The Guide

A basic guide for setting up your Samanage application
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Introduction

Thank you for choosing Samanage, the leading SaaS IT Service and Asset Management service! We are excited to introduce you to the easiest way to manage your IT assets and service desk. Samanage is an on-demand service, therefore, there are no servers to provision, no software to maintain, and no databases to administer. Additionally, with Samanage you will have no need to worry about running more software or backing up your data.

This guide will serve as an outline used to assist Samanage users with their initial setup in order to gain better control in regards to IT requests, solutions and assets across your organization.

Contacting Samanage for Assistance

If you need help, we are at your service. You can search our online community, which is updated frequently by our technical support team, to find answers to the most commonly asked questions. You can also contact our support team by emailing support@samanage.com or by visiting our support page to chat with a representative.
Organization

Defining your organization will be a cornerstone in setting up your Samanage account. Therefore, we suggest that you tackle setting up your Organization in the setup section before moving on to other areas of setup. The organization section is where you set your default time zones and languages for your company. You will also create and manage your sites and departments in this section.

You can select the default:

- timezone of your organization
- language of your organization

Please note that this will change the default language for all pages of the Application, Service Portal, and any email notifications that are sent out. Simply click on the drop down and choose the language that suits your company.

* Alternatively, you can also set a different language per site as well as per user.
Creating a New Site

The sites in Samanage are most commonly used to designate your various physical locations. When creating a new site there are many options available for you to specify. You will need to enter the following:

- Name (Required) - name of site
- Location (Required) - location of site
- Description - description of site to better understand the use of the site
- Time Zone - time zone associated with specific site
- Language - language associated with specific site
- Business Hours - business hours associated with specific site (these should be defined before creating the site)
- Site Manager - user defined as site manager (this can be the main contact for the site or the IT manager for the site)
- Default Assignee - the user assigned as the default assignee for each site will receive all unassigned tickets for this site
- Actions (Edit/Delete) - options given in this column to edit or delete sites
Adding a Department

This is where you will break down the various departments in your organization. The departments are going to be the various functions in your organization such as IT, Human Resources, or Facilities. This is a similar process to adding a site to your company. When adding a new department, you will need to enter the following:

- Name (Required) - name of department
- Description - description of department
Users

In the Setup section of Samanage, you will find the User section which allows you to add and manage users in your account. Here there are various ways to import your users and alter the information associated with each user.

Table View

The Table View is the view that you will see upon arriving at the Users section of Setup. Here you can view the users as well as filter the users by specific criteria. You can also customize the view by adding additional columns.

- Name
- Email
- Last Login
- Role
- Actions (various actions appear for each user when cursor rolls over selection)
  - EditUser, DisableUser, ResendActivationEmail, ResetUserPassword, and Delete User

* To add additional columns, click the blue wrench on the far right and add any additional columns you wish to view. You can export the list to Excel (CSV) or PDF or print it.
Buttons Above Table View

At the top of the Users section, there are several actions available to you:

1. Update – the “Update” button will save you a significant amount of time by mass update user details like roles, who they report to, sites/depts, and enabling/disabling users
2. Import – use the “import” button to import a CSV of user data
3. Login history - the “Login History” will show your account’s login history
4. Add new user – this button will prompt you to manually enter user information
**Adding New Users**

There are two ways to add new users:

1. **+ New User** - the new user button allows you to create a user manually
2. **Import** - the import functionality allows you to import users via a .csv document

When adding a new user manually with the "+ New User" button, an optional activation email can be sent to the user with a link to activate the account and select a new password. This email can always be resent if the account hasn’t been activated yet. Please note that the .csv import functionality does not trigger an activation email to the new user.

* Importing users via .csv does not trigger an email to the user.*
Inserting Users Manually

The following visual shows an example using the "+ New User" process. Here we are adding a test user in the Sales Department at the North Carolina Office Site. We encourage you to fill out as much information as possible. By clicking on the "Send Activation Mail" check box, the user will receive an email notifying them to activate their account and select a new password.

