User Guide v1.1

freshservice

freshservice

Introduction

Congratulations on signing up with **Freshservice** for your IT Service Desk needs! We're excited to have you on board.

Freshservice is an online ITIL Service Desk with a fresh twist. It puts a refreshing user experience on top of powerful ticketing and asset management capabilities, and is the most user-friendly app in the space. In addition to core functionalities like **Incident**, **Problem**, **Change**, **Release**, **Service Request** and **Asset Management**, Freshservice also lets you put your **Knowledge Base** on the cloud.

Freshservice offers a plug and play ITIL solution for organizations looking to align themselves with best practices without getting any expert implementation help. It has been developed by the team of experts behind Freshdesk, the leading customer support software that is currently being used to support over 15 million customers across the world.

This playbook will help you get started with Freshservice. It will also give you some tips and best practices to help your team perform the best it can.

What's new in this version?

This is version 1.1 of the **Admin User Guide**. Besides the features included in v1.0, two key features have been added.

- **Freshservice Discovery Agent**- A Windows application that works with **Discovery Probe** to help you with asset discovery, while eliminating some of the limitations that **Probe** faced.
- **Service Catalog**- The Service Catalog organizes all the services that your business provides. It's a one stop shop for your customers where they can see just the services they are eligible for and request for them in a couple of clicks.

1. The basics

1.1. What's a ticket?

Every service desk agent's life revolves around service tickets and so does yours. But what exactly is a support ticket?

You can think of a ticket as a case-sheet that contains the entire history of a problem/incident - right from the minute it was reported by a user, to the time it gets closed. Also, every ticket carries a unique ID number that differentiates it from the rest.

1.2. What's your goal as an Admin?

As an Admin, you are expected to maintain smooth operation for all the other departments by making sure IT issues are resolved as quickly and efficiently as possible within the defined Service Level Agreement (SLA) period, in a way that minimizes further issues.

1.3. Where are you headed now?

Haven't you always wanted a magic cloak that can help you assist users better? If you are looking for ways to improve your customer service quality score, we can help. This guide explains the Freshservice features that can help improve your quality score apart from bringing out the super smart agent in you.

1.4. What will you learn?

From this guide, you'll learn how to respond to and resolve customer tickets using Freshservice, assign tickets to agents if you are an Admin, set-up email notifications & canned solutions, take your customer service over social channels and much more! You will also find tips and tricks that will help you resolve issues quickly and in style!

2. Getting started with Freshservice

2.1. Creating your Freshservice account

Freshservice is available in four distinct flavours - Sprout, Blossom, Garden and Estate- with a variation in features. However, when you signup for the first time, you'll have access to a fully functional Freshservice account with absolutely no restrictions during the entire 30-day trial period.

Creating an account in Freshservice takes less than 30 seconds. Here's how you go about it.

1. Visit http://www.Freshservice.com
2. Click *Sign-up* or *Get Started*
3. On the *Create your Freshservice account* page, specify the following:

- Company Name (this can be changed from the Admin settings in case you want to change it later on or if you want to leave it blank).
- Site Address (For eg. http://YourCompanyName.Freshservice.com) - Site Address represents your service desk's web address through which your customers will contact you.
- Email address - Your contact email address for notifications pertaining to your service desk.
- Phone no. - Contact phone number.

4. Read the *Terms and conditions.*
5. Click *Create my account.*

2.1.1. What should I do after Creating my account?

Immediately after you click on "Create my account", you will receive an account activation email from Freshservice Support. Click the 'activation' link, to access the Activate your account page.

Specify the password for your company's Freshservice account. Confirm the same and then click Activate.

Congratulations! Your Freshservice account account is now all set!

2.2. Configuring Freshservice - On Boarding

Once you've created your account, here are a few things to get your service desk rolling.

2.2.1. Creating your Support Email

What's your support email?

The support email that you supplied while creating your Freshservice account gets automatically populated as *Your Support Email Address*. If you have specified the correct support email, click *Save*. Else, you can update your *service desk URL* and then click *Save*.

What is Site Address?

Site Address represents your company's support portal. Let's say, your company's name is 'sample', then ideally your Site Address would be *http://sample.freshservice.com* and your support email would be *support@sample.freshservice.com*.

Forwarding your support emails to your Freshservice account

For Freshservice to handle your support tickets, you'll need to forward emails from your email account to the support email address of Freshservice. Gmail has a great guide to doing this. You can try this with your mail service as well.
https://support.google.com/mail/bin/answer.py?hl=en&answer=10957

Confirming that your emails are getting forwarded to Freshservice

To ensure everything is working fine, click *'sending a test email'* to check if your Freshservice email account is receiving emails from your gmail.

2.2.2. Adding Agents to Freshservice

Now that you have created an account, you can add agents for your service desk. To do that, go to admin → send invites to your service desk agents to access your Freshservice service desk. In the *Send Invites to agents*, text box, you can key in the email id of the agent, whom you would like to invite to access Freshservice. To invite multiple agents, use a comma to separate the email ids. Once done, click *Send Invite*.

2.2.3. Rebranding your service desk

Your company's web site may have a theme/colour/logo etc., that your users associate you with. And with the re-branding options available with Freshservice, you can make your service desk shout YOU. The process is simple too... Here's how you can go about re-branding your service desk.

- In the Company Name section, specify your Company Name
- Logo - Click Choose File to select your company's logo
- Paint your service desk - allows you to customize your service desk's colour schemes for Header, Tabs and Background to match with your web site.
- Once done, click Rebrand

3. Configuring Admin Settings

3.1. Everything service desk

3.1.1 Service desk rebranding

You can completely customize your Freshservice for requesters logging into your self-service portal as well as your agents. Rebrand the look and feel of your helpdesk with your logo and theme by uploading your logo and favicon, giving your service desk a name, and customizing your portal colors.
You probably want your customers and support agents to access your support portal in your own domain. You can point your support URL at yourcompany.freshservice.com to your own domain, like helpdesk.mycompany.com.

3.1.2. Email Settings

Your default support email address is helpdesk@YourCompanyName.freshservice.com. Any email sent here gets automatically converted into a ticket that you can get working on.
You can configure your Freshservice account to use a support email from your own domain, like helpdesk@YourCompanyDomain.com by forwarding emails from this address to helpdesk@YourCompanyName.freshservice.com. To create a new support email box, click “Edit” under global email settings.

Quick tip: Using Multiple Mailboxes

You can add unlimited incoming and outgoing mailboxes (like info@yourcompany.com, sales@yourcompany.com, etc.) in your helpdesk. You can even set up Freshservice to automatically assign emails from each mailbox to a specific group.
Reply emails from Freshservice will automatically use your respective support email IDs as the From email address. Creating an SPF record in your DNS zone file will ensure proper delivery of emails.

3.1.3. Email Notifications

You can configure Freshservice to send out automatic email notifications to agents and requesters when specific events occur in your service desk. For example, you can notify users when an agent adds comment to their requests or notify an agent when his problem gets linked to a change.
You can send out email notifications instantly for activities that take place on all tickets, problems, changes and releases in Freshservice. In addition, you can also configure reminders for your tasks in each of these sections. You can enable or disable any of the notifications from this page except for important system alerts.

You can also customize the email template for agent replies and even add dynamic content in replies using placeholders. Note that you can choose to disable notifications, and also create Dispatch'r or Supervisor rules to complement an event.

3.1.4. Field Templates

Every ticket, problem, change or release in Freshservice consists of a set of fields that hold necessary information about it. These fields are collectively called a template and can be customized to include anything you need. You can add additional fields to each template, such as text boxes, drop down lists or checkboxes depending on your requirements.
The fields you configure across these tabs will show up whenever your agents create a new ticket, problem, change or release in your service desk. They can also be modified from the sidebar whenever your agents are working on a specific request anywhere in Freshservice.
he forms offer an easy way to capture all the data you need from the requester, even as they submit a ticket. You can customize your templates to include the right fields for your service desk, and let your requesters and agents fill in the information you need in the format you want.

Dependent Fields

Dependent Fields give you an easy way to create deeper ticket categories and identify the biggest issues that come into your helpdesk. With dependent fields you can organize tickets hierarchically into categories, subcategories and item affected.
Dependent Fields give you an easy way to create deeper ticket categories and identify the biggest types of issues that clog your support. With Dependent Fields you can nest each ticket into a specific category, sub category and item. That way, when you pull out a report of all the requests that have come into your service desk at the end of the month, you get to see which categories bring up a majority of tickets, and what specific items within are causing them.

For example, in an IT Helpdesk, Dependent Fields let you organize support queries into first-level categories like Hardware, Software and Network. You could then have sub-categories under Hardware like Desktops, Laptops and Printers, and finally have the individual assets as items.

Quick guide to adding Dependent Fields in your Ticket Forms:

- Click on Admin → Ticket Fields to start customizing the Ticket Form
- Drag the custom field type called Dependent Fields from the top, onto the ticket form
- In the "Field Properties" lightbox choose the visibility and editing permissions for Agents and for Customers
- Create the Label names for the 3 levels of hierarchy in your dependent field. For example, you could call it Category >> Subcategory >> Item or Problem >>Asset >> Type etc.
- Click on Edit under the Dropdown items to start editing the field values
- Type the values for each level of hierarchy. Start the value with one tabbed space for the second level hierarchy, and with 2 tabbed spaces for the third level
- Click on Done when you have finished editing
- Click "Save" in the ticket form to save the new field

If you have a big list of dependent fields you can organize them with the tabbed hierarchies in any text editor and copy-paste them into the dependent fields editor.

3.1.5. SLA Policies

A service level agreement (SLA) policy lets you set standards of performance for your support team. You can set SLA policies for the time within which agents should respond to, and resolve tickets based on ticket priorities. You can choose whether you want each SLA rule to be calculated over calendar hours or your business hours.

Your SLA Policies will be used in Freshservice to determine the “Due By” time for each ticket.

Using Multiple SLA Policies

You can have multiple SLA policies, triggered by specific conditions like the user who requested the ticket, the group it is assigned to and/or its source.

For example, you can have set a special SLA policy for tickets coming in through Phone and assigned to the Major Incident team.

The order of your SLA policies is important.The first SLA Policy that matches all conditions for a ticket will be applied to it, so remember to order your important rules closer to the top.

Enforcing Escalation Rules

You can optionally set escalation hierarchies for each policy to notify specific agents when an SLA rule is violated.

3.1.6. Business Hours

Business Hours give you more control over SLAs in your helpdesk, and when a ticket is due. For example, if your helpdesk works between 9am to 6pm Mon-Fri and a customer logs a ticket at 7pm on Tuesday, the "Due by" timers do not start ticking till Wednesday morning at 9.

Holidays

Holidays work exactly like business hours. If your helpdesk works between 9am to 6pm Mon-Fri and a customer sends a medium priority ticket at 8pm on Friday with a resolution time of 24 hours, then the ticket Due By time is set to 9am on Tuesday (not 8pm on Sat).

Multiple Business Hours

You can also create multiple sets of business hours and holidays, and apply them for specific groups. If you have one support team working on PST and another on GMT, you can let each group have its own set of business hours and holidays.
Learn more about Multiple Business Hours

3.2. Asset Management- *Tracking Assets to Foresee the Impact of Changes*

3.2.1 Adding assets in your service desk

Freshservice's comprehensive **Asset Management** module was designed to let IT Admins manage their CIs efficiently and proactively. Discovery Probe scans the entire network and automatically populates the CMDB with the CIs. Freshservice also shows you the relationships between various assets so you can calculate impact before rolling out changes. Our financial module includes expense management and asset price upon depreciation.

Discovery Probe

Discovery Probe is a Windows application that makes Asset Management easier by tracking hardware assets in your network. It can be downloaded right from your Freshservice account.

The Probe can be installed on any workstation or laptop in your network. Once installed, it will be able to scan through all kinds of computers (including those running on Mac OS X or Linux), network routers, switches and other devices like printers etc. Just make sure you have the probe running on the same network.

Requirements:

- **Operating System**: Windows XP, Vista, 7, 8 or higher
- **Processor**: Intel Pentium class of processors or higher
- **RAM**: 1GB of RAM or more
- **Storage**: 25MB for free space in your hard drive
- An active computer that is always available to perform scheduled scans and updates

Apart from scanning assets in a network, you can also import users from your Active Directory and schedule periodic scans.

Downloading and installing Discovery Probe on your computer

Before you start scanning your network for assets, you will have to download and install Discovery Probe on one of the systems in your network. Once you have set everything up, your probe should be able to add new hardware to your service desk, and also keep the existing ones in check and updated.

Step 1: Finding the right workstation to run the probe

Discovery Probe needs a Windows system to work. Make sure you go through the minimum requirements and identify the right computer to run the probe. If you have multiple networks in your organization, you will need to run separate probes to manage each one.

Step 2: Downloading Discovery Probe

In order to get the installation file, you need to be logged in as an administrator in Freshservice. Once you are in, go to the **Admin** tab and click on **Discovery**. Click on the "**Download Application**" button to start downloading the setup file.

Step 3: Installing Discovery Probe

Once your download is complete, click on the setup file to start the installation wizard. Go through the steps one by one and install the application in your local system directly. Once the installation is complete, you will be able to see Discovery Probe's icon on your system tray.

You will now be able to run Discovery Probe whenever you want and configure its settings. Find out how you can use the application to scan assets here.

Scanning and discovering assets in your network

Discovery Probe lets you scan and discover all the hardware assets in your network. In addition to identifying new items, it also runs scheduled updates and keeps your asset list updated. To make things easier and straightforward, Freshservice lets you configure a lot of settings directly on the probe once, and let it work automatically from then on.

When you run the application for the first time, you will need to go through a series of steps to get things up and running. This will include adding credentials and managing preferences so that the probe works just the way you want. You can also set up multiple probes with different settings take care of different needs in your organization.

Please get help from your IT admin or network administrator if you are having problems setting this up.

Step 1: Authorize your Freshservice account

- Type in your Freshservice URL.
- Enter your username (the email address you used to register your Freshservice account).
- Enter your password.
- Click on the Next button.

Step 2: Importing users from Active Directory

- Type in the Domain Name or the IP address of your Active Directory.
- Enter a Controller Name if applicable.
- Type in the Username and Password for your user directory.
- Try clicking on the Fetch OU Structure button.
- You should now be able to see a structure of all users in your network.
- Check the names you want to import into Freshservice from the list.
- Click on the Next button to finish adding them to your helpdesk.

Step 3: Scanning your network for assets

- Choose between IP Range and Domain Scan.
- Enter a start and end IP address or type in a domain you want the probe to scan.
- Give a description to the scan based on how it is going to function with your network (for example, which IP range, which department, what kind of systems etc.).
- Type in Windows Credentials - these will be used to authenticate all Windows machines in your network.
- Type in SSH Credentials - these will be used to authenticate all Mac OS X and Linux based machines in your network.
- In case you are using SNMP, you can type in the secure string to be used for authentication.
- Click on the Next button to start the scan.

Step 4: Scheduling scans to take place periodically

- Give a name for the probe so that it is easily identifiable from your admin panel.
- Turn on automated device scanning.
- Choose the days on which you want the probe to run every week along with the time.
- Turn on automated Active Directory scanning.
- Pick out any days from the list based on when you want user information to be fetched.
- Click on the Get Started button to finish setting up the probe.

When you are done configuring your probe for the first time, your discovery probe will no longer show the four-step setup wizard. Instead, you will be able to see tabs for scanned devices, error messages, IP ranges and domains that are currently related to the probe. You can learn more about configuring the probe after setting it up here.

Managing scanned assets

With a Freshservice Discovery Probe running on one of your workstations, the results screen will show a bunch of information and tools for you to manage your probe directly from where it has been installed.

This section has been broadly classified into four tabs.

The first thing you will see when you have started the network scan is the **Devices** tab, which displays the list of all assets as they are discovered. The list will show different types of devices including workstations, network routers, printers etc. along with their names and last scan information. You will also be able to see any error messages with respect to each configuration item in the list.

