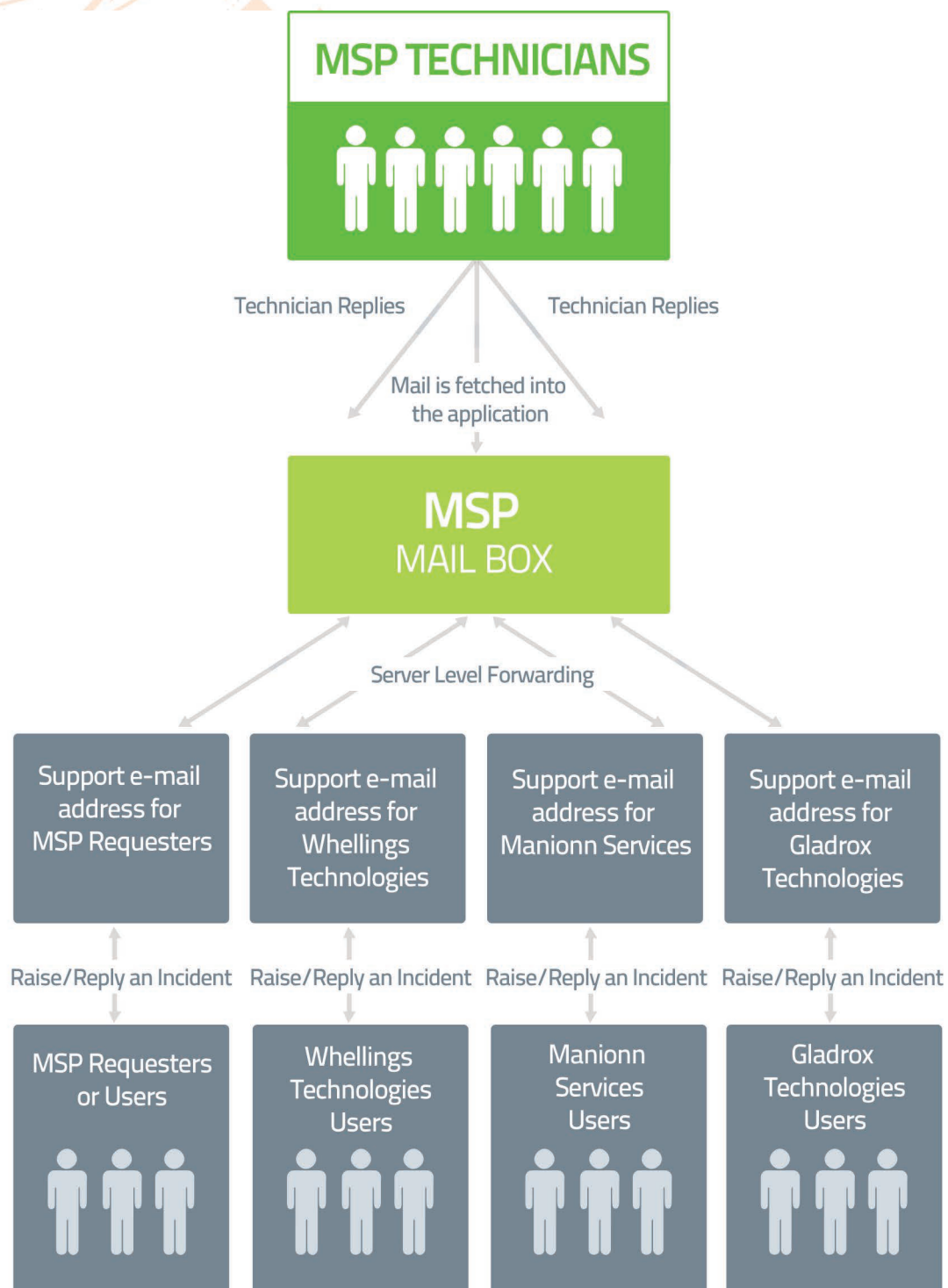


QUICK START GUIDE





Architecture Diagram

Start using ServiceDesk Plus – MSP in a few minutes

ServiceDesk Plus - MSP is an ITIL-Ready help desk software that caters to Managed Service Providers. We would love to see you start using ServiceDesk Plus - MSP right away. However for that, you need to perform a set of basic configurations to suit your business needs.

We would like to emphasize that this product is best suited for Managed Service Providers*.

Start managing multiple clients with ServiceDesk Plus - MSP from a single touchpoint.

Take a look at the [installation guide](#) for more assistance on product installation.

To start ServiceDesk Plus - MSP,

Log in as an administrator.

Configure ServiceDesk Plus - MSP in three simple steps:

Step 1: Enter your organizational details and accounts' details

Step 2: Configure your mail server

Step 3: Import users into the application

Step 1(a): Enter your organizational details into the application

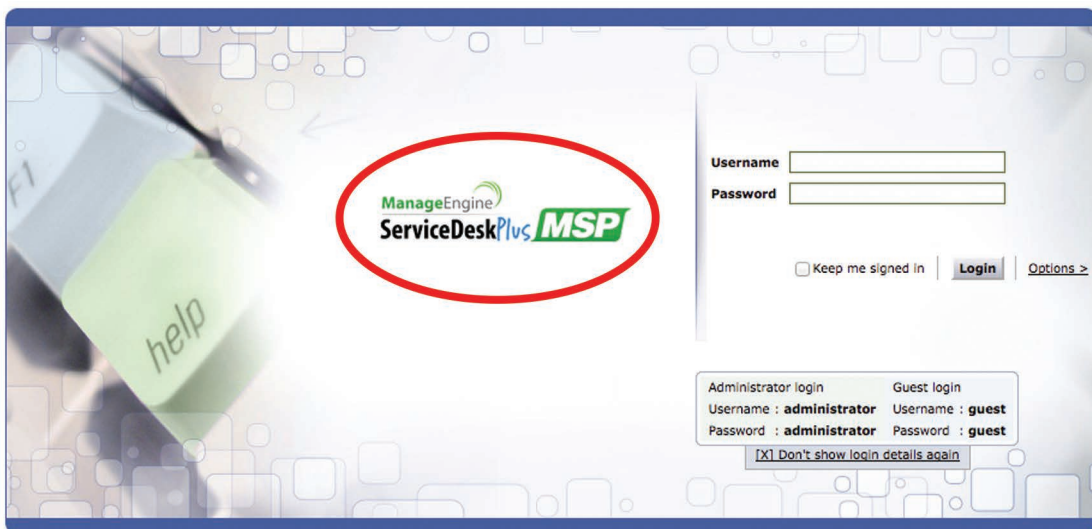
Click the *Admin tab* and click *Organization Details*.



Fill your organizational details and save the page. Make use of the help card (section under organization details) for detailed explanation of the fields.

Company logo: You can upload your company logo that will be displayed on all reports generated from the product.

Customize images: This section helps you to configure the “login page image” and the “header image”. The login page image and the header image provide a customized view of the application to the end users so that they get a feel of working on their own organizational application.



Login page image



Header image:

Step 1(b): Enter your account's details into the application

Enter your account details under *Admin -> Accounts*.



Follow the same procedure as Organization details while filling the fields on the account page.

Login URL – Account-specific login and the header images will be displayed when the account specific Login URL is used.

Step 2: Configure the Mail Server Settings

Send and receive e-mails to and from the application by configuring the mail server. A user can send a mail to the account-specific support address which is forwarded on a server level to the MSP's mail box and created as a ticket in the application.

Configure the mail server under *Admin -> Mail Server Settings*



Configure the incoming mail server to fetch mails into the application and configure the outgoing mail server to send mails from the application. Make use of the help card (section under Mail Server Settings) for detailed explanation of the fields.

Difference between the support e-mail address and mail server e-mail address:

The support e-mail address is the one to which your end users will be sending incident requests or service requests whereas the e-mail address in the mail server settings is the unique address of your mailbox from which mails will be fetched.

You can configure the support e-mail address while creating the accounts under *Admin -> Accounts -> support e-mail address*.

For example, Acme is a Managed Service Provider. Support@acme-msp.com is the support address to which Acme users will send their e-mails. Requests sent to this support address will be forwarded at the mail server level to the MSP's mailbox. Also, consider if Whellings technologies is one of the clients, configure the support e-mail address for Whellings technologies as support@Whellings-technologies.com and the users of this company are required to send their e-mails to this address and the tickets will be created under the Whellings technologies' account.

Incoming e-mail address can be configured under *Admin -> Mail Server Settings -> Incoming tab -> E-mail Address*. Consider that your incoming e-mail address is incoming@acme-msp.com. The support mails that are sent to any of the support addresses will be forwarded on a server level to incoming@acme-msp.com and tickets will be created under the respective accounts. For more information on configuring mail server, please [click here](#).

Step 3: Import users into the applications

As per the product, users are categorized into two types namely Requesters and Technicians.

A **Requester** is a person who raises incidents or service requests to the service provider.

A **Technician** is a representative or an employee of your (Managed Service Provider) organization who addresses these issues and provides a service to the requester.

A **Requester** is added into the application under the respective account when he sends a mail to the respective support e-mail address for the first time. To add a Requester manually, click on *Admin -> Requesters -> Add New Requester*.

[Import from Active Directory | Import from CSV | Add New Requester]

You can also import users in bulk into the application in the following ways.

- Import through Active Directory
- Import through CSV

Bulk importing of Requesters

Click on *Admin -> Requesters -> Import from Active Directory or Import from CSV* (and follow the instructions further)

[Import from Active Directory | Import from CSV | Add New Requester]

Importing a technician into the application

Technicians can be imported into the application in bulk through a CSV file. This can be done by clicking *Admin -> Technicians -> Import from CSV*


[Add New Technician] [Import from CSV]

Apart from this, you can add a technician into the application manually or you can change a MSP Requester into a Technician.

To Change a MSP Requester into a Technician

Click on *Admin -> Organization Details -> MSP Requester -> Click on a Requester -> Change as Technician*

View List Edit Change as Technician Associate Workstation View Requests



You can associate a technician to accounts, sites, departments and groups. Technicians can also approve service requests and/or purchase orders. Provide login credentials for the technician and you can associate the roles to him/her based on your requirement. To know more about roles, [click here](#).

So now, start raising tickets and let the application take care of managing them. You can raise a ticket in ServiceDesk Plus - MSP in five different ways,

- Phone calls
- E-mail
- Web-form/Templates
- E-mail Commands and
- API

To know more about ticket/request creation, [click here](#)

The application has the intelligence to automatically route the ticket under the respective account and you can make use of the high level of automations throughout the ticket lifecycle.

- For a detailed assistance, please make use of our [Admin Guide](#)
- For installation assistance, please refer our [Installation Guide](#)

Managed service providers: A person/organization that supports and provides services to its clients and also satisfying its own requirements



ManageEngine **ServiceDesk Plus MSP**

Zoho Corporation
4900 Hopyard Rd., Suite 310
Pleasanton, CA 94588, USA
Phone: +1-925-924-9500

Website : <http://www.servicedeskplusmsp.com>
For queries on products : msp-servicedeskplus-support@manageengine.com
For demo : <http://demo.servicedeskplusmsp.com>
Toll free : +1 925 924 9500