* Our best practice would be to upload an avatar for each user in the system. Adding avatars for each user is helpful when you have a large amount of users. You can select any picture to use as an avatar by clicking the "Choose" button below the avatar circle.
Importing Users

Sammanage also gives you the option to import your users through a .csv import. The user fields that can be imported through a .csv file are the same fields that can be entered manually. You can import .csv files by clicking the "Import" button at the top right corner of the Users section. This will bring you to the import screen which gives you the option to choose a file to upload.
Groups

In Samanage, groups are collections of users that are used to assign incidents to groups of people that will be handling the incidents in certain categories. Once you have added your users to the system you will want to create groups and include the relevant users in those groups.

Creating Groups

To create a group in the application, you will click the "+ Create New Group" button on the top right of the Groups section in Setup portion of Samanage.

When creating a new group in Samanage you can specify the name, add a description and choose a user for the group to report to. Once you have finished defining the details of the group, you can add users to the group via the "+ Add User to Group" button.
Roles

Roles in Samanage allow you to create custom roles and associate those various roles with specific permissions and restrictions for specific user groups. Each Samanage account comes with several default roles available to you. You can create new roles from scratch or you have the option to clone, edit and delete new or existing roles.

Default Roles

- Administrator – This is the all powerful administrator role! The administrator role allows the user to manage everything from the service portal look and feel to the application setup. We recommend that the number of administrator roles is limited to 1 or 2 users.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Action</th>
<th>Subject</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage</td>
<td></td>
<td>All</td>
<td></td>
</tr>
</tbody>
</table>

- Service Agent User – The service agent user is almost like the administrator role, but the service agent user will have no access to the Setup section of Samanage. This role is for users who will be in the application side of Samanage working the various tickets that come through the system. We would also refer to this role as the technician role.

<table>
<thead>
<tr>
<th>Type</th>
<th>Action</th>
<th>Subject</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permission</td>
<td>Manage</td>
<td>All</td>
<td></td>
</tr>
<tr>
<td>Restriction</td>
<td>Manage</td>
<td>Setup</td>
<td></td>
</tr>
<tr>
<td>Restriction</td>
<td>Delete</td>
<td>All</td>
<td></td>
</tr>
<tr>
<td>Restriction</td>
<td>Manage</td>
<td>Benchmarks</td>
<td></td>
</tr>
<tr>
<td>Restriction</td>
<td>Manage</td>
<td>Risks</td>
<td></td>
</tr>
</tbody>
</table>
• Service Task User - The service task user role is for any user accessing the Service Portal for task and approval management. In other words, these users will be accessing the portal, mark off tasks and approve various changes submitted by other users. We recommend this role for users who will not be working tickets, but who will need more visibility and the ability to manage tasks and approvals.

<table>
<thead>
<tr>
<th>Type</th>
<th>Action</th>
<th>Subject</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permission</td>
<td>Read</td>
<td>Incidents</td>
<td>Requester: -- Requester: --</td>
</tr>
<tr>
<td>Permission</td>
<td>Create</td>
<td>Incidents</td>
<td>Requester: -- Requester: --</td>
</tr>
<tr>
<td>Permission</td>
<td>Update</td>
<td>Incidents</td>
<td>Requester: -- Requester: --</td>
</tr>
<tr>
<td>Permission</td>
<td>Read</td>
<td>Solutions</td>
<td>State: Approved</td>
</tr>
<tr>
<td>Permission</td>
<td>Update</td>
<td>Solutions</td>
<td>State: Approved</td>
</tr>
<tr>
<td>Permission</td>
<td>Read</td>
<td>Service Catalog</td>
<td>State: Approved</td>
</tr>
</tbody>
</table>

• Requester - The requester role is for users who will be submitting incidents and requesting service catalog items. These users can also view their own requests on the service portal. This role is sometimes referred to as the end user, portal user, or a requester.

<table>
<thead>
<tr>
<th>Type</th>
<th>Action</th>
<th>Subject</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permission</td>
<td>Read</td>
<td>Incidents</td>
<td>Requester: -- Requester: --</td>
</tr>
<tr>
<td>Permission</td>
<td>Create</td>
<td>Incidents</td>
<td>Requester: -- Requester: --</td>
</tr>
<tr>
<td>Permission</td>
<td>Update</td>
<td>Incidents</td>
<td>Requester: -- Requester: --</td>
</tr>
<tr>
<td>Permission</td>
<td>Read</td>
<td>Solutions</td>
<td>State: Approved</td>
</tr>
<tr>
<td>Permission</td>
<td>Update</td>
<td>Solutions</td>
<td>State: Approved</td>
</tr>
<tr>
<td>Permission</td>
<td>Read</td>
<td>Service Catalog</td>
<td>State: Approved</td>
</tr>
</tbody>
</table>
Creating New Roles

There are two way to create a new role:

1. + New Role – the new role button allows you to create a new role from scratch
2. Clone Role - you can also clone existing roles

You can add new roles using the “+ New Role” button at the top right hand corner of the Roles section in Setup. Once you have entered a name and description as well as chosen a user licence type, you can click “Create Role”. After you have created that role, you can add the appropriate permissions and restrictions.