The **Error Logs** tab picks out every error that occurred during recent scans and displays them together for you to fix. Clicking on one of them will give you a detailed report on what went wrong while the system was trying to add an asset. You will be able to modify the type of asset or change its credentials in order to troubleshoot.

There is also a **Domains** tab, which lists out every unique domain address that has been identified during the scan. A progress bar on the right shows you if any scans are currently under progress. You can get a quick glance at the number of users who are present in the domain and the total number of assets that have been scanned so far. You will also be able to manually import users or scan the network again by using the buttons.

Finally, the **IP Ranges** tab lets you add any new IP ranges to your Discovery Probe and start scanning it along with any of the existing scans that might be running already. To avoid overlaps, please make sure you define new IP ranges that aren't already being monitored.

Tip: You can find more about what information Probe fetches and how, and steps to troubleshoot common error messages you might get during asset discovery in the Discovery Probe User Guide.

Discovery 'Agent'

Freshservice Windows Discovery Agent (**FSWinAgent**) is an application that you can install on all Windows machines in your network. It then helps you keep track of those machines *without* the interruptions that **Probe** might sometimes face.

FSWinAgent collects the machines' details without needing any authentication from the respective user. The details can then be sent to a server and populated in the **Configuration Management Database** (**CMDB**) of **Freshservice**.

What additional benefits do I get by installing the Agent?

Besides making the discovery of your assets extremely easy, the Agent helps you keep track of the assets better in the long run. Its key benefits include:

- **Dynamic Discovery**: Every time **FSWinAgent** detects a change in its host machine, it will update the data on the server. This makes sure that the database stays the best possible representation of your assets at all times.
- **Periodic Discovery** (*also available in Probe*): It sends updates to the server on a weekly basis to maintain an up to date record of all your assets. This is done regardless of whether changes were made to the asset or not.
- **Auto Upgrade**: You would not need to worry about upgrading **FSWinAgent** every time a new version is available. We've got it covered.
- Lastly, Windows settings like DCOM and Antivirus, Firewall etc. will not impact the discoverability of assets.

What are the minimum system requirements for installing the Agent?

Here's the list of supported Operating Systems for installing the **FSWinAgent**:

- Windows XP (Home and Professional editions only)
- Windows Vista
- Windows 7
- Windows 8
- Windows 8.1
- Windows 2003
- Windows 2003 R2
- Windows 2008
- Windows 2008 R2
- Windows 2012
- Windows 2012 R2

As a prerequisite, Microsoft .NET 4.0 client profile should be installed on the device before the agent can be installed.

How do I download and install the Agent?

Once you install **Discovery Probe**, you will be prompted to authorize it, import users and scan your network. On the 'Scan Network' phase, you get the option to download the **Agent** installer.

In case you *skipped* the step, you can always access the **Agent** download link by launching **Probe** and going to Settings → Configuration.

Then you can use one of the following methods to install the **Agent** on machines in your network easily:

- To install it on a single machine, simply double-click the msi file.
- To install it on all machines in a **domain**, use **Group Policy Object** in the Active Directory.
- To install it on all machines in a **workgroup**, use the **PsExec** tool.

3.2.2 Configuration items and CMDB

Different types of Configuration Items

The CMDB in Freshservice shows you the complete list of all the assets and configuration items that have been linked with your service desk.

By default, Freshservice comes with a set of CI types that cover all the essentials for a typical IT service desk. This includes hardware items like laptops, workstations, network routers etc. and software assets like operating systems.

In case the default categories don't fit your purpose, you can add additional CI types, or edit the existing ones from the Admin page.

Adding a new configuration item to your service desk

In addition to having your assets scanned by Discovery Probe, Freshservice also lets you add configurations to your helpdesk manually. This is useful when you want to keep track of a system that is outside your network, or with any consumable items and peripherals.

These assets will become a part of your CMDB and can have properties and relationships just like the ones discovered automatically.

Quick guide to adding a new CI type to Freshservice:

- Login to Freshservice as an administrator.
- Go the the Admin tab and click on the Configuration Item Types Icon.
- Click on the Add new button on the top.
- Type in a name and description for your CI.
- Choose a parent category for the CI if applicable.
- Click on the Save button to finish adding the item to your CMDB.

Looking up information about configurations items from your CMDB

Freshservice makes it easy for you to pull up information about any asset that has already been linked with your service desk. Once you have opened up any item in particular, the asset view page provides comprehensive information about the CI at large and explains how it is being used by your team.

Every time you look up a CI in Freshservice, you will be able get a look at the following -

1. Specifications
The actual specifications about the configuration item, including the name of the product, the vendor, it's cost, serial number and warranty information. Additionally, you will also be able to see details such as the operating system, CPU Speed, Memory etc when it's a hardware item. Similarly, in a software asset, you will able to see license information and expiry dates.

2. CI Properties
The Properties section on the sidebar shows a set of variables that have been allotted to the asset. These properties can be reconfigured to have fewer, more or different kinds of fields altogether. The key among these is be the Asset State field. Just like your ticket fields, you will be able to define custom fields for each type of CI manually.

3. Relationships
Relationships are used to define the way users and assets are linked with each other in your service desk. For example, a relationship called "Uses" can help you understand that a requester is using a specific printer in your building. Similarly an inverse relationship "Connected To" can be used to declare the names of users who are connected to your payroll system.

Relationships can be one to one, one to many, or can be customized in any way you like based on the nature of the asset. For example, a laptop is likely to be used by only one employee but a hundred users might be connected to the same access point. These can be managed from under Admin → Relationships

You can manage your assets using the existing relationships in Freshservice or create a type of relationship yourself. You can attach relationships to any of your configuration items individually and also see a collection of assets a particular user is related to.

4. Components
You can use the components tab to manage the CI and deal with internal components. For example, you can specify what processor, memory or storage options are included with a computer to know exactly what's inside it. That way, you can go ahead with replacing parts parts of the asset more easily.

5. Requests
The requests tab shows you the set of all incidents and service requests that are relevant to that particular CI. Any ticket which has the same CI attached to it will be displayed in this section.

6. Activity

The activity log shows you historical information about what's been going on with the CI and who has been doing it. You can track down info like the last owner of the asset, any component changes or any relevant activities.

Understanding the different states of assets

Every asset in Freshservice has a state of availability, just like tickets, problems or changes. This is an important property which will affect the availability of the CI, and how it is currently useful in your helpdesk.

The state of an asset can have any of these five values:

In Use	The CI is currently being used by somebody in your team
Missing	The CI isn't being used, but cannot be used since it's missing
In Transit	The CI has been ordered from a vendor or is being moved
In Stock	The CI is readily available for use.
Retired	The CI is too old, or isn't functional and has been retired

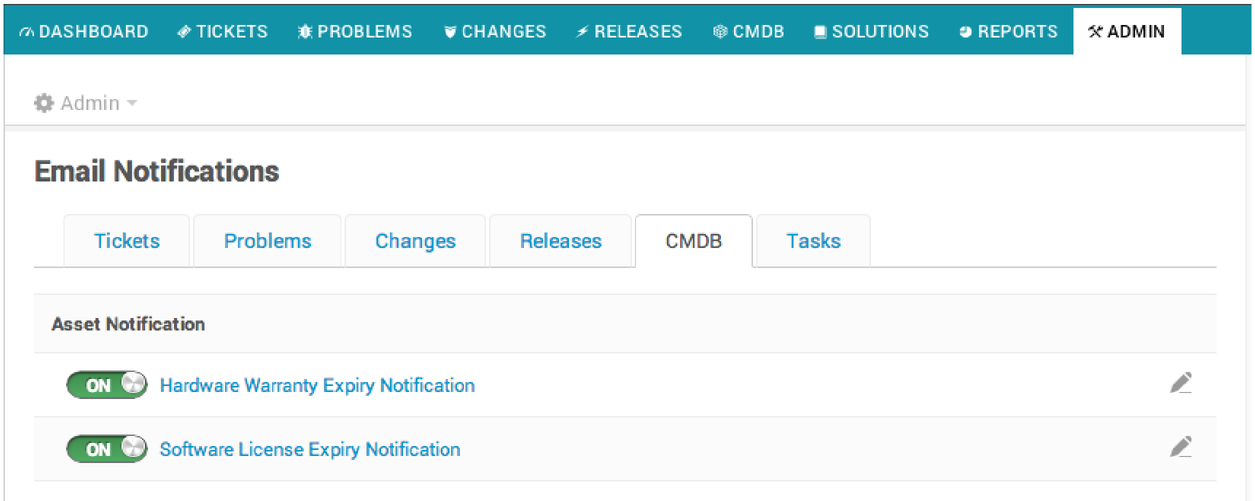
Assigning assets to different users and departments

Freshservice lets you assign CIs to different departments and users in your organization. It makes it easy for department heads and managers to control who gets to use an asset.

You can also assign a manager for the CI directly from the properties. Once you do, all future requests with respect to the CI will be sent to the manager for approval. Further, whenever an asset gets assigned to a user, Freshservice automatically marks it as "In Use" so that there isn't discrepancy in your team.

3.2.3 Warranty Expiration

Freshservice automatically sends you notifications for expiring assets - hardware and software.



The notifications are raised as tickets.

3.2.4 Relationships

Different types of relationships in Freshservice?

Relationships in Freshservice help you control and manage the the way different assets are tied to each other in your organization. Whenever you open up a configuration item, you will be able to see the list of all relationships (it can be one or more depending on the asset) it has under the Relationships tab.

Whenever you add a relationship to a CI and include a different, the corresponding inverse relationship is included with the linked asset automatically. This also works the other way around and you will not have to worry about setting up relationships at both ends every time.

You can also choose to add a custom relationship type to Freshservice by giving it a name and an equivalent inverse relationship.

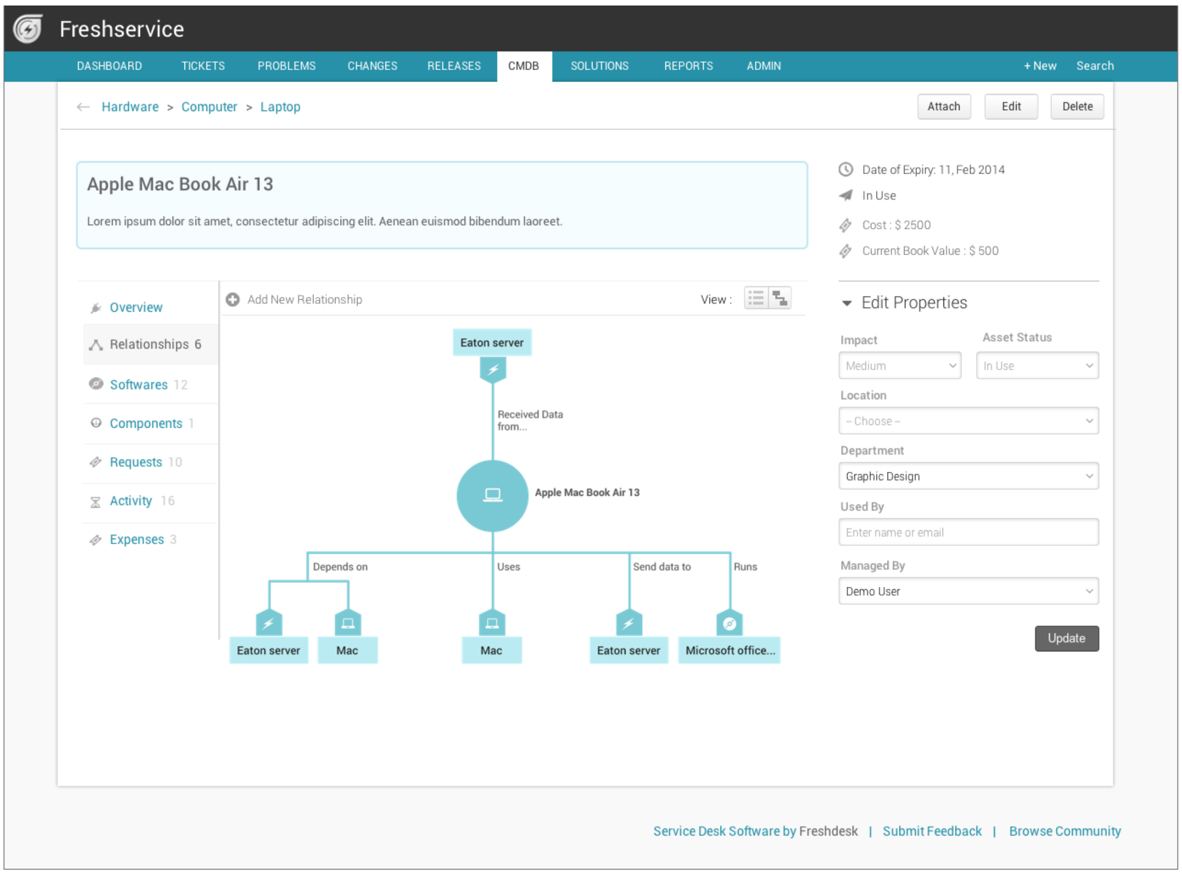
Relationship Types

A → RELATIONSHIP TYPE → B	B → INVERSE RELATIONSHIP TYPE → A
Depends On	Used By
Uses	Used By
Send Data to	Received Data from
Runs	Runs on
Connected to	Connected to
Subscribes to	Subscribed by
Impacts	Impacted By
Submits	Submitted By
Supports	Supported By
Author of	Written By
Hosted On	Hosts
Enables	Is Enabled By
Includes	Member of
Contains	In Rack
Located In	Houses
Exchanges data with	Exchanges data with
Managed by	Manages
Uses	Owned By
Virtualized by	Virtualizes
Is Edited by	Editor
Backed Up by	Backed Up by
Consists of	Are part of

Add a New Relationship Type

Attaching relationships to your assets

You can attach relationships to any of the assets in your helpdesk when you are managing them in your CMDB. Every item has two types of relationships - normal and inverse. Together, they give you a clear picture about how one particular asset is tied to other configuration items in your organization.



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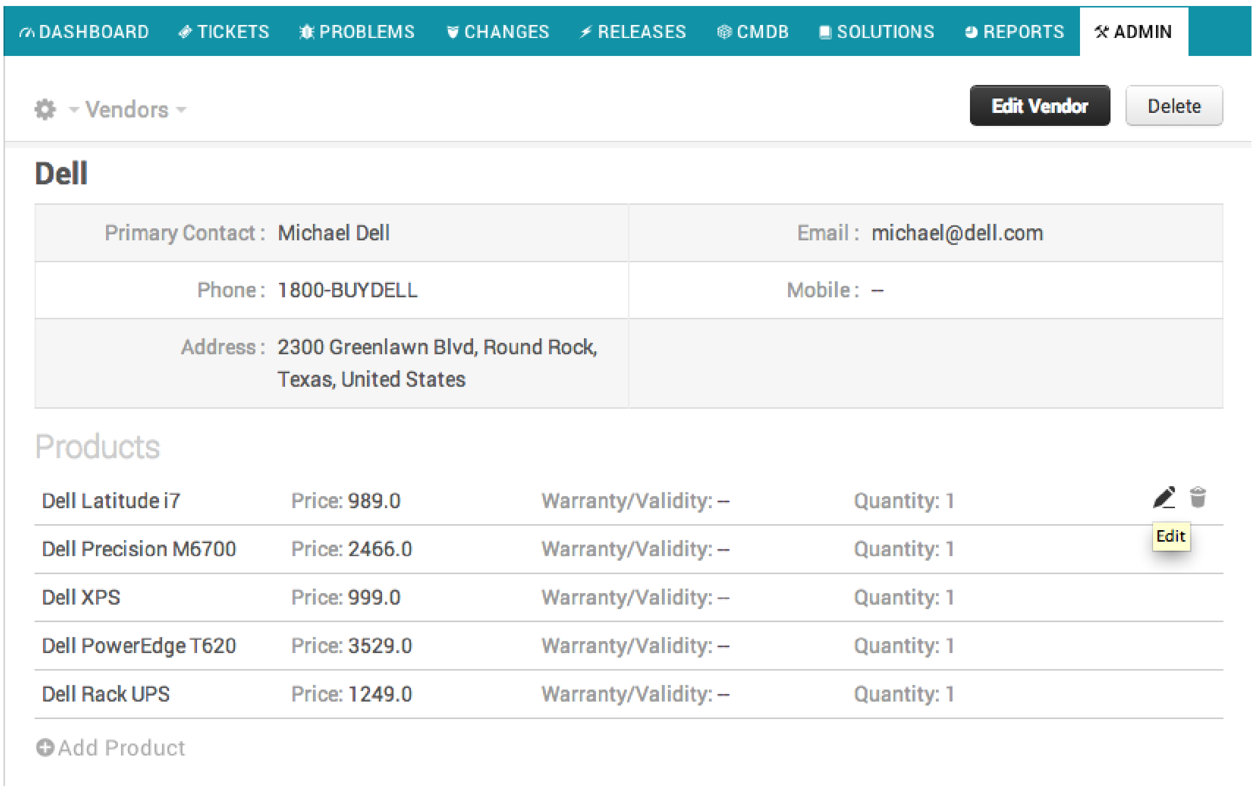
3.2.5 Vendor Management

Freshservice lets you manage products and vendors side by side with your service desk. You can add multiple vendors to each of your products and access contact information and details such as price, warranty and address alongside your product. When you are managing your products, you can gather basic information such as cost, see how any of the other vendors are priced and check to see if it's still covered under a warranty. You can also quickly contact the vendor for troubleshooting and fixing service issues.



