

ManageEngine

SupportCenter Plus

Getting started with SupportCenter Plus

Quick Start Guide



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Introduction to SupportCenter Plus

SupportCenter Plus is a comprehensive customer support application with capabilities like request management, solution management, account management, contact management, contract management, billing, and reports.

SupportCenter Plus is available in more than 15 languages, including Chinese (Simplified and Traditional), Danish, Dutch, English, French, German, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Portugal and Brazil), Spanish, Swedish, and Russian.

For the updated list of supported languages, [click here](#).

This quick start guide allows you to set up and use SupportCenter Plus with minimal configurations.

Basic and Essential Configurations

Mail Server Settings

The mail server settings in SupportCenter Plus allow you to configure inbound and outbound email service. This configuration is required to provide customer support for each of the individual product offering divisions.

To configure a mail server, go to **Admin > Main Settings > Mail Server Settings**.

Configuring Settings for Incoming Emails

1. Go to the **Incoming** tab.
2. Select your preferred protocol: POP, POPS, IMAP, IMAPS, or EWS.
3. Choose the authentication type: **Basic** or **OAuth**. To learn more about OAuth configuration, [click here](#).
4. Enter server name/IP address, username, password, and list of email addresses.
5. Set port number and frequency of fetching mails in minutes.
6. Finally, click **Save**.

The screenshot shows the 'Incoming' tab of the Mail Server Settings configuration page. At the top, there are tabs for 'Incoming', 'Outgoing', 'Spam Filter', 'E-mail Command', and 'Deliverer'. A blue banner at the top reads: 'Create a separate mail account and an alias for this email ID because all messages for this account in the server will be deleted after the mails are fetched.' Below this, the 'Connection Protocol' is set to 'POP / IMAP / POPS / IMAPS' (selected with a radio button), with 'EWS (Exchange Web Services)' as an alternative. The 'Authentication Type' is set to 'Basic'. The 'Server Name / IP Address', 'Username', and 'Password' fields are empty. The 'Email Address' field contains a list of email addresses. The 'Protocol' is set to 'POP' and the 'Port' is '110'. There is a 'Check your mail server connectivity' section with a 'Fetch a sample mail' button. At the bottom, 'Fetch mails every' is set to '1' minute, with 'Enable Email Debug' and 'Disable new request creation by email' as checkboxes. A 'Save' button is at the bottom right.

Note: You can also enable email debugging and disable request creation via email using the appropriate check boxes.

Configuring Settings for Outgoing Emails

1. Go to the **Outgoing** tab.
2. Select your preferred protocol: SMTP, SMTPS, or EWS.
3. Choose authentication type: **Basic** or **OAuth**. To learn more about OAuth configuration, [click here](#).
4. Enter server name/IP address, alternate server name/IP address, sender name, and reply to email ID.
5. Set port number and provide authentication details (user name and password) if applicable.
6. Finally, click **Save**.

The screenshot shows the 'Outgoing' configuration page. At the top, there are tabs for 'Incoming', 'Outgoing', 'Spam Filter', 'E-mail Command', and 'Delimiter'. The 'Outgoing' tab is active. Below the tabs, there are two radio buttons for 'Connection Protocol': 'SMTP / SMTPS' (selected) and 'EWS (Exchange Web Services)'. Under 'SMTP / SMTPS', there is a dropdown for 'Authentication Type' set to 'Basic'. Below that are input fields for 'Server Name / IP Address', 'Alternate Server Name / IP Address', 'Sender Name', and 'Reply to'. There is a dropdown for 'Protocol' set to 'SMTP'. Below that are radio buttons for 'TLS Enabled' set to 'No'. There is an input field for 'Port' set to '25'. Below that is a checkbox for 'Requires Authentication' which is unchecked. Below that are input fields for 'Username' and 'Password'. On the right side, there is a section titled 'Check your mail server connectivity' with an input field for 'Email Address' and a 'Send a sample mail' button.

Note: Make sure you enable TLS and/or proxy server to add additional security before saving.

Configuring Spam Filter

1. Go to the **Spam Filter** tab.
2. Define filtering rules by selecting email fields, conditions, and values. You can add multiple rules.
3. Choose either **Match ALL of the following (AND)** or **Match ANY of the following (OR)**
4. Finally, click **Save**.

Incoming Outgoing **Spam Filter** E-mail Command Delimiter

E-mails matching the below conditions will be dropped and no new requests will be created out of them.

