Admin Guide
Learn how to setup and manage your service desk
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Getting Started

Freshservice is an online IT 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 user guide is designed to help you get started with Freshservice.

Apart from walking you through the basics and help you configure your IT service desk, our guide will also give you tips and best practices to help your team give out its best.

Setting up your Freshservice Account

When you sign up for Freshservice, you will be offered a 21-day free trial will all the features. Once you’re satisfied, you can choose from one of the available plans: Sprout, Blossom, Garden and Estate. To know more about the difference between each plan, click here.

Creating an account in Freshservice is simple and takes less than 30 seconds. To create a new account,

- Go to [www.freshservice.com](http://www.freshservice.com) and click on the Sign up button on the top right corner
- You can either sign up using your existing Google account, or create a new account by filling the details mentioned in the sign up form.
- The service desk name you enter in the sign up form will be the URL through which you and your requesters will be accessing your service desk. For example, if you enter example.freshservice.com as your service desk name, it will be the standard URL for others to access your service desk.
- Once you’re done with filling all the details, click on Sign up for FREE.
- You’ll be taken into your account, where you will asked to setup your service desk.
Configure your Service Desk in 3 Simple Steps

Now, that you’ve created you signed up, the next step is to set up your service desk. You can do it in three simple steps:

1. Add Primary Helpdesk email

The first step is to add your primary helpdesk email address. If you’re given your service desk name (while filling up the signup form) as example.freshservice.com, your helpdesk email address will then be helpdesk@example.freshservice.com. This will also be the default reply-to address when you send emails from your service desk.

If you wish add a custom email address as your primary helpdesk email address, you can do so by entering the new email address in the input field.

Once you’re done, you will have to configure the helpdesk mailbox to forward all the emails to your service desk. In order to do that, click on link that says ‘how you can do it’ and you will be shown the necessary steps.

You can also check if the set up is working by sending a test email. To send a test email, click on the Send Test Email button.
2. Add Agents

The next step is to add agents to your service desk. Enter the email addresses of the employees you wish to add as agents. If you’re adding multiple email addresses, add them using a comma and click on **Send Invite**. An email will be sent, through which they can gain access to the service desk.

3. Rebrand Your Helpdesk

The next and final step is rebranding your service desk with your company’s logo. You can enter a fancy name for your service desk, and also upload the logo of your company by clicking on **Change Logo**.
You can also change the color scheme of your helpdesk to align with your brand. You can do that by click on the color palettes present in the Preview section.

With that you'll be done with the basic setup of your service desk. To go to your service desk dashboard, click on Jump right in!

**Know your Way around Freshservice**

Before learning about each individual modules, it is essential to know they key components of the Freshservice UI. This will help you in effectively navigate once you log into the application.
Sidebar - You can access all the key modules like Incident, Problems, Change, Release, Reports, Settings, etc. from the sidebar. You can’t customize or rearrange modules in the sidebar.

Ticket Summary - This section gives you a glimpse of tickets that come into your service desk. Apart from giving you the number of overdue tickets, it also gives you stats on tickets that are unassigned, open, on hold and due today.

Recent Activity - Right below Ticket Summary, you can see a list showing the log of recent activity that happened in your service desk.

Global Search - With our enhanced global search, you can easily find the information that you’re looking for. To know more about how effective our search is, check out the solution article.

Calendar - The calendar icon next to the search bar takes you to the ITIL calendar that lays out all the tasks that are being scheduled by you as well as other teams.

Quick Create Button - The small + New button next to the global search allows you to instantly create an incident, request, problem, change, or release.
Announcements - All internal service desk announcements will be displayed here. If you’re an admin, you can post the announcement and all the agents who are part of the service desk will be able to see the announcement on their dashboard.

Agent Availability Status - You can get a list of all the available agents in your service desk. This will allow you plan your day accordingly.