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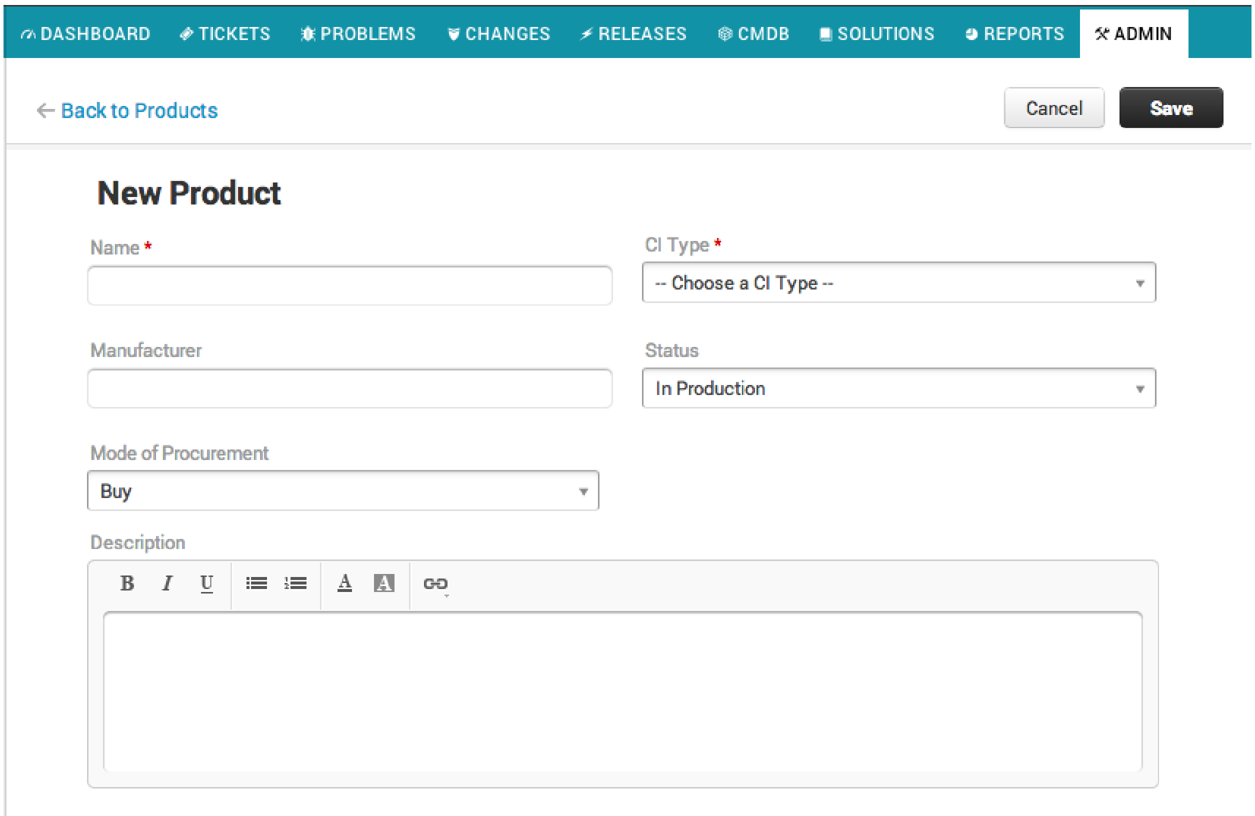
3.2.6 Product Catalogue

The Product Catalogue contains a list of all the products that are currently being used in your organization. It helps you manage hardware units and software licenses for applications from a single place, and maintains a repository of items with necessary information. When you are managing all your assets together, you can create multiple product types in your system for better classification. You can also view details about the manufacturer, the availability and



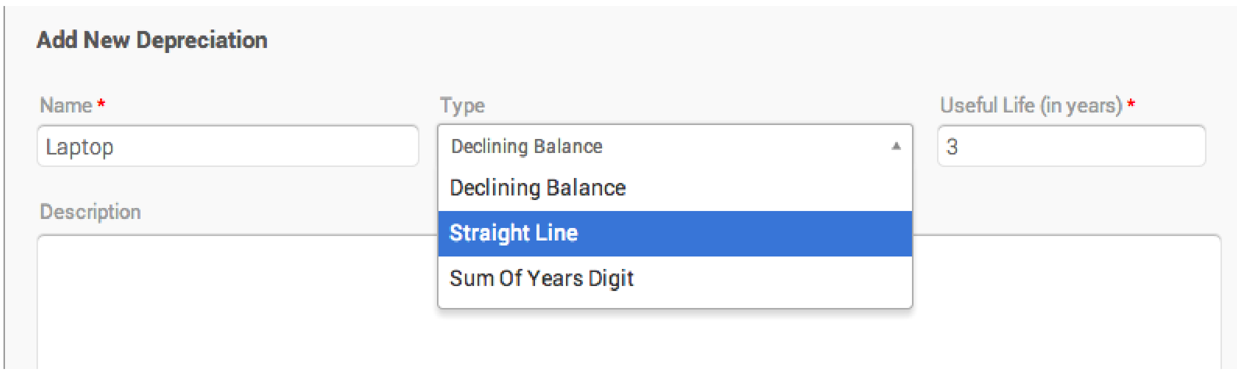
pricing of each product you have added to your product catalogue.

3.2.7 Financial Management

Depreciation

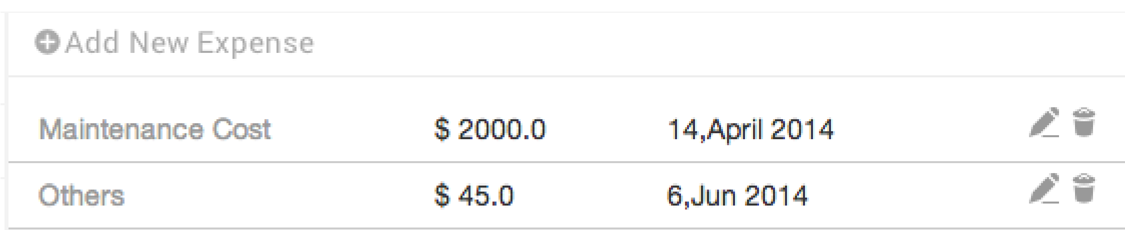
In Freshservice, Depreciation can be calculated in three modes - Declining balance, Straight Line and Sum-of-years-digits method.

Based on this, the Book Value of the asset will be displayed in the CI page.



Expense Tracking

You can also track the expenses accrued upon each asset by noting it down in the CMDB page of the particular asset. When you need to add more, click on add new expense to do so.

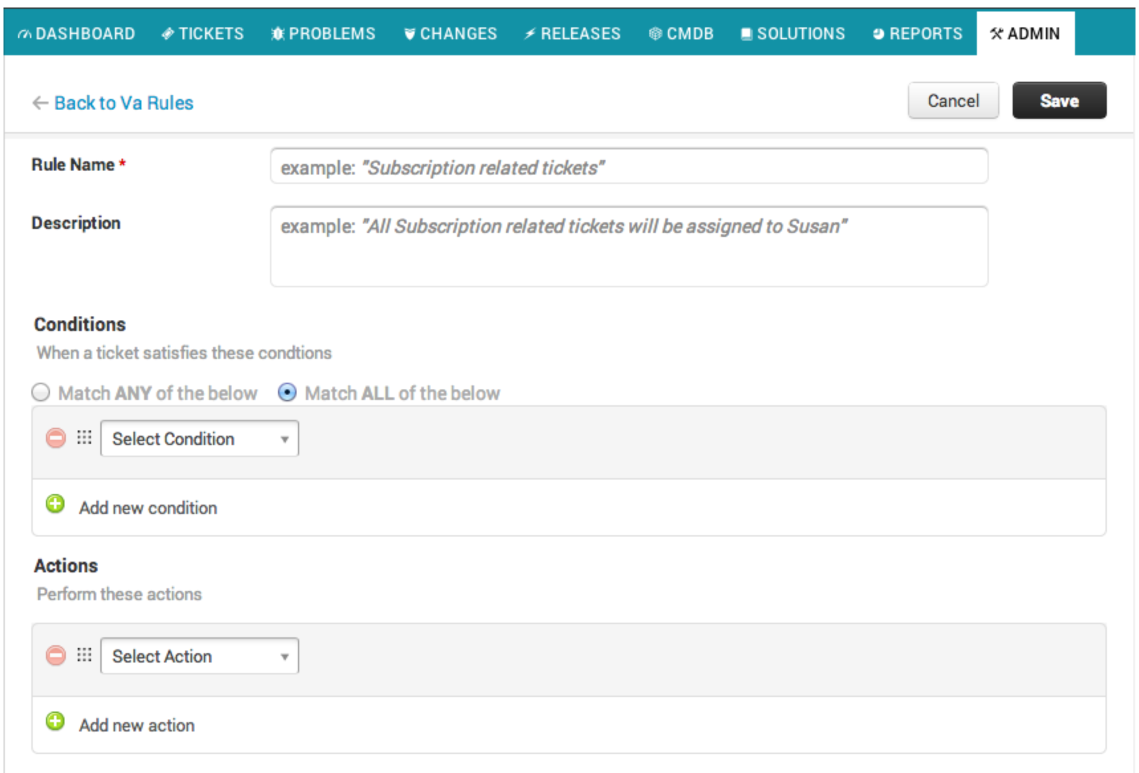


3.3. Service desk Productivity

3.3.1. Dispatch'r

The **Dispatch’r** lets you bring your business rules into your support workflow by performing a predefined set of actions on newly created tickets. For example, you could use the Dispatch’r to automatically categorize, prioritize and assign every incoming ticket to the right agent in your team, based on the conditions you specify.

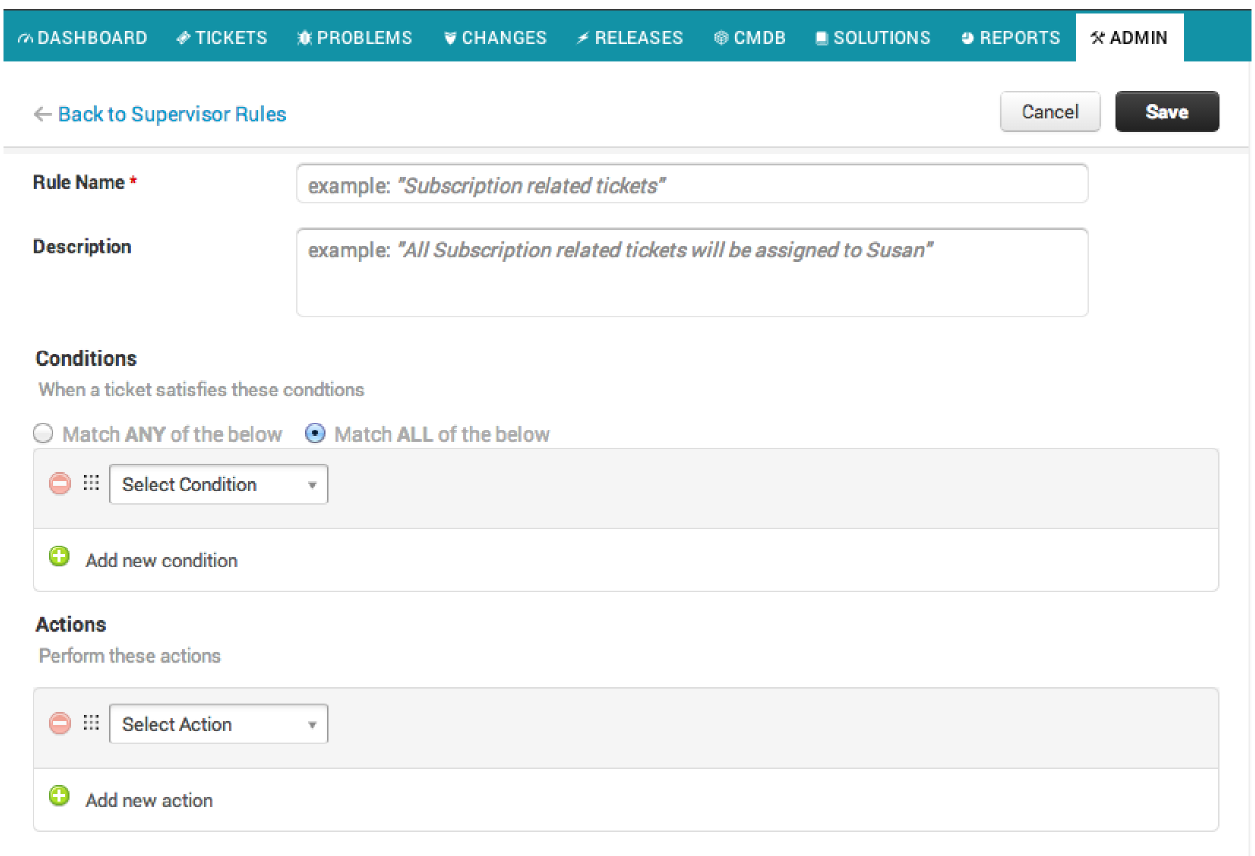
Remember, the order of the Dispatch’r rules is important. For each incoming ticket, Dispatch'r will execute the first matching rule and stop. You can reorder the list of rules to have the most important rules on top.



3.3.2. Supervisor

The **Supervisor** performs actions on tickets that you specify based on time and event driven triggers. Use the Supervisor to periodically check recent tickets and perform actions like sending reminders to customers for pending tickets, or escalating overdue tickets to the right person in your team.

The Supervisor will run every hour and process tickets that have been updated within the past 30 days. Supervisor rules are processed sequentially, so the order of the rules is important. A rule may cause certain actions that trigger subsequent rules.



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3.3.3. Observer

The **Observer** lets you trigger specific actions in your support desk as soon as a certain event occurs. For example, you could create an Observer Rule to alert the big man when a customer gives an unfavourable satisfaction rating on any ticket.

You can set Observer rules for Tickets, Problems, Changes and Releases.