When a new mail arrives :

Define rule
 --- Select Criteria --- ----- Conditions -----

Match the below criteria Match ALL of the following (AND) Match ANY of the following (OR)

	Rule
<input type="checkbox"/> <input type="checkbox"/>	Sender does not contain "zyiker.com"

Note:

To delete a rule, click **Delete**, and confirm your action.

To edit a rule, click **Edit** beside the rule, make necessary changes, and click **Save**.

Organizational Configurations

Organizational Details

You can add your organization details such as name, address, and logo to SupportCenter Plus.

To do this

1. Go to **Admin > Organizational Details > Organizational Details** (in single-portal setups) or go to **Global Settings > Organizational Details** (in multi-portal setups).
2. Fill in the required details such as name, address, contact details, and add a custom logo.
3. Finally, click **Save**.

Organization Details

Name

Description

Address

Address

City

Postal Code

State

Country/Region

Contact Information

E-mail ID


Phone No.

Fax No.

Web URL

Company Logo

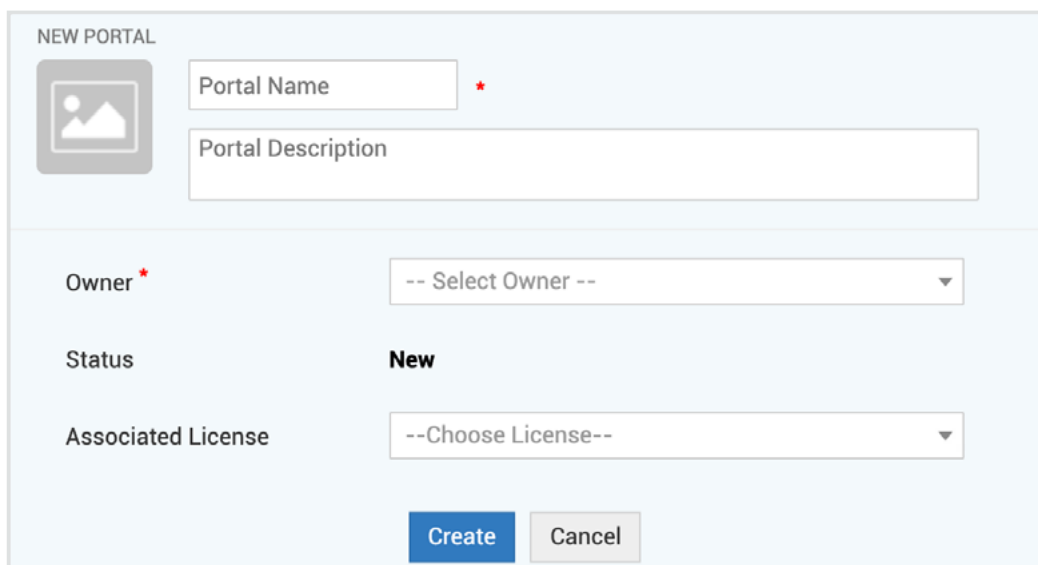
Show & use this Image



Portals

Portals are used to manage your business verticals independently. By default, the application is configured with only one portal.

1. Click Global Settings and then click Add Portal.
2. Now, provide details such as portal name, portal description, select portal owner, and add license.
3. Finally, click Create.



NEW PORTAL

*

Owner *

Status **New**


Associated License

Support reps, support groups, roles, account managers

Add Support Reps

1. Go to Admin > Users > Support Reps (to add portal-specific support reps) or go to Global settings > User Management > Users (to add support reps across portals).
2. Click Add New.
3. In the new support rep form, provide details such as name, display name, login details, etc.
4. Finally, click Save.

← **New Support Rep**



*** Display Name**

Mobile

Oppurtunity

Primary Email

Secondary Email ID(s)

Import Support Reps

You can also add support reps in bulk by importing them from CSV or Active Directory.

To import from CSV,

1. Go to **Global Settings > User Management > Support Reps**.
2. Click the down-arrow beside the New button and select **Import from CSV**.
3. In the import wizard, select the file and click **Submit**.
4. Map the field names with the column names in CSV and click **Import**.

Customize Mapping * Mandatory Field

The column headers in the csv file are displayed in the drop down boxes. Kindly choose the appropriate column header for the fields below.

All the date fields in the csv file should be in the same format. Kindly choose the data format required for the date fields :

i Local authentication password policy is configured under Security Settings. You can verify the user's password in a CSV file.

Personal Details

Display Name*

First Name

Middle Name

Last Name

Employee ID

Contact Information

E-mail

- First e-mail will be primary.
- E-mail duplicates will be discarded automatically.