Now, that you’ve set up your service desk and know your way around, let’s jump right into Admin Settings as the module offers several options to configure your service desk based on your requirements.
Admin Settings

For easier understanding, the Admin Settings has been classified into four different sections:

- **General Settings** - you can configure basic settings that are necessary for your service desk.
- **Helpdesk productivity** - Set processes to automate repetitive tasks and be more productive
- **Configuration Management** - Keep track of your assets, contracts, and vendors, all in one place
- **User Management** - Manage agents and end users

### General Settings

**Helpdesk Rebranding**

You can completely customize your service desk for requesters logging into your self-service portal as well as your agents.

Under this section, you can customize the following parameters of the self service portal:

- **Portal Name** - The portal name of your service desk
● **Helpdesk Portal URL** - You can change your self service portal URL to a domain of your choice. For example, if your helpdesk portal URL is `yourcompany.freshservice.com` and if you wish to change it to `helpdesk.yourcompany.com`, you can do it from this section.

● **Languages** - You can choose the primary language of your service desk. Apart from choosing the primary language, you can also choose a list of supporting languages. Adding languages to this list will enable you to translate email notifications in the respective languages to support your customers.

● **Date Format** - Choose the date format for your service desk

● **Currency** - Choose the base currency for your service desk

● **Time Zone** - Choose the time zone in which your service desk will function.

● **Next Ticket ID** - The next ticket ID counter will start with this number (Should be greater than the last ticket ID created). This affects tickets created henceforth.

● **Logo & Favicon** - You can upload your company’s logo and favicon

● **Linkback URL** - The user will be directed to the linkback URL when he/she clicks on the header logo.

● **Helpdesk colors** - You can select the colors that match/compliment your brand.

● **Helpdesk Phone** - Add your helpdesk phone number

● **Portal Customization** - By clicking on the **Customize Portal** button, you will be taken to a page where you can completely customize the color, look, feel and layout of your self service portal. You can even add custom HTML/CSS codes to customize your portal.
Helpdesk Security

When you’re setting up your service desk for the first time, it is also essential to make sure that the portal is secure from external and internal threats. The Helpdesk Security section allows you to set up some key security elements for your service desk. They are:

- **Single Sign On** - 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.
- **Secure Connection using SSL** - You can enable this option to secure your self service portal using SSL encryption.
- **IP Whitelisting** - This option will allow you to restrict access to your support portal to only trusted locations and networks by defining the range of allowed IP addresses. When you enable the option, you will be asked to enter the IP range which you wish to be whitelisted.
- **Session Timeout** - Choose the duration post which the session will be timed out.
- **Admin Notifications** - You can set email notifications to be sent to a specific email address when when an agent is added or remove, or when a whitelisted IP is been modified.
- **Password Policy** - Set password policies for agents and contacts
Email Settings

Your default support email address is helpdesk@yourcompany.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@yourcompany.com by forwarding emails from this address to helpdesk@yourcompany.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 by clicking on the New Helpdesk Email button. 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.

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.
Form Fields

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. The 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 → Form 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.

SLA Policies

A service level agreement (SLA) policy lets you set standards of performance for your support team. Under SLA policies, you can set the time within which you want your 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. You can create an additional SLA policy by clicking on the New SLA Policy button present on the top right corner.
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.

**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.

Tags

Freshservice allows you to add tags to tickets so that you can easily find them when needed. The use of tags is not just restricted to tickets, and is also used in contacts and solution articles. This section under Admin settings gives you a complete list of all the tags used in the service desk along with usage count for every tag, including the number of linked tickets or solution articles. You can delete tags and also filter them based on usage, name, and in ascending or descending order.
Service Catalog

Service catalog is part of the self service portal from where your employees (requesters) request for new hardware, software, and other service items. You can add multiple service categories (like Audio and Video softwares, Apple hardware, etc.) and add service items (a product or service that employees are eligible to request) under each category.

Creating a New Service Category

To create a new service category,

- Go to Admin > Service Catalog and click on the Add New dropdown.
- Choose Service Category
- Enter the category name and description and click Save.