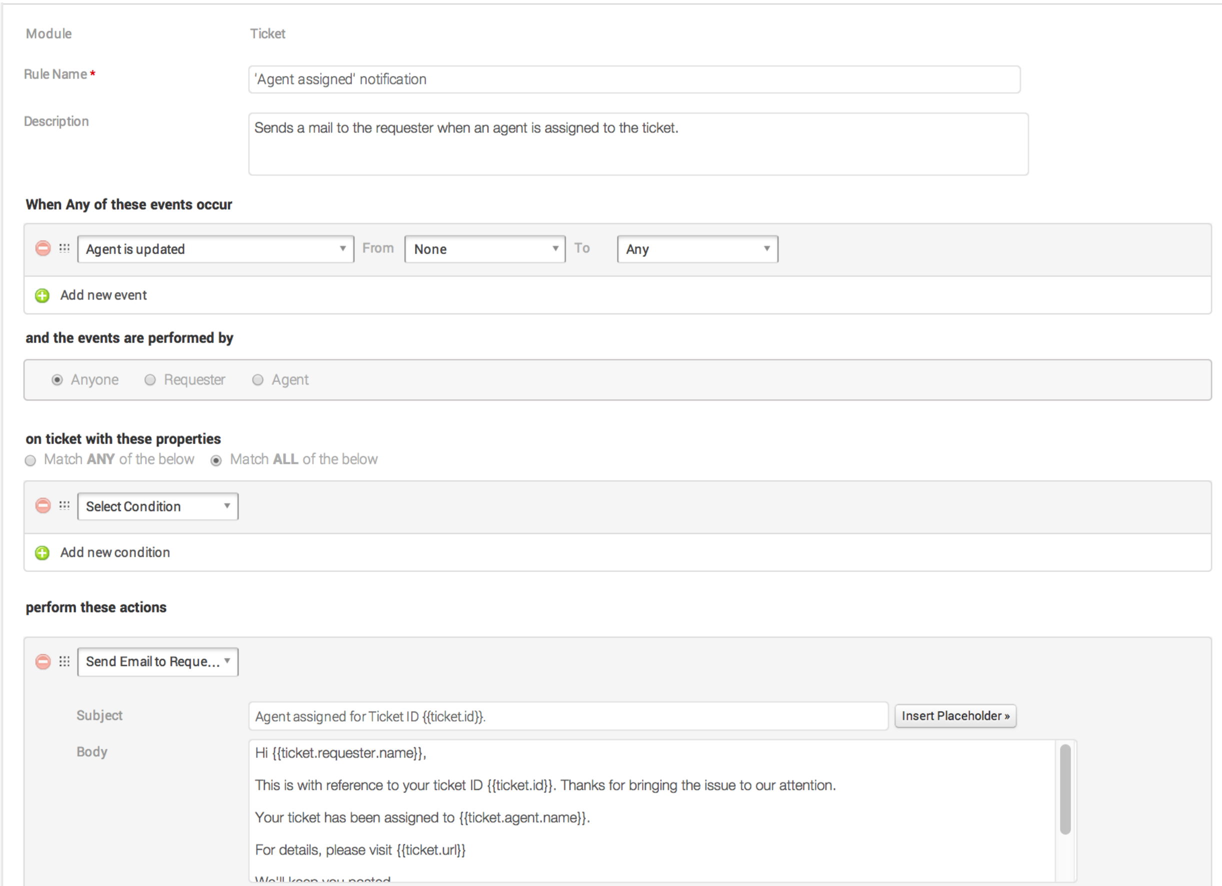
Events: An event may refer to any change that will trigger the Observer rule.

Event Performers (*for Ticket Rules only*): Specifies which user's changes should trigger the rule. You can choose between the agent, the requestor (or someone outside your support team in the ticket loop), or both.

Conditions: You can optionally filter the rule to apply to only certain tickets/problems/changes/releases.

Actions: This specifies what you want the rule to do.

You can use the Observer to modify fields, change status, or even send out notification alerts as soon as certain conditions are met.



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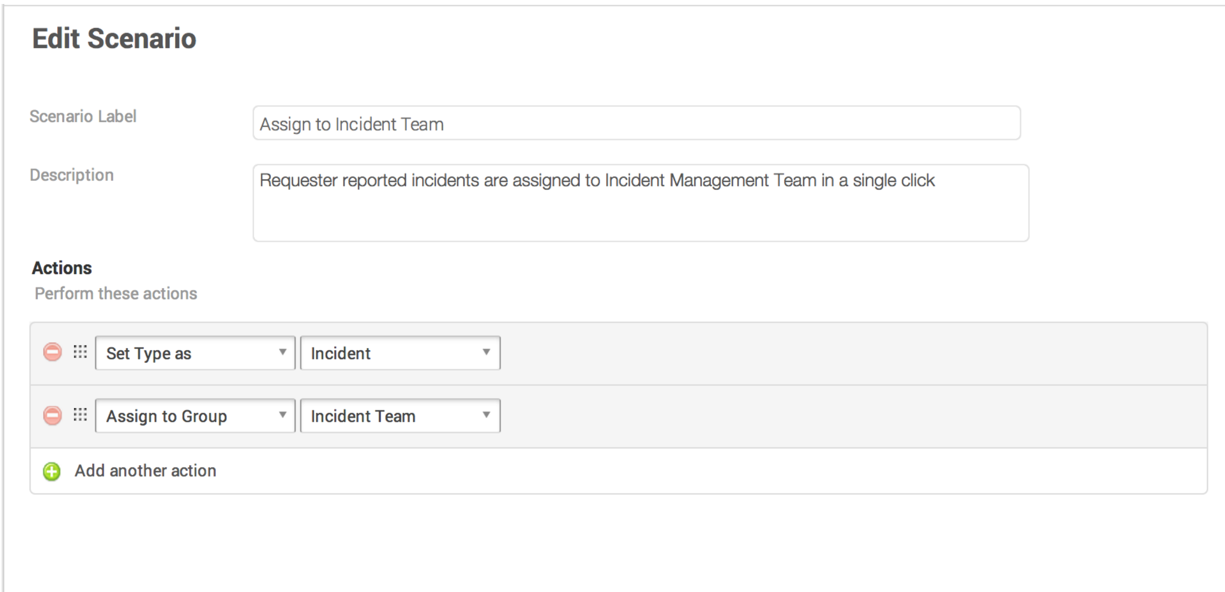
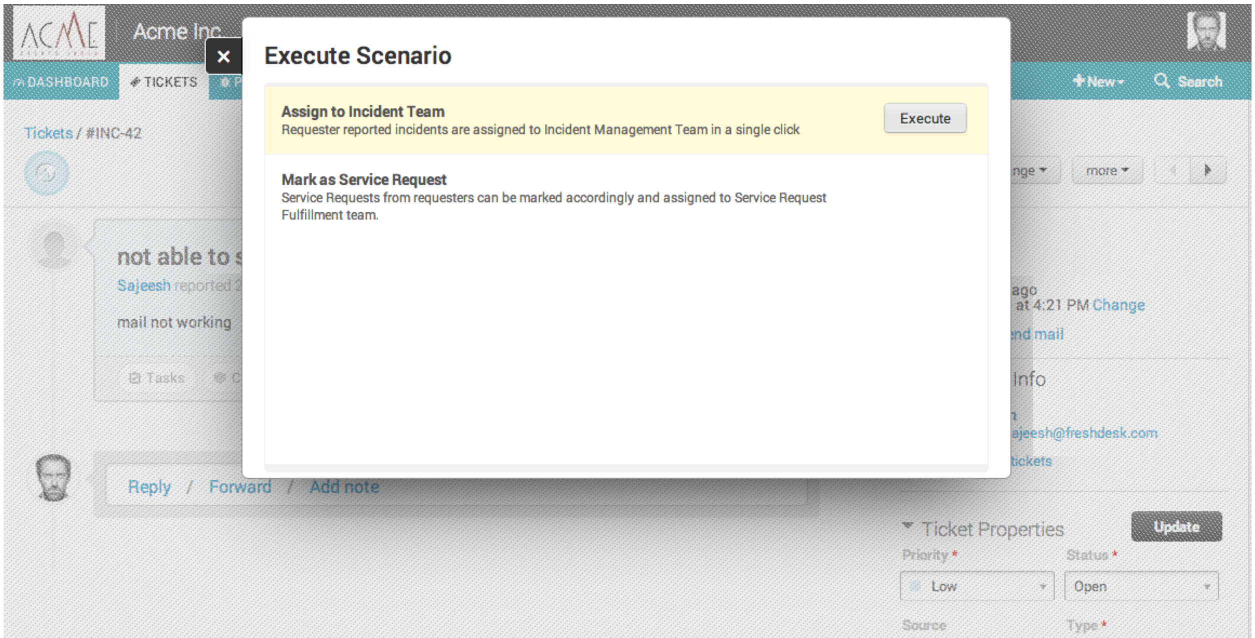
3.3.4. Scenario Automations

Scenario Automations let you perform actions on tickets with a single click. Here you can create 'automations' for frequently occurring scenarios and define what the automation does when executed. For example, you could create a scenario to "Mark a Ticket as an incident", "Assign to the Incident Management team".



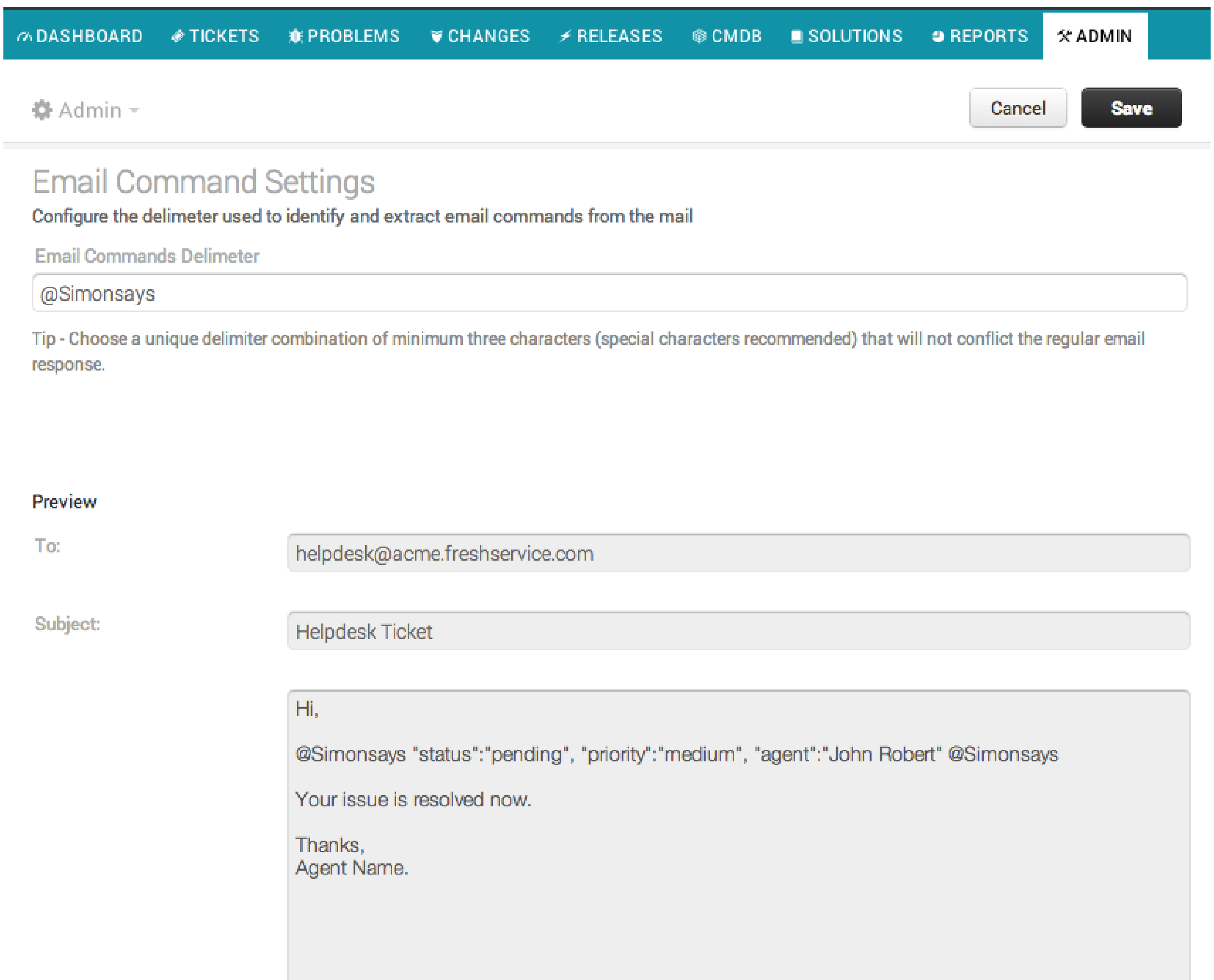
When a ticket requires one of these actions to be performed, you'll get a list of all the added scenarios at the click of a button.



3.3.5. Email Commands

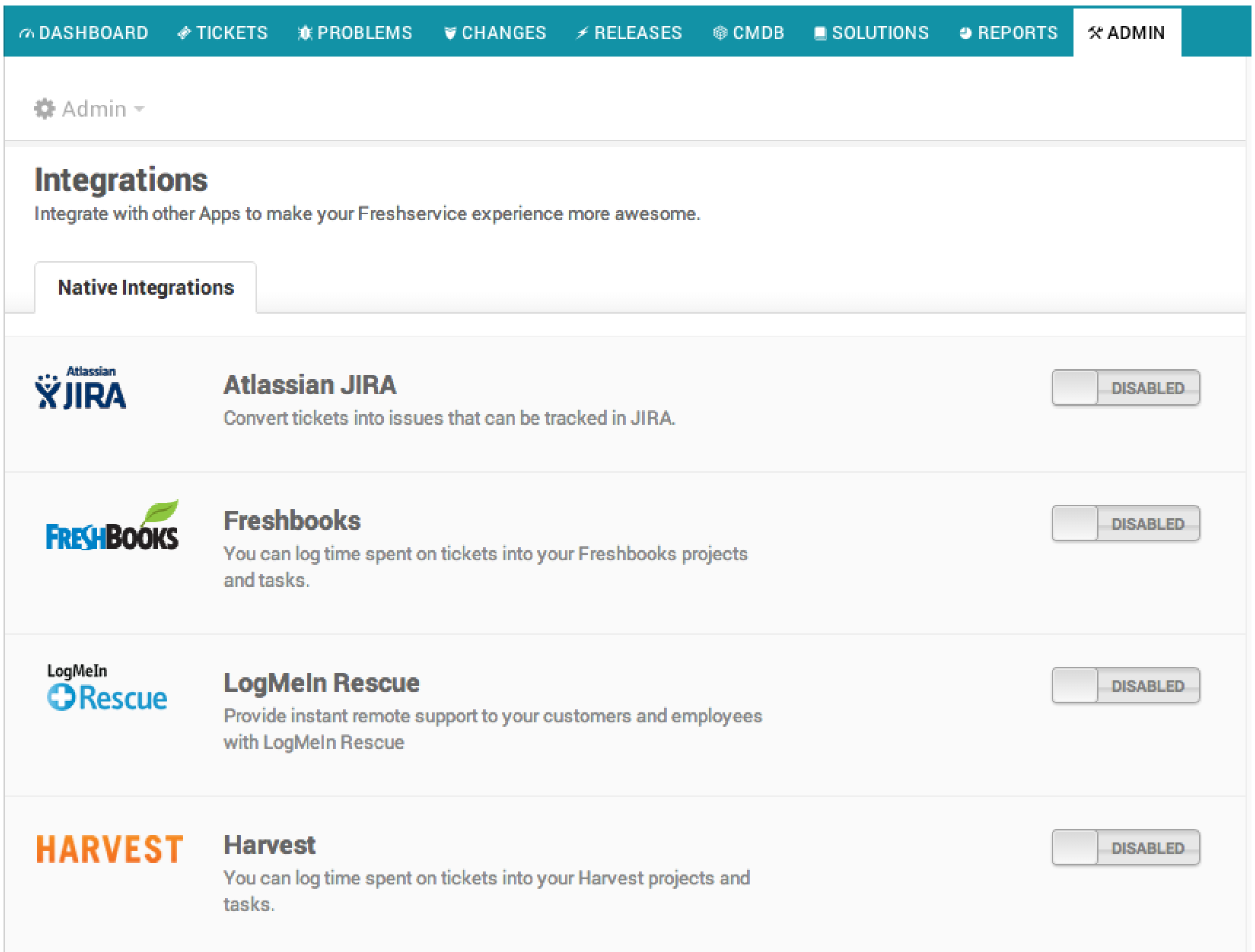
When replying to notification emails from your mailbox, you can include "Email Commands" to instruct Freshservice to perform certain actions on a ticket. The Email Command text will be stripped by Freshservice and will not be seen by the requestor, while the rest of the text will become a part of the conversation.

