

Click 'Staff Panel' > 'Users' > 'Customers'

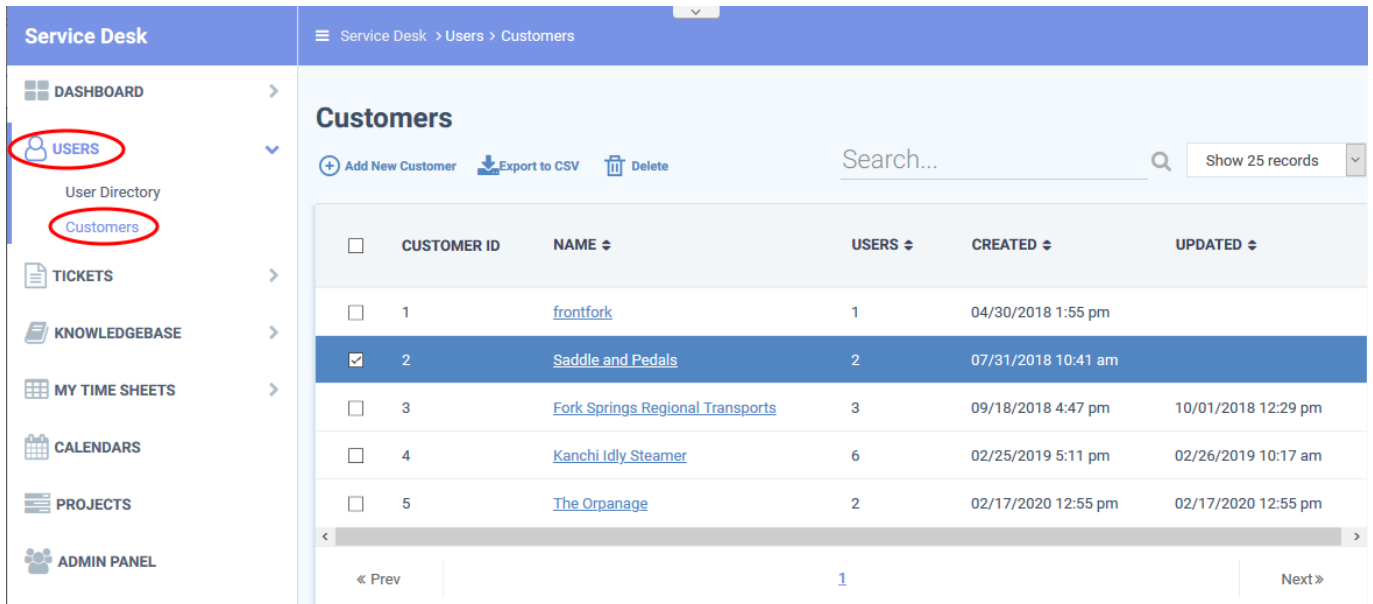
- A customer is an organization, usually a company or business from whom you will accept tickets. 'Users' are the people who actually submit the tickets.
- Customers added to your ITarian account are automatically imported to Service Desk. Such 'Managed' customers are universally available in all integrated modules (Endpoint Manager, Quote Manager etc).
 - Login to ITarian > Click 'Management' > 'Customer' to add and manage customers in ITarian
- Alternatively, you can create 'standalone' (aka 'unmanaged') customers in Service Desk. Customers added via Service Desk are not available in ITarian or other modules. You can add such standalone customers to ITarian later to convert them to fully managed.
- This article explains how to add and manage stand-alone customers in [Service Desk](#).

Use the links below to jump to the area you need help with:

- [The customer interface](#)
- [Add a customer](#)
- [Manage customer details](#)
- [Manage users of a customer](#)
- [Manage forms](#)
- [Manage tickets](#)
- [Manage notes](#)
- [View customer contracts](#)
- [Remove unmanaged customers](#)
- [Export customer list](#)

The customer interface

- Login to ITarian
- Click 'Applications' > 'Service Desk'
- Open the staff panel (See the last link on the left)
- Click 'Users' > 'Customers'



- **Customer ID** - The identity number assigned to the customer by Service Desk.
- **Name** - The organization or company that is your customer.
 - Click the name of a customer to open their details interface. The customer details interface lets you:

[Manage customer details](#)

[Add and manage users of the customer](#)

[Manage forms for the customer](#)

[View and manage tickets](#)

[Manage notes](#)

[View customer contracts](#)

- **Users** - Number of Service Desk users belonging to the customer company.
- **Created** - The date on which the customer was added to Service Desk.
- **Updated** - Date and time at which the customer details were most recently updated.

Add a customer

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'Customers'
- Click 'Add New Customer' at the top

Customers

+ Add New Customer

Export to CSV

Delete

Search...

CUSTOMER ID	NAME	USERS	CREATED
1	frontfork	1	04/30/2018 1:55 pm

Add New Customer

Complete the form below to add a new customer.

Create New Customer: Details on customer.