Creating a New Service Item

To create a new service item,

- Go to Admin > Service Catalog and click on the Add New dropdown.
- Choose Service Item
- Enter the name for your service item and the choose the service category under which you wish to add it
- Fill in other details such as the asset type, product, description, etc. and once done, click Save.

Feedback Widget

The feedback widget lets you embed a ticket form directly into your website or product. You can customize the look and feel, and also placement of the widget on your website.
You can use the section to customize the pop up/embedded widget using HTML/CSS. Once done, copy-paste the generated embed code in your website or app, to start using the Feedback Widget.

Support Portals

You can create multiple end user support portals for different customers. These portals can be customized so users see just what they need to see. You can also configure separate URLs for these portals and provide access to just the relevant Knowledge Base solutions in each of these portals. Agents can still access the tickets created from each of these portals as a consolidated list in the Tickets tab of Freshservice.

Creating a new support portal

To create a new support portal,

- Go to **Admin > Support Portals** and click on **New Portal**
- Provide a portal name for the new portal and select the company. A company can define a different department for which you wish to create the portal. For example, you’re already having a self service portal for all the employees and wish to create a separate one for all the marketing teams in the company. In that case, you can choose Marketing from the dropdown or create a new company titled “Marketing.”

- Enter a **portal URL** and choose the portal language.
- Choose solution category which you want to be associated with this portal. You can add one or more solution categories to a portal.
● You also have option to customize the look and feel of the new portal by changing its logo, favicon, etc.
● Once done, enter the linkback URL and helpdesk phone number.
● In the end, you will also have options to enable Single Sign On and SSL encryption.
● After filling in all the details, click Save.

To set up user permissions, click on the 'Settings' tab. Settings cannot be configured for individual portals and will be common for all portals that have been created.

Helpdesk Productivity

Workflow Automator

Workflow Automator allows you to automate all the repetitive tasks and manual processes that you perform on a daily basis. This includes processes like assigning tickets to the right agent or team, following up on approval, and so on. With the Workflow Automator, you can create a workflow using simple drag and drop actions.

Components of a workflow

A workflow is made up of three components:
**Event** - defines when a workflow has to be triggered

**Condition** - defines the parameter(s) that needs to be validated during the execution of a workflow

**Action** - The outcome of the workflow

It is not necessary that a workflow should have only one condition or an action. You can add multiple conditions and actions to a workflow. (We’ll be seeing this later with a detailed example).

Creating a workflow

To create a workflow,

- Head to Settings > Workflow Automator
- Click on the New Automator button on the top right corner and choose the module for which you wish to create a workflow. For example, if you wish to create a new ticket workflow, click on the New Automator drop down and click on Ticket.
- Provide a name and description for your workflow. A description would be helpful for other admins to understand why the workflow was created.
- The next step is to set up an event. This is where you set up when the workflow has to be triggered.
- Choose the conditions to trigger the workflow and click Done.
- The next step is to add a condition. This is where you provide a set of parameters to the workflow. The workflow, after being triggered, will check for the parameters. Upon the validation of the parameters, the workflow will perform the defined action.
- To add a condition, click on the condition icon, drag and place it next to the event.
- Choose the parameters for validation and click Done. If you wish to add additional parameters, click on Add New condition present at the bottom of the dialog box.
The next and final step in creating a workflow is to add an action. Click on the Action icon, drag and place it next to the condition. Choose the action that you want your workflow to perform and click **Done**. Now, the workflow is complete. As you keep adding conditions and actions, the automator will automatically save the workflow as a draft. If you wish to activate the workflow, you can click on Activate.

The above mentioned steps will help you in creating a workflow. But, in order to understand the level of flexibility offered by the Workflow Automator, take a look at our [solution article](#).

**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.
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.

To create a new rule under Supervisor,

- Head to Admin > Supervisor and click on New Rule
- Provide a name and description for your supervisor rule.
- Setup conditions and actions for your rule. Click on + New Condition or + New Action if you to add additional conditions or actions.
- Once done, click Save.

