div><div></div></div> <div><div>Primary E-Mail Address</div><div></div></div> <div><div>Primary Phone Number</div><div></div></div>	<div>Additional Account Details (Optional)</div> <div><div>Employee ID</div><div></div></div> <div><div>Secondary E-Mail Address</div><div></div></div> <div><div>Secondary Phone Number</div><div></div></div>

5. Here you can update Account Details and Additional Account Details for the user.
Provide the relevant information about the Requester or Account Manager you would like to update
Note the fields marked as Required and Optional



The screenshot shows a form titled "Account Manager". Below the title is a section labeled "Configure new requester as account manager" which contains a dropdown menu with the text "--- Select Item ---". Below this is a section titled "Account Manager Permissions" containing three checkboxes: "Changes", "Problems", and "Work Logs", all of which are currently unchecked.

6. In the Account Manager section, under "Configure new requester as account manager" select the appropriate setting for the user being updated.
1. Select No for Requester
 2. Select Yes for Account Manager
 3. Be sure to update the check boxes for Changes, Problems and Work Logs as needed if this person is an Account manager



The screenshot shows a dropdown menu titled "Approval Permissions" with the label "Service Request Approver". The dropdown is open, showing a search bar with a magnifying glass icon and a list of options. The first option is "--- Select Item ---" (highlighted in blue), followed by "No" and "Yes".

- Under Approval Permission, select the options you prefer to update for the Requester or Account Manager.

Approval Permissions

Service Request Approver

--- Select Item ---

Purchase Approver

--- Select Item ---

--- Select Item ---

No

Yes

- When you are finished, click Submit Request at the bottom.
You will receive a response within 24 hours confirming your request has been completed.

Submit Request

Reset

Cancel