Name: *

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

Cancel

Reset

Add Customer

- **Name:** Enter a label for the customer company.
- **Web Domain:** Enter the domain that the customer uses for employee email. For example, enter 'example.com' if the customer's employees have email addresses like alice@example.com.

Service Desk creates two new users with email addresses in this domain - 'Monitor Agent' and 'Patch Management Agent'. These accounts are used to receive automatically generated tickets from

Endpoint Manager.

They also assign to the customer any guests who submit tickets from an email at their domain.

- **Address and Phone:** Contact details of the company.
- **Website:** URL of the customer's public-facing / marketing website.
- **Internal Notes:** Enter any comments about the customer.

Note: You can change the field labels of this form in 'Admin Panel' > 'Manage' > 'Forms' > 'Customer Information'.

- Click 'Add Customer'
- The customer is added and their details interface opens:



Military Road Cyclists

Military Road Cyclists More ▾

Name: [Military Road Cyclists](#) Created: 02/18/2020 9:52 am
Account Manager: Updated: 02/18/2020 9:52 am

Users Tickets Notes Contracts

[+ Add User](#) [+ Import](#) [Remove](#)

<input type="checkbox"/>	NAME ⇅	STATUS ⇅	EMAIL ⇅	CREATED ⇅	UPDATED ⇅
<input type="checkbox"/>	Monitor Agent  (0)	Guest	agent.monitor@militaryroadcyclists.com	02/18/2020 9:52 am	02/18/2020 9:52 am
<input type="checkbox"/>	Patch Management Agent  (0)	Guest	agent.patchmanagement@militaryroadcyclists.com	02/18/2020 9:52 am	02/18/2020 9:52 am

« Prev 1 Next »

Two new users and email ids are automatically created - the Monitor Agent and the Patch Agent. The email IDs of these two agents are used to collect tickets which have been auto-submitted to service desk by other ITarian modules.

Next: [Manage Details of a customer.](#)

- Customers added via this interface are available in Service Desk alone and are not listed in the ITarian interface.

- Staff can assign users to these customers and can access the customers' tickets and contracts. Staff members can also add customers from the 'User Directory' interface

Manage customer details

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of the customer to open its details interface.

The details interface lets you view and update both managed and non-managed customers.

- **'Managed' customers** - Those added through the ITarian console. Managed customers are available for selection in all Comodo One modules, including Endpoint Manager and CRM.
- **'Non-Managed' customers** - Those added directly via the Service Desk interface. These customers are only available in Service Desk.

You can also configure:

- The default email account for outgoing mails sent on behalf of the customer.
- The account manager responsible for the customer
- Ticket auto-assignment rules and more.

View and manage customer details

- Open the staff panel (see the last link on the left)
- Click 'Users' > 'Customers'
- Click the name of the customer company to open its details interface.
- Click the name of the company in the details interface to open its configuration interface

Kanchi Idly Steamer

Kanchi Idly Steamer

More ▾

Name: [Kanchi Idly Steamer](#)

Created: 02/25/2019 5:11 pm

Account Manager:

Updated: 02/25/2019 5:11 pm

Kanchi Idly Steamer

Fields

Settings

Customer Information: Details on customer.

Name: * Kanchi Idly Steamer

Web Domain: * kanchiidlysteamer.com

Address: Periyar Nagar

Phone: 0987654321

Ext:

Website: www.kanchiidlysteamer.com

Internal Notes:

Cancel

Reset

Update Customer

The configuration interface has two tabs:

- **Fields** - View and edit general customer details.
- **Settings** - View and edit advanced details like outgoing email, account admin, auto-assignment rules, and more.

The 'Fields' tab

- The fields tab shows general details of the customer and allows you to edit them as required.
- If required, you can create custom form fields for the customer. Click 'Admin Panel' > 'Manage tab' > 'Forms' > 'Add Custom Form' to create a new form

Kanchi Idly Steamer

Fields | **Settings**

Customer Information: Details on customer.

Name: * Kanchi Idly Steamer

Web Domain: * kanchiidlysteamer.com

Address: Periyar Nagar

Phone: 0987654321 Ext:

Website: www.kanchiidlysteamer.com

Internal Notes:

Cancel Reset **Update Customer**

Edit the details as required.

Name - The company added as customer to service desk. You cannot edit the name from here.

Web Domain - The domain used for email by your customer.

- Service Desk creates two new users - 'Monitor Agent' and 'Patch Management Agent' - with email addresses at this domain. These accounts are used to receive automatically generated tickets from Endpoint Manager.
- They are also used to assign to your customer any guests who submit tickets from an email address at this domain.
- You can change the domain name if required

Address and Phone - The contact details of the customer. You can change these details as required.

Website - The URL of the company's website. You can change the website details if required.

Internal Notes - Enter any comments about the customer.