Phone

Mobile

Department Details

Job title

Self-Service Access Details

Provide self-service login details here

Login Name* [Used to identify user uniquely]

Password*

Domain Name

To import from Active Directory,

1. Go to **Global Settings > User Management > Active Directory**.
2. Click **Import Users**.
3. In the pop-up that appears, provide **details** such as domain name, domain controller, login name, and password and select the required fields to be imported.
4. Finally, click **Import**.

Import from Active Directory

Please Note:

1. On importing, existing data will be overwritten and new data will be added.
2. The application is currently not configured to e-mail users on Self-service login details. This can be enabled from Notification Rules under General Settings in the Global Settings.
3. On Importing, Users deleted in Active Directory will be identified for admin to take further action. This configuration can be changed from Global Settings-> Active Directory page

• Mandatory Field

• Domain Name

• Domain Controller

• Login Name

• Password

Select fields for import

<input checked="" type="checkbox"/> Phone	<input type="text" value="telephoneNuml"/>	<input checked="" type="checkbox"/> Mobile	<input type="text" value="mobile"/>
<input checked="" type="checkbox"/> Job title	<input type="text" value="title"/>	<input checked="" type="checkbox"/> E-mail	<input type="text" value="mail"/>



For importing support reps from active directory periodically, [click here](#).
 For importing support reps from other portals, [click here](#).

Support Groups

Support reps with the same area of expertise can be grouped into various support groups. You can configure custom groups as per your requirements.

Add Support Groups

To add a new support group,

1. Go to **Admin > Users > Support Groups**.
2. Click **Add New Group**.
3. Provide the necessary details.
4. Finally, click **Save**.

Add New Group

• Name

Description

• Support Reps

Available Support Reps

John
Alice
Bob

Support Reps interested in this group

Send notification to group Support Rep(s) when a new request is added to this group

Send notification to support rep(s) when a request in this group is left unpicked.

Send notification to group support rep(s) when a request in this group is updated.

Group Mail Settings

! You can configure Group e-mail ID(s) and/or Sender Name and e-mail for this support group here. Multiple group e-mail IDs should be unique and separated with comma or semi-colon. Group e-mail ID specified here should be aliased with the Mail Account specified in Incoming Mail Server settings.

Group E-mail

Sender Name

Sender's e-mail

Save **Cancel**

Assign Roles

Support reps can be assigned to different roles to configure access permissions. There are three default roles and you can also create a new role with custom permissions.

The default roles and their typical usage are listed as follows.

- **SDAdmin:** This role is given to the administrator. Besides access to all modules in the application, the administrator has sole access to the Admin module, which is the key to operating the application.
- **SDCo-ordinator:** This role provides access to the Requests module and allows users to perform actions such as creating requests, editing, deleting, and any other actions over the requests. Users with this role can also access the Support Rep Availability Chart.
- **SDReport:** This role provides permission to create and schedule survey reports alone. When combined with another role, the support reps can access reports based on modules enabled in the other role.

To create a new role,

1. Go to Admin > Users > Roles.
2. Click Add New Role.
3. Provide necessary details and configure access permissions as required.
4. Finally, click Save..

← Add Role

• Role Name

Description

• Permissions

	Complete Access	View	Add	Edit	Delete
Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Advanced Permissions

Requests

<input type="checkbox"/> Add	<input type="checkbox"/> Adding/Editing Request Task	<input type="checkbox"/> Adding Contact
<input type="checkbox"/> Edit	<input type="checkbox"/> Resolving Request	<input type="checkbox"/> Allow Stop Timer
	<input type="checkbox"/> Closing Request	<input type="checkbox"/> Modifying Due Time
	<input type="checkbox"/> Reopening Request	<input type="checkbox"/> Assigning Support Rep
	<input type="checkbox"/> Editing closed Requests	<input type="checkbox"/> Adding Approvals
<input type="checkbox"/> Delete	<input type="checkbox"/> Editing/Deleting Others Notes	<input type="checkbox"/> Editing/Deleting others Time Entry
	<input type="checkbox"/> Editing/Deleting own notes	<input type="checkbox"/> Deleting Request Task

Allow support rep to share request

Allow task support rep to access request

Allow support reps in task group to access request

Allow support rep to move request

Products

Adding New Product Type

Reports

Create Query Report

Allow support rep to view
 All
 All in group & Assigned to Support Rep [Requests only]
 Assigned to Support Rep [Requests only]

Allow support rep to approve solution Support Rep allowed to View all Solutions

Allow Support Rep to modify unknown contact

Allow support rep to view maps

Account Managers

Account managers are users who are responsible for managing customer accounts and keep them up to date. Account managers can view all requests raised in their associated account and can coordinate with support reps to ensure quicker resolution.

