ManageEngine
SupportCenter Plus

Getting started with SupportCenter Plus

Quick Start Guide

Contents

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

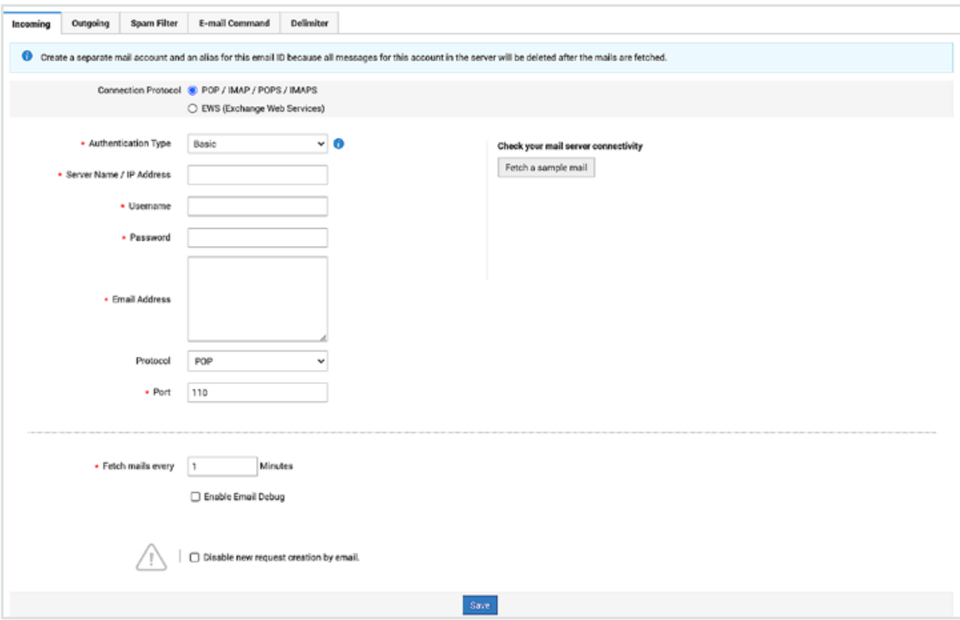
Mail Server Settings

The mail server settings in SupportCenter Plus allow you to configure inbound and out-bound 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

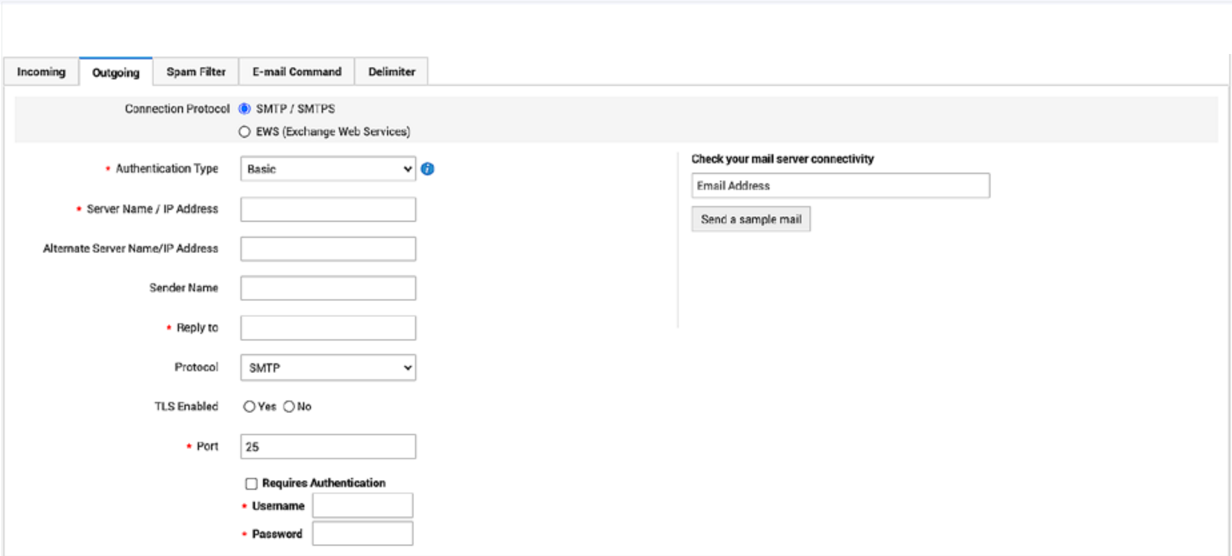
1. Go to the **Incoming** tab.
2. Select your preferred protocol: POP, POPS, IMAP, IMAPS, or EWS.
3. Choose the authentication type: **Basic or OAuth**. To learn more about OAuth configuration, click here.
4. Enter server name/IP address, username, password, and list of email addresses.
5. Set port number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



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

Configuring Settings for Outgoing Emails

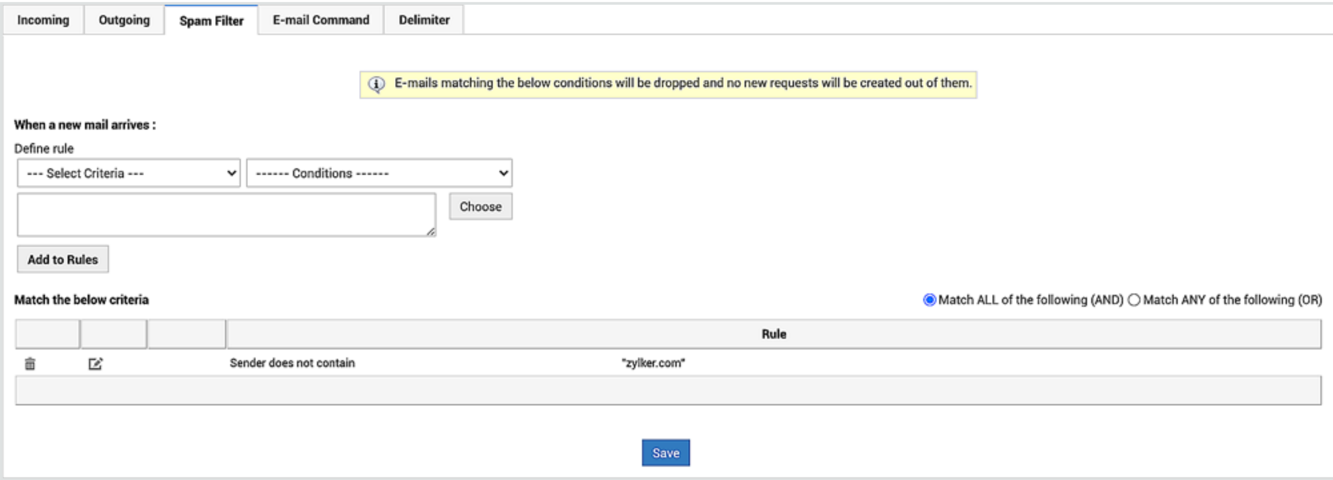
1. Go to the **Outgoing** tab.
2. Select your preferred protocol: SMTP, SMTPS, or EWS.
3. Choose authentication type: **Basic or OAuth**. To learn more about OAuth configuration, click here.
4. Enter server name/IP address, alternate server name/IP address, sender name, and reply to email ID.
5. Set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



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**.



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**.