Type - Indicates whether the customer is 'managed' (added through ITarian) or 'non-managed' (stand-alone customer added through Service Desk)

The 'Settings' tab

Kanchi Idly Steamer

Fields **Settings**

Available Outgoing Email Address:

Default Outgoing Email Address:

Account Manager:

Auto-Assignment: Assign tickets from this customer to the *Account Manager*

Primary Contacts:

Automated Collaboration:

Available Outgoing Email Address - Shows all addresses added which are capable of sending outgoing mail.

- You can configure these email addresses in 'Admin Panel' > 'Emails' > 'Emails'.

Default Outgoing Email Address - Select the address you want to use to send emails (ticket responses) to users who belong to this customer.

Account Manager - The drop-down shows all admins and staff added to service desk. Choose the account manager responsible for the customer.

Auto Assignment - Choose whether or not tickets created by users of the customer are automatically

assigned to the account manager.

Primary Contacts - Select the person with whom your staff can liaise on issues.

Automated Collaborations - Collaborators receive copies of all communications between staff and users during the progress of a ticket. Collaborators can respond to communications.

- **Primary Contacts** – Add collaborators from the contact list.
- **Customer Members** – Add collaborators from users who belong to the customer.

Main Domain

- **Auto Add Members From:** Guests are auto-assigned to a customer if the email address they used to submit a ticket matches any domain in this field.

Click 'Update Customer' for your settings to take effect.

Manage users of a customer

Click 'Staff Panel' > 'Users' > 'Customers' > click on a customer name > Open the 'Users' tab

- The users tab lets you add or remove users for customers

Add users to a customer

There are two places you can add users to a customer:

1. The 'User Directory' area

- Click 'Staff Panel' > 'Users' > 'User Directory'
- Click on a user name to open their details
- Click 'Add Customer'
- See [this wiki](#) if you need more help with this.

2. The 'Customers' area

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click on a customer name
- Open the 'Users' tab and click 'Add User'
- Alternatively, click 'Import' to import users from a .csv file

The rest of this section explains option 2 above in more detail.

- [Manually add users to a customer](#)
- [Import users from a list](#)
- [Remove users from a customer](#)

Manually add users to a customer

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Users' tab to view a list of users belonging to the customer
- Click the 'Add User' link:

Kanchi Idly Steamer

Kanchi Idly Steamer

Name: [Kanchi Idly Steamer](#)

Account Manager: frontfork


Users

Tickets

Notes

Contracts

[+ Add User](#) [+ Import](#) [Remove](#)

<input type="checkbox"/>	NAME	STATUS	EMAIL
<input type="checkbox"/>	Monitor Agent  (0)	Guest	agent.monitor@kanchiidlys

Add User

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

Register with Default Settings
Default timezone: GMT 5:30 - Asia/Calcutta

[Cancel](#) [Reset](#) [Add User](#)

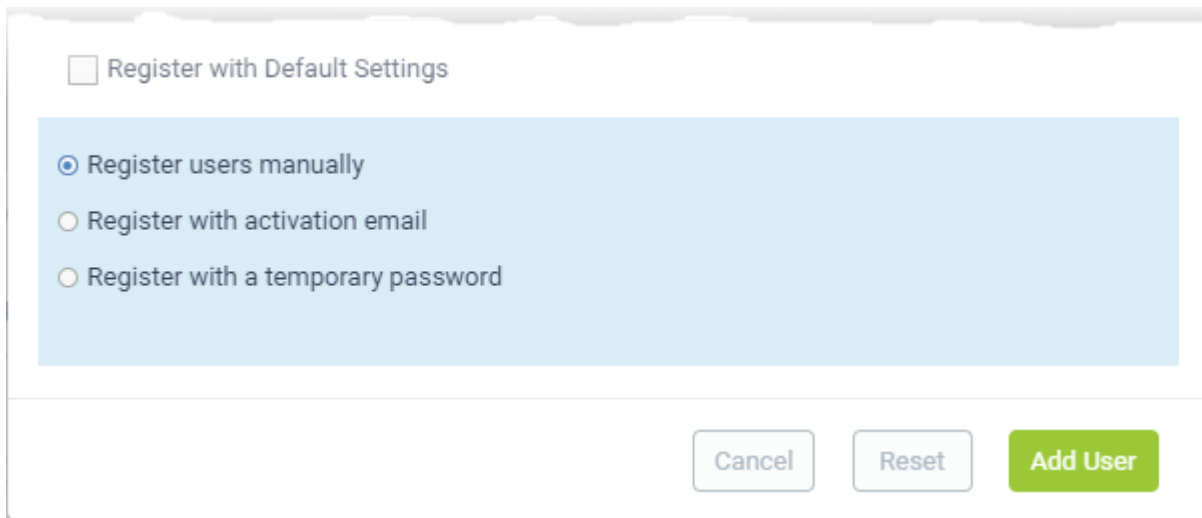
- Tip. You can configure the fields in the form above in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'.

Complete the details of the new user.