To configure an account manager,

1. Go to **Admin > Users > Account Managers**.
2. Click **New**.
3. Provide the **details** as required such as name, employee ID, primary email, phone, etc.
4. Click **Save**.

New Account Manager ×

* Name	<input type="text"/>
Employee ID	<input type="text"/>
Primary Email	<input type="text"/>
Phone	<input type="text"/>
Mobile	<input type="text"/>
Login Name	<input type="text"/>
Password	<input type="password"/>
Retype Password	<input type="password"/>

Accounts

Accounts are used to manage all customer information in a single place. The Accounts module lets you manage transactional information, such as business details, associated contacts, requests, and tasks, and non-transactional information, such as sales, products, contracts, and billing. Accounts can also have sub-accounts. To learn more, [click here](#).

Add Accounts

To add a new account,

1. Go to **Accounts**.
2. Click **New**.
3. Provide the necessary account **details** as required.
4. Finally, click **Add**

The screenshot shows the 'Add Account' form with the following fields and sections:

- Account Name:** Account Name (text), Domain Name (text with search icon), Description (text area).
- ACCOUNT ATTRIBUTES:** Opportunity (dropdown, value: New), Customer Type (dropdown, value: Chill).
- ADDRESS:** Address (text), Landmark (text), Postal Code (text), State (text), Country/Region (dropdown).
- CONTACT INFORMATION:** E-mail ID (text), Phone No. (text), Fax No. (text), Web URL (text).
- Attachments:** Add New (button).
- Global Attachments:** Add New (button).
- Footer:** Add (button), Save and Add: New (button), Cancel (button).

Import Accounts

You can also import accounts in bulk from CSV files.

To import accounts,

1. Go to **Accounts**.
2. Select **Import from CSV** by clicking the drop-down arrow beside the New button.
3. In the import wizard, click **Choose File**, select the CSV file and then click **Submit**.
4. Map account fields with column names in the CSV file and click **Import**.

Customize Mapping * Mandatory Field

The column headers in the csv file are displayed in the drop down boxes. Kindly choose the appropriate column header for the fields below.

All the date fields in the csv file should be in the same format. Kindly choose the data format required for the date fields :.

yyyy-MM-dd ▾

i Local authentication password policy is configured under Security Settings. You can verify the user's password in a CSV file.

Account Details

Account Name* ▾

Description ▾

Address

Address ▾

City ▾

Postal Code ▾

State ▾

Country/Region ▾

Contact Information

E-mail ID ▾

Phone ▾

Fax No. ▾

Web URL ▾

Domain Name ▾

Additional Fields

Oppurtunity ▾

Customer Type ▾

You can also import accounts from CSV files periodically. To learn more about scheduled CSV import, [click here](#).

Contacts

In SupportCenter Plus, the individual customers are managed as contacts. Contacts can be associated with accounts or sub-accounts. The Contacts module allows you to manage all contacts across accounts within the portal. You can also manage contacts associated with an account from the corresponding account details page or sub-account details page.

Add Contacts

You can add a new contact from the contact list view. To access it, go to the Contacts tab. This lists all contacts across accounts within the portal. Alternatively, you can access contacts specific to an account or sub-account as described below.

To access account-specific contacts:

1. Go to Accounts and then click your preferred account name.
2. Click the Contacts tab on the account details page.

To access sub-account specific contacts:

1. Go to **Accounts** and then click your preferred account name.
2. Click the sub-account name under the **Sub-Accounts** section.
3. Click the **Contacts** tab on the sub-account details page.

To add a new contact:

1. Go to **Contacts** and then click **New**. Alternatively, you can go to the Contacts tab in the accounts details page/sub-account details page.
2. Fill in the necessary **contact details** as required.
3. Finally, click **Save**.

New Contact

First Name Middle Name Last Name

• Display Name

Account Sub Account

Mobile Phone

Opportunity Customer Type

Primary Email Description

Secondary Email ID(s)

• Contact allowed to view

Login Name

Password

Retype Password

Importing Contacts

You can also import contacts in bulk from CSV files.

