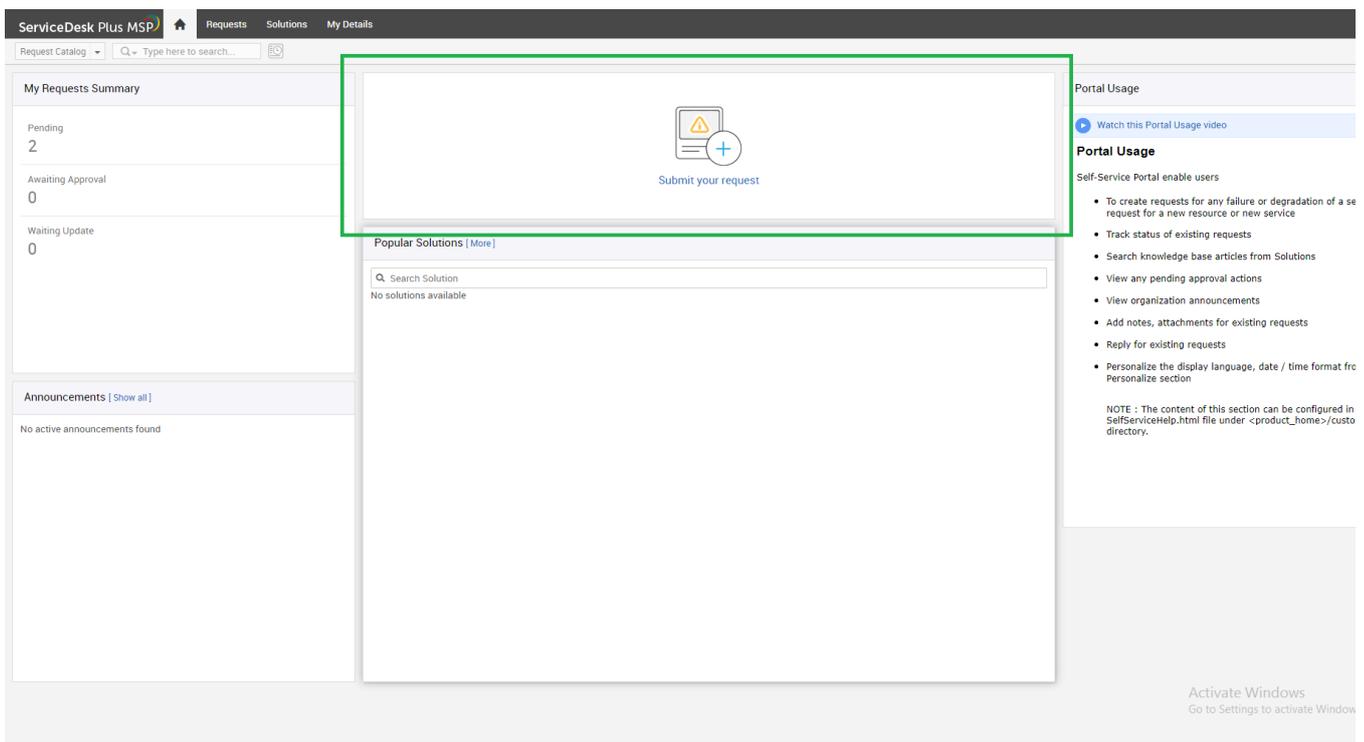


Adding an Account Manager

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



The screenshot displays the ServiceDesk Plus MSP user interface. The top navigation bar includes 'ServiceDesk Plus MSP', a home icon, and tabs for 'Requests', 'Solutions', and 'My Details'. Below the navigation bar is a search bar labeled 'Request Catalog' with a search icon and the text 'Type here to search...'. The main content area is divided into several sections:

- My Requests Summary:** A table showing the status of requests: Pending (2), Awaiting Approval (0), and Waiting Update (0).
- Announcements:** A section titled 'Announcements [Show all]' with the text 'No active announcements found'.
- Submit your request:** A large button with a warning icon and a plus sign, highlighted with a green box.
- Popular Solutions:** A section titled 'Popular Solutions [More]' with a search bar and the text 'No solutions available'.
- Portal Usage:** A section on the right side of the page with a blue button 'Watch this Portal Usage video' and a list of actions for 'Self-Service Portal enable users'.