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.
The Observer has the following elements:

- **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.

To create a new rule under Observer,

- Head to *Admin > Observer*

- Click on **New** dropdown and choose the module under which you wish to create the rule. For example, if you wish to create an observer rule for Tickets, click on the **New** dropdown and choose **Ticket Rule**.

- Provide a name and description for your observer rule.

- Setup events, event performers (if applicable), conditions, and actions.

- Once done, click **Save**.
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”.

Creating a scenario

To create a scenario,

- Head to Admin > Scenario Automations and click on New Rule
- Provide a name and description for the automation
- Choose the action you want the automation to perform
- Once done, click Save.

Executing a scenario

Let’s say you’ve created a scenario automation to convert an incident to a service request and you’ve named it as “convert to service request”. Now, to execute the scenario automation,

- Click on the incident ticket which you wish to convert to a service request
- Click on the More dropdown and click on Scenarios
- You will see a popup with all the scenario automations
- Scroll till you reach “convert to service request”.

Scenario Automations

Scenario Automations let you carry out a bunch of updates to the ticket with a single click. They help you quickly handle recurring scenarios. For example, you could create a scenario to “Mark a Ticket as an incident”, “Assign to the Incident Management team”.

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Let’s say you’ve created a scenario automation to convert an incident to a service request and you’ve named it as “convert to service request”. Now, to execute the scenario automation,

- Click on the incident ticket which you wish to convert to a service request
- Click on the More dropdown and click on Scenarios
- You will see a popup with all the scenario automations
- Scroll till you reach “convert to service request”.

Scenario Automations

Scenario Automations let you carry out a bunch of updates to the ticket with a single click. They help you quickly handle recurring scenarios. For example, you could create a scenario to “Mark a Ticket as an incident”, “Assign to the Incident Management team”.

Creating a scenario

To create a scenario,

- Head to Admin > Scenario Automations and click on New Rule
- Provide a name and description for the automation
- Choose the action you want the automation to perform
- Once done, click Save.

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- Click on the incident ticket which you wish to convert to a service request
- Click on the More dropdown and click on Scenarios
- You will see a popup with all the scenario automations
- Scroll till you reach “convert to service request”.
Once you reach the scenario, click on the **Execute** button present right next to the scenario. This will convert the incident ticket to a service request.

**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.

**Available commands**

- **Status**: Pending
- **Priority**: Medium
Agent: John Robert
Group: Sales
Source: Email
Type: Incident
Urgency: Low
Impact: Low
Category: Hardware
Subcategory: Computer
Item: Macbook
Associate_ci: {Serial_no=>123, User=>andrea@freshservice.com, Name=>Andrea's Laptop}

Apps
The Apps section allows you to connect your Freshservice account with other third party applications. We’ve developed a new app marketplace from where you can choose and integrate with different applications.
For example, if you’re using Slack for internal communication, you can send ticket information and notifications to specific Slack channels.

Adding a new app

To add a new app,

- Go to Admin > Apps and click on Get More Apps
- You’ll be taken to the app marketplace where you can browse for the app you wish to integrate with your Freshservice account. You can either search for the app using the search bar or browse for the app by under the respective category.
- Once you’ve found the app, you can integrate it with your Freshservice account.

Adding a custom app

Apart from choosing from a library of apps from the marketplace, you can also create and upload custom applications on to your account. To create a custom app, you’ll have to log into our developer portal, and build custom apps using our Marketplace SDK. Once done, you can upload the custom app to your account and can later integrate them to your Freshservice account.

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.
Customer Satisfaction

Satisfaction Surveys let you add a link to your response emails and directly collect customer feedback and satisfaction.
The following steps let you collect feedback from your customers through a link in your response emails:

- Enable the Customer Satisfaction Surveys checkbox
- Specify the Satisfaction Link Text. The default text goes as “Please tell us what you think of your support experience.” But, you can customize this content as per your requirement.
- Choose how and when you want the survey link to be sent.
- Once done, click Save.