To import contacts,

1. Go to **Contacts**.
2. Select **Import from CSV** by clicking the drop-down arrow beside the **New** button.
3. In the import wizard that appears, click **Choose File**, select the CSV file and then click **Submit**.
4. Map the contact fields with the respective column names in the CSV file and **click Import**.

For scheduled imports, [click here](#).

Note: Bulk import of contacts is available only under the Contacts module.

Customize Mapping * Mandatory Field

The column headers in the csv file are displayed in the drop down boxes. Kindly choose the appropriate column header for the fields below.

All the date fields in the csv file should be in the same format. Kindly choose the data format required for the date fields :

i Local authentication password policy is configured under Security Settings. You can verify the user's password in a CSV file.

AccountDetails

Account

Personal Details

Display Name*

First Name

Middle Name

Last Name

Contact Information

E-mail

- First e-mail will be primary.
- E-mail duplicates will be discarded automatically.

Phone

Mobile

Self-Service Access Details

Provide self-service login details here

Login Name* [Used to identify user uniquely]

Password*



Support Channels

SupportCenter Plus provides several channels for customers to interact with support reps.

Email Channel: Contacts can raise requests by sending an email to the support email address as configured in the mail server settings.

Customer Portal: This is an open-access web portal that allows both registered and unregistered contacts to raise requests, browse solutions, view announcements, register as a new contact, etc.

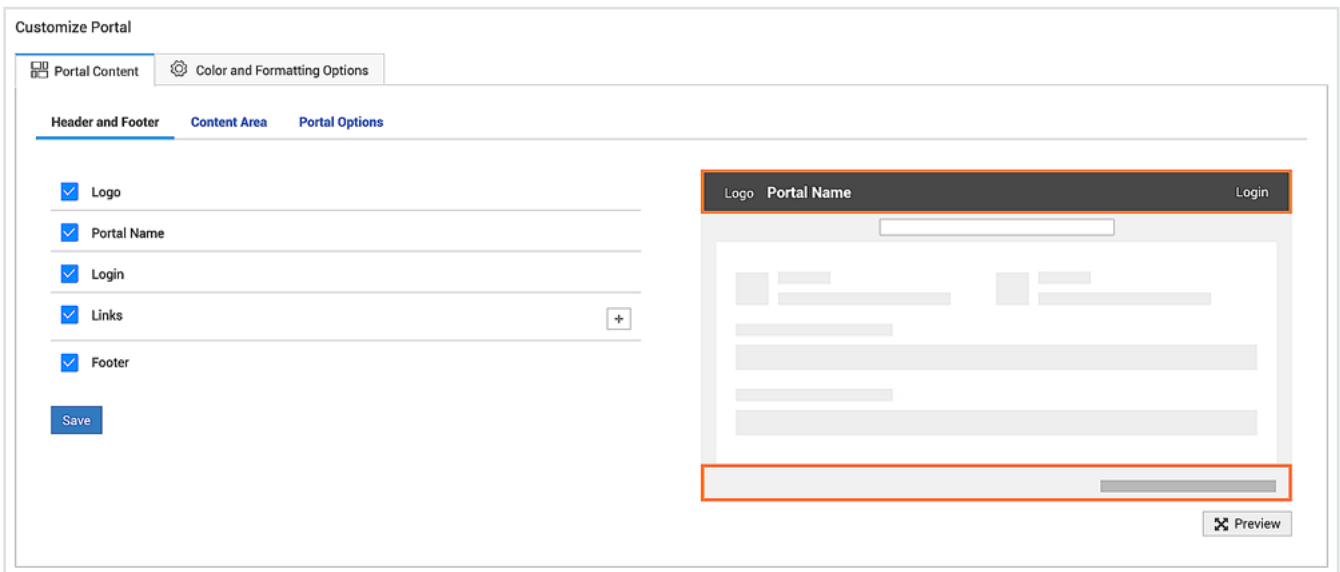
Self-Service Portal: Registered contacts can access the self-service portal to raise requests, track and manage requests, browse solutions, view announcements, initiate live chat with support rep, etc.