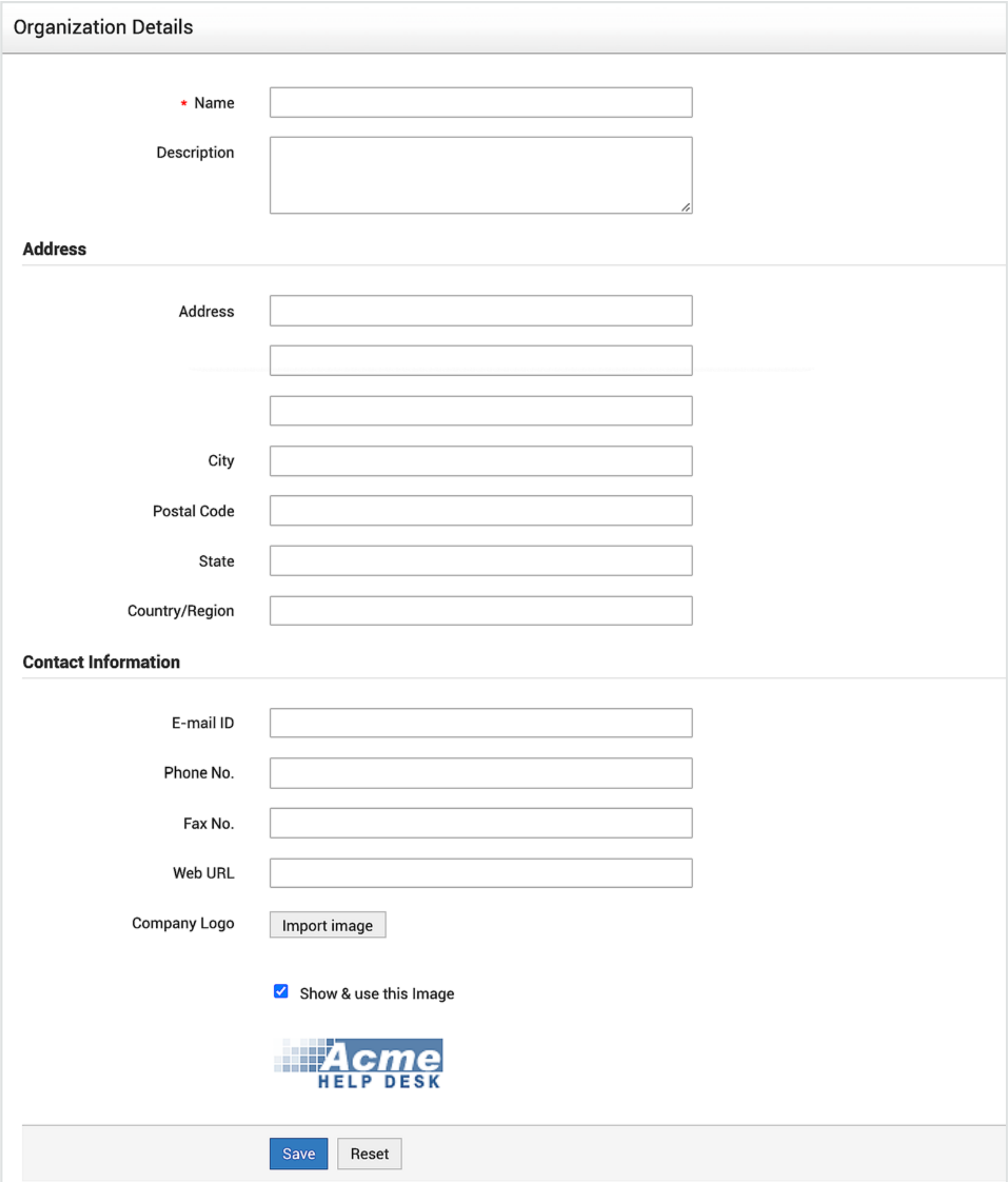
Organizational Configurations

Organizational Details

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

To do this

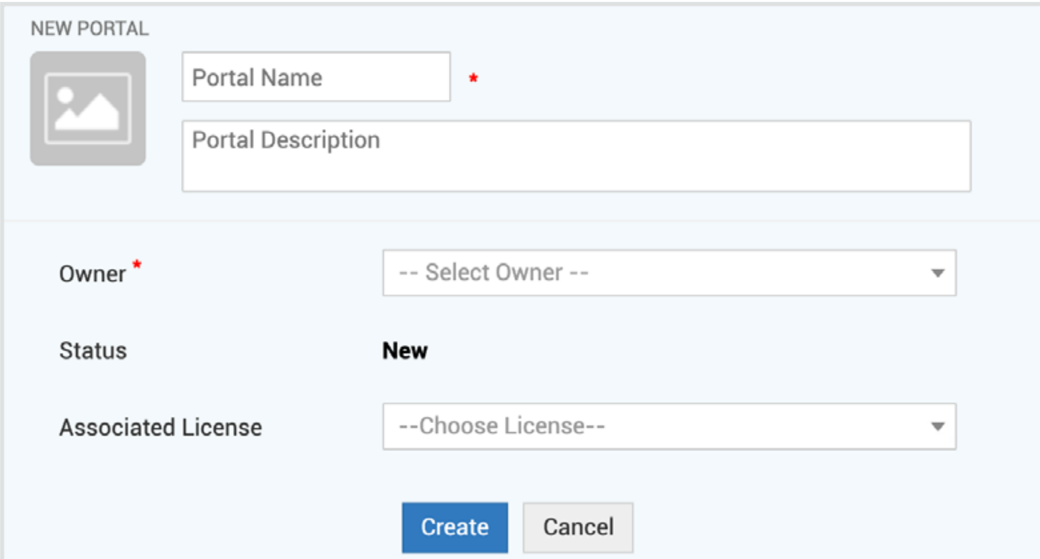
1. Go to **Admin > Organizational Details > Organizational Details** (in single-portal setups) or go to **Global Settings > Organizational Details** (in multi-portal setups).
2. Fill in the required details such as name, address, contact details, and add a custom logo.
3. Finally, click **Save**.


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
Import image
Show & use this Image
Acme
HELP DESK
Save
Reset

Portals

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

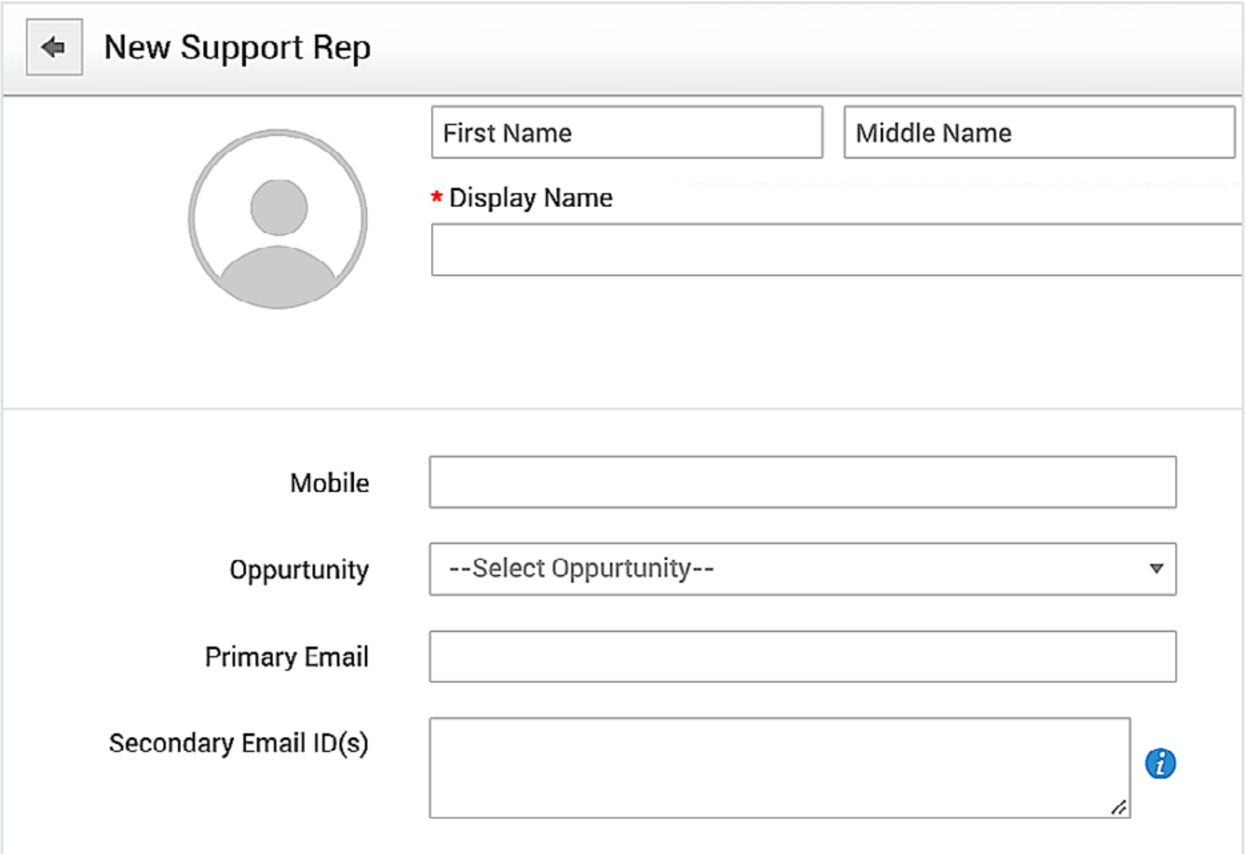
1. Click Global Settings and then click Add Portal.
2. Now, provide details such as portal name, portal description, select portal owner, and add license.
3. Finally, click Create.



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.