Email commands must follow the correct syntax and must be placed within the pre-configured delimiter text. For example the command - "@simonsays agent : John Roberts Status:Resolved @simonsays" will assign the ticket to the agent John Roberts and mark the Ticket as Resolved. The rest of your email content will be added as a conversation to Freshservice and also sent to the Requester via email.



3.3.6. Integrations

Integrations in Freshservice let you share data with third party applications and services that you use regularly. Freshservice offers several native integrations out-of-the-box. To start using a native integration, go to ‘Integrations’ from the Admin console and click on the corresponding ‘Enable’ button.

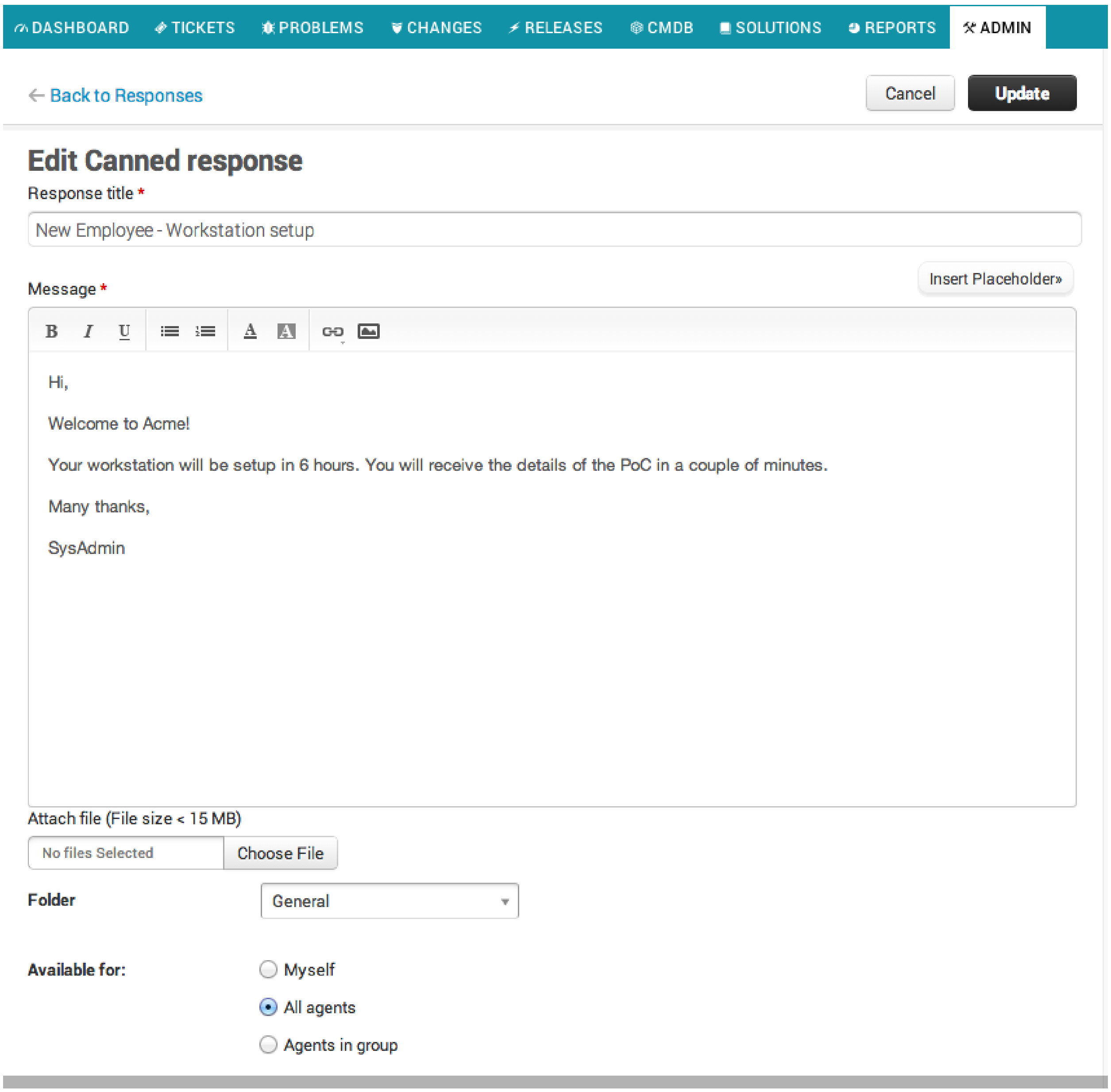


Besides the ones you can find within your Freshservice account, the integration with Zapier now allows you to integrate over 300 apps with your service desk.

3.3.7. Canned Responses

Canned Responses are predefined reply templates which can be used to quickly send out replies to tickets.

You can use placeholders in your canned responses to fill in dynamic content like the requestor’s name, ticket ID and URL inside the response.



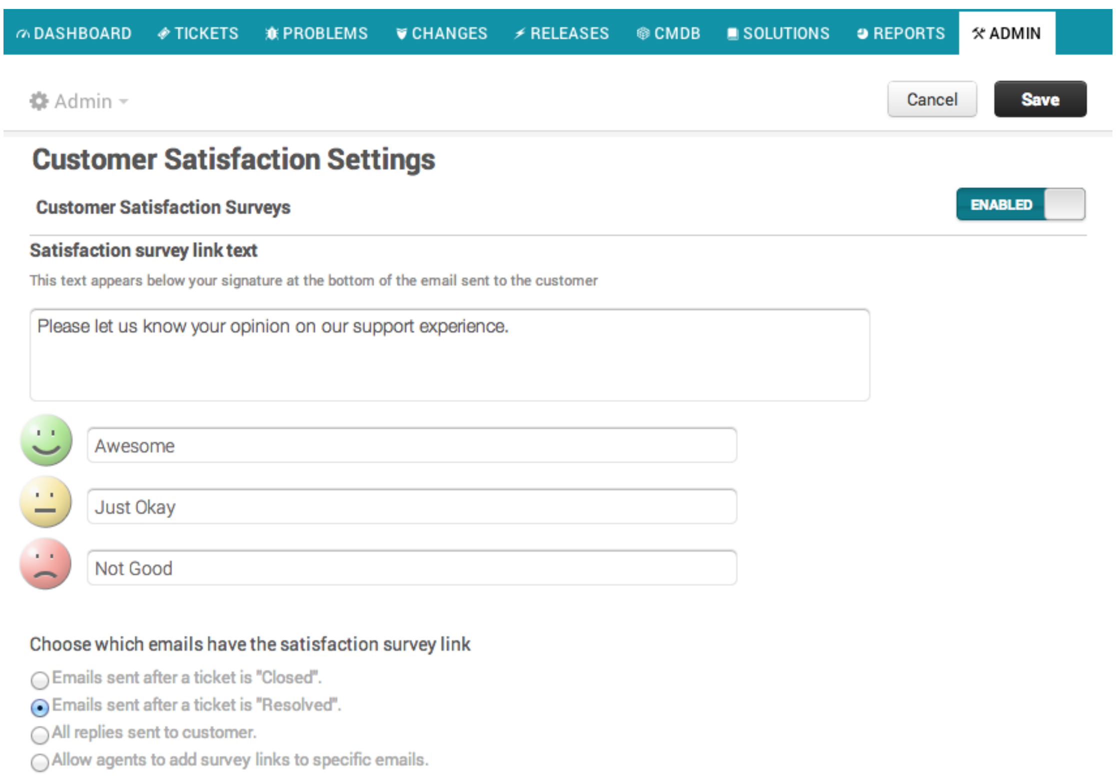
3.3.8. Customer Satisfaction

Customer Satisfaction Surveys let you add a link to your response emails and directly collect customer feedback and satisfaction.

Creating your satisfaction survey:
The following steps let you collect feedback from your customers through a link in your response emails:

1. Enable the Customer Satisfaction Surveys checkbox
2. Specify the Satisfaction Link Text. The default text goes as "Please let us know your opinion on our support experience."

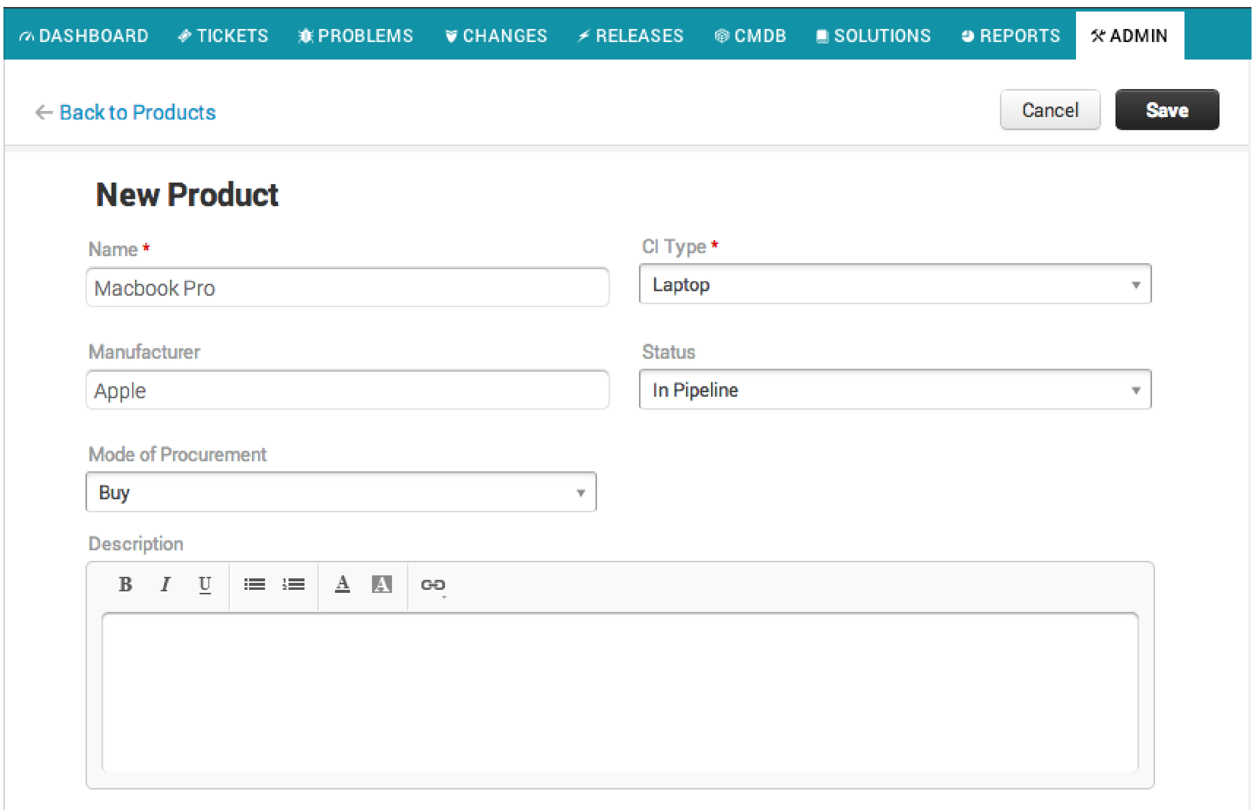
Choose which emails have the satisfaction survey link:
You can choose whether satisfaction survey links are sent to customers in every email, or only in the final email once the ticket is resolved.



3.3. Configuration Management

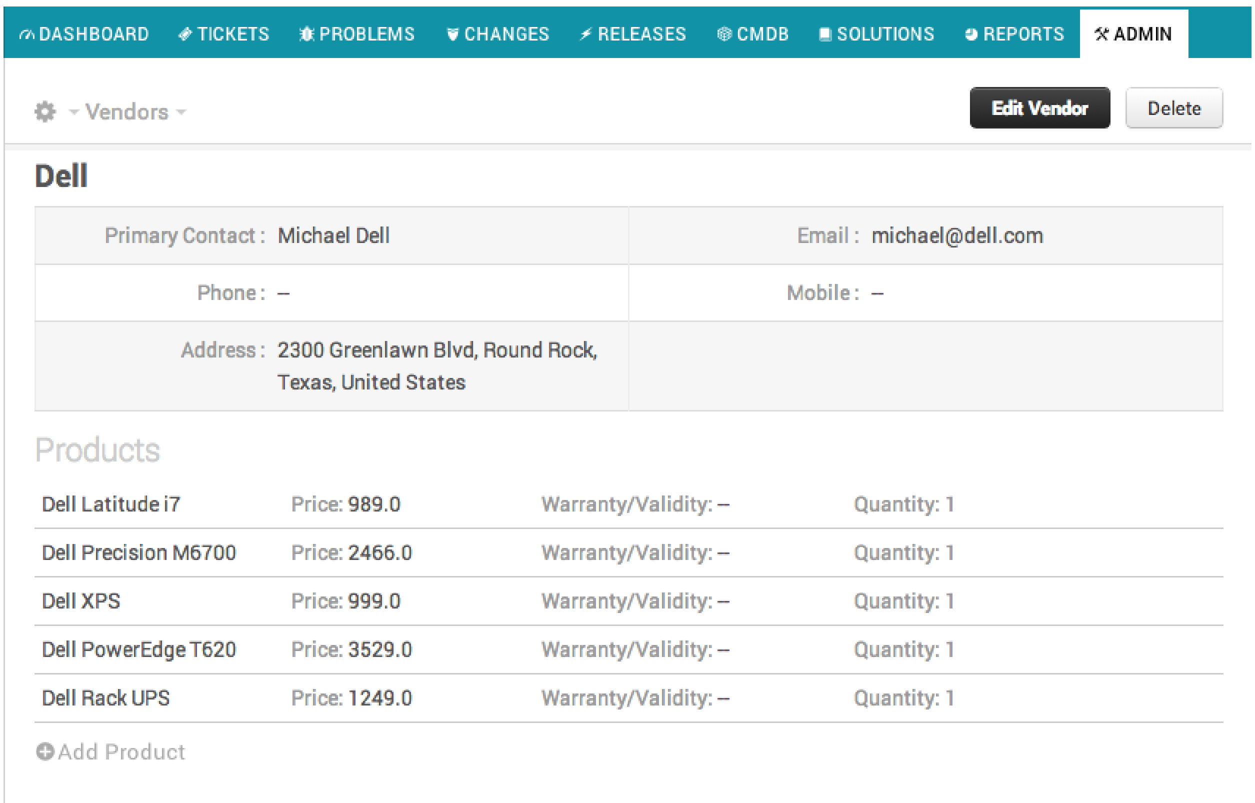
3.3.1. Product Catalogue

The Product Catalogue consists of a list of products that are currently being used in your organization. It helps you manage hardware units and software licenses for applications from a single place, and maintain a repository of items with necessary information. When you are managing all your assets together, you can create multiple product types in your system for better classification. You can also view details about the manufacturer, the availability and pricing of each product you have added to your product catalogue.



3.3.2. Vendors

Freshservice lets you manage products and vendors side by side with your service desk. You can add multiple vendors to each of your products and access contact information and details such as price, warranty and address alongside your product. When you are managing your products, you can easily gather basic information such as cost, see how any of the other vendors are priced and check to see if it's still covered under a warranty. You can also quickly contact the vendor for troubleshooting and fixing service issues.