Arcade

This section allows you create challenges and award points to your agents.

Points are awarded to agents based on how fast they resolve the tickets assigned to them. There are also bonus points for first call resolution and satisfied customers. Agents also lose points for late resolution of tickets and for unhappy customers.

An agent can reach higher levels as he keeps getting more and more points, the set points to be achieved will be set by the Admin.

The section also allows you to create quests, which represent performance goals that you set for agents, completing which they will be awarded badges of honour.
Scheduler

Freshservice lets you schedule tickets at periodic intervals to remind the service desk of important tasks. For example, you can schedule tickets once every month to remind you to check disk space in your data centre.

Priority Matrix

A Priority Matrix (also known as the Impact-Urgency matrix) is used to automatically assign a priority to an incident. The priority for an incident is set based on the Impact and Urgency of the event.

**Impact** refers to the effect an incident has on service levels.

**Urgency** refers to how soon an incident should be resolved.

![Priority Matrix](image)

Asset Impact

Asset impact is used for automatically passing impact from list of associated assets to "impact" field of Incident. Priority matrix logic on Incident will be applied according to updated Incident impact field.

It compares the existing "impact" field in Incident details page against respective impacts of all associated assets and updates the value to whichever is the highest among the two.
Asset Impact
Allow associated asset’s impact from asset tab in Incident details page to pass on to incident impact field.

Pass associated Asset impact to incident

For example, if the existing Incident impact field value is "Medium" and when a "High" impact asset is associated with Incident, Incident impact field value will be updated to "High" from "Medium". This change is always from a lower value to higher and not the other way to ensure that system doesn’t downgrade existing higher impact. So, the value can change from "Low" to "Medium" or from "Medium" to "High" but not from "High" to "Low".

Team Huddle

Team Huddle allows you to chat with your fellow agents, add multiple agents to a conversation and even share files related to a particular ticket.

Note: As of now, you can start conversations only from the Tickets module.

Starting a conversation

To start a conversation,

- Head to the Tickets module from the left sidebar and select the ticket regarding which you wish to discuss with your fellow agents.
- Click on the Discuss button on the top right corner.
- Add your fellow agents using '@'. The autocomplete feature will help you quickly find the fellow agent you are looking for.
- Once you find the agent, select him/her and hit Enter.
- Now, the agent you added to the conversation will be notified through in-app and email notifications.
- Similarly, you can use '@' to add multiple agents (not more than 20) to a single conversation.

Conversations related to a ticket cannot be viewed when you move out of the ticket. However, when you get back to the ticket and if you have unread messages from other agents, you will be notified using a red dot. You can click on the Discuss button and view the unread messages.
To know more about what else you could do with Team Huddle, kindly visit the solution article.

**Configuration Management**

**Product Catalog**

The Product Catalog 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 catalog.
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.
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.

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.

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.

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.
When you head to Admin and click on Discovery, you will be taken to the module from where you can download the discovery probe.

To know more about discovery probe, kindly take a look at our solution article.

Financial Management

This section allows you to manage depreciation of assets. Depreciation refers to the decrease in the value of assets over time.

In Freshservice, Depreciation can be calculated in three modes:

- Declining balance
- Straight Line
- Sum-of-years-digits method

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

Note: The ‘Useful life’ field will accept only a whole number.

Contract Types

By default, you can classify your contracts into 3 categories- lease, maintenance and software license. If some of your contracts fall outside of these, you can add custom contract types based on your business needs.
To obtain and maintain relevant details about the contracts, you can even add custom fields to all contract types.

User Management

Contacts

This page lets you handpick a set of contacts and add them to your help desk. These contacts 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.

You can fill in the details of each of your new contacts 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.

Contact Fields

The contact form in Freshservice lets you capture important data from your customers so that you can support them better. You can help your team get additional context about customers quickly by including custom fields based on your type of business. For example, you can collect information with custom fields for pricing plan, company etc. and prioritize tickets accordingly in your helpdesk.