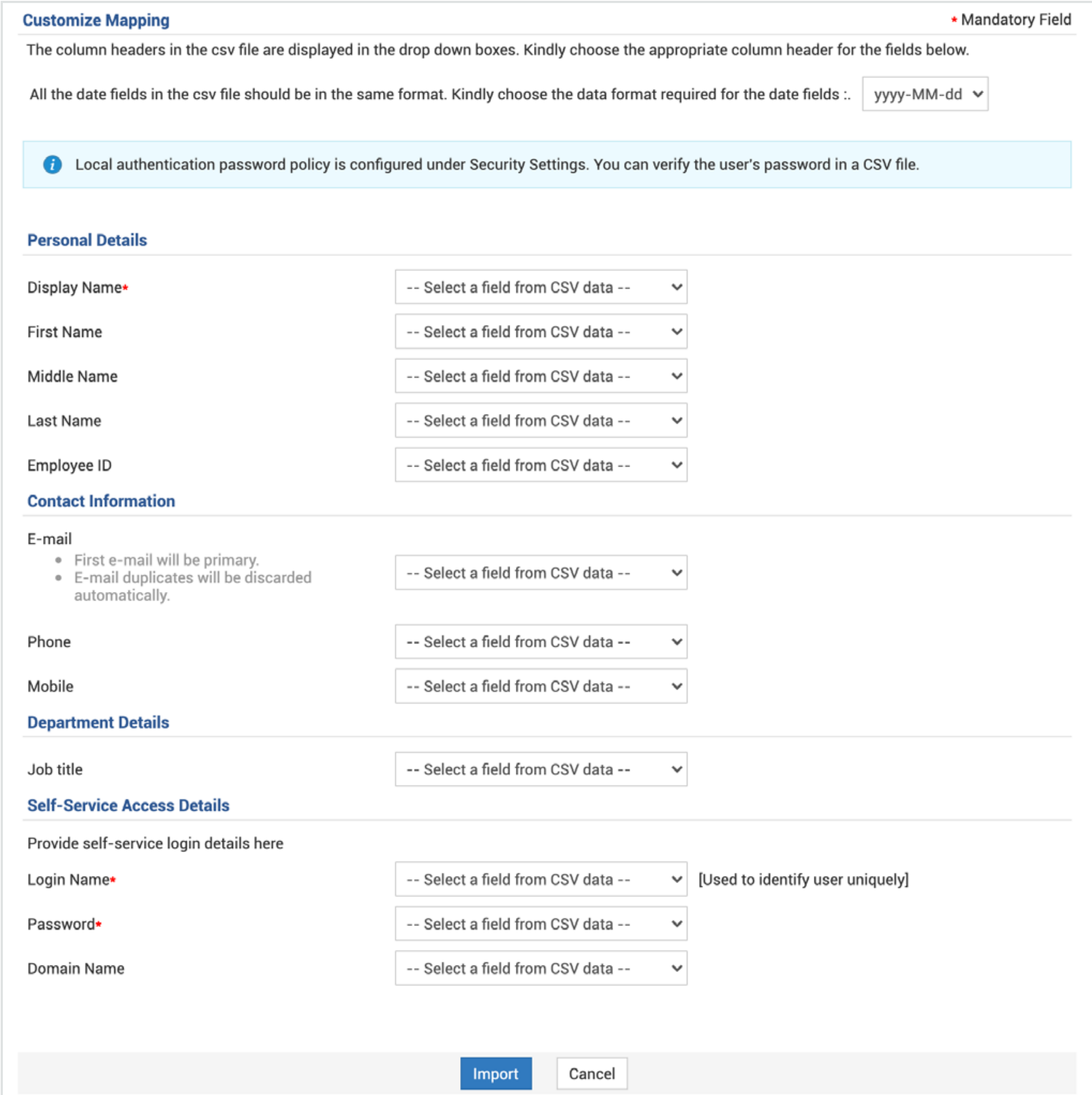


Import Support Reps

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

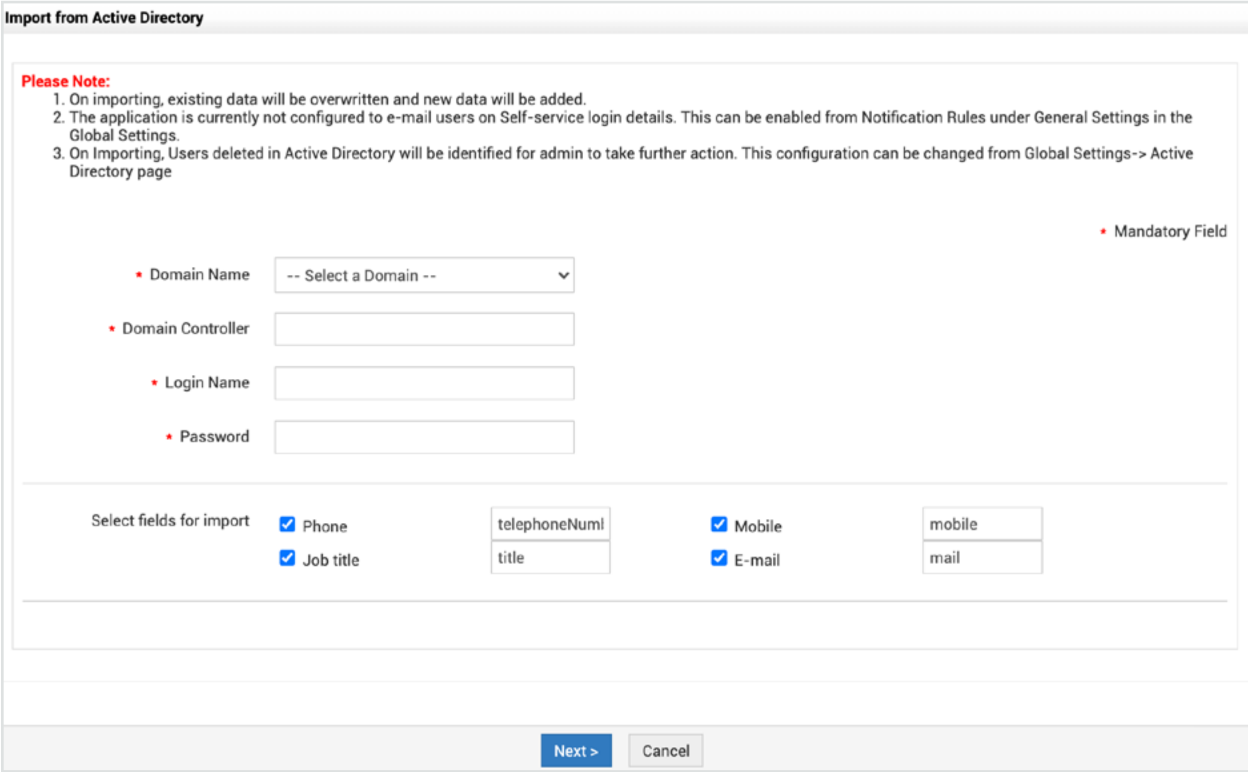
To import from CSV,

1. Go to **Global Settings > User Management > Support Rep**s.
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**.



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**.



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

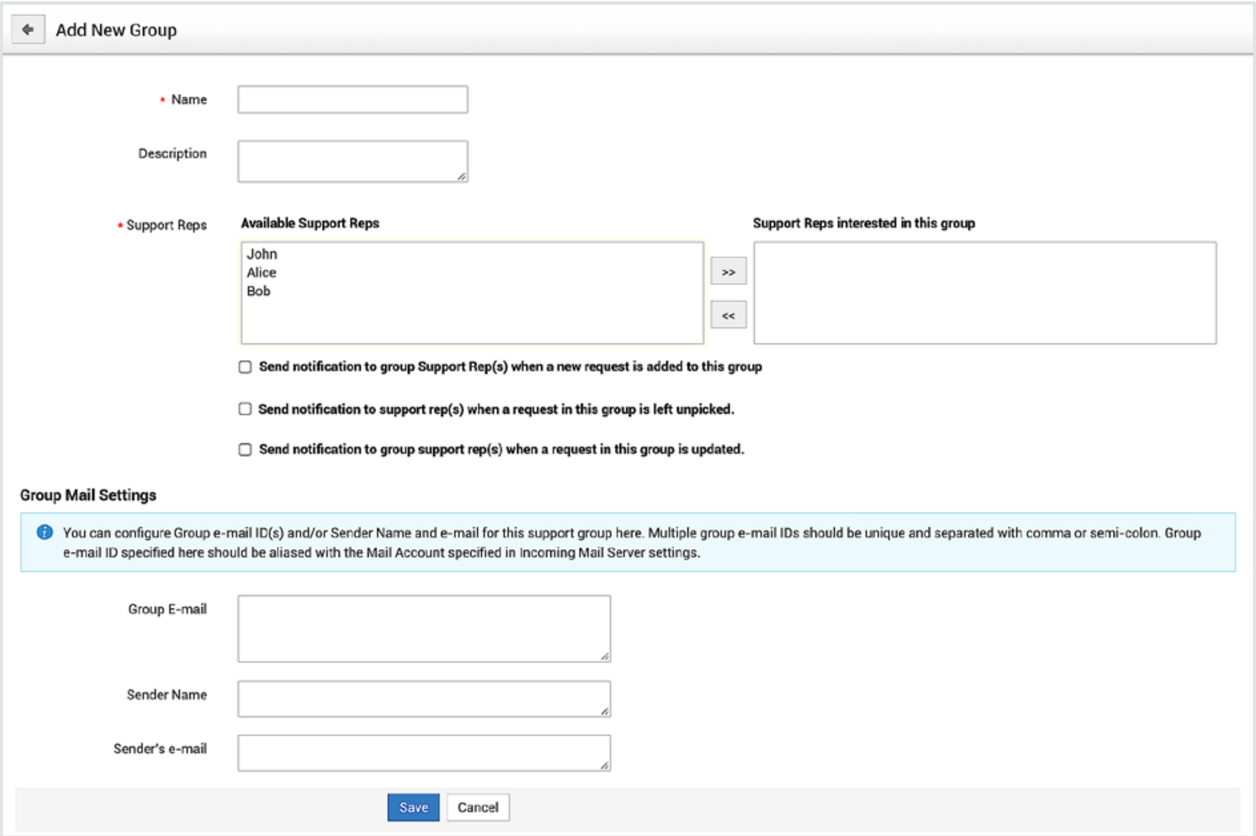
Support Groups

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**.



