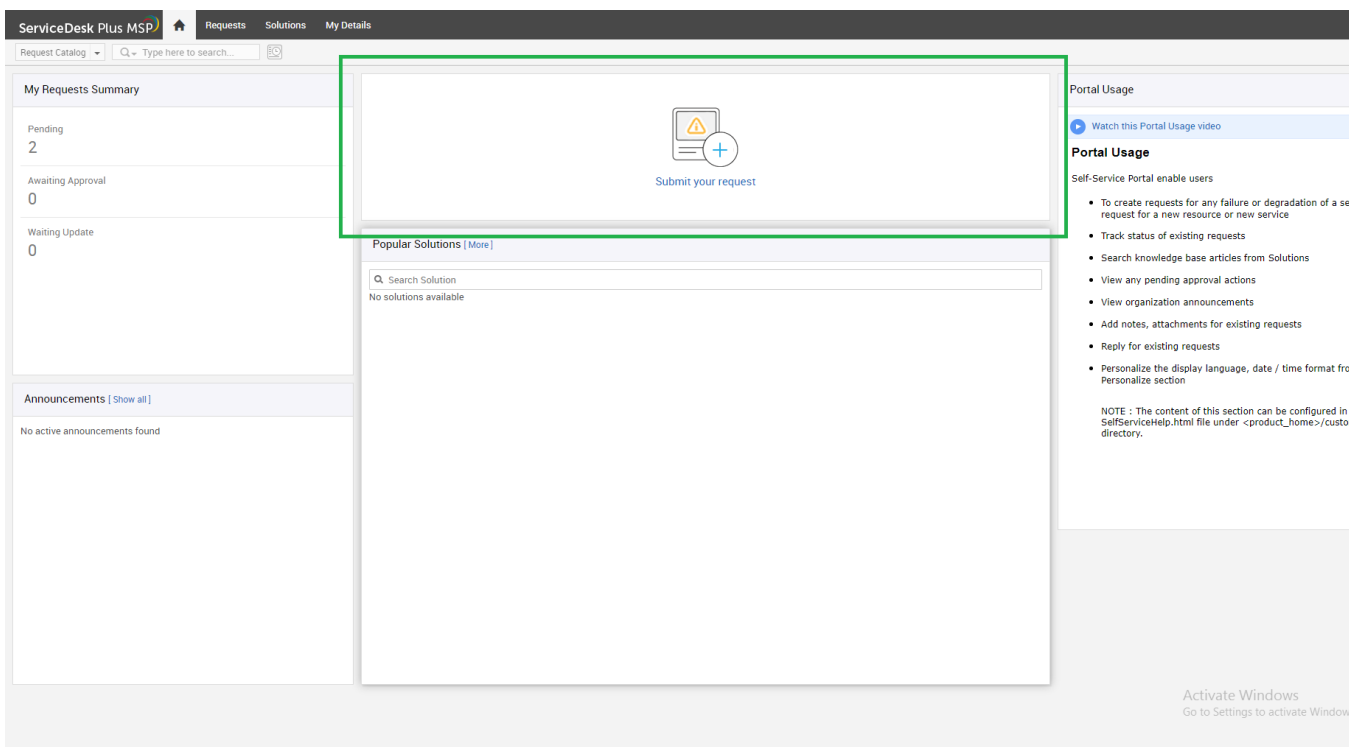


Adding an Account Manager

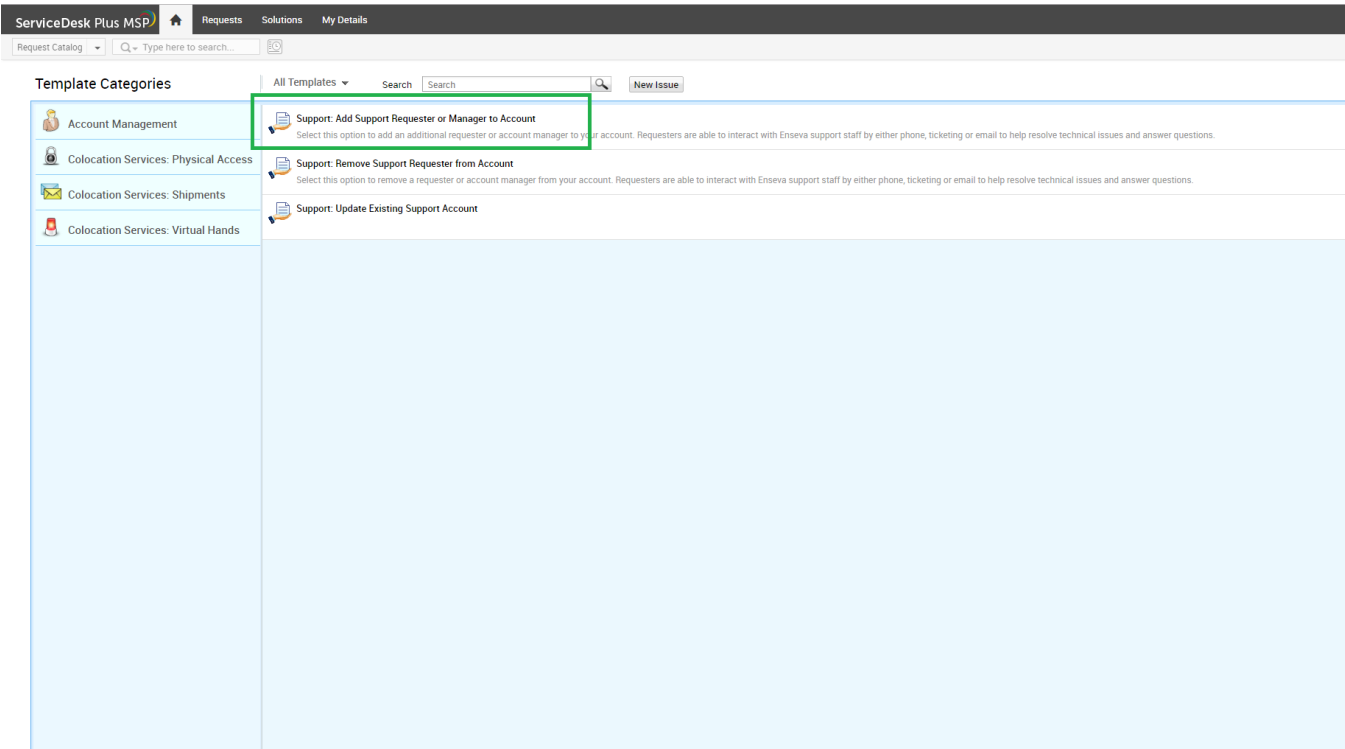
An Account Manager can be given access to make purchases, account changes, modify the level of access for other users and request technical assistance on behalf of your organization or company. You can add a new Account