At the bottom right of the page, there is a watermark for 'Activate Windows' with the text 'Go to Settings to activate Windows'.

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

The screenshot displays the ServiceDesk Plus MSP interface. At the top, there is a navigation bar with 'ServiceDesk Plus MSP' on the left and 'Requests', 'Solutions', and 'My Details' on the right. Below this is a search bar with the text 'Request Catalog' and a search icon. The main content area is titled 'Template Categories' and features a sidebar on the left with categories: 'Account Management', 'Colocation Services: Physical Access', 'Colocation Services: Shipments', and 'Colocation Services: Virtual Hands'. The main area shows a list of templates under the heading 'All Templates'. The first template, 'Support: Add Support Requester or Manager to Account', is highlighted with a green box. Its description reads: 'Select this option to add an additional requester or account manager to your account. Requesters are able to interact with Enseva support staff by either phone, ticketing or email to help resolve technical issues and answer questions.' Below it are two other templates: 'Support: Remove Support Requester from Account' and 'Support: Update Existing Support Account'.

ServiceDesk Plus MSP

Requests Solutions My Details

Request Catalog

Type here to search...

Template Categories

All Templates Search Search New Issue

Account Management

Colocation Services: Physical Access

Colocation Services: Shipments

Colocation Services: Virtual Hands

Support: Add Support Requester or Manager to Account

Select this option to add an additional requester or account manager to your account. Requesters are able to interact with Enseva support staff by either phone, ticketing or email to help resolve technical issues and answer questions.

Support: Remove Support Requester from Account

Select this option to remove a requester or account manager from your account. Requesters are able to interact with Enseva support staff by either phone, ticketing or email to help resolve technical issues and answer questions.

Support: Update Existing Support 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 | Requests | Solutions | My Details