Assign Roles

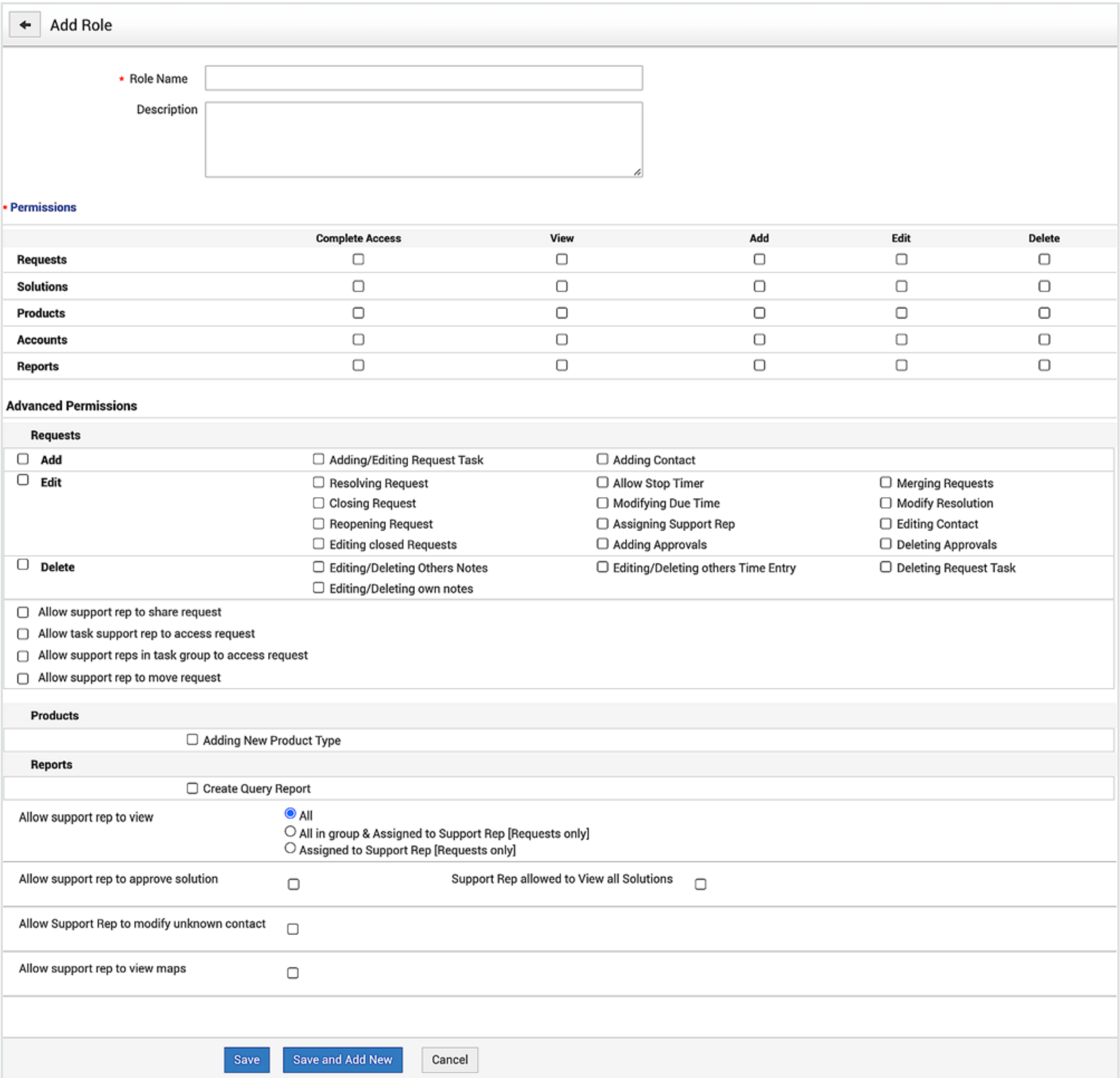
Support reps can be assigned to different roles to configure access permissions. There are three default roles and you can also create a new role with custom permissions.

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..

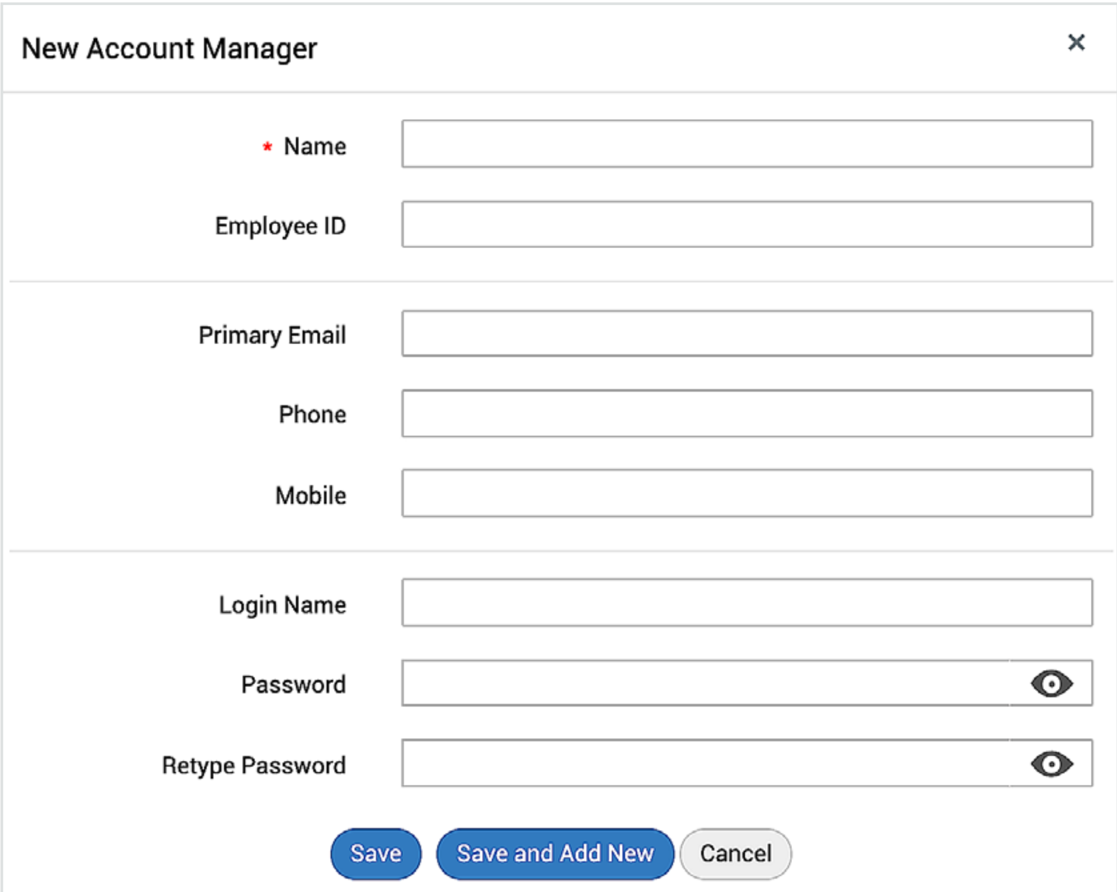


Account Managers

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**.



