



Sub-Account Management in the Customer Support Portal

In this document, learn how to create Sub-Accounts for existing contacts in your organization, how to add new contacts to your organization for use in creating a new Sub-Account, managing your currently active sub-account users and assigning Sub-Account Management privileges to other members of your team.



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INTRODUCTION

Welcome to the **Commvault Customer Support Portal**. This guide will assist with getting you and your colleagues set up with individually assigned user accounts to access the support portal and receive support on your Commvault Cloud Enterprise, either by opening a Customer Support Case or by conducting an Online Support Chat with one of our Customer Support Engineers.

Every customer organization begins their access to the support portal with the creation of a Parent User Account. The parent user account will typically have a username that coincides with one of the CommCell servers in their Commvault Cloud Enterprise. A welcome email for this user account will be sent from the email address support@commvault.com, to the email address of the designated parent account “owner”.

By default, the parent account user can create new Sub-Accounts for other colleagues or individuals who manage the operations of the CommCell(s) in their enterprise. To allow for Commvault Customer Support to accurately track the specific contact who engages Commvault for assistance, only Sub-Accounts can open new customer support cases via the support portal – so the creation and management of Sub-Accounts is an important first step a customer can perform after receiving the access credentials for the Parent User Account.

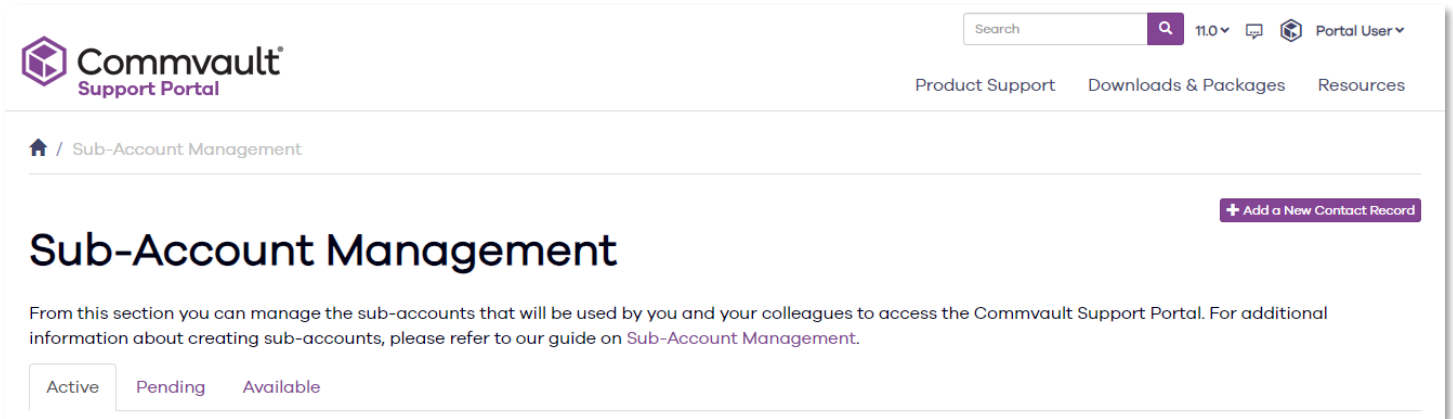
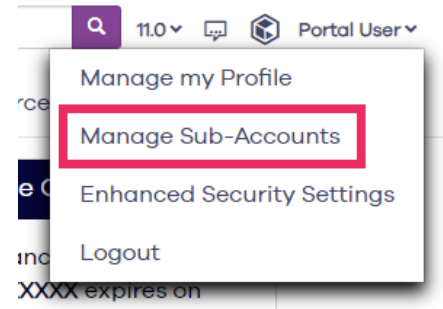
This guide will review the steps required for completing each of the key actions Parent Account users (and their assigned delegates) can perform:

- Creation of a new Sub-Account user for accessing the support portal
- Addition of a new contact record to the Commvault Customer Relationship Management database (only known contacts can have sub-accounts created for them)
- Delegation of Parent Account capabilities & permissions to Sub-Account users

SUB-ACCOUNT MANAGEMENT

Parent Account users, as well as Sub-Account users who have been granted the necessary permissions will see additional options from the User Menu located in the upper-right corner of the support portal. To begin the process of creating new sub-account users, click the Manage Sub-Accounts option.

Once the Manage Sub-Accounts page has loaded, you will see that the page has three tabs: **Active**, **Pending** & **Available**.