- **Email Address:** Contact mail address. This doubles-up as their username to login to your support portal.
- **Full Name:** First name and last name of the user.
- **Phone Number:** The contact number of the user.
- **Internal Notes:** Enter any comments about the user.
- **Register with Default Settings** - Select whether the registration should use the settings in 'Admin Panel' > 'Settings' > 'Users'

Admins can configure how new user accounts are registered in 'Admin Panel' > 'Settings' > 'Users'. See [this wiki](#) for more details.

- Leave selected if you want to use the default settings.
- Deselect to choose a different registration method.



The screenshot shows a form for configuring user registration. At the top, there is a checkbox labeled "Register with Default Settings" which is currently unchecked. Below this, there is a light blue shaded area containing three radio button options: "Register users manually" (which is selected), "Register with activation email", and "Register with a temporary password". At the bottom of the form, there are three buttons: "Cancel", "Reset", and "Add User".

- **Register users manually** - The user is initially added a guest and needs to be manually registered afterwards. You can register a guest as follows:
 - Click 'Users' > 'User Directory' > click on the name of the guest > Click the 'Register' button
 - See [this wiki](#) if you need help
- **Register with activation email** - The user is initially added as a guest and sent a mail which contains a link to register their account.
 - The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.

- **Register with a temporary password** - Create a temporary account password which registers the user immediately.

You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.

- **'Require password change on first login'** - Forces the user to create a new password after logging in for the first time (recommended).

- **Default User Timezone** - Select the time zone to which the user belongs

Click 'Add User'. The user is added to Service Desk and assigned to the customer company. Repeat the process to add more users.

Import users to a customer

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Users' tab
- Click the 'Import' link at the top:

Kanchi Idly Steamer

Kanchi Idly Steamer

Name: [Kanchi Idly Steamer](#)

Account Manager: frontfork


Users

Tickets

Notes

Contracts

[+ Add User](#) [+ Import](#) [Remove](#)

<input type="checkbox"/>	NAME	STATUS	EMAIL
<input type="checkbox"/>	Monitor Agent  (0)	Guest	agent.monitor@kanchidly-

Import Users

Copy Paste | **Upload**

Name and Email
Enter one name and email address per line. *To import more other fields, use the Upload tab.*

e.g. John Doe, john.doe@your-server.com

[Cancel](#) [Reset](#) [Import Users](#)

There are two ways to import users:

1. **Copy Paste** - Import users with name and email address only.

- Enter the user's full name, followed by a comma, then their email address.
- Add more users in subsequent lines.
- Click 'Import Users' to add the users as guests.

2. **Upload** - Import users from a .csv file. More details can be added about a user with this method.

- Create a .csv file of users that you want to import. The file should have the following column headers:

Email,Name,Phone,Notes,Customer ID

Note: Customer ID is mandatory to import users to the correct company. You can view the customer's ID at 'Staff Panel' > 'Users' > 'Customers'.

- Each line should contain the contact information of a single user
- Save the .csv, then click 'Choose file' to upload the file to Service Desk:

Import Users

Copy Paste **Upload**

Import a CSV File

Use the columns shown in the table below. To add more fields, visit the Admin Panel -> Manage -> Forms -> Contact Information page to edit the available fields. Only fields with `variable` defined can be imported.

[Example CSV File](#)

Email	Name	Phone	Notes	Organization ID (Optional)
john.doe@your-server.com	John Doe			

No file chosen

- Click 'Import Users'. The users will be added to Service Desk and assigned to the customer company.
- Depending on your settings, imported users will be added as guests, or their account activation started.

You can configure default registration settings in 'Admin Panel' > 'Settings' > 'Users'.

See [this wiki](#) if you need help with this

Remove users from a company

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Users' tab to view users who belong to the customer
- Select the users you want to delete and click the 'Remove' button

The screenshot shows a user management interface with a table of users. The 'Users' tab is selected and circled in red. Below the tabs are buttons for '+ Add User', '+ Import', and 'Remove' (with a trash icon), also circled in red. A table lists users with columns for selection, name, status, and email. The 'Dennis' and 'John' rows are selected, with their checkboxes circled in red. A red arrow points from the 'Remove' button to a 'Please Confirm' dialog box. The dialog asks: 'Are you sure want to REMOVE selected user from Kanchi Idly Steamer customer?' and has 'No, Cancel' and 'Yes, Do it!' buttons.

<input type="checkbox"/>	NAME ↕	STATUS ↕	EMAIL ↕
<input type="checkbox"/>	Monitor Agent (0)	Guest	agent.monitor@kanchiidlysteamer.com
<input type="checkbox"/>	Patch Management Agent (0)	Guest	agent.patchmanagement@kanc
<input checked="" type="checkbox"/>	Dennis (0)	Guest	dennis@kanchiidlysteamer.com
<input checked="" type="checkbox"/>	John (0)	Guest	john@kanchiidlysteamer.com
<input type="checkbox"/>	Joe (0)	Guest	joe@kanchiidlysteamer.com

Please Confirm ✕

Are you sure want to **REMOVE** selected user from **Kanchi Idly Steamer** customer?