Manager and set their level of permission by following the steps below.

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

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 ---▼

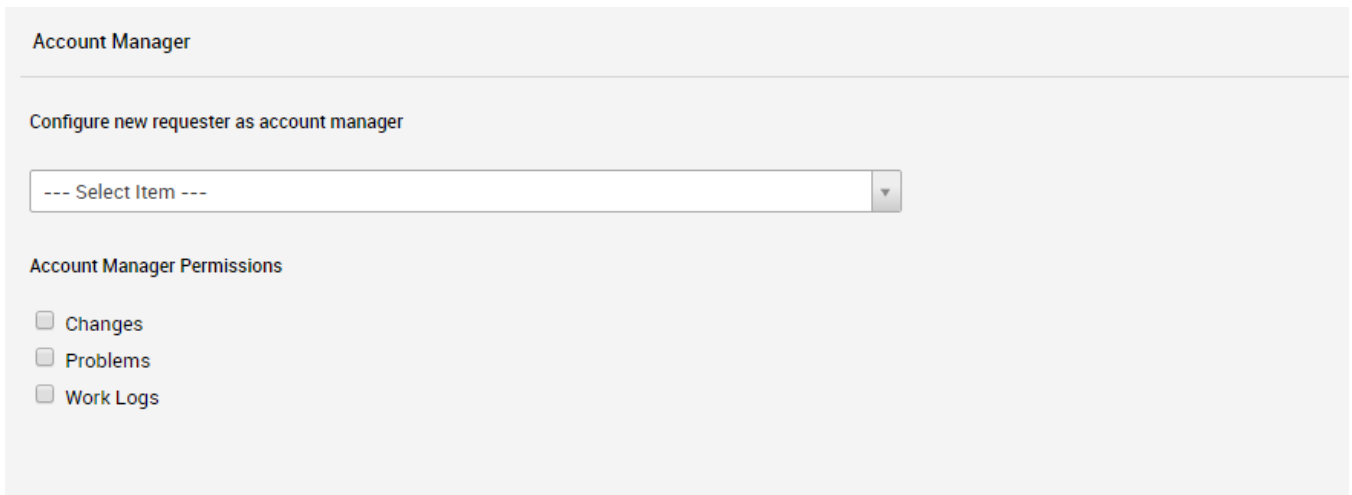
Attachments : Attach file

Submit RequestResetCancel

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.