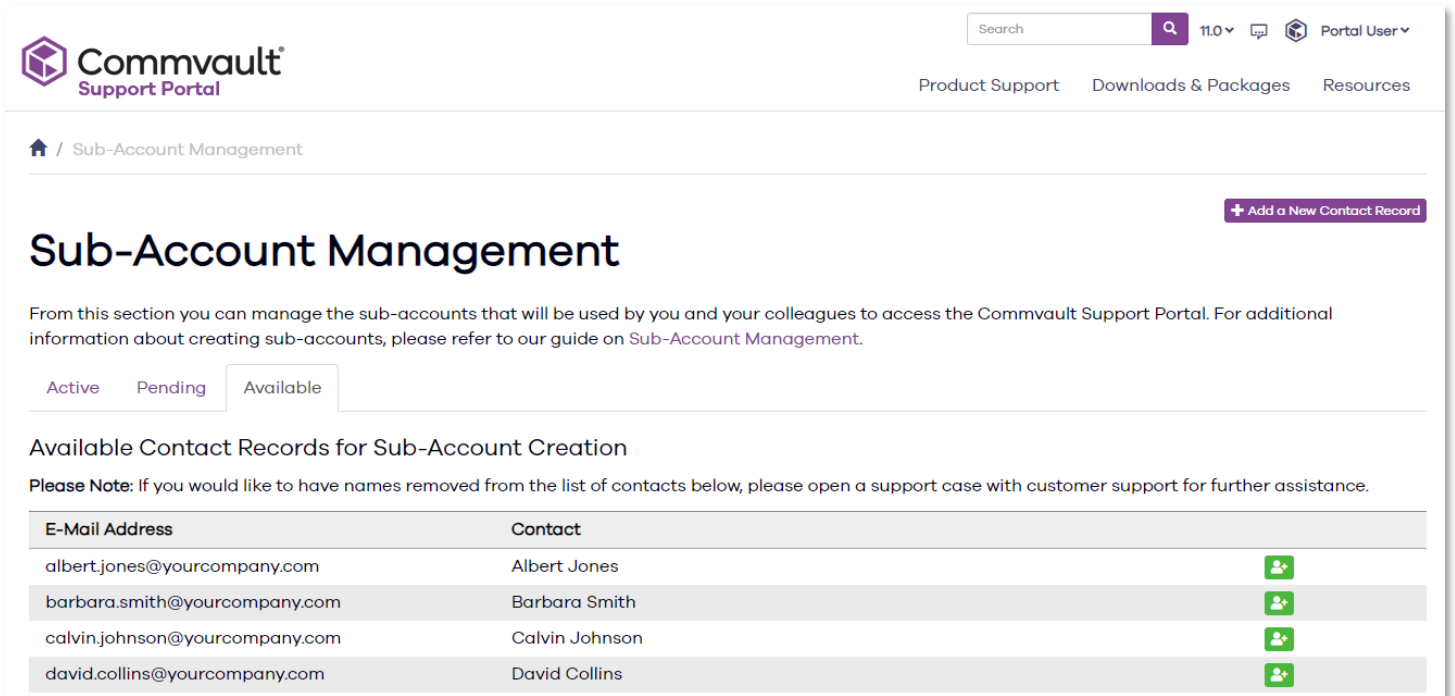
These tabs list the following contacts:

- **Active** – This tab shows the list of currently active sub-account users in your organization. From this page you will be able to:
 - View the user profile data
 - Delete a sub-account user
 - Promote to or demote from sub-account management permissions
- **Pending** – Once a sub-account creation request is made, the account will be left in a “pending” state until the activation process is completed by the user. Sub-accounts will stay in a pending state for 14 calendar days. If the sub-account is not activated within 14 calendar days, the sub-account will be purged from the database and need to be recreated.
- **Available** – Since sub-accounts can only be created for known contact records in your organization, this tab lists the known contacts that are available for the creation of new sub-accounts.

Additionally, from the Manage Sub-Accounts page, you can add a new contact to your organization by clicking the **Add a New Contact Record** button.

SUB-ACCOUNT CREATION

To get started with the process of creating new sub-accounts for you and your colleagues, on the Manage Sub-Accounts page, click the **Available** tab to view the list of known contacts in your organization.



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Home / Sub-Account Management





Sub-Account Management [+ Add a New Contact Record](#)


From this section you can manage the sub-accounts that will be used by you and your colleagues to access the Commvault Support Portal. For additional information about creating sub-accounts, please refer to our guide on [Sub-Account Management](#).

Active Pending **Available**

Available Contact Records for Sub-Account Creation

Please Note: If you would like to have names removed from the list of contacts below, please open a support case with customer support for further assistance.

E-Mail Address	Contact	
albert.jones@yourcompany.com	Albert Jones	
barbara.smith@yourcompany.com	Barbara Smith	
calvin.johnson@yourcompany.com	Calvin Johnson	
david.collins@yourcompany.com	David Collins	

If the contact you want to create a sub-account for is listed, simply click the  button in the far-right column. This will create a sub-account for the selected contact. Once the page refreshes, that individual will be listed under the **Pending** tab and no longer visible on the **Available** tab. When contacts are listed in the pending section, this means the account has been created and a confirmation email has been sent to the user's email to verify & activate the account.

After the sub-account user has received the confirmation email, they should click the account verification/ activation link within the email message. This will take the user to a webpage where they will be asked to submit a short form to complete the sub-account activation process.

Once that short form is submitted, the sub-account will be fully activated, their contact record will be listed under the **Active** tab on the Manage Sub-Accounts page and the user will be able to log into the Commvault Support Portal.

Important Notes:

1. The account verification link will expire in 14 calendar days, after that period; the sub-account reservation will be automatically deleted, and you will need to create the sub-account again.
2. If you are the parent account owner and creating a sub-account for yourself, make sure you log out of the parent account before starting the process of activating your sub-account.