Live Chat: Registered contacts can initiate live chat from the self-service portal to raise requests or interact with support reps. Live chat can also be integrated with any website to allow anyone to initiate a chat session

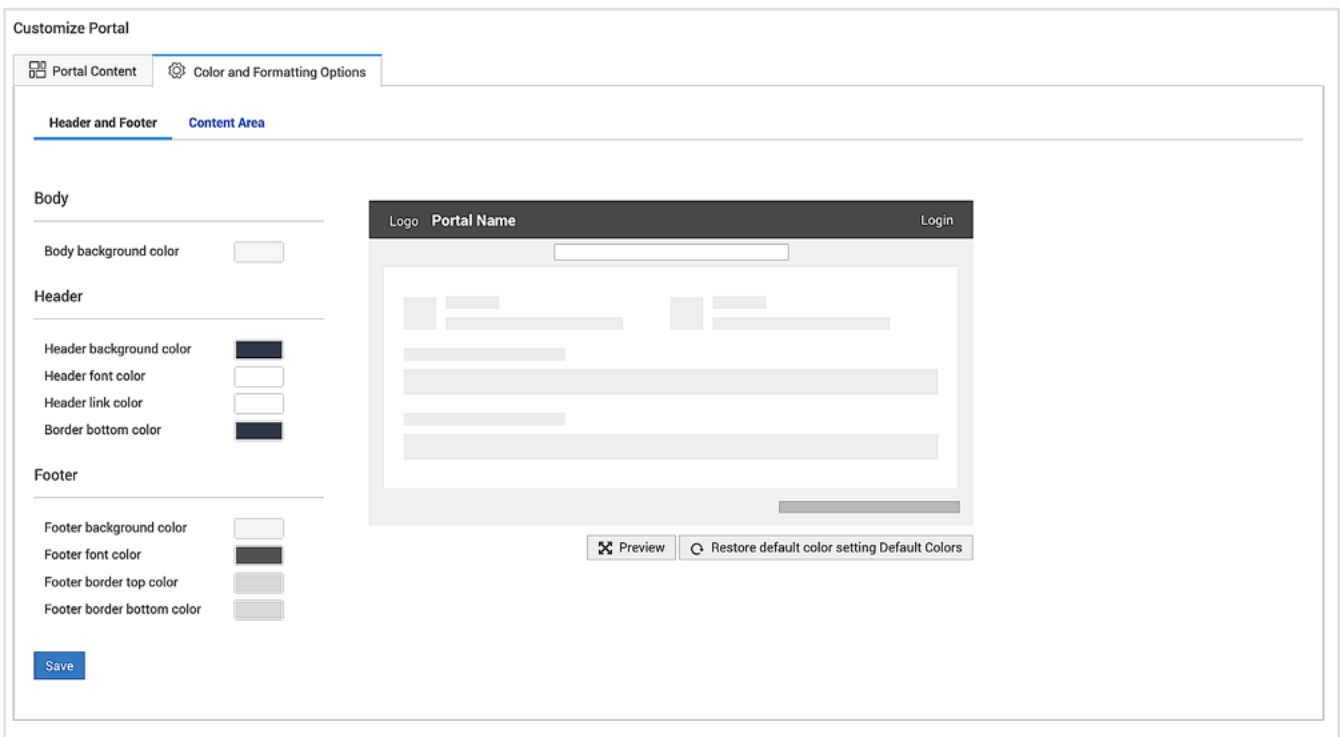
Set up Customer Portal

To set up a customer portal,

1. Go to **Admin > Users > Customer Portal Settings** (in single-portal setups) or go to Global Settings > Customer Portal Settings (in multi-portal setups).
2. Click **New portal** and then provide the portal name and URL and click **Create Portal**.
3. To customize portal content, go to the Customize Portal tab, and select the required content under each section. The available sections are as follows:
 - a. **Header and Footer:** Customize logo, portal name, login, custom links, and footer.
 - b. **Content Area:** Add or remove options like search solution, announcements, recent solution, custom links, popular solutions and custom sections.
 - c. **Portal options:** Allow/disallow new user registration and enable/disable access to knowledge base for unregistered contacts.



4. To customize the color and formatting, go to the **Color and Formatting Options** tab. Click the selection box against the UI element and choose your preferred color from the color gamut.