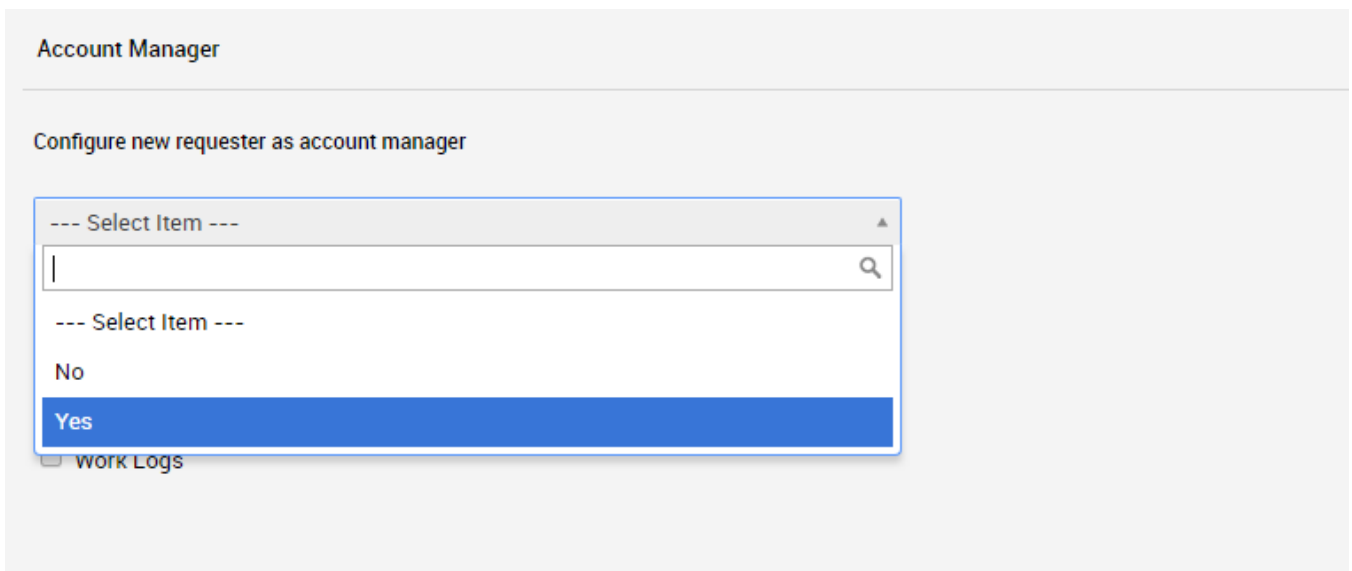
Asset Details	
<div>Account Details (Required)</div> <div>First Name</div> <div></div> <div>Last Name</div> <div></div> <div>Primary E-Mail Address</div> <div></div> <div>Primary Phone Number</div> <div></div>	<div>Additional Account Details (Optional)</div> <div>Employee ID</div> <div></div> <div>Secondary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

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



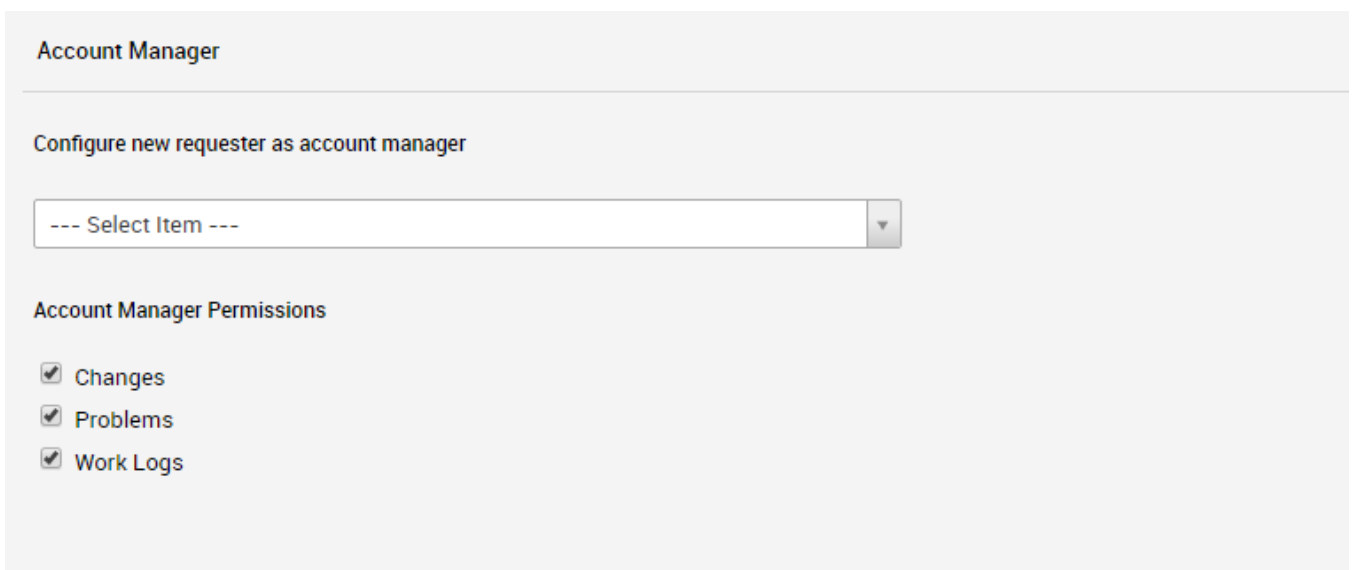
The screenshot shows the 'Account Manager' section of a web interface. Under the heading 'Configure new requester as account manager', there is a dropdown menu with the text '--- Select Item ---'. Below this, under the heading 'Account Manager Permissions', there are three unchecked checkboxes labeled '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' configuration page, but with the dropdown menu 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, indicating it is the selected choice. The 'Work Logs' checkbox under 'Account Manager Permissions' is partially visible at the bottom of the frame.

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



The screenshot shows the 'Account Manager' configuration page with the 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

Revision #3

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Updated 17 December 2023 12:56:54 by Admin