Request Catalog | Q - Type 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

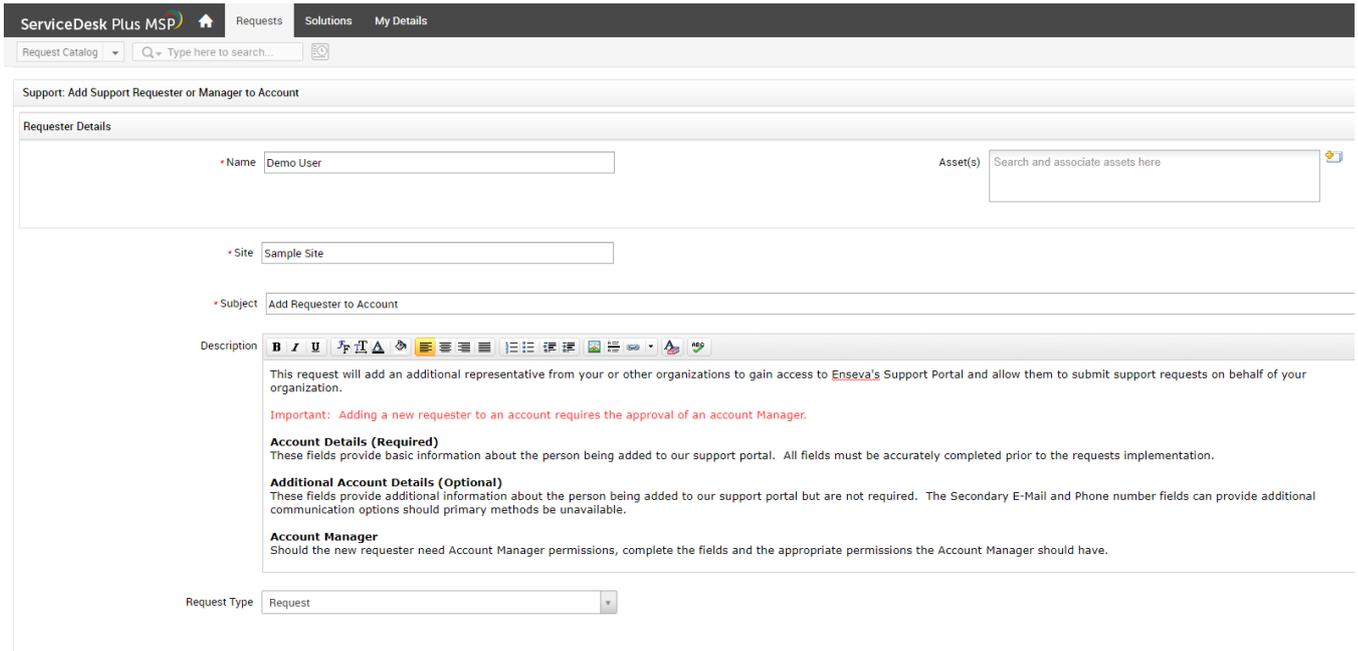
Asset Details

| Account Details (Required) | Additional Account Details (Optional) |
|--|--|
| First Name: <input type="text"/> | Employee ID: <input type="text"/> |
| Last Name: <input type="text"/> | Secondary E-Mail Address: <input type="text"/> |
| Primary E-Mail Address: <input type="text"/> | Secondary Phone Number: <input type="text"/> |
| Primary Phone Number: <input type="text"/> | |

| Account Manager | Approval Permissions |
|---|--|
| Configure new requester as account manager: <input type="text" value="--- Select Item ---"/> | Service Request Approver: <input type="text" value="--- Select Item ---"/> |
| Account Manager Permissions: <input type="checkbox"/> Changes <input type="checkbox"/> Problems <input type="checkbox"/> Work Logs | Purchase Approver: <input type="text" value="--- Select Item ---"/> |

Attachments:

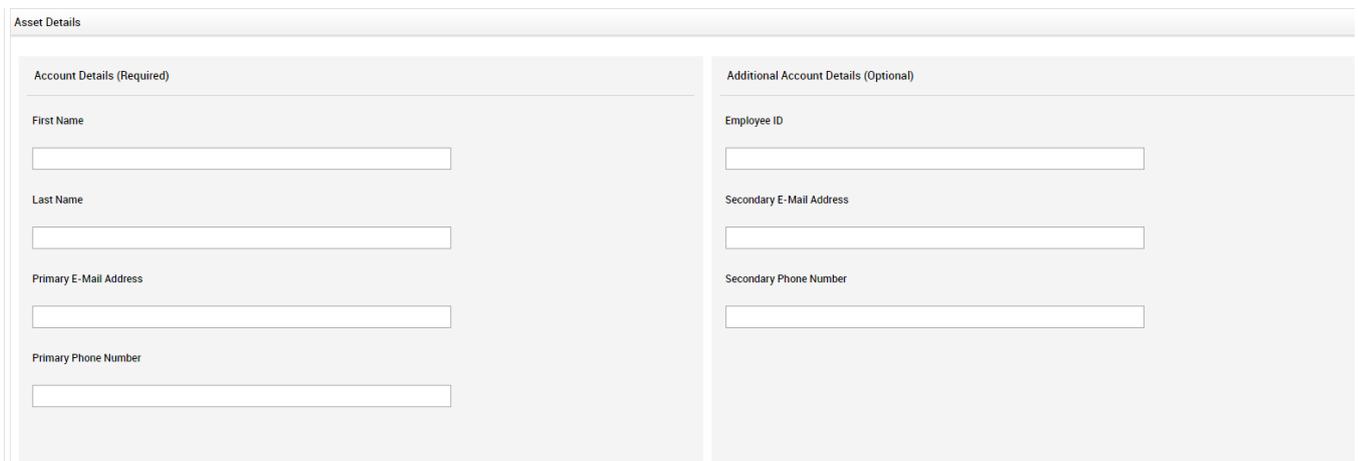
4. At the top of the request form you will see basic instructions on how to use this form. You do not need to edit information in this area.



The screenshot shows the 'Requester Details' section of a ServiceDesk Plus MSP request form. The form is titled 'Support: Add Support Requester or Manager to Account'. It includes the following fields and sections:

- Name:** A text input field containing 'Demo User'.
- Asset(s):** A search box with the placeholder text 'Search and associate assets here'.
- Site:** A text input field containing 'Sample Site'.
- Subject:** A text input field containing 'Add Requester to Account'.
- Description:** A rich text editor with a toolbar. The content includes:
 - A paragraph: 'This request will add an additional representative from your or other organizations to gain access to [Enseva's Support Portal](#) and allow them to submit support requests on behalf of your organization.'
 - An important note: '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.'
- Request Type:** A dropdown menu currently set to 'Request'.