- Click 'Yes, Do it' in the confirmation dialogue to remove the user.

- The user will not be able to login to the web portal and generate tickets.

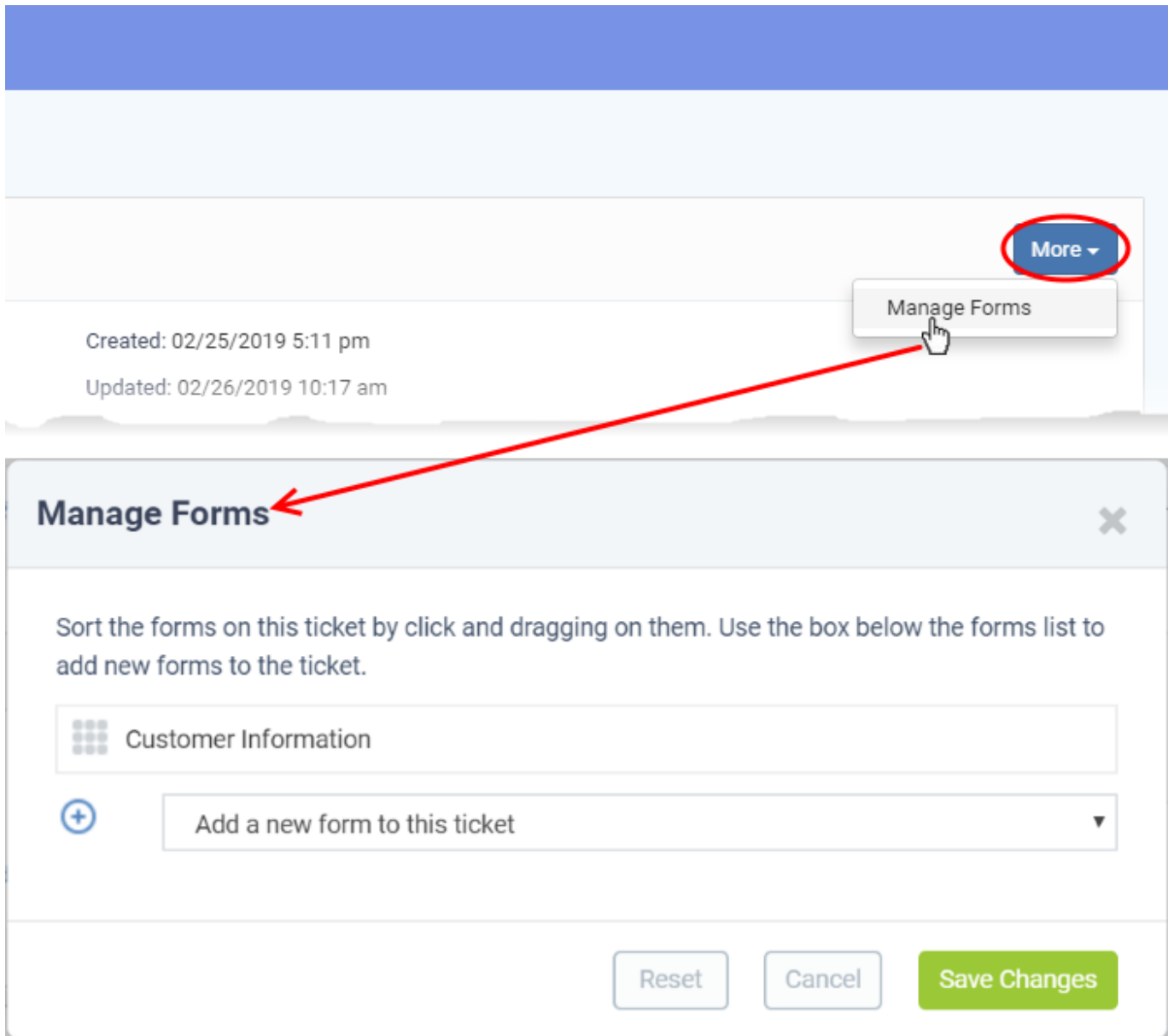
Manage forms

You can add extra fields to a customer's detail page so you can include more information about them.