You can also add new roles by cloning existing roles. This is extremely helpful in the case that you need a large number of similar roles. To clone a role, you can click the “Clone Role” button located to the right of each role. Once you have cloned the role, it will appear at the top of the roles list where you can make needed adjustments if necessary.
Deployment

There are a number of ways that you can deploy the Samanage agent to your assets. In the application, you will find instructions for deploying the agent on your own computer or for deploying the agent to your organization.

Deployment Options - Your Computer

Located in the first tab on the deployment menu, you will find the instructions for installing the agent on your own computer. This is where you will find options for installing the agent on a Windows, Mac, or Unix/Linux computer.
Deployment Options - Your Organization

Located in the second tab on the deployment menu, you will find ways to roll out the agent to your entire organization. There are a number of ways to deploy the Samanage agent, but our best practices will be found here.

1. Domain Logon Script – Recommended for: Enterprise deployment (Windows). Use a Domain Logon Script to deploy the Samanage Agent on all computers that log into the domain.

2. Active Directory GPO – Recommended for: Enterprise deployment (Windows). Use Active Directory Group Policy Option (GPO) to deploy the Samanage agent automatically to all computers that join the domain.

3. Email – Recommended for: Enterprise deployment (when Domain / Active Directory GPO is not available).
Service Desk

In this section under Setup, you can personalize your service desk. This section will allow you to customize your service desk so that it aligns with your own service desk processes. You will find many ways to tailor your service desk from customizable incident state names to changing the default priority for incidents.

Enter Service Desk Name

This function allows you to enter a Service Desk name for your company. This name is used in the “From” field in email notifications and in the service portal.

<table>
<thead>
<tr>
<th>Service Desk</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter your service desk name - this name is used in the “From” field for email notifications and in the self-service portal. For example: enter Demo Service Desk.</td>
<td></td>
</tr>
<tr>
<td>Samanage Service Desk</td>
<td></td>
</tr>
<tr>
<td>Update</td>
<td></td>
</tr>
</tbody>
</table>

Custom Incident States

Here you can rename system states or create new custom states. You also have the option to change the order in which they appear in the drop down menu for incidents. Additionally you can determine if the custom states are affected by the SLA rules by checking the “Apply SLA” box next to each state.
**Auto Tagging**

You can check this box if you want Samanage to automatically generate Service Tags. You can also enable the Tag Cloud widget on the dashboard which will show you how often you're receiving incidents based on your tag list.

![Auto Tagging](image)

**Close Inactive Resolved Incidents**

This feature allows you to select a duration after which inactive incidents will be moved from Resolved state to Closed.

*An incident is considered inactive when it has no new comments and no changes are made to the incident.*

![Close Inactive Resolved Incidents](image)
**Reopen Resolved/Closed Incidents**

This feature allows you to reopen any closed or resolved incidents when a new comment is made by the end-user either via the portal or email.

```
<table>
<thead>
<tr>
<th>Reopen resolved/closed incidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enabling this option will reopen any closed or resolved incidents when a new comment is made by any recipient of the incident via the web or email.</td>
</tr>
<tr>
<td>☑ Reopen incidents when a comment is made</td>
</tr>
</tbody>
</table>
```

**General Settings**

This feature allows you to set the default priority for new Service Desk items. You are able to adjust the default priority to Low, Medium, High, or Critical.

```
<table>
<thead>
<tr>
<th>General Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default priority for new Service Desk items:</td>
</tr>
<tr>
<td>Medium.</td>
</tr>
</tbody>
</table>
```