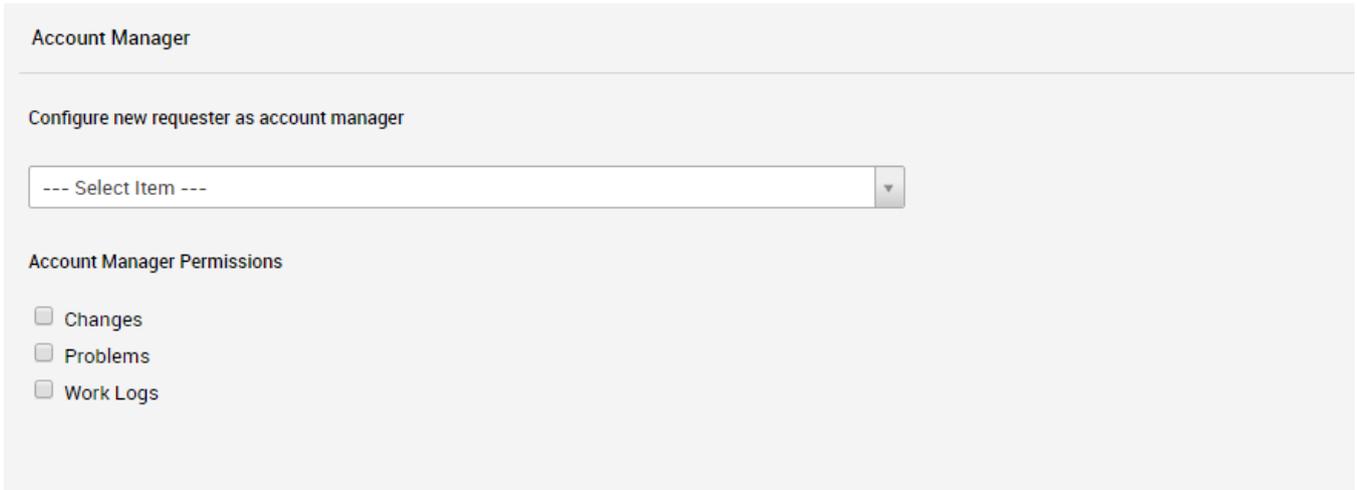
5. Under Account Details and Additional Account Details, provide the relevant information about the new Account Manager you would like to add. Note the fields marked as Required and Optional.



The screenshot shows the 'Asset Details' section of the form, which is divided into two columns:

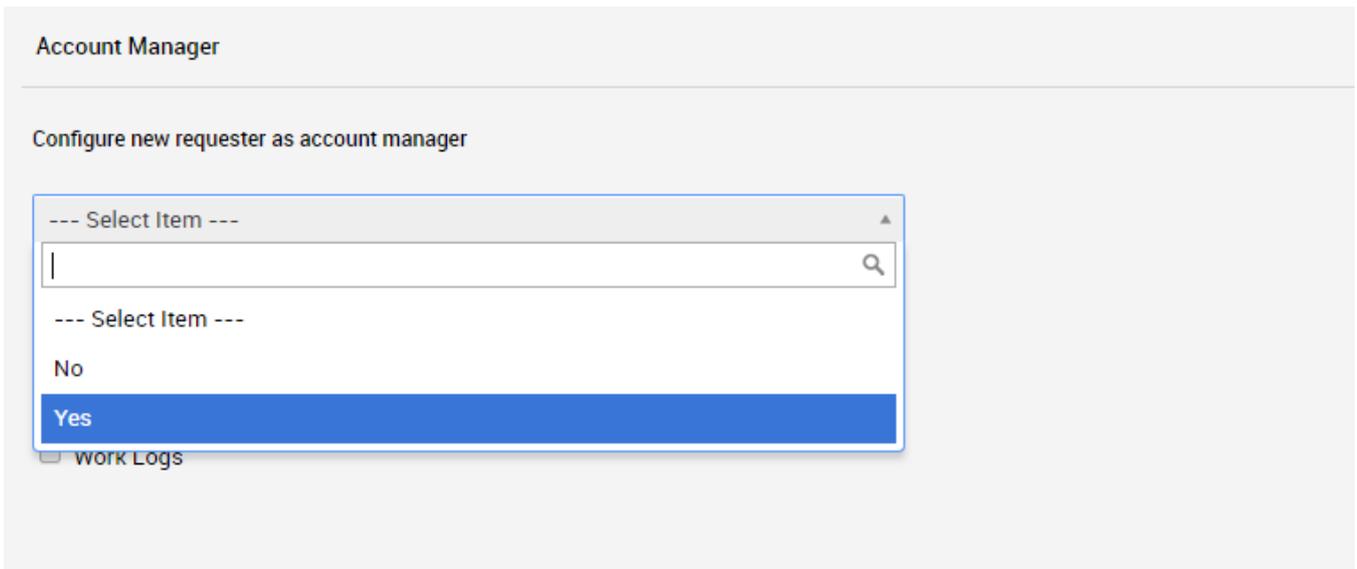
- Account Details (Required):**
 - First Name:
 - Last Name:
 - Primary E-Mail Address:
 - Primary Phone Number:
- Additional Account Details (Optional):**
 - Employee ID:
 - Secondary E-Mail Address:
 - Secondary Phone Number:

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



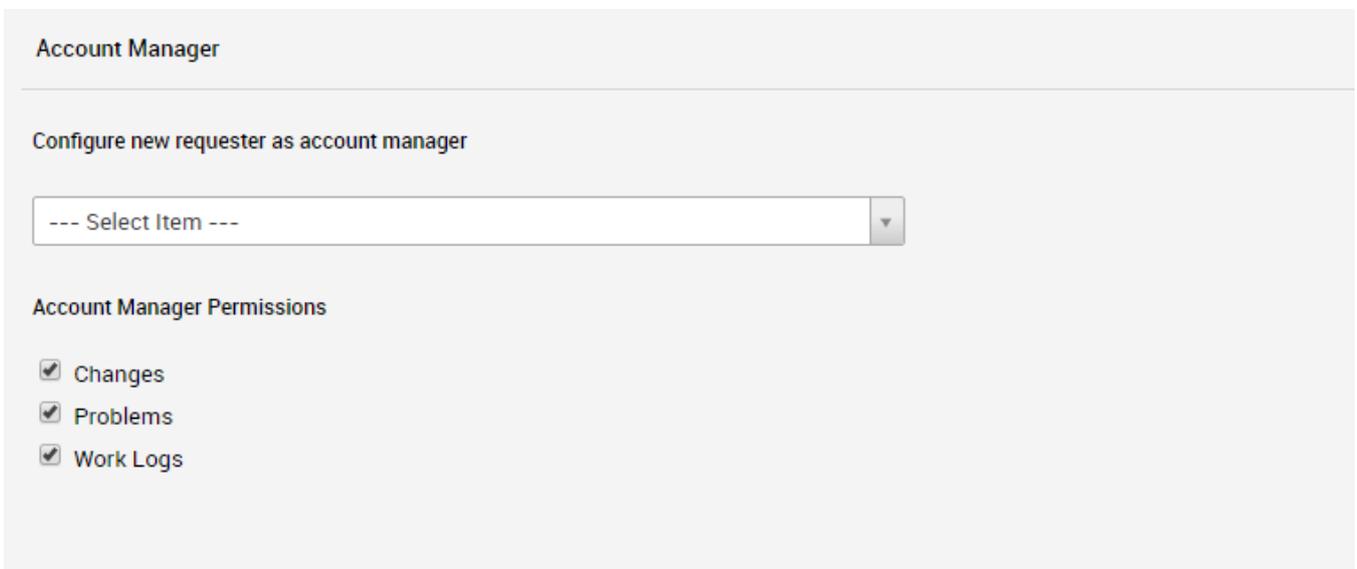
The screenshot shows the 'Account Manager' section. Under the heading 'Configure new requester as account manager', there is a dropdown menu with the text '--- Select Item ---'. Below this, under the heading 'Account Manager Permissions', there are three unchecked checkboxes: 'Changes', 'Problems', and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

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



The screenshot shows the 'Account Manager' section. Under the heading 'Configure new requester as account manager', the dropdown menu is open, showing a search bar and two options: 'No' and 'Yes'. The 'Yes' option is highlighted in blue. Below the dropdown, the 'Work Logs' checkbox is visible and is unchecked.

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



The screenshot shows the 'Account Manager' section. 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 checked checkboxes: 'Changes', 'Problems', and 'Work Logs'.

Approval Permissions

Service Request Approver

--- 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

Revision #3

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