Just like your ticket fields, you can add new fields to the customer sign up form and make them mandatory. You can also have private fields that are visible just to your agents.

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.
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.

To know more about auto-ticket assignment, kindly refer our solution article.

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.

CAB (Change Advisory Board)

A Change Advisory Board, or a CAB consists of a set of agents who have been nominated to verify new changes in the help 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.

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 help 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.

To know more about how to create a role, kindly refer the solution article.

Companies

Companies refer to departments in your company. You can configure companies inside Freshservice and group your contacts based on the nature of their job or position in your company.

Companies can also help you classify tickets, problems, changes and releases from different types of employees differently, and define different workflows based on the impact and the urgency of requests.

Every company 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 companies that can be accessed only by the members of that team.

Company Fields

The company form in Freshservice lets you capture important data about the companies you support. You can help your team get additional context about the companies quickly by adding custom fields. For example, you can add a custom field to specify the physical location of companies to help agents provide better support.

Just like requester fields, you can add new fields to the company form and choose to make them mandatory.
Incident Management

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 through the support portal, it becomes a ticket.

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

To create a ticket,

- 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 supporting files if necessary
- Click on Save, Save and Close, or 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.

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

Replying to, and resolving a ticket

When a requester raises a ticket, it becomes 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**, and 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).
Quick Tip:

While replying to the requester, you can save a lot of time by including solution articles or canned responses.

Key Actions

Once a ticket is created, you can perform the following actions to it from your Freshservice account.

- **Reply** - You can reply to the ticket, which will be sent as an email to the requester.
- **Forward** - You can forward the entire conversation thread to another agent or person.
- **Add note** - You can add a private note where you can enter key details about a ticket which you want to keep for internal purposes. This will be of great help if the ticket is transferred or assigned to another agent in the future.
- **Discuss** - If you wish to discuss about the ticket with your fellow agents, you can make use of this option. This will open up a chat window where you can add your fellow agents, chat, share relevant files and even highlight key areas in a ticket. To know more about this feature, click here.

**Associate actions**

You can link your incident ticket to several other modules of your service desk. You can do that by clicking on the **Associate** drop down present on the top right corner.

The associate actions you can perform under this menu are:

- **New Problem** - You can associate the incident to a new problem by creating one. Clicking this option will open a form where you can fill in the details of the new problem.
- **Existing Problem** - You can choose from a list of existing problems and associate your incident ticket to it.
- **New Change** - You can associate your incident ticket to a new change
- **Existing Change** - You can choose from list of existing changes and associate your incident to it.
- **New Project** - You can associate your ticket to a new project
- **Existing Project** - You can associate your ticket to an existing project

**More Actions**

**Additional actions include:**

- **Merge** - You can merge your incident ticket with one or more existing ticket(s).
- **Scenarios** - If you’ve created scenario automations under Settings, you can access and execute them from here
- **Time** - You can add the start a timer to track the progress made on the ticket with respect to the lapsed time.
- **Edit** - You can edit different aspects of the ticket.
- **Print** - Print a hard copy of the ticket.
- **Mark as Spam** - Mark the ticket as spam.
- **Delete** - Delete the ticket.

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.

**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.

**Child Tickets**

If you have other incident tickets that talk about the same issue as your current ticket, you can add them as child tickets to this ticket.

