

End User Guide

Learn how to raise and manage incident tickets and service requests



Welcome to Freshservice- the IT service desk with a fresh twist.

This user guide will walk you through everything you need to know about Freshservice. SysAdmins can set up and manage the entire service desk and also configure the end user interface, that you use. They also provide self-help solutions to common IT issues in Freshservice's knowledge base. You can refer to these solutions to solve problems you face and (if still required), raise a service ticket for your service desk to resolve.

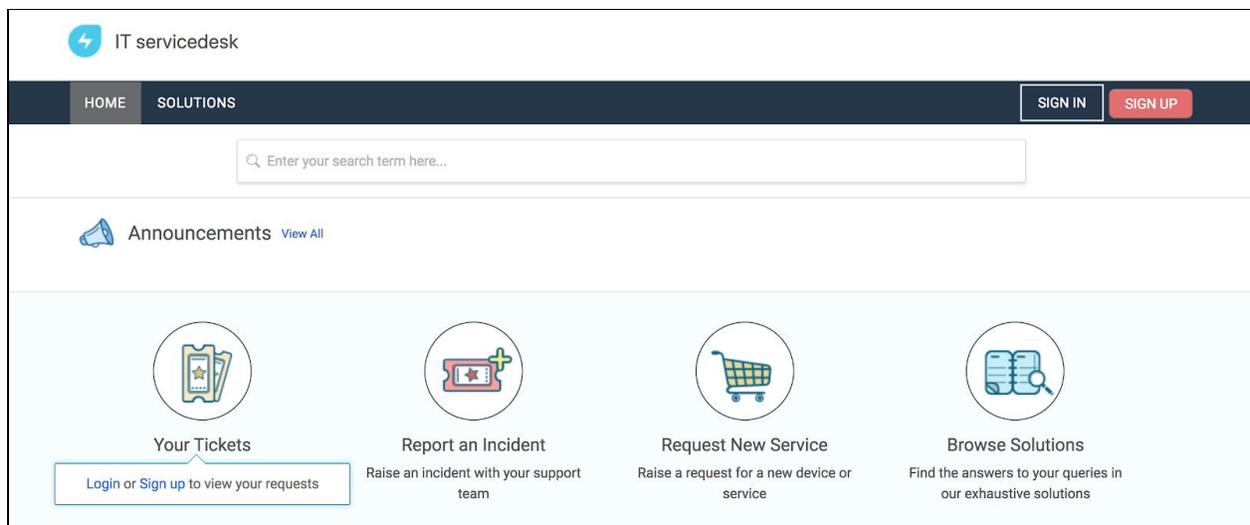
Here's how to get started.

Logging into Freshservice

Your organisation would provide the URL for your service desk which would be in the format: <yourcompanyname>.freshservice.com.

You have access to your service desk's knowledge base and announcements even before you login.

You'll also be able to raise a ticket without logging in (you'll be prompted to provide your official email address), but you will need to login in order to track a ticket you've raised. Click on "Login" in the top-right corner to do so.



You can login to Freshservice using one of **two** options:

1. Your official email address and its password
2. Your official Google ID (if your organisation has integrated it with Google Apps)

Note: In case you happen to forget your login password, you can click on '**forgot your password?**' to get a password reset link mailed to your email address.

Self-Help Solution Articles

The service desk admins and agents in your organisation want you to resolve some issues on your own. To help you with this, they provide solution articles in Freshservice's knowledge base. You can access these articles right from the self-service portal, without the need to log in. The knowledge base is provided right on the home page, but you can use the search field to

find solutions for specific issues.

The screenshot shows the top navigation bar with 'Support Home', 'Solutions', and 'Forums' tabs. A search bar is present with the text 'Search Articles and Community Discussions..'. Below the navigation is a 'Knowledge base' section with a sub-header 'GETTING STARTED WITH FRESHSERVICE'. Two columns of articles are displayed: 'Setting up Freshservice (9)' and 'Configuring your self service portal (1)'. The first column includes links for 'Setting up your support email address', 'Adding agents to Freshservice', 'Scanning and discovering assets in your network', 'Freshservice System Requirements', and 'Setting up a custom mailbox in Freshservice', along with a 'See all 9 articles' link. The second column includes a link for 'Logging in and accessing your service desk'.