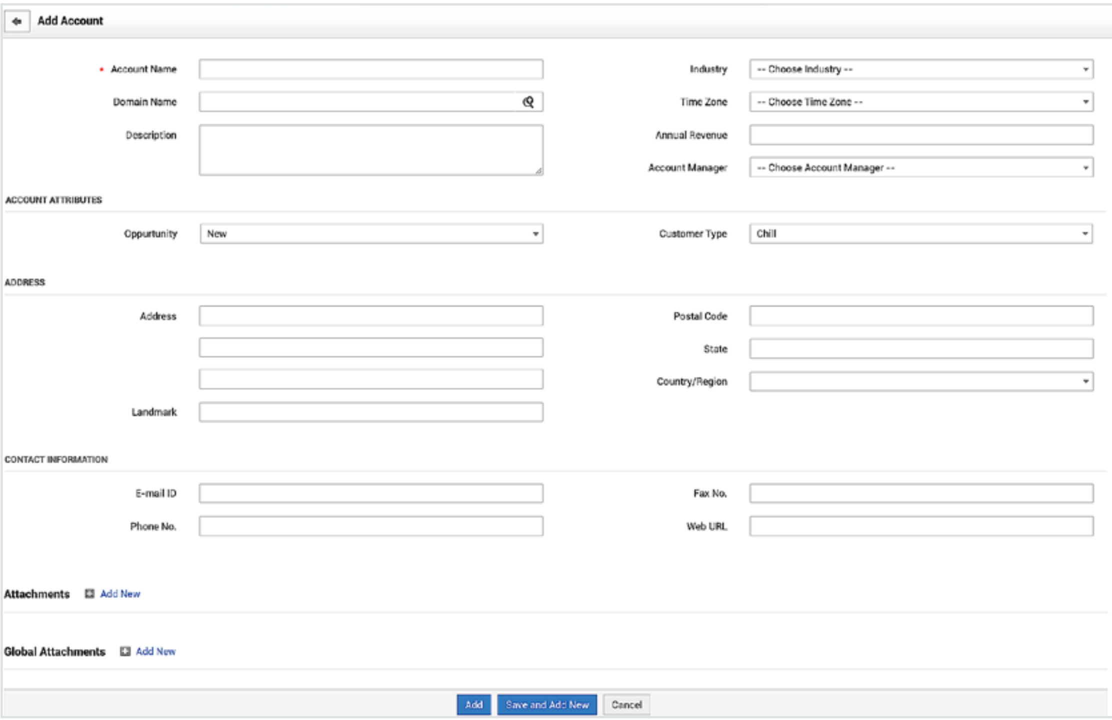
Accounts

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**

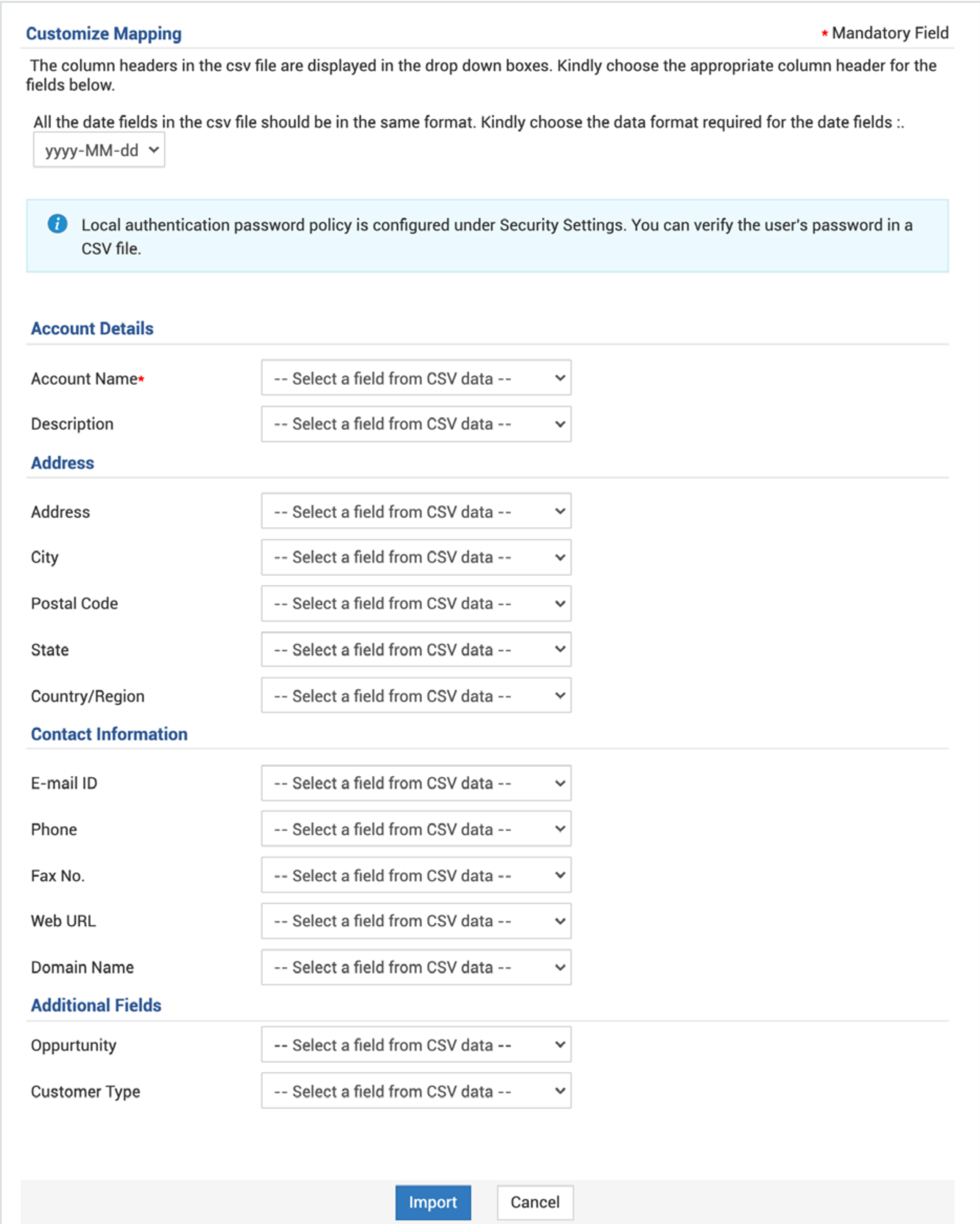


Import Accounts

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**.



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:

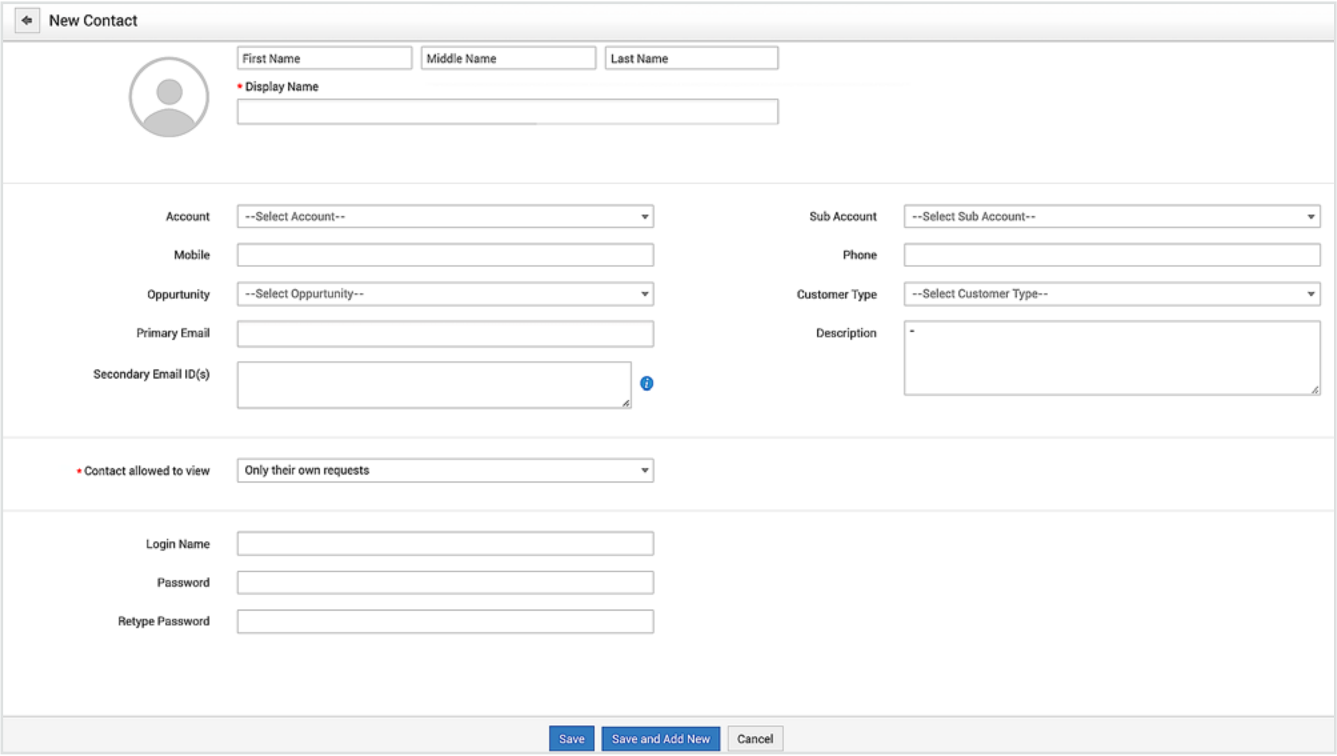
1. Go to Accounts and then click your preferred account name.
2. Click the Contacts tab on the account details page.

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**.