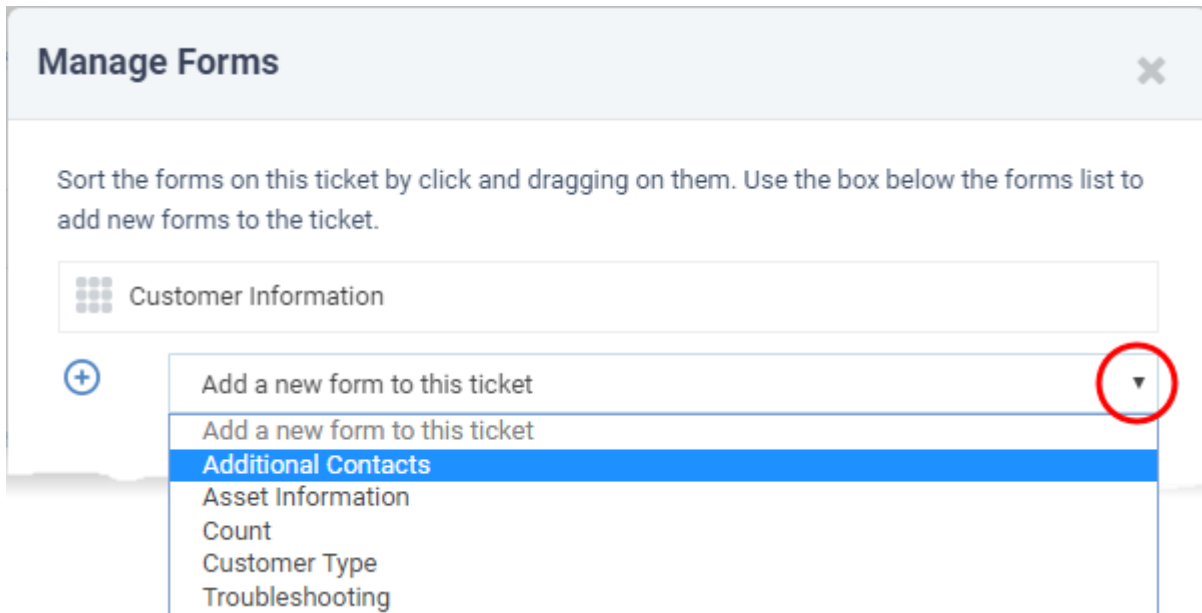
- **Prerequisite** - You must first create a custom form in 'Admin Panel' > 'Manage' > 'Forms' > 'Add New Custom Form'.
- A 'form' can be as little as a single field or can have multiple fields.
- For example, you might create a form for a customer's Tax ID number, or a larger form for each of the company's 'C' level executives.
- Once created, you can add these additional forms to any customer detail page.

Add additional details about a customer

- Click 'Users' > 'Customers'
- Click the name of a customer to open its details interface
- Click the 'More' button at top-right and choose 'Manage Forms'



- The drop-down contains all forms created in 'Admin Panel' > 'Manage' > 'Forms'
- Select the form you want to add from the drop-down.



- Repeat the process to add more forms
- Drag-and-drop the forms to choose the order in which they appear on the details page.
- Click the 'Save Changes' button.

Admins and staff can complete the additional fields at any time:

- Click 'Users' > 'Customers'
- Click the name of the customer to open its details page
- The new forms appear as configured:

Kanchi Idly Steamer

✕

Fields Settings

Customer Information: Details on customer.

Name: * Kanchi Idly Steamer

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

Additional Contacts :

Overseas contact number:

Man power Agent Contact:

Type: Non-managed

Cancel Reset Update Customer

- Complete the form and click the 'Update Customer' button at the bottom.

Manage tickets

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface

- Click the 'Tickets' tab to view a list of tickets generated by users belonging to the customer

Service Desk > Users > Customers

Kanchi Idly Steamer

Kanchi Idly Steamer More ▾

Name: [Kanchi Idly Steamer](#) Created: 02/25/2019 5:11 pm
 Account Manager: frontfork Updated: 02/26/2019 10:17 am

Users **Tickets** Notes Contracts

TICKET ▾	LAST UPDATE DATE ↕	STATUS ▾	SUBJECT ▾	ASSIGNED TO ▾
1112	02/26/2019 3:13 pm	Open	System restarts frequently	frontfork
1111	02/26/2019 1:37 pm	Open	Quote for cooling pad	frontfork

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- **Ticket:** The number assigned to the ticket.
 - Click the ticket number to open its details screen. See [this wiki](#) for help with ticket actions.
 - Place your mouse over a ticket number to see a preview of the ticket
- **Last Update Date:** The date and time of the most recent activity on the ticket.
- **Status:** Whether the ticket is open, closed, overdue or paused.
- **Subject:** An outline of the issue. This is entered in the 'Issue Summary' field in the web portal by the user.
- **Assigned To:** The name of the staff member to whom the ticket is allotted.

Manage notes

The 'Notes' feature lets you add general comments about a customer. Notes are internal, so they are only visible to staff members.