Suggested solutions

Freshservice also suggests solutions in case the issue you're reporting happens to have a relevant solution in the knowledge base- even before you submit the ticket.

The screenshot shows the 'Submit a ticket' form on the Freshservice portal. The form fields are: 'Your Email Address *' (example@example.com), 'Your Phone Number or Skype ID' (+919880000000), 'What do you need help with? *' (Setting up support email), and 'Describe your problem/question *' (with a rich text editor). A '+ Attach a file' link is located below the text area. On the right side, there is a 'Related articles...' section with four links: 'Setting up your support email address', 'Setting up your support email address', 'Setting up a custom mailbox in Freshservice', and 'Security settings for multi-portal set up'. Each link is followed by a short summary of the article's content.

Raising a Ticket

Click on the **New Ticket** button to access the ticket submission form.

Although you can access the form even without logging in, it is recommended that you DO login before submitting a ticket, for two main reasons.

Firstly, it gives you access to the entire form as opposed to when you are logged out (for instance, if you're logged in, you can specify assets- like your laptop etc.- that the ticket pertains to).

Secondly, it ensures that the ticket traces back to you easily and avoids potential confusion caused, for instance, by inadvertently mistyping the email address.

Tracking your Tickets

When you click on the **Tickets** tab, you get a list of your tickets. By default, this list shows your *open* and *pending* tickets, but you can change the filter to show just the *resolved* and *closed* tickets or all of your tickets.

You can also sort your tickets based on:

- Date Created
- Last Modified
- Status (default)
- Ascending order
- Descending order

From this list, click on the ticket you need to track. This opens the detailed view for the ticket that provides information like the name of the **agent** working on it, the current **status** and any **conversation** that has happened on the ticket so far.

HOME SOLUTIONS TICKETS SERVICE CATALOG

Karthik Pasupathy Ramachandran New Ticket

Enter your search term here...

Home / Tickets list

REPLY MARK TICKET AS CLOSED ADD PEOPLE

This ticket has been Resolved since 2 days 23 hours

#INC-9285 Mouse Request

Karthik Pasupathy Ramachandran reported 3 days ago

Request for new mouse

Karthik Pasupathy Ramachandran

Click here to reply to this ticket

Agent Working on This Ticket

Theyagarajan Gc

Ticket details

Status
This ticket has been Resolved

Assigned to
Theyagarajan Gc

Category *
Hardware

Sub category *
IT-Accessories

Item *
Mouse

Update

At the detailed view, you can post a reply, mark the ticket as closed and even add people to be notified about future activity on the ticket.

Exporting Tickets

Freshservice lets you export your tickets in CSV or XLS format, should you need a detailed copy of them. You can choose (tickets created in) a specific time period and specific fields to be Exported.

HOME SOLUTIONS TICKETS SERVICE CATALOG

Karthik Pasupathy Ramachandran New Ticket

Enter your search term here...

All Tickets ▾

Sort by Date Created ▾

Export tickets

Mouse Request #INC-9285
Created on Tue, 8 May at 11:07 AM Agent: Theyagarajan Gc
THIS TICKET HAS BEEN RESOLVED

Request for Karthik Pasupathy Ramachandran : Atlassian Suite access #SR-8165
Created on Wed, 14 Feb at 4:58 PM Agent: Thomas Prabhu
THIS TICKET HAS BEEN CLOSED

To export tickets, go to the Tickets tab and click on **Export tickets**.

Export tickets

Export as: CSV Excel

Filter tickets created in

Last 30 Days x

Select fields to export or [Select All](#)

<input checked="" type="checkbox"/> Ticket Id	<input checked="" type="checkbox"/> Subject	<input type="checkbox"/> Description
<input checked="" type="checkbox"/> Status	<input type="checkbox"/> Requester Name	<input checked="" type="checkbox"/> Requester Email
<input type="checkbox"/> Agent	<input type="checkbox"/> Created Time	<input type="checkbox"/> Last Updated Time
<input type="checkbox"/> Category		
<input type="checkbox"/> Sub category		
<input type="checkbox"/> Item		

Then select the file format, the time period and the fields you need to export.

Raising a Service Request

The Service Catalog consolidates all the services that you, as an employee, are entitled to. The catalog makes it easy for you to request for services by providing a one stop shop on the portal.