3.3.3. Relationship Types

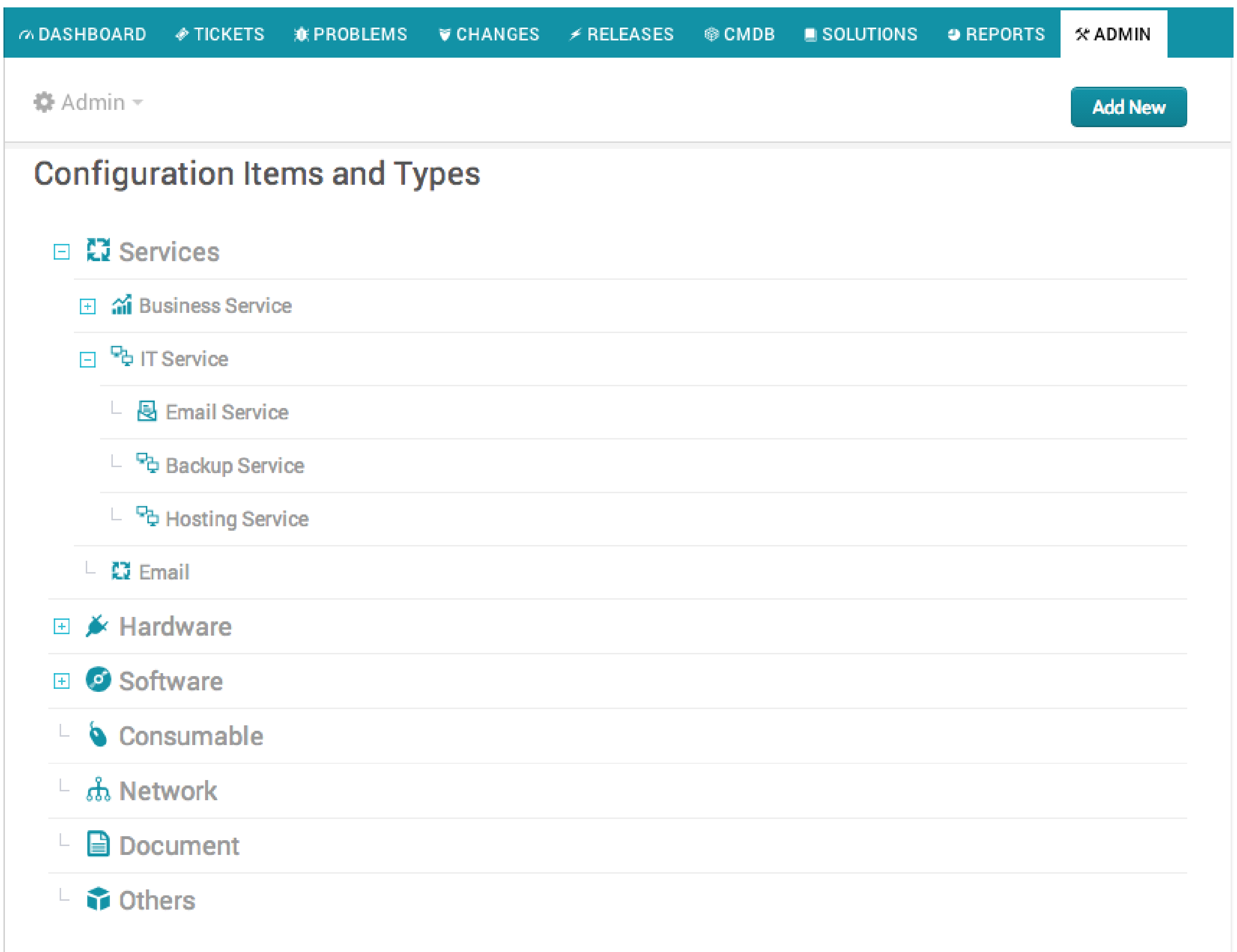
Relationships are used to define the way users and assets are linked with each other in your service desk. For example, a relationship called “Uses” can help you understand that a requester is using a specific printer in your building. Similarly an inverse relationship “Connected To” can be used to declare the names of users who are connected to your payroll system.

You can manage your assets using the existing relationships in Freshservice or create a type of relationship yourself. You can attach relationships to any of your configuration items individually and also see a collection of assets a particular user is related to.

3.3.4. Configuration Item Types

Freshservice lets maintain your repository of assets by creating a structure of configuration types in your service desk. You can create top level CI Types for both hardware and software assets, add child types under them, and have several items mapped individually.

When you open a configuration item, you can find out whether it is currently being used, its business impact and the employee it's assigned to in your team. In addition you will also be able to pull out specifications, relationship details etc. about the asset without switching between different pages.



3.3.5. Locations

Freshservice lets you add location details into your service desk. You can create top level locations and add child locations under them. Like for example if your company operates out of multiple places, you could have the country name at the top level followed by the state, district and city.

You can specify the location while creating a new asset and segregate them based on the location.

3.3.6. Discovery

Discovery Probe scans your network for assets and adds them to your CMDB in your service desk. You can get started by downloading the application and installing it on one of your windows systems. It can be used to discover any assets running on any operating system, as long as they are a part of the network.

3.4. User Management

3.4.1. Requestors

This page lets you handpick a set of requesters and add them to your service desk. These requesters will have selective privileges to submit requests to your helpdesk. You can restrict access such that only people who have been added here are allowed to login to your self-service portal and access your knowledge base and community forums.

You can fill in the details of each of your new requesters manually or import a list of users from a CSV file. Once you have populated your list, your agents can open up each of your contacts and view their ticket history and contact information.

3.4.2. Agents

The list shows all Agents added in your service desk. You can edit an existing agent's permissions and access rights by hovering over the agent and clicking on "Edit". You can add new agents by clicking on the "New Agent" button.

3.4.3. Groups

You can organize your agents into specific Groups like "Sales" and "Product Management". Segmenting them into divisions lets you easily assign tickets, create specific canned responses, manage workflows and generate group-level reports. Note that the same agent can be a member of multiple groups as well.

Auto-ticket Assignment

Once you create homogeneous agent groups, you can choose to automatically assign new tickets in this group to the next agent in Round Robin. Learn more about automatic ticket assignment.

Quick Tip: Working Hours

You can assign a different set of business hours and holidays to each Group. For example, you can separate agents by shifts and assign them different business hours, or create separate groups for each time zone your agents work at.

3.4.4. CAB

A Change Advisory Board, or a CAB consists of a set of agents who have been nominated to verify new changes in the service desk. They help managers to assess changes and finalize them before implementation. The members of the each CAB include experts in a particular area, who go through every change before they approve or reject it.

Freshservice lets you create custom CABs and fill them up with specific experts from your team. Whenever a change needs approval, the Change Manager can select any of the available CABs and also pick out individual members of the CAB who will get to review it.

3.4.5. Roles

Roles allow you to create and edit access permissions for agents. You can create new roles, specify what actions agents with these roles can perform within your service desk, and assign the role to agents.

For example, you can create a role for your Support Co-ordinators, allowing them to update fields and assign tickets, and even add notes internally, but not reply to customers.
Once you create and save a new Role you will be able to assign it to agents when you create or edit their profile by clicking on the Agents icon under the admin tab.

Quick Tip: Admin Privileges
You can nominate whether you want an agent to have access to settings under the Admin tab. Agents with admin access can be Operation Agents with limited access, or Super Admins with the ability to edit all configurations. You can have as many Super Admins with the ability to view and modify your billing details, or as few as one.

3.4.6. Departments

You can configure departments inside Freshservice and group your requesters based on the nature of their job or position in your company. Departments can also help you classify tickets from different types of employees differently, and define different workflows based on the impact and the urgency of requests.

Every department in Freshservice has a nominated head employee, who will take care of approving service requests from members in his team. In addition, you can also create separate knowledge base and forum categories for each of your departments that can be accessed only by the members of that team.

3.4.7. Day Passes

A Day Pass is used up for each day an occasional agent logs in to your helpdesk. You can purchase Day Passes in multiples of 5 at a time, and even setup Freshservice to automatically renew your Day Passes when they gets used up.

3.5. Customer Portal

3.5.1. Security

Allowing Single Sign On access
If your users already have login credentials with you, such as through Active Directory or your own web applications, you can allow them to login to your support portal with these credentials using Single Sign On. Learn more about setting up single sign on in Freshservice here.

Enabling SSL security
You can ensure secure communication through your support portal by enabling SSL encryption. Freshservice offers a default wildcard SSL certificate to all accounts on the freshservice.com domain. Note that you will not be able to use the wildcard SSL if you are using your own branded support URL. If you are on the Estate Plan, you can request for a custom SSL certificate for your vanity support URL.

Restricting access by IP address
You can restrict access to your support portal to IP addresses from your company or organization. You can add unlimited number of IP ranges that have access, as well as define whether you want to control access for customers as well, or only for your agents.

4. Understanding your helpdesk

4.1 Knowing your Dashboard

Dashboard gives you a quick snapshot of your helpdesk. You'll find two sections -

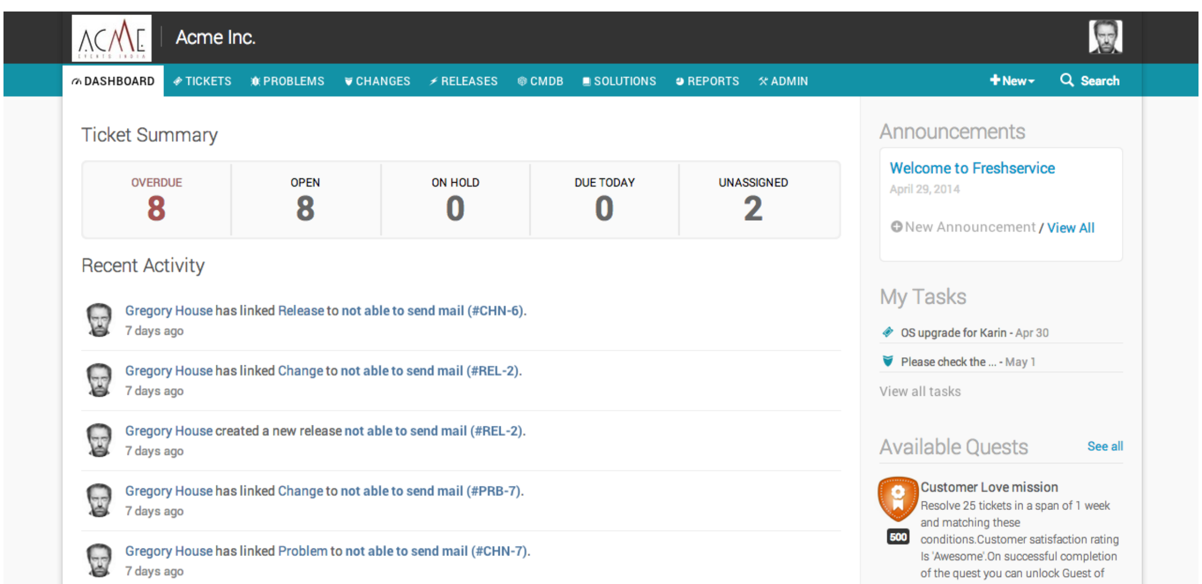
Ticket Summary: Gives you the number of tickets in various statuses - Overdue, Open, Pending, Due Today, Unassigned.

For more information about the tickets that fall under a specific status, click on the appropriate status section of the Ticket Summary.

Recent Activity: Gives an account of activities that happened in your service desk - like an email response that was sent or received, status updates that were done, ticket creation, etc.

For more information about a particular activity, click on the appropriate activity under the Recent Activity section of Ticket Summary.

The first time you open your Helpdesk's Dashboard, you'll find an Open and Unassigned ticket under Recent Activity. Wondering what this could be and who Rachel is? Well, don't worry - that's just a sample ticket that comes along with the default settings and about Rachel, we simply liked the name! And moreover, when you create a ticket in your service desk, it would look exactly like the sample ticket that you see here.



4.2. Incident Management- *Resolving Incidents to Restore Service Operations*

Simply put, an incident is an unplanned interruption to an IT service or a reduction in quality of an IT service.

Incident Management is responsible for proper logging, analyzing and (especially) resolving incidents. It's primary objective is to help resume service operations as quickly as possible.

Incident Management in Freshservice

Every time a customer asks for support or submits a query in Freshservice, it becomes a ticket. An email automatically becomes one, and a phone call will become a ticket if support personnel consider it to be one, and actually create a ticket for it.

The ticket is now your means of interacting with the customer and every conversation is recorded and can be referred back to, if need be. It should be noted that every customer interaction can become a ticket if required, from email, your website, Social Media, phone calls or any other means.

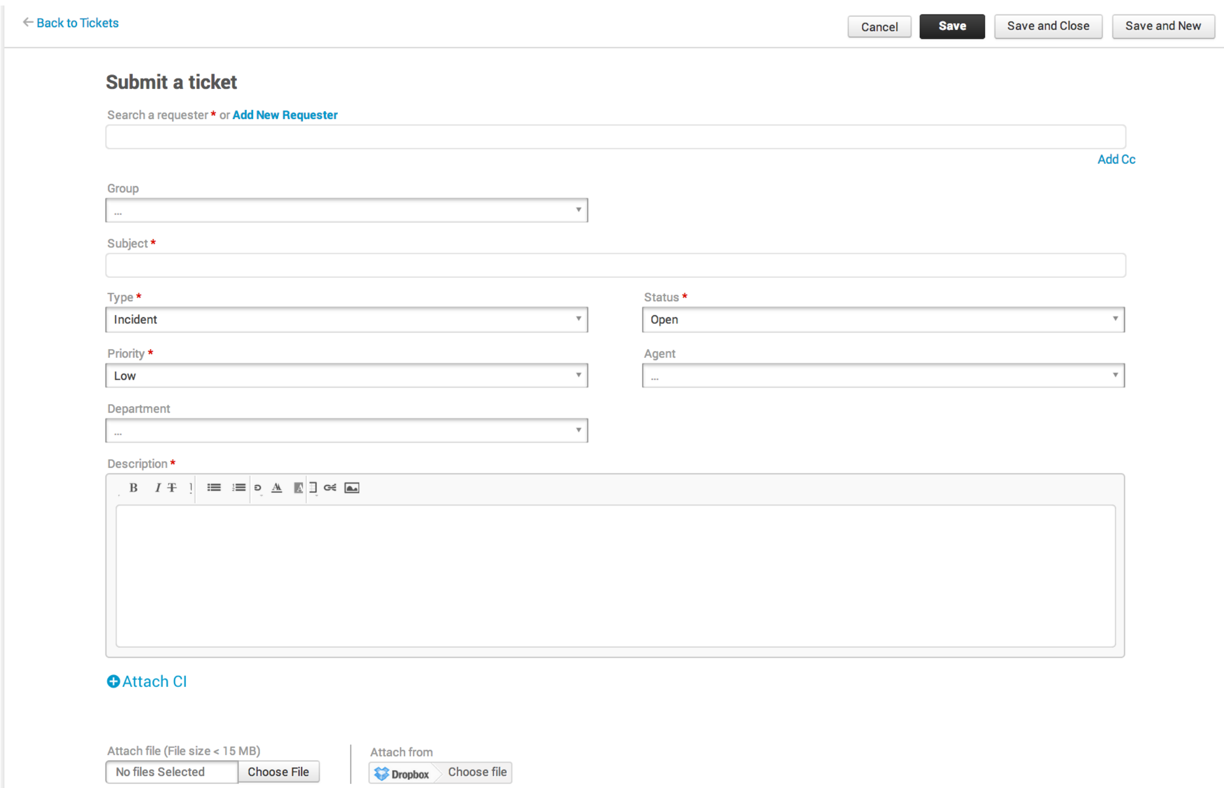
Creating a Ticket

Creating a ticket in Freshservice is quite simple. Here's how you can go about it:

- Click **New** in the top-right corner.
- Select **Incident** from the drop down (depending on the request type).
- Enter the details in **Submit a ticket** form.
- Attach a file if you have one.
- Click on **Save**/**Save and Close**/**Save and New** to save changes.