ADDING A NEW CONTACT

If you do not see the name of the individual, you are creating a Commvault Support Portal sub-account for on the Available list, you can click the **Add a New Contact Record** button.

The screenshot shows the 'Sub-Account Management' page. At the top right, there is a search bar and a user profile 'Portal User'. Below the navigation bar, the page title is 'Sub-Account Management'. A red arrow points to a purple button labeled '+ Add a New Contact Record'. Below the title, there is a paragraph of text and three filter tabs: 'Active', 'Pending', and 'Available'.

If you wish to both add a new contact and create a sub-account for the user at the same time, click the radio button indicating as such. Shortly after clicking the **Submit** button, if you indicated that you wanted a sub-account to be created, the contact will receive a confirmation e-mail for completing the sub-account creation process.

Home / Sub-Account Management / Add a New Contact Record

Add a New Contact Record

First Name

Last Name

Company

Your Company Name

E-Mail Address

Phone Number

Mobile Phone

Street Address

Address Line 2

City

State / Province

Zip / Postal Code

Country

Would you like to create the sub-account for this contact now as well?

Yes No

Submit

ACTIVE SUB-ACCOUNT MANAGEMENT

Now that you have active sub-accounts for yourself and / or your colleagues, you can use the **Manage Sub-Accounts** page to perform additional management operations for those **Active** user accounts.

On the Active user tab, you will see a list of your active sub-account users, alphabetized by their last name, an example of this is shown below:

[Home](#) / Sub-Account Management + Add a New Contact Record

Sub-Account Management

From this section you can manage the sub-accounts that will be used by you and your colleagues to access the Commvault Support Portal. For additional information about creating sub-accounts, please refer to our guide on [Sub-Account Management](#).

Active
Pending
Available

Active Sub-Accounts

Username	Contact	
thomas.anderson@yourcompany.com	Thomas Anderson	
elizabeth.bennett@yourcompany.com	Elizabeth Bennett	
hans.castorp@yourcompany.com	Hans Castorp	
anne.elliott@yourcompany.com	Anne Elliot	
moll.flanders@yourcompany.com	Moll Flanders	
joe.gargery@yourcompany.com	Joe Gargery	
anna.howe@yourcompany.com	Anna Howe	
philip.marlowe@yourcompany.com	Philip Marlowe	

Management operations you can perform on your active sub-accounts are:

- View User Details** – Quickly review the user profile of the user
- Promote User** – Provide the ability to Manage Sub-Accounts to one of your Sub-Account users. A user who does not have Sub-Account Management capabilities will be denoted with a “pawn” icon.
- Demote User** – If the user has previously been granted the ability to Manage Sub-Accounts, the account will be denoted with a “king” icon. Clicking this button will remove those privileges from the user.
- Delete User** – Clicking the trash icon button will delete the user’s sub-account and terminate their access to the support portal. This will not delete their history of working with Commvault Customer Support; any cases that the individual has worked on will still be available for you to access and review. Since deleting a sub-account is not reversible, you will be asked to confirm the deletion before the action is processed.

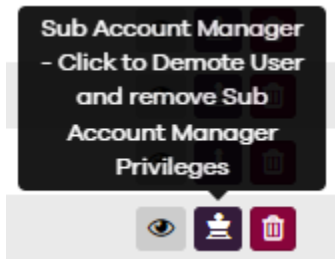
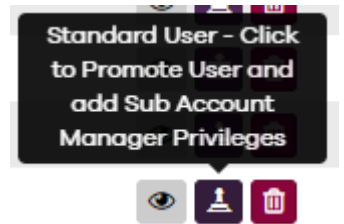
DELEGATING SUB-ACCOUNT MANAGEMENT CAPABILITIES

As mentioned in the previous section, one of the key functions you can perform on a sub-account is to “promote” the user to have the same sub-account management capabilities of the parent user account.

In larger or distributed teams, Commvault Customer Support strongly recommends promoting several users to the sub-account manager role so that the creation and management of your user access can be handled by multiple individuals. This feature has been made available in the Commvault Customer Support Portal because many parent user account owners felt that they were a “bottleneck” to sub-account user management process.

It is also strongly recommended that once the parent user account owner has set up and activated their own personal sub-account that they delegate sub-account management capabilities to that sub-account as well. This will alleviate the need for having to switch back and forth between your sub-account and the parent account.

When toggling a user’s ability to manage sub-accounts from the **Manage Sub-Accounts** page, you will be guided by tooltips that clearly indicate the operation you are about to perform. So, if you have a standard / regular user that you wish to promote, if you put your mouse over the “pawn” icon, you will see the tooltip as shown to the right.



Additionally, if you have a user who has already been granted permission to manage sub-accounts and you wish to remove those capabilities from their account, if you put your mouse over the “king” icon you will see the tooltip shown to the left.

Once the user has had their sub-account management capabilities removed, they will no longer be able to perform any sub-account management related functions, even if they have a currently active session on the support portal.

Engage with Commvault Customer Support today, visit support.commvault.com