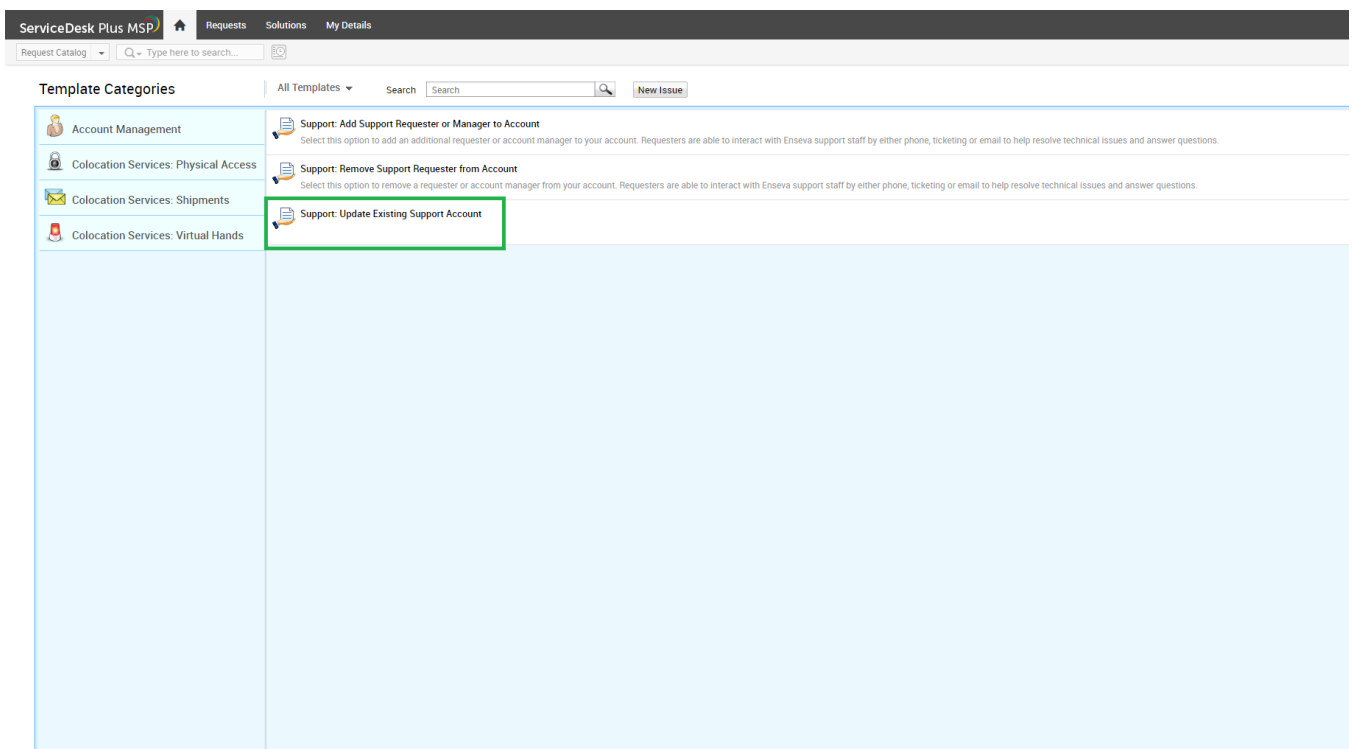


Updating a Support Requester

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

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

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

B

I

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

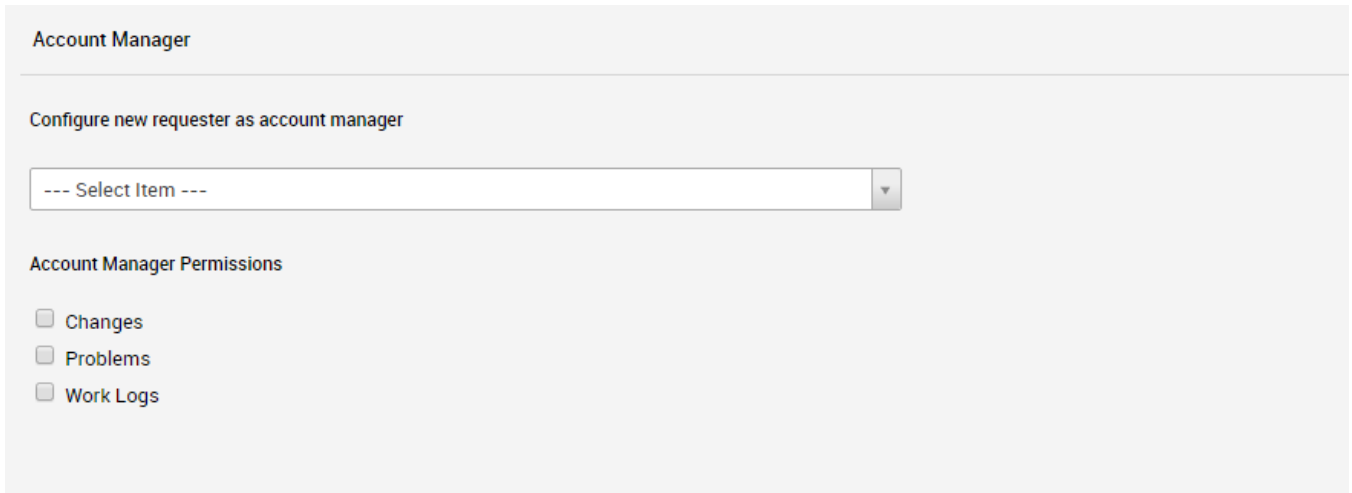
Activate Windows

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.

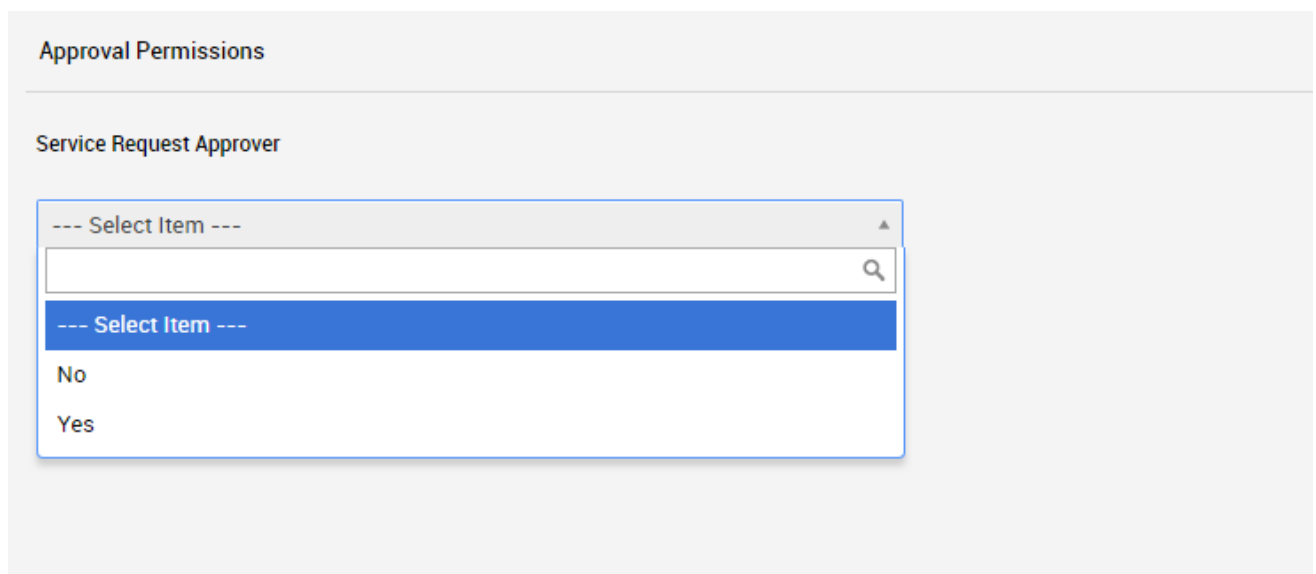
| Asset Details | |
|--|---|
| <div>Account Details (Required)</div> <div>First Name</div> <div><input type="text"/></div> <div>Last Name</div> <div><input type="text"/></div> <div>Primary E-Mail Address</div> <div><input type="text"/></div> <div>Primary Phone Number</div> <div><input type="text"/></div>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

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: "No" and "Yes". The "No" option is currently selected and highlighted in blue.

7. 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 ---

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

Revision #3

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