1. Associate a portal with a customer portal, if applicable.
2. Finally, click **Save**.

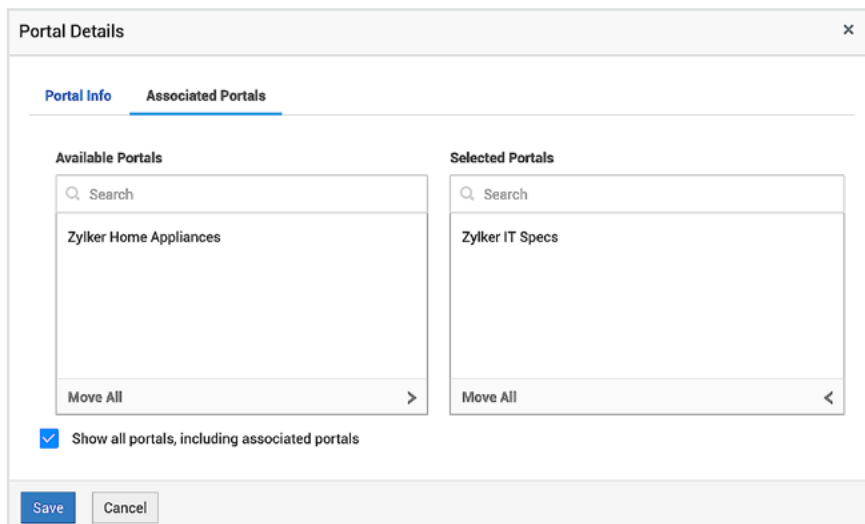
Note:

- You can preview changes to the customer portal by clicking Preview.
- Use the toggle button to enable or disable the customer portal.
- To delete or make a customer portal default, click the menu icon and then select the appropriate option.
- You can add any custom link by clicking the add icon and then providing the link name, URL, and description.
- By default, Browse Solutions and Submit a Ticket links are added in the Content Area.
- You can also add a custom section under the Content Area by clicking Add Portal section and then providing the section name and description.

Portal Association

In single-portal setups, the default portal is associated automatically with the enabled customer portal. In multi-portal setups, associations should be done manually as described below.

1. Go to **Global Settings > Customer Portal Settings**.
2. Click **More Options** and then select **Associate**.
3. In the dialog box that appears, select and move the required portal from Available Portals to Selected Portals block.
4. Finally, click **Save**.

**Note:**

- Multiple portals can be associated with one customer portal. However, a single portal can be associated with only one customer portal at a time.
- You can also associate a portal from the customer portal edit page by hovering over and clicking Associate under the Associated Portal section.

Typical customer portal:

The screenshot displays the ManageEngine SupportCenter Plus Customer Portal. At the top, there is a dark navigation bar with the 'SupportCenter Plus' logo, 'Customer Portal' text, and a 'Login' link. Below this is a search bar with the placeholder text 'Search Solution'. The main content area is organized into several sections:

- Browse Solutions:** A box with a magnifying glass icon and the text 'Click here to look up our knowledge base to find solutions to common problems/queries.'
- Submit a Ticket:** A box with a ticket icon and the text 'Click here to raise a ticket/request to the Helpdesk.'
- Announcements:** A section with two announcements:
 - How to claim warranty:** Marked as 'New', it states that carry-in warranty claims are temporarily suspended and provides instructions on how to request a pickup.
 - Warranty extension:** Marked as 'New', it announces a 6-month warranty extension for all products due to the pandemic.
- Popular Solutions:** A list of five frequently viewed articles, each with a topic, last updated date, and view count.
 - Increased Latency in RFID Scanners after firmware upgrade:** Topic: Troubleshooting, Last Updated On: Oct 21, 2020 11:36 AM, 136 views.
 - Genuine accessories for legacy products:** Topic: Accessories, Last Updated On: Oct 21, 2020 11:36 AM, 83 views.
 - Registering as a contact:** Topic: General, Last updated On: Oct 21, 2020 11:08 AM, 4 views.
 - How to ship product for warranty claims.:** Topic: How To's, Last Updated On: -, 4 views.
 - Activation mail not received:** Topic: General, Last Updated On: Oct 21, 2020 11:43 AM, 2 views.
- Recent Solutions:** A list of five recently updated articles, each with a topic, last updated date, and view count.
 - Checking status of warranty:** Topic: Warranty, Last Updated On: -, 1 view.
 - Scheduled Pickup Missed:** Topic: General, Last Updated On: -, 1 view.
 - How to upgrade firmware for RFID scanners:** Topic: How To's, Last Updated On: -, 1 view.
 - Activation mail not received:** Topic: General, Last Updated On: Oct 21, 2020 11:43 AM, 2 views.
 - Increased Latency in RFID Scanners after firmware upgrade:** Topic: Troubleshooting, Last Updated On: Oct 21, 2020 11:36 AM, 136 views.

Set Up Self-Service Portal

Self-service portal is enabled by default. Registered contacts can access it from the customer portal by clicking Login on the top-right. You can customize the self-service portal by adding or removing widgets as required. To learn more, [click here](#).

Set Up Live Chat

You can enable live chat for your registered contacts on the self-service portal or you can also make it open to any users by embedding live chat on your website.