**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.

**Associate a CI**

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

**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.

**Activities**

It lets you see a list of all activities performed on the ticket since the time it was created.
Actions on the Ticket List Page

Under the incident module, the first thing you will see is the list of incident tickets that were submitted. Freshservice allows you to perform certain actions when you select single or multiple tickets from the list. The actions are:

- **Pick up** - The ticket(s) will be assigned to you.
- **Assign to Agent** - You can assign ticket(s) to your fellow agent
- **Close** - You can close selected ticket(s)
- **Bulk Actions** - You can update several parameters of the chosen ticket(s) such as the status, priority, department, category, etc.
- **Merge** - Merge chosen ticket(s)
- **Flag Spam** - Mark the chosen ticket(s) as spam
- **Delete** - Delete selected ticket(s)

Filtering Tickets

The right side bar on the ticket list view allows you to filter ticket based various parameters. They are:

- Agent
- Requester email
- Companies
- Groups
- Created time
- Due date
- Status
- Priority
- Urgency
- Impact
- Type
- Source
- Tags
- Category
- Issue type
- Issue Classification
- Location
- Issue category
Problem Management

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 in 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:

**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.

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

More Options

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.

Additionally, you can also set whether the Problem is a known issue or not, right on the Problem view page.
If you need to track the elapsed time for a problem, scroll all the way down and click on **Time tracked → Add time**. Fill in the details and click on **Start timer**. You can also specify the amount of time elapsed since the Problem was created to start the timer at that point.

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.
Change Management

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 module 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
   - 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 request.
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.
Release Management

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 nontechnical, 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.
Bulk Actions

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.

Modification options available in 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:

**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.

**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.
CMDB

CMDB or Configuration Management Database is a central location where you can view information about all the hardware and software installations in your network. Each asset is known as a Configuration Item (CI).

Asset Management in Freshservice

Freshservice allows you to import all the assets in your network using various methods. They are:

- Discovery agent
- Discovery probe
- Import asset details
- Barcode scanning using mobile app

Discovery Agent

Discovery Agent is a lightweight application which you'll have to install on your Windows, Mac or Linux computers to continuously update information about the assets in real time. The agent updates Freshservice with the hardware and software information of the computers in real time.

To know more about Discovery agent, click [here](#).

Discovery Probe

The Freshservice Discovery Probe is a Windows application that is normally set up in a server in your organization. The Probe automatically scans and identifies any assets in your network through a domain or IP Range scan. Once the assets are identified the first time, these assets are then updated periodically based on the schedule that you can control.

To know more about Discovery probe, click [here](#).

Import Asset Details

You can import asset details in the form of a csv file. To import asset details from a .csv file, kindly follow the steps mentioned below:

- Click on the CMDB module on the left sidebar and choose **Assets**
- Click on **Import**
- Select the CI type you wish to import.
Choose the **CSV** file from your computer and upload it onto Freshservice.

Once done, click on **Import**.

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**Barcode Scanning using Mobile App**

If you’re using the Freshservice mobile app, you can use your smartphone’s camera to scan the barcode of your assets. Once scanned, the asset information is automatically fetched into your Freshservice account.

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**Viewing an Asset**

After scanning or importing the assets, they will be populated in the form of a list.

When you click on an asset, you will be able to see the following information:

- **Overview** - You will have generic details about the asset followed by acquisition date, warranty information, serial number, OS type, OS version, etc.
- **Relationship** - Here you can see the relationship of your asset with other assets in the network. If you’re an admin, you can create the relationship for every asset in your network.
- **Software** - You can get a glimpse of all the softwares installed in your asset. They are marked as Non CI by default. But, you can convert those into CIs whenever necessary.
- **Components** - This section will display the list of components that make up the asset. For example, if you’re viewing a laptop, this section will provide details about the processor, chipset, storage capacity, RAM, etc.

- **Contracts** - You can view the list of active contracts associated with the asset.

- **Expenses** - This section shows you the list of expenses that is associated with the asset. This include maintenance cost, support cost, disposal cost, etc.

- **Activity** - You can view the activity related to a particular asset. This includes information such as when the asset was requested, who was it assigned to, the requests it had raised in the past, etc.

**Edit Asset Properties**

While viewing an asset, you can also make changes to its properties such as the state of the asset, impact, usage type, location, etc.
Contract Management in Freshservice

Contracts module in Freshservice lets you manage contracts established with third-party vendors.

Freshservice supports different types of contracts – from creating your very own custom contract types to supporting lease, maintenance, as well as software license contracts, by default.