**Comments Sorting**

This feature allows you to order comments from newest to oldest. By disabling this option, you can show comments on incidents from oldest to newest.

```
<table>
<thead>
<tr>
<th>Comments Sorting</th>
</tr>
</thead>
<tbody>
<tr>
<td>By default, newest comments are displayed first in the incident view. Disable the option below to reverse the order:</td>
</tr>
<tr>
<td>☑ Comments are sorted from newest to oldest</td>
</tr>
</tbody>
</table>
```
**Customer Satisfaction Surveys**

The Customer Satisfaction Survey feature will enable you to send satisfaction surveys to your users once an incident is resolved. The satisfaction survey will be sent to the incident requester. The requester will be asked to provide feedback on the service received and indicate their satisfaction with "yes" or "no". After this feature has been enabled you will see two new satisfaction widgets on your dashboard. These widgets represent the "Customer Satisfaction" and "Customer Satisfaction Today" levels.

![Customer Satisfaction](image1)

![Customer Satisfaction Today](image2)
If you enable this feature, you can choose to send satisfaction survey to all categories or you can select specific categories.

- Do not send customer satisfaction surveys.
- Send customer satisfaction surveys for all incident categories.
- Choose a selection of categories to send customer satisfaction surveys to.

You can also choose when and how often the survey is sent. You are also given the option to adjust the threshold for the customer satisfaction widget. When the percentage drops below the value you set, the widget will appear in red.

* Once this feature is enabled, you will be able to view the satisfaction for each incident at the incident list by adding "satisfaction" to the custom view using the blue wrench button.
Service Portal

The Service Portal is customizable and can be branded to your own company. You can change the logo, favicon, titles and messages displayed across the portal. You can also customize the way that your end users interact with the portal by managing certain fields on the new incident or service request form.

Access the Service Portal

The bolded URL in this section is your organization’s service portal website. You can click the “Portal Preview” button to see a preview of the changes you have made to your service portal.

Allowed Domains

This section enables you to specify the domains that can create an account and access your service portal. You can separate multiple domains using commas. If you decide to leave this section blank, any user will be allowed to create an account for your service portal.
**Logo**

Here you can upload an image to appear as your company's logo. The logo will appear on the upper left hand side of your Service Portal.

<table>
<thead>
<tr>
<th>Logo</th>
</tr>
</thead>
<tbody>
<tr>
<td>The logo appears in several places, such as on the upper left side of your Portal pages. Your image will be reduced to two different sizes: 200x100 and 200x40 pixels.</td>
</tr>
<tr>
<td>Select a file for new logo, 4MB max.</td>
</tr>
</tbody>
</table>

**Favicon**

You can also upload an image for the favicon, which appears on the left side of the tabs in your browser.

<table>
<thead>
<tr>
<th>Favicon</th>
</tr>
</thead>
<tbody>
<tr>
<td>The favicon appears on the tabs in your browser.</td>
</tr>
<tr>
<td>Select a file for new favicon, 100KB max.</td>
</tr>
</tbody>
</table>

**Title**

You can update your Service Portal title in this section. This title will appear on the upper left hand side of the Service Portal page.

<table>
<thead>
<tr>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Portal pages title appears on the upper left side of your Self Service Portal pages.</td>
</tr>
<tr>
<td>Portal title</td>
</tr>
<tr>
<td>Samanage Service Desk</td>
</tr>
<tr>
<td>Update</td>
</tr>
</tbody>
</table>
Welcome Message

You can also add a welcome message for your users. The welcome message will appear below the portal title. Occasionally, customers will use this message to update their users with company announcements.

Sign Up Message

There is also an option to add a signup message for your portal users. This will appear below the portal sign up box.
Portal Menus & Sections

This section enable you to customize the visibility, labels and order of the menus for the Service Portal.

- **Default Portal Landing Page** – This dropbox box will help you change the default page that your portal users land on when they log in. You can select from the various menus available to you.

- **Visible?** – On the far left you will find an option to make the Service Catalog, Solutions and Incident Creation menus invisible. This feature is helpful for hiding certain areas of the application from Portal Users before they have been launched.

- **Menu Labels** – This section enables you to change the title of the menus. This customization feature allows you to adjust the menus to align with your organization’s terminology.

- **Order** – This column will allow you to change the order in which the portal menus appear.

- **Action Text** – You can change the action text that appears for requesting service catalog items and submitting incidents. This will alter the text that appears for the “apply” button for each of these actions.