To raise a service request,

1. Login to the end user portal and click on either **Service Catalog** or **Request New Service**.

Announcements [View All](#)

Welcome to Freshservice
29 Nov, 2013



Your Tickets
All your tickets, responses & activities



Report an Incident
Raise an incident with your support team



Request New Service
Raise a request for a new device or service



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2. From the list of services click on the one that you want to request. You can even search for it directly.

HOME SOLUTIONS TICKETS **SERVICE CATALOG** Karthik Pasupathy Ramachandran [New Ticket](#)

SERVICE CATEGORIES

- Laptop
- Software Installation
- Data Services
- Desktop/Workstation
- iPad/iPod Touch
- Mobile

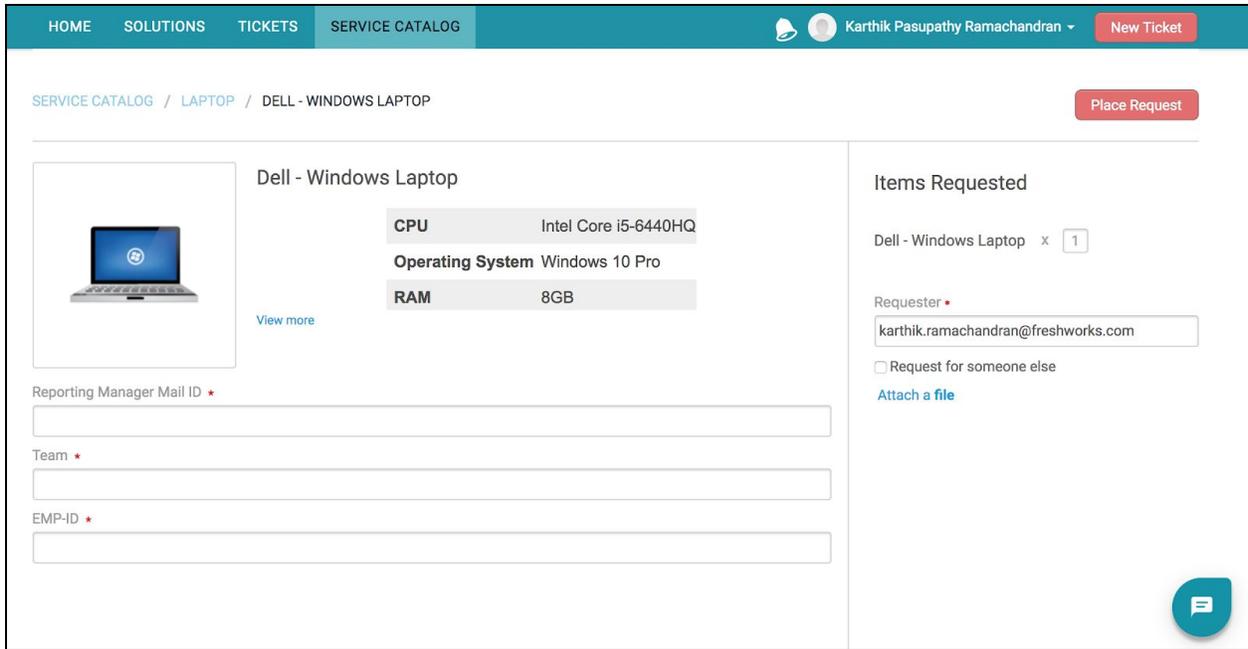
Apple iMac
Request for a new Apple iMac.
[Request Now](#)

Apple iPhone 5s
Request for a new Apple ipho...

Apple iPhone 6
Request for a new Apple ipho...

Apple iPhone Plus
Request for a new Apple ipho...

3. This takes you to the checkout page that provides more details about the service and tells you when you can expect it.



4. If you need more than one of the item, specify the quantity.
5. In case you're placing the request on somebody else's behalf, enter their email address and then click on **Place Request**.

This creates a **Service Request** automatically. You can keep track of it from the **Tickets** tab

Announcements

Your IT department might sometimes need to update/alert you about upcoming events like server migrations, possible downtimes etc. They can do this by posting an announcement on Freshservice.

Announcements are displayed on the right pane on the Home tab. You can view them even if you're not logged in.