**Note:** Only users who have drafted the contract will be able to submit the contract for approval.

Vendor details can be added or edited from **Settings > Configuration Management > Vendors.**
Project Management

Most IT companies have projects that involve intense planning. Having to switch between your project management solution and your ITSM tool is difficult to manage.

Projects module in Freshservice allows you to bridge this gap by bringing more visibility into how projects are related to incident, changes, and assets.

The following are some of the major activities involved in managing projects in Freshservice:

Projects tab

When you go to the Projects tab, you can see a grid view of all projects. You can filter it down to show just the projects that you’re a part of, completed projects and archived projects.

Creating a new project

To create a new project,

- Go to the Projects tab and click on the New Project button. This brings up the New Project Form.
- Enter a title for the project. If you wish to add a description, click on Add Description to do that.
- Now enter a start date and an end date for the project.
- Specify the project’s status and priority and click on Create Project.

Once the project is created, you can edit its title or description by clicking on the ‘pencil’ icon next to the title.

If you need to update its properties like the priority, status, owner and start/end date, click on the ‘pencil’ icon next to Properties, make the changes and click update.
Adding members to a Project

The agent who creates the project is designated as the project owner by default, but you can add other stakeholders as members to the project:

To add more members to a project,

- Open the project and scroll down to the Members section.
- Click on the + icon. Now you can search for agents and add them as project members.
- Once added, members can perform the following tasks on the project:
  - Add more members
  - Add tasks
  - Delete their own tasks
  - Assign tasks
  - Add watchers to tasks
  - Schedule tasks
  - Add dependency to all tasks
  - Comment on all tasks
  - Add subtasks to all tasks

Managing project tasks and subtasks

Tasks and subtasks are critical parts of a project. They define the activities that need to be carried out to ensure project completion.

Adding tasks to projects

You can create up to 3 levels of tasks within a project (task, subtask, and sub-subtask). To add a task to a project:

- Go to the project and under the Tasks tab, click on Add new.
- Enter a short description for the task.
● Click on the **Calendar** icon to add a start and end date and choose when the task owner will be notified.
● Assign a member to the task and click on **Add** to create the task.

**Adding Subtasks**

If a task consists of multiple activities to be carried out by different stakeholders, it can be split into subtasks. To add a subtask to a task, go to the Subtasks tab and click on Add New.

You can also go one level deeper and add sub-subtasks to subtasks.

**Associating Incidents, Changes, and CIs**

If you wish to associate incidents, changes, or CIs to a project, you can do it from the Associations tab.

To associate, head to the **Associations** tab and click on **+ Associate**

**Activity Tab**

The activity tab displays all the activities that are associated with a project
Solutions

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.
Reports

The **Reports** module in Freshservice contains a list of reports designed to give you insights on the efficiency of your service desk. The module contains 30+ reports split under three categories:

- Incidents
- Changes
- Assets

Viewing a Report

When you click on a report, you will see all the necessary information in the form of a list, graph, or a chart.

All reports are provided with the option to edit the date range for which you wish to see the data. In order to edit the time range,

- Head to the **Reports** section and click on the report of your choice.
- Click on the **Edit** button. In some reports, you will see the option to choose the time period on the right side of the page.
● Choose the time frame for which you wish to see the data and click **Done**.

You will then see the data for the chosen time range.

● If you wish to download the report in the form of PDF, click on **Download as PDF** button present on the top right corner.

**Creating a new report**

Apart from the reports listed by default, you can also create customized reports with parameters of your choice. To create a new report,

● Head to the **Reports** section and click on **New Report** button present on the top right corner.

● Choose the module for which you wish to create report. In this case, you can choose between **Ticket**, **Change** and **Asset**.

● Provide a name and description for your report

● Choose the parameters for which you wish to run the report.

● Select other details such as the chart type and parameters you wish to display on the X-axis and the Y-axis
● Once done, click on **Save & Run Report**