Importing Contacts

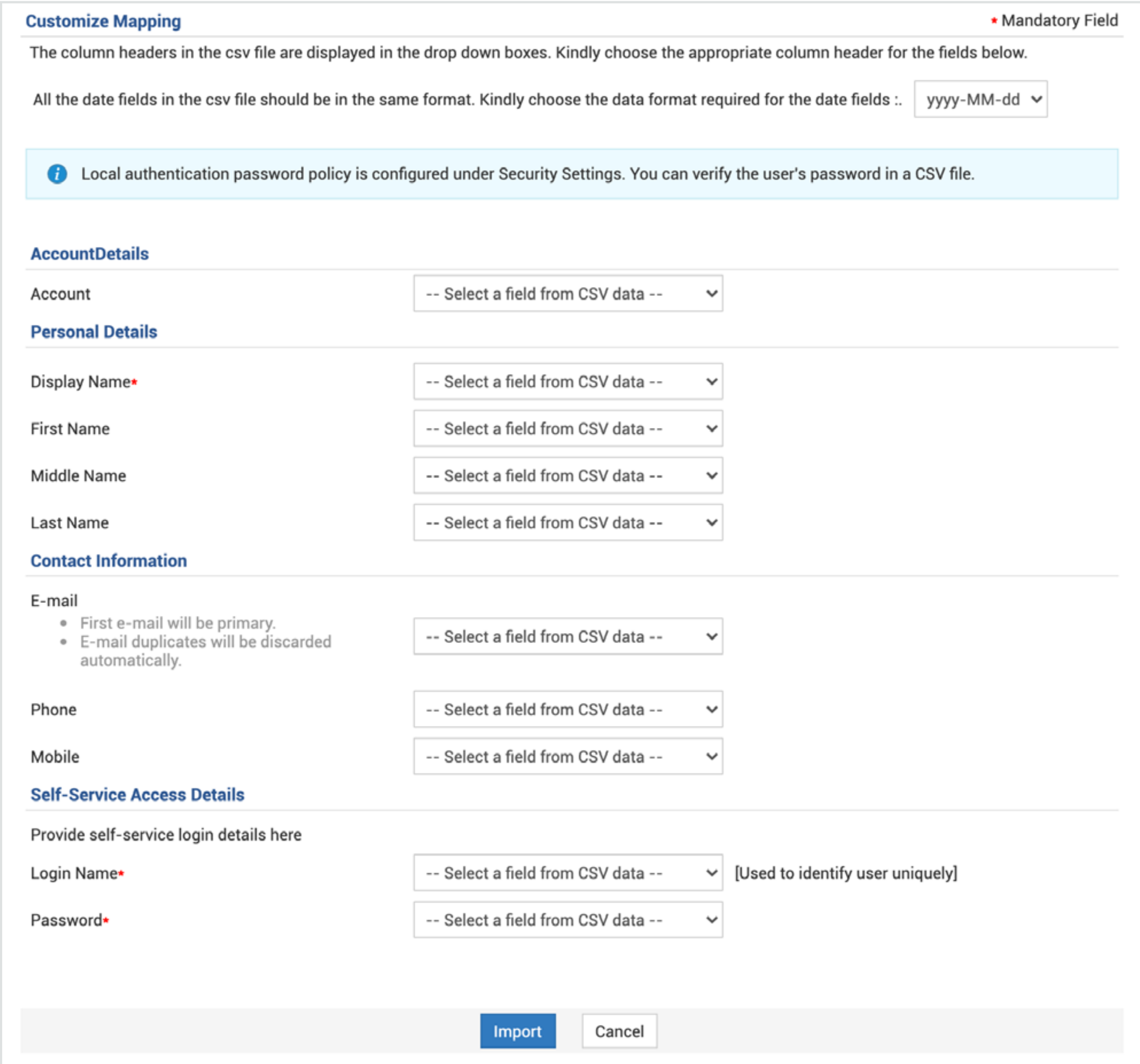
You can also import contacts in bulk from CSV files.

To import contacts,

1. Go to **Contacts**.
2. 2. Select **Import from CSV** by clicking the drop-down arrow beside the **New** button.
3. 3. In the import wizard that appears, click **Choose File**, select the CSV file and then click **Submit**.
4. 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 :.
yyyy-MM-dd
Local authentication password policy is configured under Security Settings. You can verify the user's password in a CSV file.
AccountDetails
Account
-- Select a field from CSV data --
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*
Import
Cancel

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.

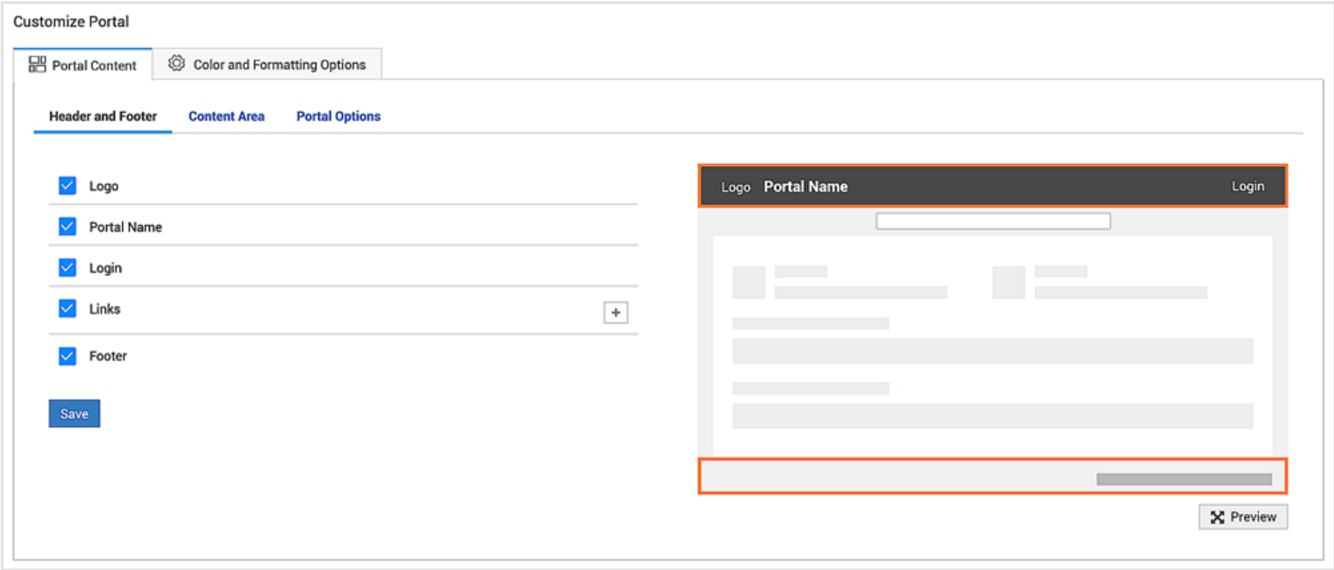
Self-Service Portal: Registered contacts can access the self-service portal to raise requests, track and manage requests, browse solutions, view announcements, initiate live chat with support rep, etc.

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

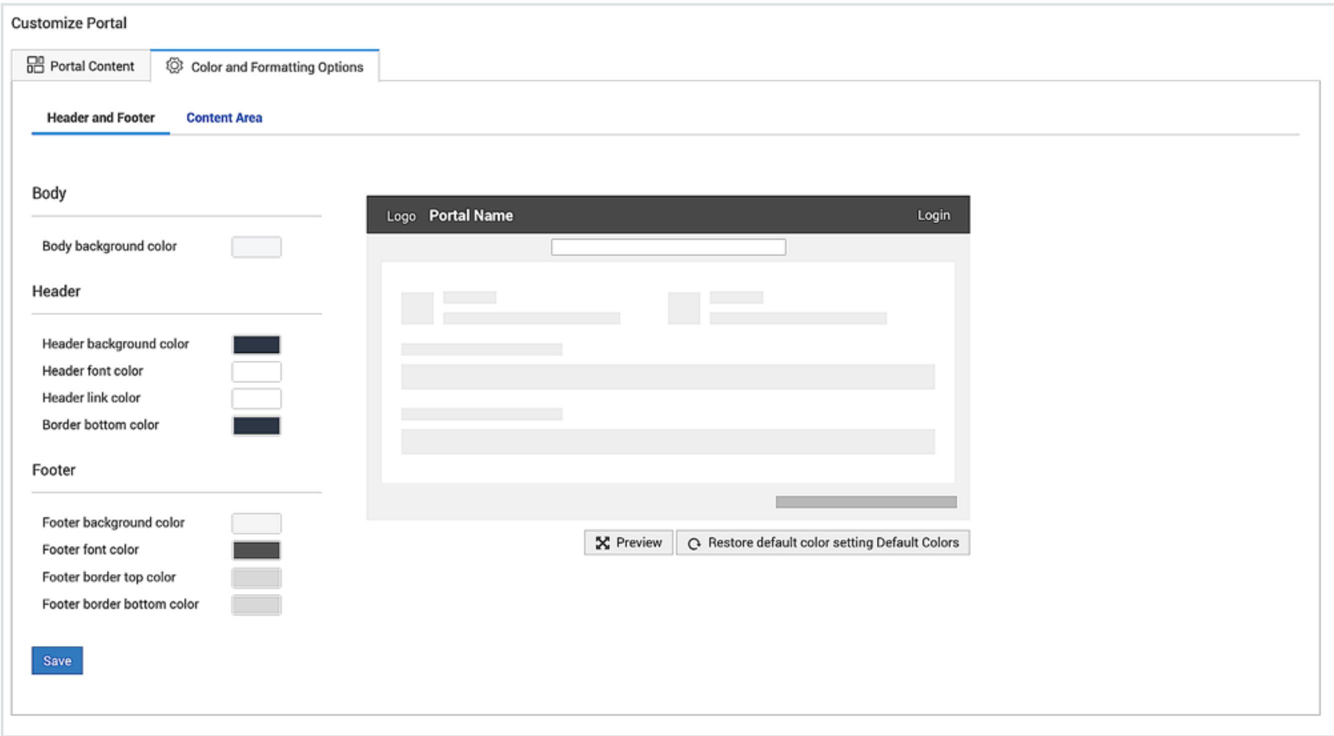
Set up Customer Portal

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**.