<table>
<thead>
<tr>
<th>Visible?</th>
<th>Menu Labels</th>
<th>Order</th>
<th>Action Text</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Home</td>
<td>1</td>
<td></td>
<td>The main page, and there is no place like it. This option can not be hidden.</td>
</tr>
<tr>
<td></td>
<td>My Service Tasks</td>
<td>2</td>
<td></td>
<td>Shows users their tasks and request status. This option can not be hidden.</td>
</tr>
<tr>
<td></td>
<td>My Requests</td>
<td>3</td>
<td></td>
<td>Shows users their requests and request status. This option can not be hidden.</td>
</tr>
<tr>
<td>✔️</td>
<td>New Service</td>
<td>4</td>
<td>Request Item</td>
<td>Allows users to browse the service catalog and request a new service.</td>
</tr>
<tr>
<td>✔️</td>
<td>Solutions</td>
<td>5</td>
<td></td>
<td>Allows users to browse the knowledge base and search through articles.</td>
</tr>
<tr>
<td>✔️</td>
<td>New Incident</td>
<td>6</td>
<td>Create New Incident</td>
<td>Allows users to submit a new incident.</td>
</tr>
</tbody>
</table>

Update Reset to Default
Header Colors

Another great customization available to you is the option to alter the header colors on your Service Portal page. This setting will change the colors of the header and header font on the top menu row of your service portal.
Customizations

This section will help you to customize the way that your portal users can interact with the Service Portal.

- **Site/Department** – The first section here will enable you to give your portal users the option to select the site and department on their incidents and service requests. If you leave these options unselected, the user’s site and department will be populated by default. You can also make these fields mandatory.
- **Attach Files** – You can give your end users the permission to attach files to their incidents and service catalog requests.
- **Specify Due Dates** – You also have the option to give users the ability to specify due dates for their incidents.
- **Categories/Subcategories** – Portal users can be given the option to select the category and subcategory for each incident. If you give portal users the option to select these fields, you can also make each of these fields mandatory.
- **Priority** – This customization allows for you to make priority visible to portal users. You can also allow portal users to specify the priority of their incidents.
- **Mark Requested Resolved** – This feature gives portal users to mark their requests as resolved once they have been submitted.
- **Submit On Behalf** – You can give portal users the ability to submit requests on another user’s behalf. This is useful in the case that a particular user does not have the ability to submit an incident. You can also narrow down this option to be applicable only for submitting requests for the users they report to.

<table>
<thead>
<tr>
<th>Customizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the options below to allow or require portal users to specify their site and/or department.</td>
</tr>
<tr>
<td><strong>Portal users can specify sites</strong></td>
</tr>
<tr>
<td>□ Site is a mandatory field</td>
</tr>
<tr>
<td><strong>Portal users can specify departments</strong></td>
</tr>
<tr>
<td>□ Department is a mandatory field</td>
</tr>
</tbody>
</table>

Select the options below to allow portal users to modify new incident properties. This is used when users submit a new incident via the portal.

- **Portal users can attach files to new incidents**
- □ Portal users can specify due dates
- **Portal users can specify categories**
  - □ Category is a mandatory field
  - □ Subcategory is a mandatory field
- □ Priority is visible to portal users
  - □ Portal users can specify priority

Select the option below to determine how portal users can interact with their own requests.

- **Portal users can mark requests as resolved**

Select the options below to determine how portal users set an incident’s requester.

- **Allow portal users to submit an incident on behalf of other users**
- □ Only on behalf of users they report to
Email Settings

The Email Settings menu allows you to setup and customize your email dropbox settings and adjust preferences for allowed and blocked domains.

Email Dropbox

For each of our customers, we provide an email dropbox which allows you to automatically create tickets in Samanage when your team receives an email. You can simply set a forwarding rule on your email server to forward the support address you currently use to our dropbox (which should look like support@accountname.samanage.com) and ticket will be automatically populated within your Samanage account. These tickets will not receive a category or subcategory.

Reply Email Address

If you are forwarding a customized support address to your Samanage email dropbox, we advise you to enter the same address in the reply email address box. This reply email address will be used for all emails sent from your Samanage service desk to your Requesters.

* This email address typically matches your support email address.
Personalized Email Names

If you wish to have personalized email names appear in the emails from your Samanage account, you can turn on the following option to do so.

Personalized Email Names
If on, emails originating from user actions, such as assigning a task or commenting, will have the user’s name and email in the ‘From’ field.