To enable live chat on the self-service portal,

1. Go to Admin > Helpdesk Customizer > Chat Settings.
2. Use the appropriate toggles to enable chat for both contacts and support reps from the respective tabs.

Chat Enabled

Contact settings Support Rep settings

Chat Enabled

Chat response time Seconds

Create request automatically when chat is closed Disabled

Assign support rep to request they created from closed chat Disabled

Allow contact to initiate a new chat Enabled

Mandate support group for initiating a new chat Disabled

Exclude chat for account(s)

Exclude chat for group(s)

Exclude chat for support rep(s)

Welcome Message *

Missed chat message *

Transfer chat message *

You can also configure chat preferences like response time, request creating from chat, personalize automated messages, etc. To learn more, [click here](#).

To integrate live chat on your website,

1. Go to **Admin > Helpdesk Customizer > Chat Settings**.
2. Click **Integrate Live Chat** on the left pane.
3. Click the **Add Live Chat** toggle button.
4. Copy the displayed code and paste it just before the closing tag of the website's HTML source code.
5. Click **Save**.

Add Live Chat Enabled

To use this feature, enable Live Chat and paste the following code just before the closing tag of the website's HTML source code:

```
<script type='text/javascript'> var d=document,s=d.createElement('script'),s.type='text/javascript', s.defer=true;s.src='sdpchat.js'; t=d.getElementsByTagName('script')[0];t.parentNode.insertBefore(s,t); </script>
```

[Copy Code](#)

Your chat preferences configured under **Admin > Helpdesk Customizer > Chat Settings** will also be applied for this embedded chat.

Request Management


Request Templates

SupportCenter Plus allows you to create request templates with pre-configured fields, properties, workflow, and rules.

To configure a request template,

1. Go to Admin > Helpdesk Customizer > Request Template.
2. Click New Template.
3. Provide a name and description.
4. Configure the template according to your needs and click Save.

For detailed instructions, [click here](#).



Add icon

Name *

Description

Support Rep

Contact

Workflow

Field and Form Rules

Available Fields New Field

No Fields available

Account

Name

Untitled

Request Type:

Status:

Mode:

Level:

Group:

Support Rep:

Service Category:

E-mail Id(s) To Notify:

Product:

Priority:

Category:

Subcategory:

Item:

Untitled

Subject

Description

B I U | F 10 | [Icons]

Resolution

Description

B I U | F 10 | [Icons]

Use this area to display a short description or any instruction, notes, or guidelines for Support Rep.

Associate Support Groups to Template @

Available Support Groups

- Defective Item Group
- Seles group
- Transportation Group
- Warranty Group

Move All >

Show to Contact

Selected Support Groups

No info available

Save

Save and Configure Workflow

Cancel

Raise Requests

SupportCenter Plus logs requests automatically from contacts via different modes like email, chat, customer portal, and self-service portal. Support Reps can also raise requests directly from the Requests module.

To raise a request,

1. Go to **Requests**
2. Click **Add New**.
3. Choose your preferred template from the **Template** drop-down on the top-right.
4. Fill in the **New Request** form with the necessary details.
5. Add attachments if required.
6. Finally, click **Submit Request**.

The screenshot shows the 'New Request' form interface. At the top right, there is a 'Template' dropdown menu set to 'Default Request'. The form contains several input fields and dropdown menus:

- Name:** Search Contact (with a search icon)
- Account:** Not associated to any Account (with a search icon)
- Request Type:** -- Select Request Type --
- Status:** Open
- Mode:** -- Select Mode --
- Level:** -- Select Level --
- Group:** -- Select Group --
- Support Rep:** -- Select Support Rep --
- Service Category:** -- Select Service Category --
- E-mail Id(s) To Notify:** (with a search icon)
- Subject:** (text input)
- Description:** (rich text editor with a toolbar)
- Product:** -- Select Product --
- Priority:** -- Select Priority --
- Category:** -- Select Category --
- Subcategory:** -- Select Subcategory --
- Item:** -- Select Item --

At the bottom of the form, there is an 'Attachments' section with an 'Attach file' button, a 'Resolution' field, and three buttons: 'Submit Request' (highlighted in blue), 'Reset', and 'Cancel'.

To learn more about request management, [click here](#).

More Resources

- ◇ [Admin configurations and integrations](#)
- ◇ [Handling support](#)
- ◇ [Managing customers](#)
- ◇ [Managing products, sales, contracts, and billing](#)
- ◇ [Contact ManageEngine Support](#)