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface

- Click the 'Notes' tab

Service Desk > Users > Customers

Kanchi Idly Steamer

Kanchi Idly Steamer More ▾

Name: [Kanchi Idly Steamer](#) Created: 02/25/2019 5:11 pm
 Account Manager: frontfork Updated: 02/26/2019 10:17 am

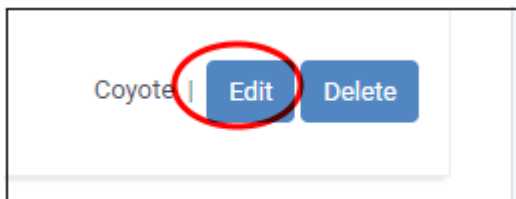
Users Tickets **Notes** Contracts

02/26/2019 3:24 pm frontfork | Edit Delete
 The customer has many users to be enrolled

02/26/2019 3:25 pm frontfork | Edit Delete
 The customer expanded their network

[+ Click to create a new note](#)

- Click the 'Click to create a new note' link, enter the required content and then click the 'Create' button at the bottom to add a new note.
- Click the 'Edit' button at the far end. to view / edit a note.



- Click the 'Save' button to save an edited note. Click 'Undo' to revert your changes.



View customer contracts

Service Contract

- Service contracts are created in 'Admin Panel' > 'Finance' > 'Contracts'
- A service contract between you and a customer can include:
 - A fee which is charged weekly/bi-weekly/monthly, or annually
 - Pre-paid hours for different types of support work ('On-site', 'Remote' and 'Telephone'). These hours are 'included in the fee' and are not charged to the customer.
- A charging plan for time that exceeds the pre-paid hours (optional). The charging plan includes:
 - Variable rates for specific types of service (optional).
 - A 'default' hourly rate which is applied to sessions not covered by a variable rate.
 - Charging plans are only applied after any pre-paid hours have been used up.
 - If no custom charging plan is applied then the default charging plan is used. The default plan is simply a list of prices that you charge for work on specific asset types (servers, workstations, printers etc). You can manage the default plan at 'Admin Panel' > 'Manage' > 'Charging'.
- See [this wiki](#) to read more about contracts.

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Contracts' tab

Kanchi Idly Steamer

Kanchi Idly Steamer

More ▾

Name: [Kanchi Idly Steamer](#)

Created: 02/25/2019 5:11 pm

Account Manager: frontfork

Updated: 02/26/2019 10:17 am

Users

Tickets

Notes

Contracts

 Remove

Showing 1 - 2 of 2

<input type="checkbox"/>	CONTRACT NAME ↕	TICKETS COUNT ↕	PREPAID HOURS ↕	RELATED BILLABLE HOURS (SUM) ↕	REMAIN BILLABLE HOURS (SUM) ↕
<input type="checkbox"/>	Small Scale Food Industries 2019-2020	0	60	0	60
<input checked="" type="checkbox"/>	Small Scale Food Industries 2020-2021	0	120	0	120

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- **Contract Name:** The label of the contract created for the customer.
- **Ticket Count:** Number of tickets associated with the customer.
- **Pre-paid Hours:** The number of hours covered by the fee mentioned in the contract.
- **Related Billable Hours (Sum):** Total chargeable hours spent by staff working on tickets for the customer on all three service types (Onsite, Remote and Telephone).
- **Remaining Billable Hours (Sum):** Amount of hours left of the customer's total pre-paid hours.

Remove Unmanaged customers

- Customers added via ITarian are known as 'Managed' customers. They are automatically imported into Service Desk and cannot be removed. This is because they also appear in other products like Endpoint Manager.
- Customers added via the Service Desk interface are known as 'Unmanaged' customers. You can remove unmanaged customers because they only exist in Service Desk and not in other products.
- You can only remove unmanaged customers that have no enrolled users. You need to delete all users from the customer before you can remove the customer itself.

Remove customers

- Click 'Staff Panel' > 'Users' > 'Customers'
- Select the customer you want to remove

Reminder: You must remove all users from a customer before you can remove the customer itself.

- Click 'Delete' at the top.

The screenshot shows the 'Customers' page in a Service Desk interface. At the top, there is a breadcrumb trail: 'Service Desk > Users > Customers'. Below this, the page title 'Customers' is displayed. There are three main action buttons: '+ Add New Customer', 'Export to CSV', and 'Delete'. The 'Delete' button is circled in red. Below the buttons is a search bar labeled 'Search...'. A table of customers is shown with columns: 'CUSTOMER ID', 'NAME', 'USERS', and 'CREATED'. The table has three rows. The second row, with 'CUSTOMER ID' 2 and 'NAME' 'Saddle and Pedals', is highlighted in blue. A red circle is drawn around the checkbox in the first column of this row. A red arrow points from the 'Delete' button to a confirmation dialog box. The dialog box has a title 'Please Confirm' and a close button 'X'. The text inside the dialog asks 'Are you sure you want to DELETE selected customer(s)?' and includes a warning: 'Deleted tickets CANNOT be recovered, including any associated data.' At the bottom of the dialog are two buttons: 'No, Cancel' and 'Yes, Do it!'.