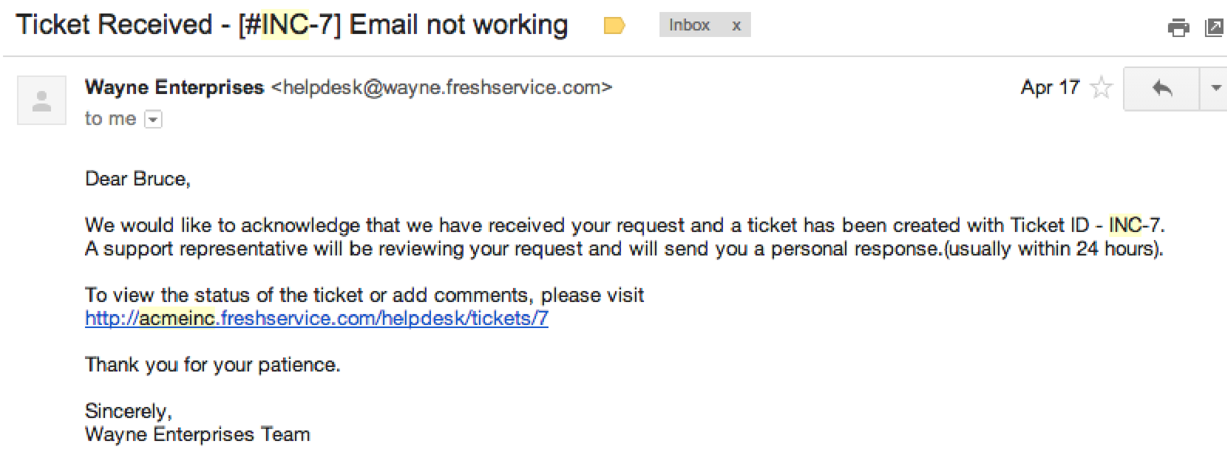
Why the different 'Save' options?

While creating a ticket, you can use the most relevant option. Here's what they do:
Save - Save changes and create the ticket.
Save and New - Save changes, create this ticket and then create another ticket.
Save and Close - Save changes, create the ticket and change its status to 'closed'. Use the option when you need to just document an incident etc.



Ticket Acknowledgement

Once a customer sends a service query, a complaint, or a request to your company's support, they will automatically receive an email acknowledging that their request has been received.



Ticket Received - [#INC-7] Email not working   Inbox x

Wayne Enterprises <helpdesk@wayne.freshservice.com>   Apr 17
to me

Dear Bruce,

We would like to acknowledge that we have received your request and a ticket has been created with Ticket ID - INC-7.
A support representative will be reviewing your request and will send you a personal response.(usually within 24 hours).

To view the status of the ticket or add comments, please visit
http://acmeinc.freshservice.com/helpdesk/tickets/7

Thank you for your patience.

Sincerely,
Wayne Enterprises Team

There will also be a link to your support portal where the customer can check the status of the Ticket & add comments.

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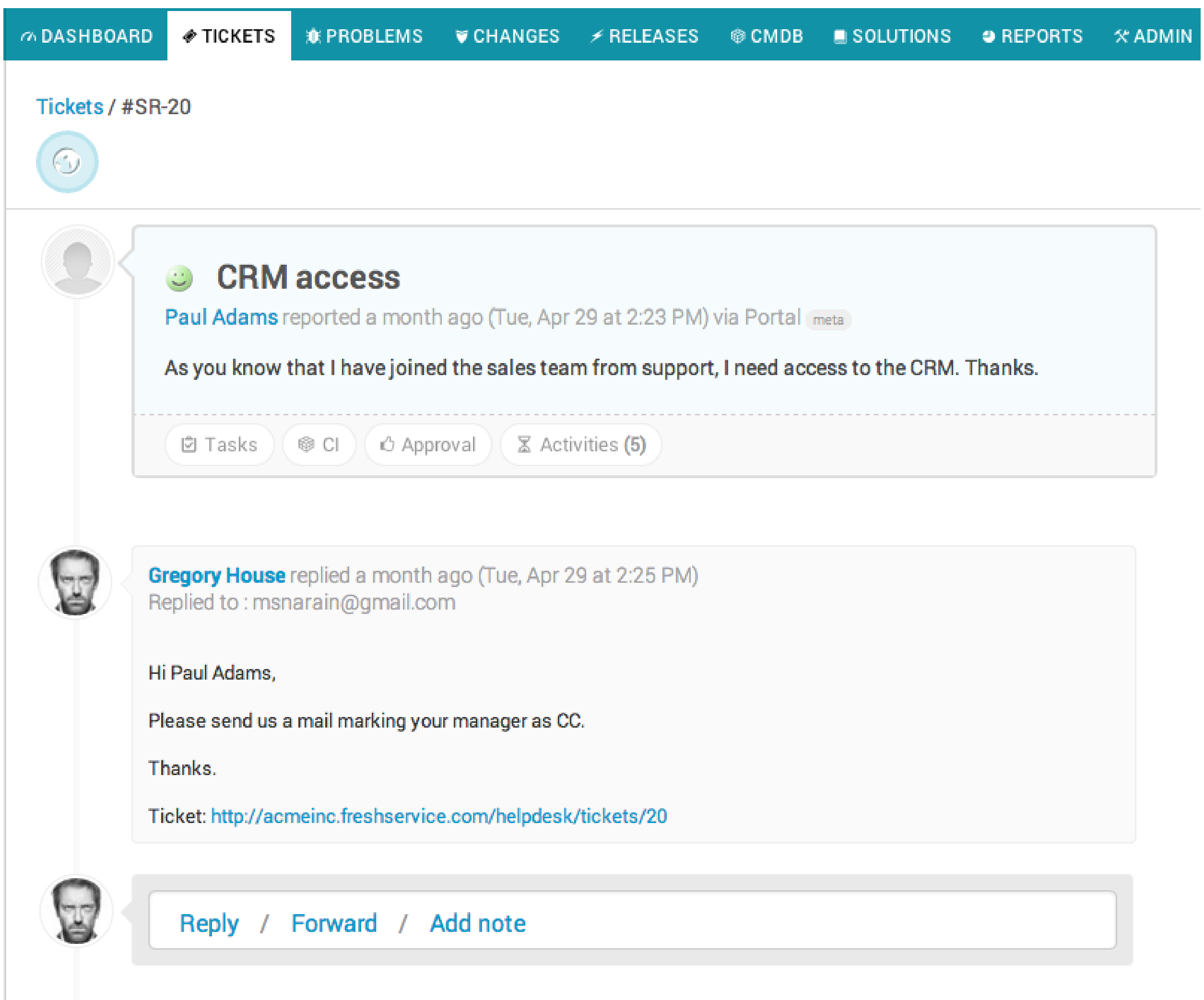
Replying to & Resolving a Ticket

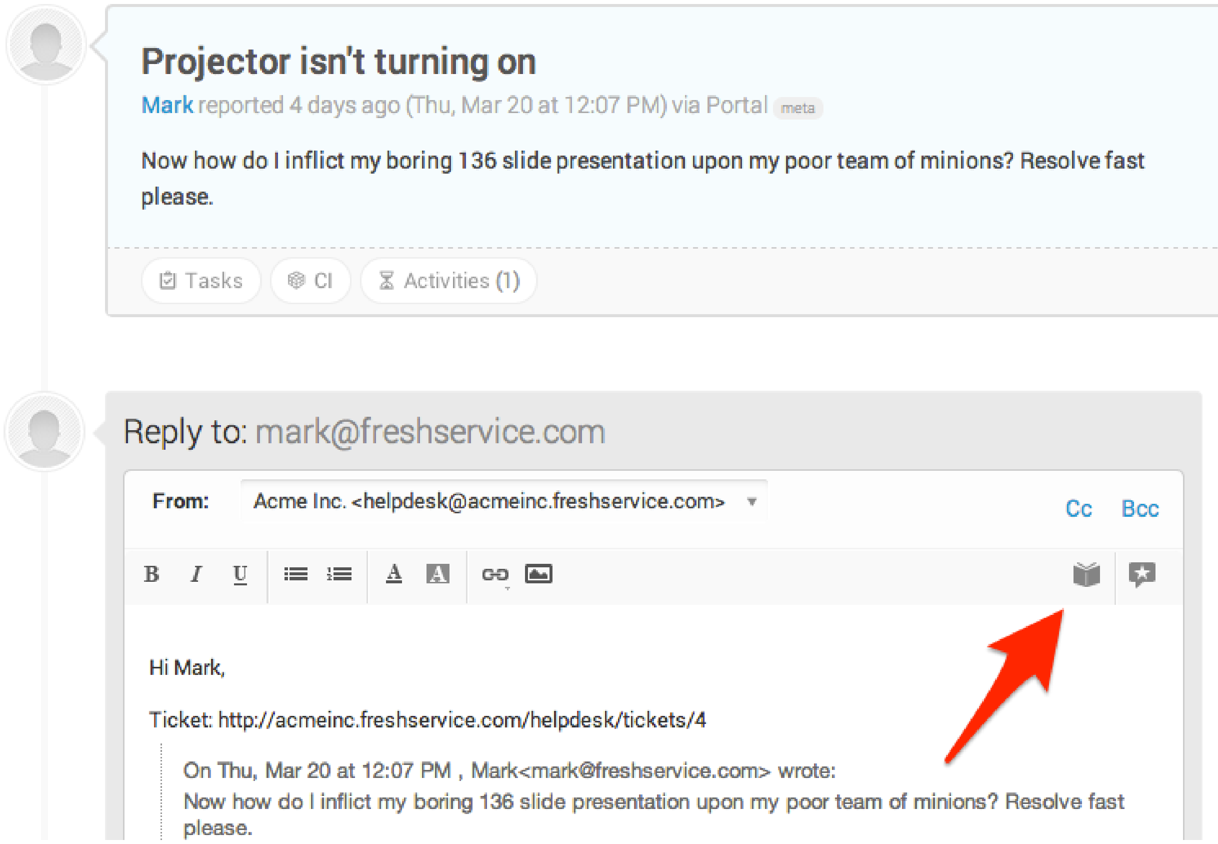
Now the customer's query or complaint is an 'open' ticket. You can respond to it by clicking on **Reply** and your answer will be sent to the customer's email as well as get posted on the tickets page itself. It will create a thread, which even the customer will have access to.

This gives you a clear view of the complaints received, and the support extended to a specific customer minimizing confusion and repetition of queries from your support staff's side.

Once a ticket has been replied to, the status can be changed to "pending" & if the customer's problem has been solved, the status can be changed to "resolved". Resolved tickets will be closed after a specific amount of time (that can be set/changed by an admin).



Tip: To save time and maintain consistency, agents can choose to quickly reply with a **knowledge base article** or a **canned response** while responding to tickets. The respective icons can be seen in the top-right corner in the 'reply to ticket' view (as shown below).



Ways to filter tickets

All tickets are displayed under the Tickets tab. If you want to view tickets selectively, you can use the following Filter options:

Filter Name	**Select the filter to**	**Filter Options**
Agents	View tickets under the ownership of specific agents	• *<Agent name>* • Me • Unassigned
Requesters	View tickets initiated by specific requesters	• *<Requester name>* • *<Requester email id>*
Departments	View tickets being handled by specific departments (E.g. HR, Finance etc.)	*<Department name>*
Groups	View tickets belonging to a specific group (E.g. Sales, Managers, etc.)	*<Group name>*
Created	Time-range when the ticket was created	• Any time • *Time ranging from the last 5 minutes to the last 6 months*
Due by	View tickets based on when they are/were due (multiple options can be selected)	• Overdue • Today • Tomorrow • Next 8 hours
Status	View tickets that have a specific status	• Open • Pending • Resolved • Closed • On hold
Priority	View tickets based on the selected priority (multiple options can be selected)	• Low • Medium • High • Urgent
Type	View tickets that belong to a specific category	• Incident • Service Request

Source	View tickets from a specific source (E.g. Email, Chat Etc.)	• Email • Portal • Phone • Chat • Feedback Widget
Category	View tickets based on their category	*<category name>*

** Filter options specified within < > are user defined or specific to your service desk.*

So, to view all of your tickets due today, set **Agent** to *Me* and **Due by** to *Today*.

Some custom views like 'My Open and Pending Tickets' and 'My Overdue Tickets' are available as a drop down menu. You can add views that you use frequently to this list by clicking on **Save** (next to 'Untitled View').

Tickets can also be sorted by the *due date*, *date created*, *last modified*, *priority*, *status* and in *ascending* or *descending* order.

Ways to update tickets right from the list

There are quite a few things that you can on a ticket. Some quick actions that you can do at first level:

Use this	**To do this**
Delete	Select the ticket(s) that you don’t need anymore and click Delete
Pick up	Take ownership of a ticket
Flag Spam	Mark as Spam
Close	Close a Ticket
Assign to Agent	Assign single or multiple tickets to a particular agent
Bulk Actions	You will find this feature quite handy when you want to update multiple tickets simultaneously. Things that you can change: ● Type ● Status ● Priority ● Group ● Category ● Agent ● Department You can also add a bulk reply to multiple tickets.
Merge	Use this feature in case you want to merge the selected ticket with another ticket. For instance, if the same issue gets reported by multiple members of a team or someone inadvertently opens a new ticket instead of just following up on an existing one, you can merge the new ticket with the original ticket.

Modification options on the ticket view page:

To view and modify a ticket, go to the **Tickets** tab and from the list of tickets, click the one that you would like to view or modify.

1. The **Star** icon - This option allows you monitor the selected ticket. Freshservice will send you a notification email, whenever an activity that involves this ticket occurs. When you want to stop monitoring the ticket, all you need to do is click the star icon again.

2. Reply - This gives you the option to respond to, forward or just add a note to a ticket.

While responding to or forwarding a ticket, you get various formatting options and also the options to insert a knowledge base solution or a canned response.

Should you choose to add a note to a ticket, it will be visible to all agents who view the ticket. You can choose to notify a specific agent and also decide whether or not the note will be visible to the customer who raised the ticket.

3. Close - Once a ticket needs to be closed, it can be done by the click of a button.

4. Problem - In case a specific incident occurs multiple times or impacts many users, it gets important to identify the root cause of the issue to fix it once and for all. Even for incidents that are being reported for the first time, identifying and fixing the underlying cause ensures that they don't occur again.

The **Problem** button can be used to associate tickets to an existing (known) problem or 'create' a new problem and then link the ticket to it.

The phase of **ITSM** that deals with identifying the root cause of incidents is called **Problem Management** (we'll talk about it in depth later).

Note: Problems can also be created independently in case you would like to document and fix a problem proactively (even before any related incident has been reported).

5. Change - Once the root cause of an incident is identified and documented as a 'Problem', appropriate steps need to be followed to rectify it. This might involve bringing about changes to assets and configuration items.

You can use the **Change** button to link tickets to a new change or an existing one. In case the incident was caused *as a result of* an implemented change, select 'Change causing this incident' from the drop down and select the change to link it to the incident.

This phase of **ITSM** that deals with efficient documentation and implementation of changes to minimize the number and impact of related incidents is called **Change Management**.

6. If you click on **More**, you'll get additional options:

- **Merge** the ticket with another ticket.
- **Execute** predefined **Scenarios**.
- **Add time** and start a timer to track the progress made on the ticket with respect to the elapsed time.
- **Edit** aspects of the ticket. The attributes you can edit here are: *Requester*, *Subject line*, *Type*, *Status*, *Priority*, *Group*, *Agent*, *Department* and *Description*.
- **Print** out a hard-copy of the ticket.
- Mark the ticket as **spam**.
- **Delete** the ticket.

7. Apart from these options, you can also update these ticket properties right from the ticket view page:

- **Due Date** - Today, this week etc. or *<A specific date/time>*.
- **Priority** - High, low, urgent etc.
- **Status** - Open, resolved, closed etc.
- **Source** - Email, phone, chat etc.
- **Type** - Incident/Service request
- **Group** - Database team, hardware team etc.
- **Assigned to** - *<Agent name>*
- **Department** - Finance, HR etc.
- **Tags** - *<Issue-specific tags>*

Note: These are the default fields. You can add or remove fields using the 'Field Templates' option in the Admin panel.

