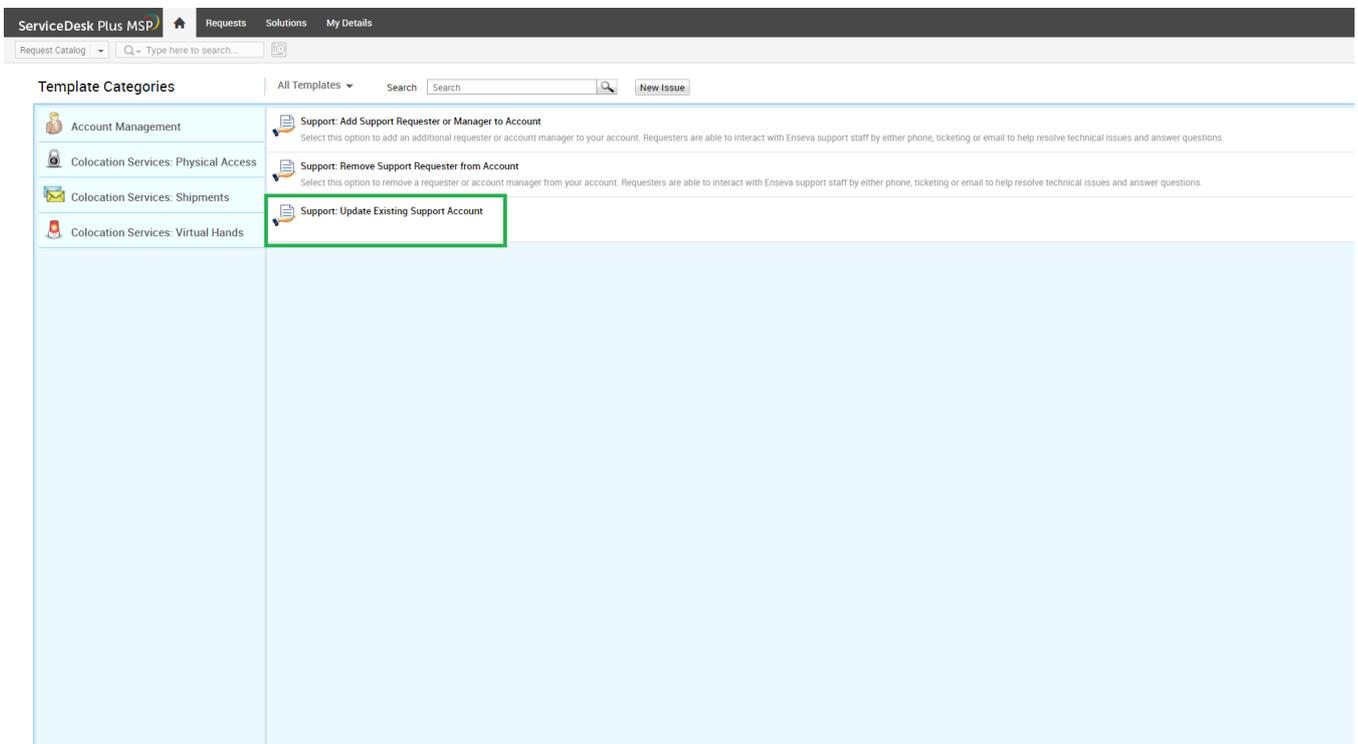


Updating a Support Requester

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 Requests Solutions My Details

Request Catalog

Support: Add Support Requester or Manager to Account

Requester Details

Name Asset(s)

Site

Subject

Description **B I U**

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

Asset Details

<p>Account Details (Required)</p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Primary E-Mail Address <input type="text"/></p> <p>Primary Phone Number <input type="text"/></p>	<p>Additional Account Details (Optional)</p> <p>Employee ID <input type="text"/></p> <p>Secondary E-Mail Address <input type="text"/></p> <p>Secondary Phone Number <input type="text"/></p>
<p>Account Manager</p> <p>Configure new requester as account manager <input type="text" value="--- Select Item ---"/></p> <p>Account Manager Permissions</p> <p><input type="checkbox"/> Changes</p> <p><input type="checkbox"/> Problems</p> <p><input type="checkbox"/> Work Logs</p>	<p>Approval Permissions</p> <p>Service Request Approver <input type="text" value="--- Select Item ---"/></p> <p>Purchase Approver <input type="text" value="--- Select Item ---"/></p>

Attachments:

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

The screenshot shows the 'Support: Update Existing Support Account' form in ServiceDesk Plus MSP. The form is divided into several sections:

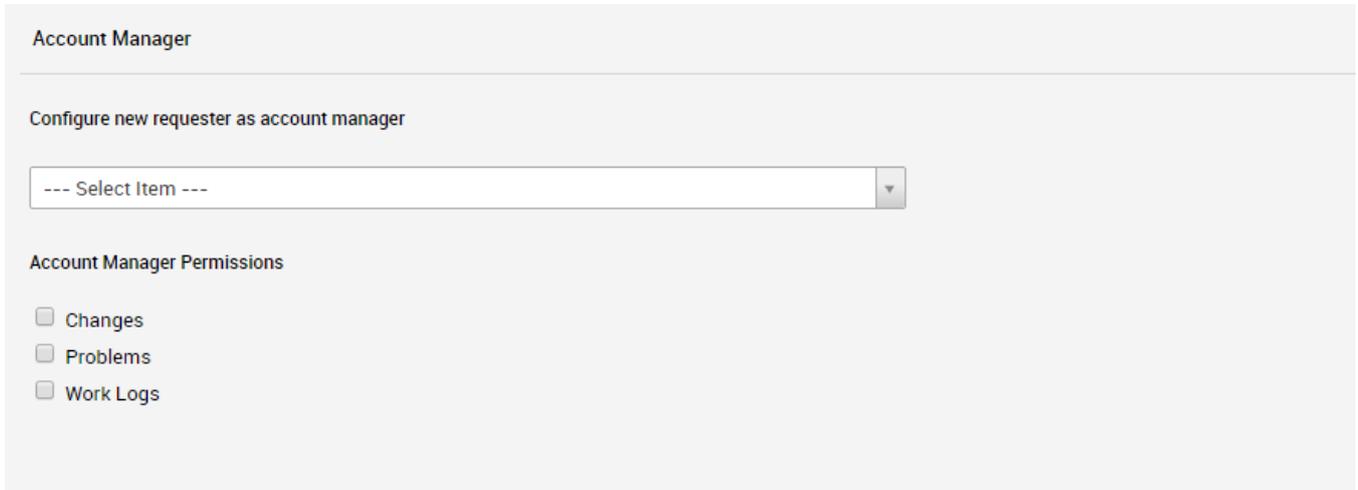
- Requester Details:** Includes fields for Name (Demo User), Site (Sample Site), and Subject (Update existing requester information and/or permissions). There is also an Asset(s) search field.
- Description:** Contains a rich text editor with a toolbar. The text includes a warning: "This request will 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." It also includes instructions for Account Details, Additional Account Details, Account Manager, and Approval Permissions.
- Asset Details:** Divided into two columns:
 - Account Details (Required):** Fields for First Name and Last Name.
 - Additional Account Details (Optional):** Fields for Employee ID, Secondary E-Mail Address, and Secondary Phone Number.

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.

This is a close-up view of the 'Asset Details' section of the form. It is split into two columns:

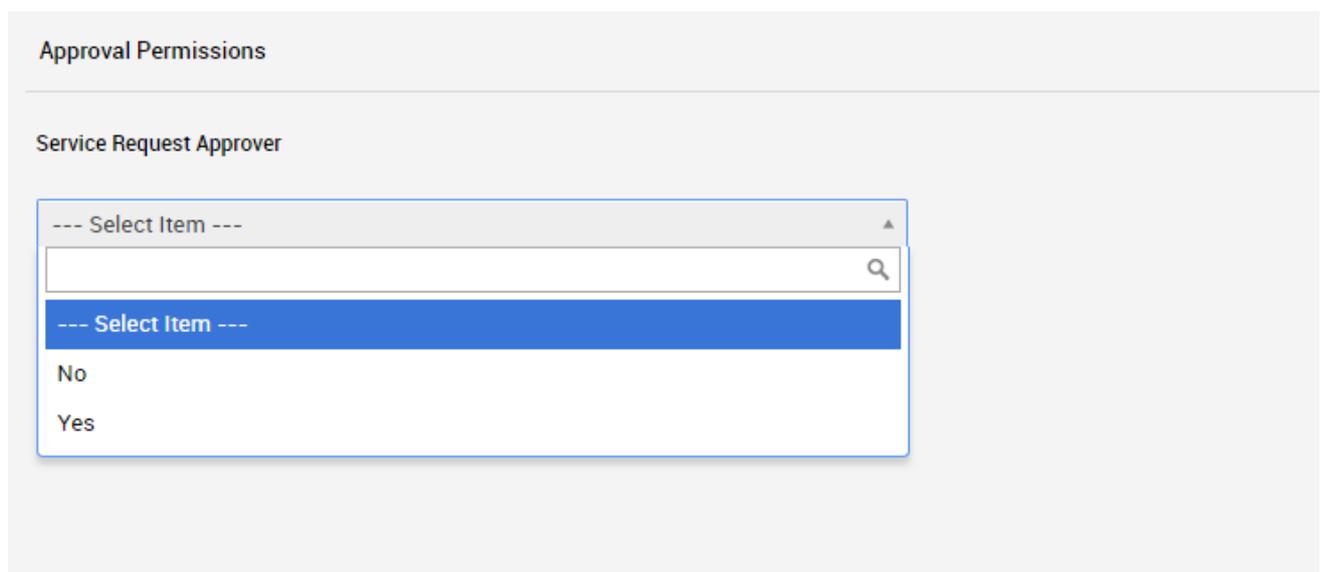
- Account Details (Required):** Fields for First Name, Last Name, Primary E-Mail Address, and Primary Phone Number.
- Additional Account Details (Optional):** Fields for Employee ID, Secondary E-Mail Address, and Secondary Phone Number.

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 section titled "Account Manager". Below the title is a sub-section "Configure new requester as account manager" which contains a dropdown menu with the text "--- Select Item ---". Below this is another sub-section "Account Manager Permissions" with 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 section titled "Approval Permissions". Below the title is a sub-section "Service Request Approver" which contains a dropdown menu. The dropdown menu is open, showing a search bar with a magnifying glass icon and a list of options: "--- Select Item ---", "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

Created 17 December 2023 12:46:07 by Admin

Updated 17 December 2023 13:05:00 by Admin