<input type="checkbox"/>	CUSTOMER ID	NAME	USERS	CREATED
<input type="checkbox"/>	1	front fork	1	04/30/2018 1:55 pm
<input checked="" type="checkbox"/>	2	Saddle and Pedals	0	07/31/2018 10:41 am
<input type="checkbox"/>	3	Fork Springs Regional Transports	3	09/18/2018 4:47 pm

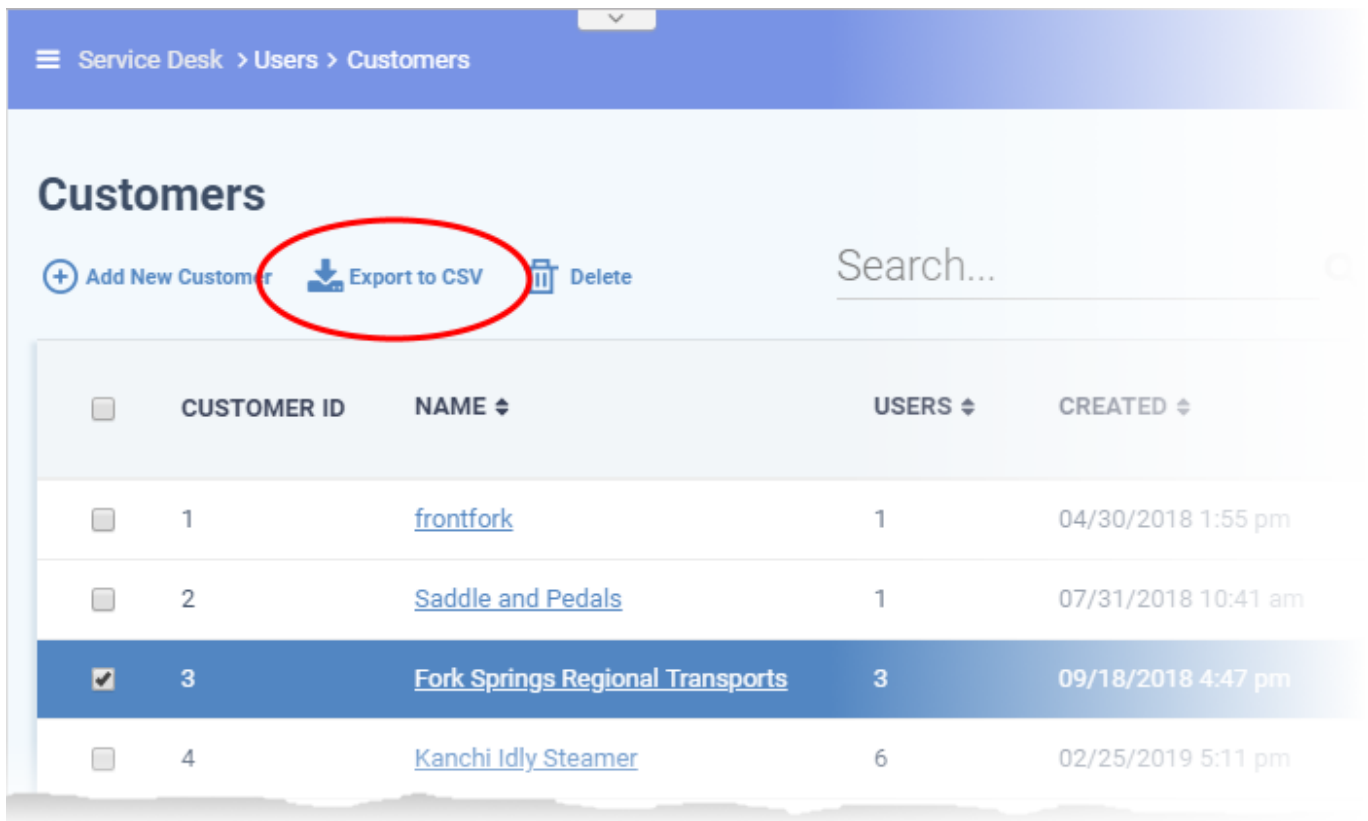
- Click 'Yes, Do it!' in the confirmation dialog

Export customer list

You can generate a report on customers (managed and unmanaged) as follows:

- Open the staff panel (See the last link on the left)

- Click 'Users' > 'Customers'
- Click 'Export to CSV':



Service Desk > Users > Customers

Customers

[+ Add New Customer](#) [↓ Export to CSV](#) [🗑 Delete](#)

<input type="checkbox"/>	CUSTOMER ID	NAME ↕	USERS ↕	CREATED ↕
<input type="checkbox"/>	1	frontfork	1	04/30/2018 1:55 pm
<input type="checkbox"/>	2	Saddle and Pedals	1	07/31/2018 10:41 am
<input checked="" type="checkbox"/>	3	Fork Springs Regional Transports	3	09/18/2018 4:47 pm
<input type="checkbox"/>	4	Kanchi Idly Steamer	6	02/25/2019 5:11 pm

.csv files are best viewed in spreadsheet applications like Microsoft Excel and OpenOffice Calc.