9. Requestor Info- You can use this to get a quick info about requester i.e. the person that sent you the ticket, including a quick synopsis of the recent tickets that you received from them. You'll be able to see their 10 most recent tickets.

10. Tasks- If you need to split the ticket into tasks and assign the tasks to specific agents for faster resolution, click on the **Tasks** button right below the ticket description. A task can have a due date etc. different from the parent ticket.

11. Associate a CI- To associate a Configuration Item with the ticket, click on the corresponding button and select an item from the list.

12. Request Approval- In case the ticket needs approval, you can send a canned mail to request for it. Click on **Approval → Request Approval** to do so.

13. Activities- It lets you see a list of all activities performed on the ticket since the time it was created.

4.3 Problem Management- *Identifying the Root Cause to Prevent Incidents*

Problem Management primarily aims at minimizing the number and severity of incidents by finding the underlying cause.

While Incident Management focuses on getting the issue resolved as quickly and efficiently as possible, Problem Management tries to prevent similar incidents from happening in the future.

Problem Management in Freshservice

Head over to the **Problem** tab and you'll see a list of all the problems that, just like **Tickets**, can be filtered to narrow down to meet specific conditions.

Problems on this page can be filtered using any of the following custom filters:

- New Problems and your open Problems
- Your Closed Problems
- All your Problems
- Unassigned Problems
- Change Requested Problems
- Closed Problems
- Trash
- All Problems

Problems can also be sorted by the *due date*, *date created*, *last modified*, *priority*, *status* and in *ascending* or *descending* order.

You can select multiple problems and perform these bulk actions:

Delete- Select the Problem(s) you don't need anymore and click Delete.

Pick Up- Just what it sounds like. Use this option to take ownership of the selected Problem(s).

Assign to Agent- In case you need to assign a problem to another agent (as opposed to yourself), click on this option and then select the agent's name from the drop down-menu.

Modification options on the problem view page:

To view and modify a problem, go to the **Problems** tab and from the list of problems, click the one that you would like to view or modify. Here's the list of options you get there:

1. Update- Click on the **Update** button and you get options to add information that will help proceed towards resolving the Problem. You can add details like:

- Root Cause
- Impact
- Symptoms
- Permanent Solution
- Workaround

In case any of the details are already added, you get the option to *edit* them.

2. Change- This option lets you associate the **Problem** with a new or existing **Change**.

3. More- You can change properties like *Status*, *Priority*, *Impact*, *Due date*, *Group* and *Agent* right from the Problem view page.

If you'd like to change the *Requester*, *Subject line* or *Description*, click on **More** and click **Edit**. You can also attach a CI to the problem if need be.

To **Delete** or **Close** the Problem, click on **More** and then click the respective option.

4. Additionally, you can set whether the Problem is a **known issue** or not, right on the Problem view page.

5. Need to track the **elapsed time** for the Problem? Scroll all the way down and click on **Time tracked → Add time**, and click on *Start timer* to start the auto-timer. You can also specify the amount of time elapsed *since* the Problem was created to start the timer at that point.

6. You can find options to **add notes** and **tasks**, **link incidents** and **CIs** and view all **activities** performed on the Problem, right below the description on the Problem view page.

4.4 Change Management- *Planning Change Implementation to Minimize Disruption*

Okay, so now you've got the root cause of the incident figured out and documented. Time to bring about the change that will fix the problem, ideally, for good.

Change Management is responsible for controlling the lifecycle of changes. Its primary objective is to enable beneficial Changes to be made, with minimum disruption to IT Services.

Change Management in Freshservice

The **Changes** tab in **Freshservice** also provides custom filter options to help you view Changes that match specific conditions.

- Your Changes
- New and Your Open Changes
- Your Closed Changes
- Your Approved Changes
- Your Unapproved Changes
- Unassigned Changes
- Closed Changes
- Changes Awaiting Release
- Trash
- All Changes

Changes can also be sorted by the *date created*, *last modified*, *priority*, *status* and in *ascending* or *descending* order.

You can select multiple Changes and perform these bulk actions:

Delete- Select the Change(s) you don't need anymore and click Delete.

Pick Up- This option assigns the selected Change to you.

Assign to Agent- In case you need to assign a Change to another agent, click on this option and then select the agent's name from the drop down-menu.

Information and modification options available on the Change view page

To access more details regarding a change or to modify its properties, from the **Changes** tab, click on the change. Here's the list of options you get there:

1. Update- Click on the **Update** button and you get options to add details like:

- Reason for Change
- Impact
- Rollout Plan
- Backout Plan

In case any of the details are already added, you get the option to *edit* them.

2. Release- This option lets you associate the **Change** with a new or existing **Release** (**Release Management** aims at implementing Changes in a planned manner. We'll get to it in a bit).

3. More- You can change properties like *Status*, *Priority*, *Impact*, *Risk*, *Change Type*, *Category*, *Cost*, *Group* and *Agent* right from the Change view page.

If you'd like to change the *Requester*, *Subject line* or *Description*, click on **More** and click **Edit**. You can also attach a CI to the problem if need be.

To **Delete** or **Close** the Change, click on **More** and then click the respective option.

4 . In case the Change requires the **CAB's approval**, you can request for it right from the Change view page. Click on the **Request for CAB Approval** option to send the reqest.

5. Need to track the **elapsed time** for the Change? Scroll all the way down and click on **Time tracked → Add time**, and click on *Start timer* to start the auto-timer. You can also specify the amount of time elapsed *since* the Change was created to start the timer at that point.

6. You can find options to **add notes** and **tasks**, **link Incidents, Problems** and **CIs** and view all **activities** performed on the Change, right below the description on the Change view page.

4.5 Release Management- *Controlling Movement of Releases to Live Environments*

Once a Change is approved by the CAB, the process of planning the deployment of the change begins. It is important to make sure that all the aspects of the Change, technical and non-technical, are considered before it is rolled out. That's what **Release Management** is responsible for.

Release Management in Freshservice
The **Releases** tab in **Freshservice** also provides custom filter options to help you view Releases that match specific conditions.

- New and Your Open Releases
- Your Completed Releases
- Your Releases
- Unassigned Releases
- Completed Releases
- Incomplete Releases
- Emergency Releases
- Trash
- All Releases

Releases can also be sorted by the *date created*, *last modified*, *priority*, *status* and in *ascending* or *descending* order.

You can select multiple Releases and perform these bulk actions:

Delete- Select the Release(s) you don't need anymore and click Delete.

Pick Up- This option assigns the Release to you.

Assign to Agent- In case you need to assign a Release to another agent, click on this option and then select the agent's name from the drop down-menu.

Information and modification options available on the Release view page

To access more details regarding a Release or to modify its properties, from the **Releases** tab, click on the Release. Here's the list of options you get there:

1. Update- On the view page, you can update Releases by adding details like:

- Build Plan
- Test Plan

In case they're already added, you get options to *edit* them.

2. More- You can change properties like *Planned Start & End Dates*, *Status*, *Priority*, *Release Type*, *Group* and *Agent* right from the Change view page.

If you'd like to change the *Subject line* or *Description*, click on **More** and click **Edit**. You can also attach a CI to the problem if need be.

To **Delete** the Release or **Mark it as completed**, click on **More** and then click the respective option.

3. Freshservice lets you track the **elapsed time** for Releases. Scroll all the way down and click on **Time tracked → Add time**, and click on *Start timer* to start the auto-timer. You can also specify the amount of time elapsed *since* the Release was created to start the timer at that point.

4. You can find options to **add notes** and **tasks**, **link Changes** and **CIs** and view all **activities** performed on the Change, right below the description on the Change view page.

4.6 Service Catalog Management- *Making Service Request and Fulfillment Simple*

A **Service Request** is a request from a user for information, advice, a standard change or access to an IT Service.

The **Service Catalog** in Freshservice helps you organize all the services that your business provides. It lets you maintain a structured list of these services and makes it easier for your customers to request for them.

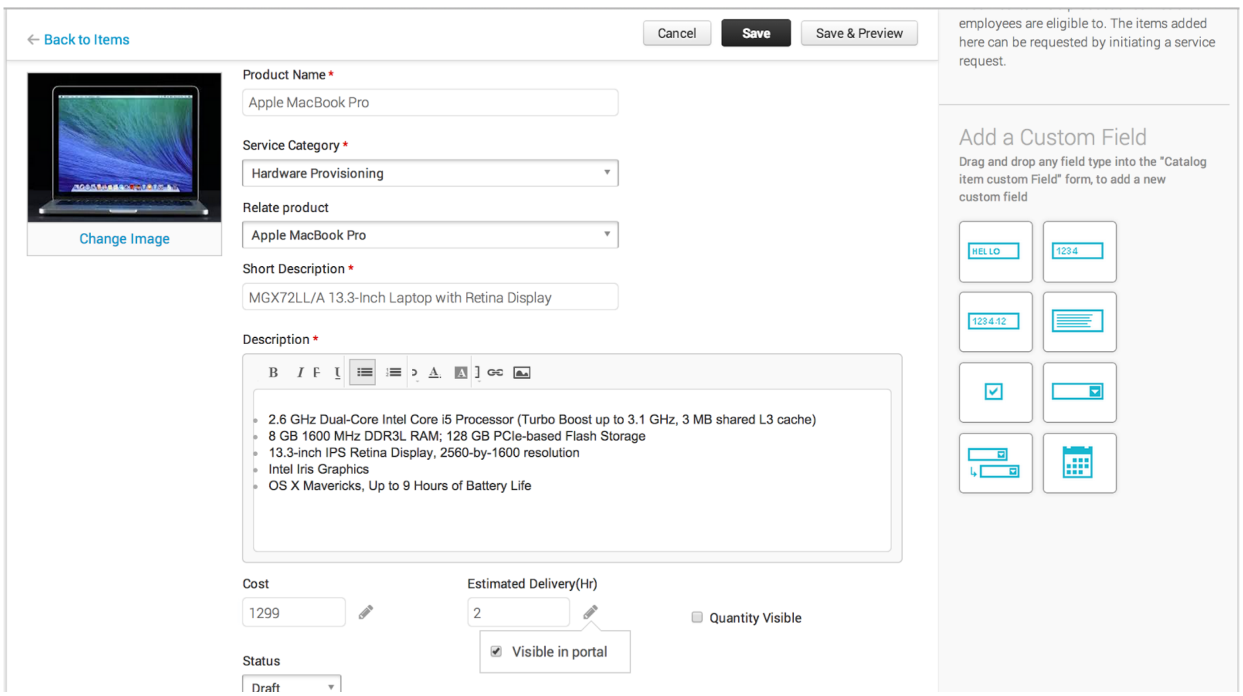
You can include information like cost, availability, ordering and request processes for the services.

You can customize the catalog, so that your customers see just the services they're eligible for. This simplifies the process by avoiding the need for explaining the specifications etc, and also prevents miscommunication during Service Requests.

To add a Service Item:

- Go to the Admin console and click on **Service Catalog**.
- Click on **Add New** and select **Service Item**. This pulls up the **New Service Item** form (*shown below*).
- Fill in the details.
    - **Image**: The image you upload will be displayed as the thumbnail for the service.
    - **Product Name**: This will be the default name of requests raised for the service.
    - **Service Category**: You can choose one of the default categories provided and add new categories if required (*see part two*). If you select either "Hardware Provisioning" or "Software Installation" as the category, you get an option to **Relate** a **product**. This maps the **Service Item** to the product and refers to it for cost etc. (Products can be managed from the Product Catalog module in the Admin console)
    - **Short Description**: This is displayed to the requesters below the image when they browse the catalog.
    - **Description**: Add a more detailed description about the item. This will be the default description of the service requests.
    - **Cost**: Click on the *pencil* icon for the option to make it visible in the portal.
    - **Estimated Delivery**: Can also be made visible on the portal.

    ○ **Quantity Visible**: Check the box to make the item's quantity visible on the portal.
    ○ **Status (Draft/Published)**: Here's something important: If a **Service Category** does not have any 'published' items, it will not be displayed on the portal.
- You might need to add fields on the 'Request Form' for the item (like '*Manager's Name*', for instance). For this, you can drag and drop custom fields from the right pane.
- Hit **Save** when you're done. You can also see a preview of the item by clicking **Save & Preview** (as the name suggests, it updates the item in the database and then displays a preview).



<u>Freshservice 'New Service Item' Form</u>

To add a Service Category:

- Go to the Admin console and click on
- From the **Add New** drop-down, select **Service Category**.
- This form is pretty simple. Just enter the name for the category, provide a brief description and hit **Save**.

Freshservice 'New Service Category' Form

Once an item is added, it can be requested from the **Service Catalog** tab on the portal. Agents can also request for items on requesters' behalf by going to the **Tickets** tab and clicking on **Request Items**.

How to customize the Service Catalog based on User Groups?

Customizing the UI of your end user portal takes you a step closer to better customer satisfaction scores. Imagine the frustration users go through when they see a product in the Service Catalog and place a request, only to find out later that they're not eligible for it. Don't even get us started on the amount of time it wastes.

The **Service Catalog** in **Freshservice** can be customized so that end users see just what they need to see.

For instance, a designer might be eligible to request for Photoshop but it does not need to show when someone from operations checks the catalog.

Customizing the Service Catalog based on the users' 'Department' and 'Job Title' involves doing 3 things.

Step 1: Specify the '**Department**' and the '**Job Title**' for the User (Requester).

- Go to **Admin → Requesters**.
- Click on the **Edit** button for the Requester.
- Add the **Department**/**Job Title** and click on **Update**.

Note: You can add more departments by going to **Admin → Departments**.

Step 2: Create a **User Group** and specify the **Departments**/**Job Titles** it should include.

- Go back to the **Admin** console and click on **Groups**.
- Click on **Create New** and select **Requester Group**.
- Type a **Name** and **Description** for the group.
- Under **Conditions**, specify the **Departments** AND/OR **Job Titles** to match.
- Click **Save** to create the group.

Step 3: Specify the **User Groups** a given **Service** will be available to.

- Go to **Admin → Service Catalog**.
- Click on the **Service** you wish to edit.
- On the **Edit Item** page, scroll all the way down and select the '**Group level**' radio button.
- Specify the groups the service needs to be available for and then click **Update**.

As you scale up, all new Requesters will be added to the relevant groups automatically based on their 'Department' and 'Job Title'.

4.7 Knowledge Base

Every service desk requires a well maintained knowledge base. A well maintained and updated knowledge base solves two of the biggest problems that take place every day. First, with all agents having access to a common place for sharing solutions, you can be sure that responses are consistent throughout. Second, since requesters have access to the knowledge base, they might find a solution even as they type out the problem to report it. As a result, your support load reduces making lives easier.

With Freshservice, you can add both permanent solutions as well as temporary workarounds to your knowledge base from the **Solutions** tab. You can make sure that all the information your agents come across everyday get documented properly into solution articles.

Once you have populated your knowledge base entries, you can setup your support portal to "auto-suggest" solutions based on the requester’s subject line before they submit a ticket. You can enable auto-suggest from Admin → Customer Portal. You can also get Freshservice to suggest the best possible solutions in response to a ticket by using "Suggest Solutions" inside a ticket.

Solutions can be public or private.

- **Public solutions** are visible in the Self Service Portal and also appear in Search results.
- **Private solutions** are agent-only solutions used for internal knowledge sharing.

Solutions have a 3 level hierarchy - Category → Folder → Article

Solutions can be of two types - Workaround and Permanent solutions.

A Solution can have a Draft status when you are working on it and can be changed to Published status once it is finished and reviewed.

4.8 Search

The **Search field** of Freshservice is a one-stop-shop for almost anything you want to find on Freshservice- right from *KB solutions* to *Tickets*, *Admins* to *Agents*, *CIs* to *Problems*, *Changes*, *Releases* and even the *notes* added on them.