Blocked and Allowed Domains

This section allow you to define blocked and allowed email addresses and domains. If you have email addresses or domains that you wish to ignore you can add them by clicking “+ New Address”. Any email received from the blacklist will be ignored and no incident or comment will be added. You also have the option to toggle each of these options to an “on” or “off” state.

* For better deliverability, add our mail server IP to your whitelist (IP is 75.126.253.143).
Categories

The categories feature in Samanage allows you to assign your incidents and service catalog items to various categories and subcategories within the application. Building out the categories for your organization will help you to identify which users or groups will receive various incidents. Categories also help to bring more accurate definition to the reporting capabilities within the application.

### Categories

Use the categories section to organize your work according to categories and subcategories for incidents and service catalog items. Categories can have a parent-child relationship, for example, Computers and Laptops. A child category is a subcategory of its parent category. Once these are defined, you can also have them automatically assigned to individuals or groups in your team. When creating a category or subcategory, you may also create an email dropbox for it, which can then be used to directly route incidents to this email address.

<table>
<thead>
<tr>
<th>Category name</th>
<th>Default Assignee</th>
<th>Default Tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities</td>
<td>Facilities</td>
<td>facilities</td>
</tr>
<tr>
<td>Cleaning</td>
<td>Facilities</td>
<td>cleaning</td>
</tr>
<tr>
<td>Equipment</td>
<td>Facilities</td>
<td>equipment</td>
</tr>
<tr>
<td>Ice Cream Runs</td>
<td>Bob Smith</td>
<td>ice cream, ice cream runs</td>
</tr>
<tr>
<td>Finance</td>
<td></td>
<td>finance</td>
</tr>
<tr>
<td>Human Resources</td>
<td></td>
<td>human resources</td>
</tr>
<tr>
<td>Incident</td>
<td></td>
<td>incident</td>
</tr>
<tr>
<td>IT Services</td>
<td></td>
<td>it services</td>
</tr>
</tbody>
</table>
Adding New Categories

To add a new category, you will click the "+ Add category" box located on the upper right hand side on the categories page. When creating a new category you will specify the category name, default assignee and the various default tags. Each incident submitted with a defined category or subcategory will receive the respective definitions.

You can also add a subcategories to each category by clicking the respective "+" button that populates next to each category name.

* We recommend that all categories and subcategories are assigned to a group of users. This allows for more visibility if a user is on vacation or if a user leaves the organization. By assigning categories to groups, you can update the group instead of updating various instances of one employee.
Category Email Dropboxes

You have the option to create an email dropbox for each category and subcategory. Incidents sent to these email addresses will be assigned to the respective categories and subcategories. To create an email dropbox within a category, you will need to click into the edit pencil for that category. From there, you will click “Create Email Dropbox”. This will populate an email address which you can customize as long as you have @accountname.samanage.com at the end. You can also select this address to be used as the reply email address as well.
Category Settings

The category settings allow you to set the category and subcategory as mandatory fields as well as select a default category for all new incidents submitted without an incident category. These mandatory selections apply for the Service Agent User and not the Requester. This will not affect the selections made in the Service Portal settings.

Default Assignee and Notifications

You also have the option to select a default assignee for all new incidents. In addition, you can also select a group or user to be notified if no default assignee has been selected.
Notifications

The Notifications menu allows you to customize the email notifications being sent to your Samanage users. You can also adjust the timeout period for approvals and data sent through email. If you find that you are either receiving too many email notifications or not enough email notifications, you can change these settings at any time.

Email Notifications

The Samanage application gives you the ability to configure which email notifications will be sent to assignees and requesters. If the requester option has been selected, you can also have notifications sent to the CC’d contacts.

![E-mail Notifications](image-url)

Configure which email notifications will be sent to assignees, requesters or CC’d contact.
Default Timeout Period

You have the option to define the default timeout period for links to approvals or exported data sent via email. Here you can enter the amount of time in days for which you would like the timeout period to be.

<table>
<thead>
<tr>
<th>Default Timeout Period</th>
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<tbody>
<tr>
<td>You can define the default timeout period for links to approvals or exported data sent via email.</td>
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<table>
<thead>
<tr>
<th>Timeout (days)</th>
<th>Update</th>
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<tr>
<td>15</td>
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