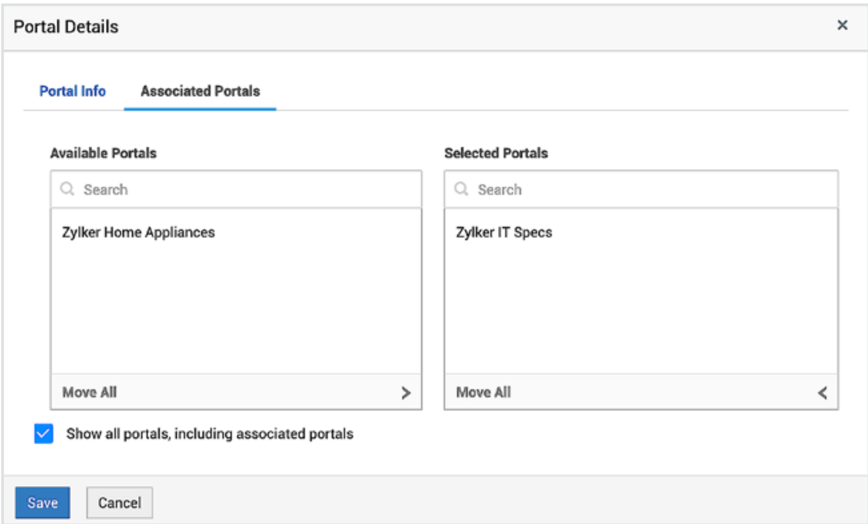
Note:

- 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.

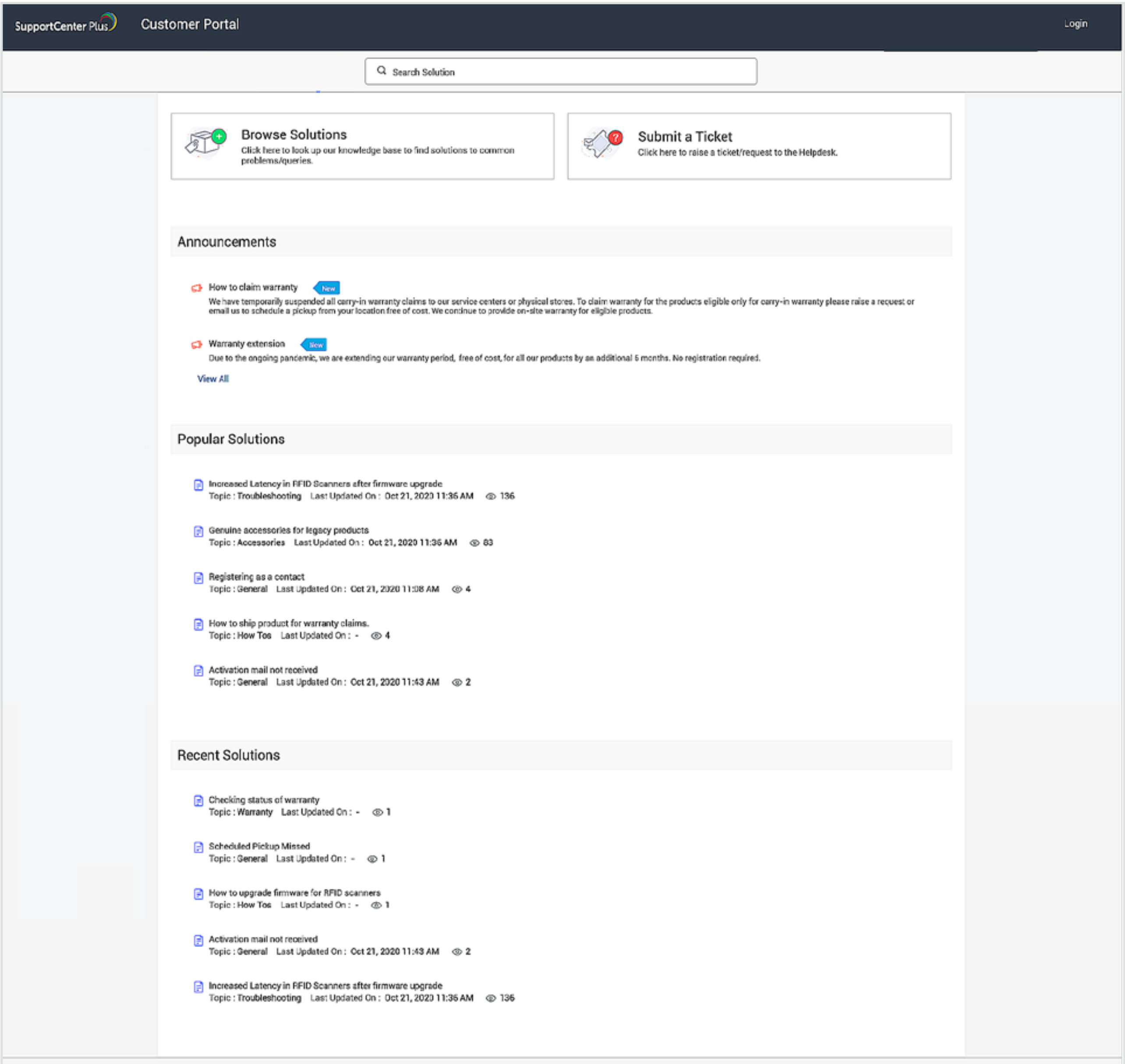
1. Go to **Global Settings > Customer Portal Settings**.
2. Click **More Options** and then select **Associate**.
3. In the dialog box that appears, select and move the required portal from Available Portals to Selected Portals block.
4. Finally, click **Save**.



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:



Set Up Self-Service Portal

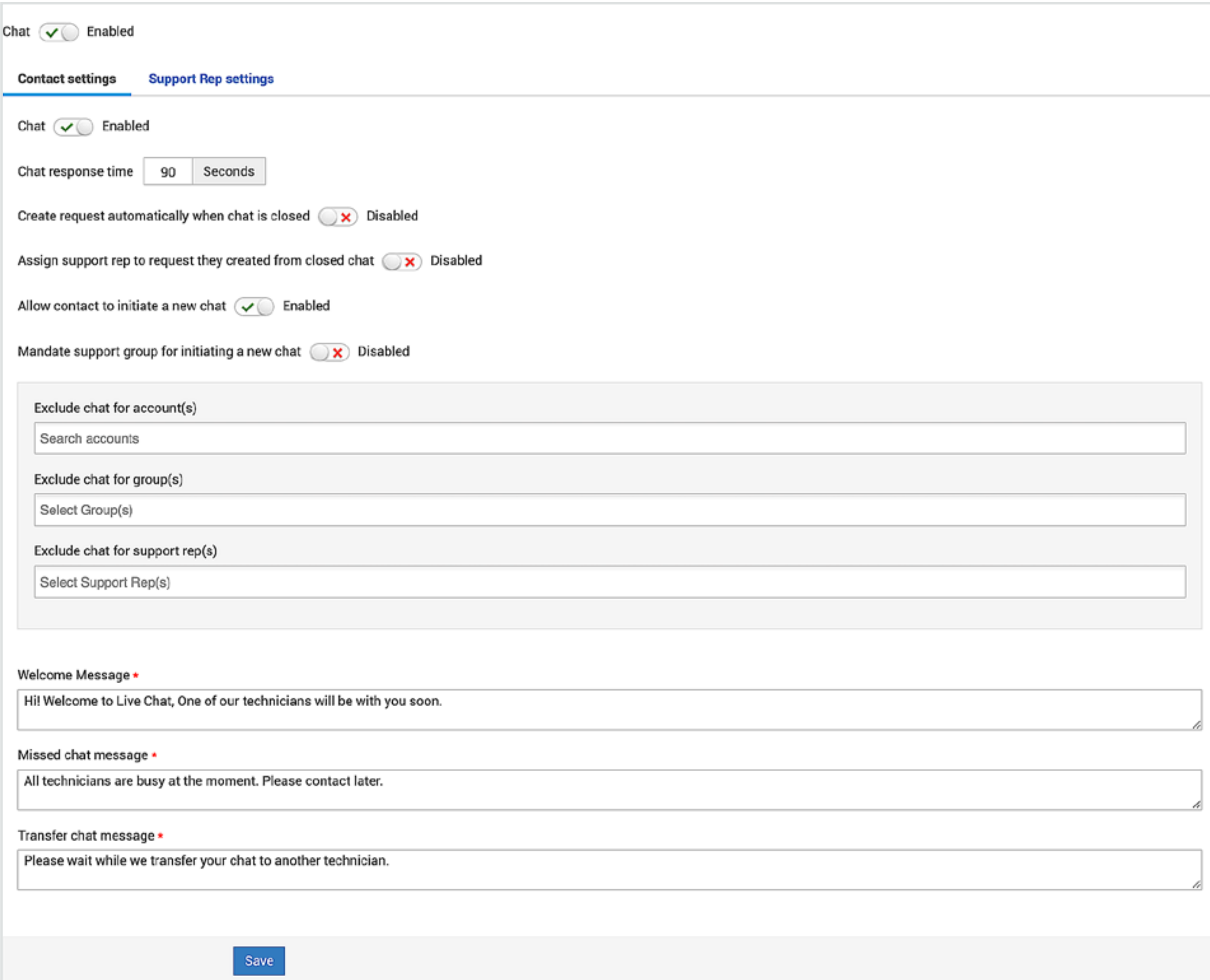
Self-service portal is enabled by default. Registered contacts can access it from the customer portal by clicking Login on the top-right. You can customize the self-service portal by adding or removing widgets as required. To learn more, click here.

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.



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**.

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

Request Management

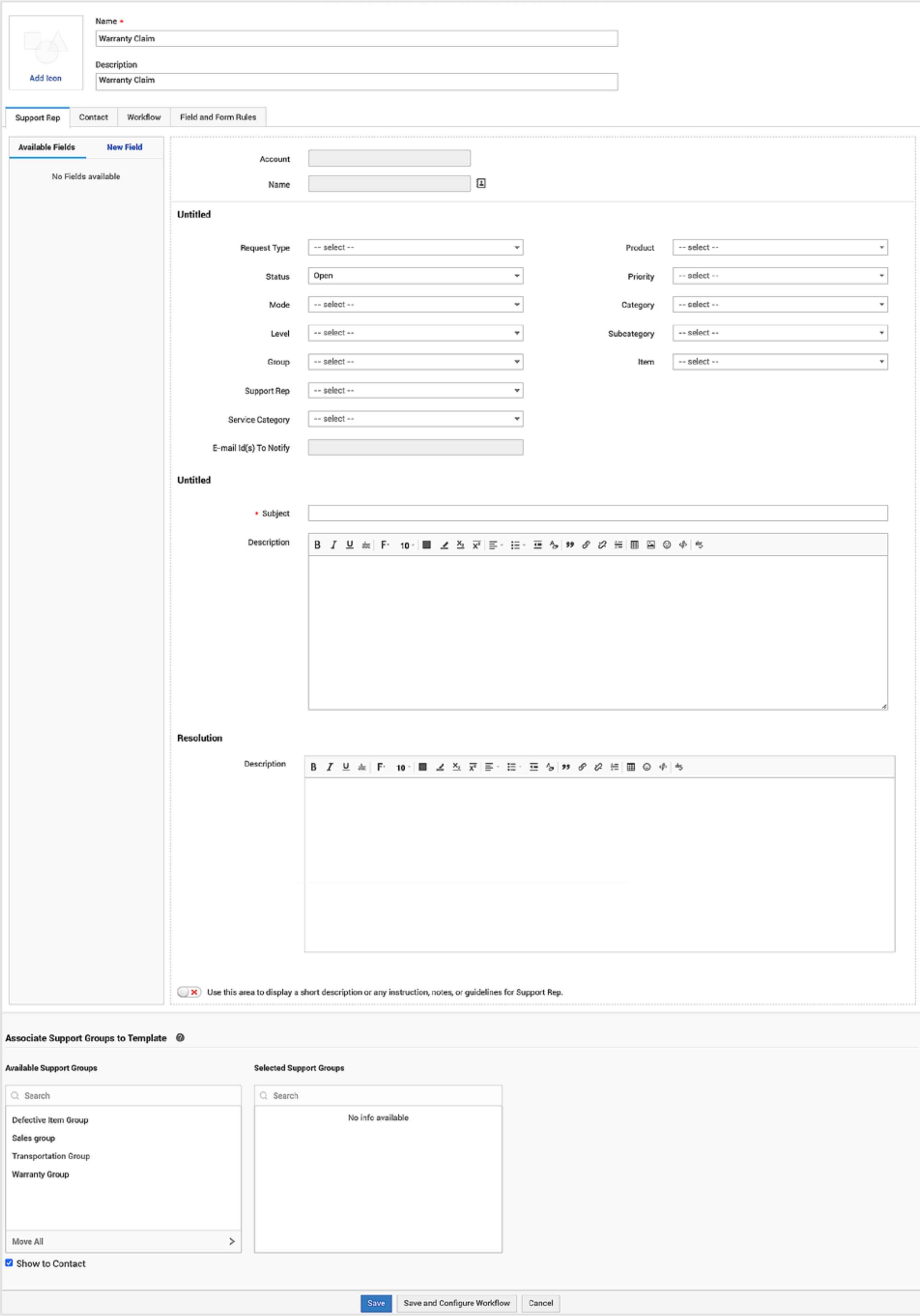
Request Templates

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.

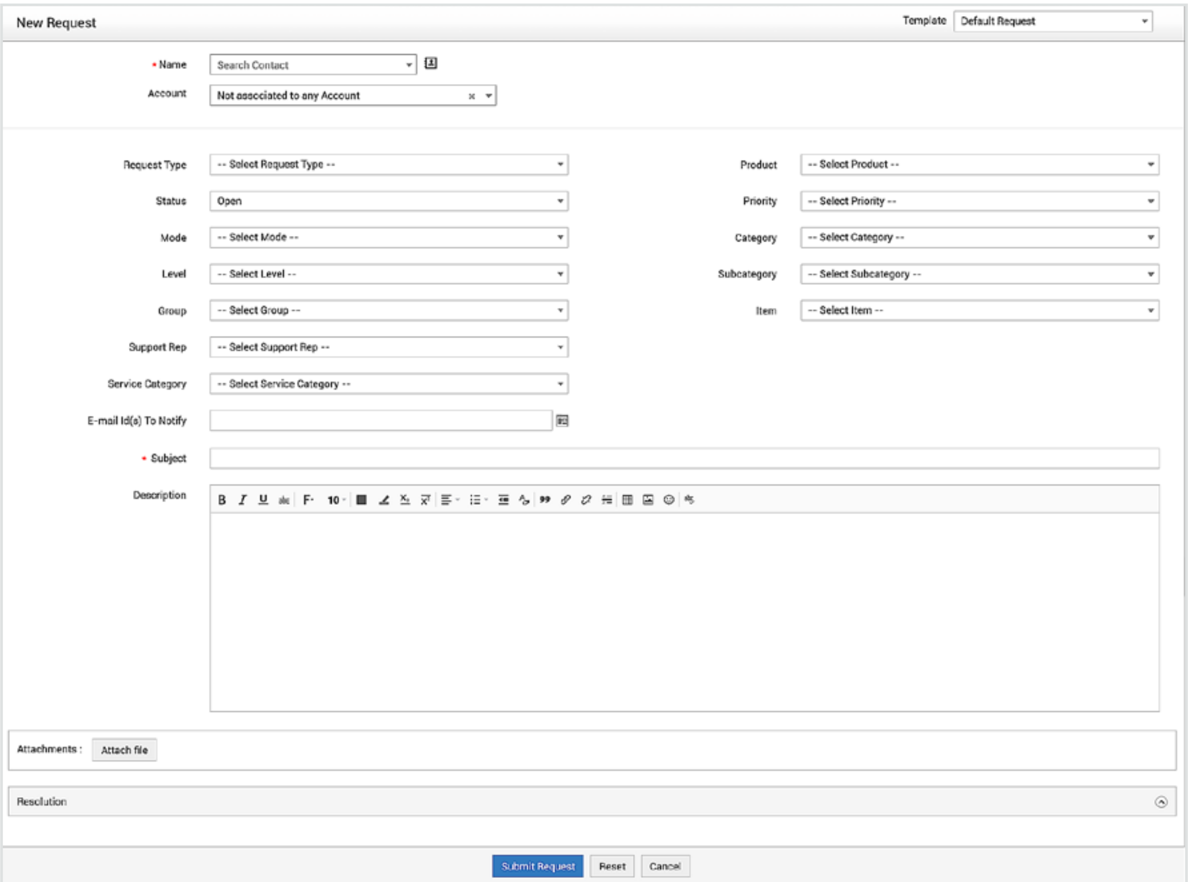

Name *
Warranty Claim
Add Icon
Description
Warranty Claim
Support Rep
Contact
Workflow
Field and Form Rules
Available Fields
New Field
No Fields available
Account
Name
Untitled
Request Type
-- select --
Status
Open
Mode
Level
Group
Support Rep
Service Category
E-mail Id(s) To Notify
Product
Priority
Category
Subcategory
Item
Untitled
* Subject
Description
Resolution
Description
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
Selected Support Groups
Search
Defective Item Group
Sales group
Transportation Group
Warranty Group
Move All
No info available
Show to Contact
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**.



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