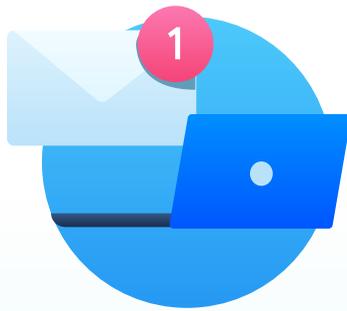




# ITSM Cheat Sheet

Check out the Cheat Sheet for ITSM and ITIL Software





# Email & Notifications



## Setting up a support email address

You can set up your own vanity email as your primary support email, and even add dedicated email addresses for specific groups. Any email sent to this address gets converted into a ticket inside Freshservice automatically. To use your own email server, a custom mailbox option, which requires incoming and outgoing email server details, is available.

[Read more →](#)



## Alerts & Notifications

You can set up your own vanity email as your primary support email, and even add dedicated email addresses for specific groups. Any email sent to this address gets converted into a ticket inside Freshservice automatically. To use your own email server, a custom mailbox option, which requires incoming and outgoing email server details, is available.

[Read more →](#)



# User Management





## Adding Agents & Requesters

Freshservice provides multiple options to import requesters/contacts information. You can import the data in various formats such as bulk import via CSV or Active Directory Integration. Similarly, it allows you to import agents along with the required fields such as role and scope. Requesters are assigned to a specific department. Agents can be a part of one or more groups that let you easily assign tickets, manage workflows, and generate group-level reports.

The system also allows you to 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.

[Read more →](#)



## SSO

Configure Freshservice to provide SAML Single Sign-On for your users. This way, they do not have to provide separate login credentials for Freshservice. The authentication of the user is done by any SAML provider you configure on your side and the user attributes like email address are sent back to Freshservice.

[Read more →](#)



# Service Request Management



## New Employee Onboarding

New Employee Onboarding (NEO) Feature provides a better way for companies to execute the Employee onboarding in their organizations. NEO lets information to be collected from multiple personnel including HR, Reporting Manager, and employee. NEO pulls-in all the right personnel into the ticket conversation at the appropriate stages.



## Service Catalog

Freshservice has an intuitive service catalog from which users can request for relevant service items. Service catalog groups similar service items which can be requested either as a permanent item or loaner item. You can add custom fields in the service item form whenever necessary, and add additional items that can be requested along with this item. You can set the visibility of service items to a specific group. All approvals can be automated using a workflow automator.

[Read more →](#)



# Asset Management



## Probe

Perform network scan using a probe that scans all kinds of computer, network routers, switches, and other devices like printers. You can use Probe to import users from your Active Directory and also schedule periodic scans.

[Read more →](#)



## Agent

Perform dynamic discovery of assets using a discovery agent. Any updates are reflected immediately within the Configuration Management Database (CMDB). You can download probe or agent under Admin → Discovery.

[Read more →](#)



# Security





## Domain Restriction

You can control who can sign up on the portal. By default, users from any domain can log in, signup, or create tickets, but when you chose the "Users from whitelisted domains" option, only users from domains that you enter can log in and create tickets.

[Read more →](#)



## IP whitelisting

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

[Read more →](#)



## CNAME & SSL Certificate

Once you have your Freshservice account up and running, you probably want your requesters and support agents to access the support portal at your own vanity URL. You can point the account to your own domain. (Free from Estate plan)

[Read more →](#)



# Customer Experience





## CSAT survey

Post ticket resolution or closure, CSAT survey can be triggered to your end users to rate the service quality. This is useful to measure service desk efficiency and customer satisfaction. The customer satisfaction report is available to assess the overall service experience and reward agents who delivered exceptional service.

[Read more →](#)



## Multi-Channel support

Freshservice supports multiple channels such as email, self-service portal, mobile app, and integrations with third-party applications such as Slack, Workplace, Skype for business, etc. These are captured as tickets within the service desk.



## Portal Customization

Rebrand your service desk color, theme, and layout easily using the portal customization feature. This even allows HTML/CSS level customization for the end user portal.

[Read more →](#)



# Productivity Hacks



## Workflow Automator

Routine ticket activities are automated in Freshservice using Workflow Automator. For example, assigning a ticket to the right agent or sending approvals to the reporting head. Workflows can be created for tickets, problems, changes, and releases by specifying an event, condition, and action.

[Read more →](#)



## Task Management

Freshservice allows you to create tasks within tickets to properly delegate tasks among different groups. The task dashboard displays tasks based on the status such as overdue, due today, upcoming, and completed. Service desk agents use this To-do list as a quick reference. You can also view tasks for a specific group and an agent.

[Read more →](#)



## Knowledge Management

Knowledge base allows you to manage solutions for Frequently Asked Questions (FAQs). This improves efficiency by reducing the need to rediscover knowledge each time a question is asked. Solutions are categorized as different folders. Knowledge base is available within the ticket reply module and can be attached to solutions within the ticket. It is accessible within the self-service portal for end users to browse whenever faced with an issue. Therefore, an effective knowledge base helps in ticket deflection.

[Read more →](#)



## Mobile App

The Freshservice mobile app can be downloaded via the Android play store or the Apple app store. Ticket and change lifecycle are managed on-the-go using the mobile app. You can track assets easily and scan assets using a barcode scanner. You can also browse through Knowledge base within the mobile app to quickly respond to tickets.



## Canned response

Canned responses are predefined reply templates that are created for recurring tickets. You can add dynamic content by adding placeholders such as requester's name, ticket fields, etc. This saves time for agents while handling redundant queries.

[Read more →](#)



## Filters and Views

You can filter tickets based on default or custom fields to view a particular list that can be saved as “Views” in Freshservice. For example, tickets that are open and assigned on your name can be created as a separate view. This makes it easier to navigate to the right set of ticket lists using “Views”.



## Scenario automation

You can perform a series of actions within a ticket with a single click. This is useful for recurring issues such as password reset. You can add actions like adding a tag, note and setting the priority as medium.



## Scheduler

Freshservice allows you to create tickets at periodic intervals automatically. For example, monthly back up activities can be set up using the Freshservice scheduler.



## Form templates

Ticket/Change template allows you to pre-fill new ticket forms with specific values. Using this, agents can save time while creating frequently occurring tickets. For example, printer issues that are often reported by end users can be saved and shared as a template and used later by agents while raising a ticket. These become standard operating procedures for frequently occurring tickets/changes. Using this, you can save time and remove redundant tasks in executing standard changes/tickets.



## Gamification

Freshservice integrates game mechanics within the service desk for agents to have a healthy competition among them. You can set up different quests for specific criteria such as fast resolution, first call resolution, and customer satisfaction rating. Gamification awards bonus points to agents for meeting these criteria. A leaderboard is displayed on the dashboard with a list of top agents in your team.



## Team huddle

With Freshservice, you can collaborate with your fellow agents within a particular ticket. You can chat with multiple agents, and share files among them for a quick resolution. You can also highlight specific ticket information from the ticket using “Highlight Mode”. This improves peer interaction and overall efficiency.



## Marketplace

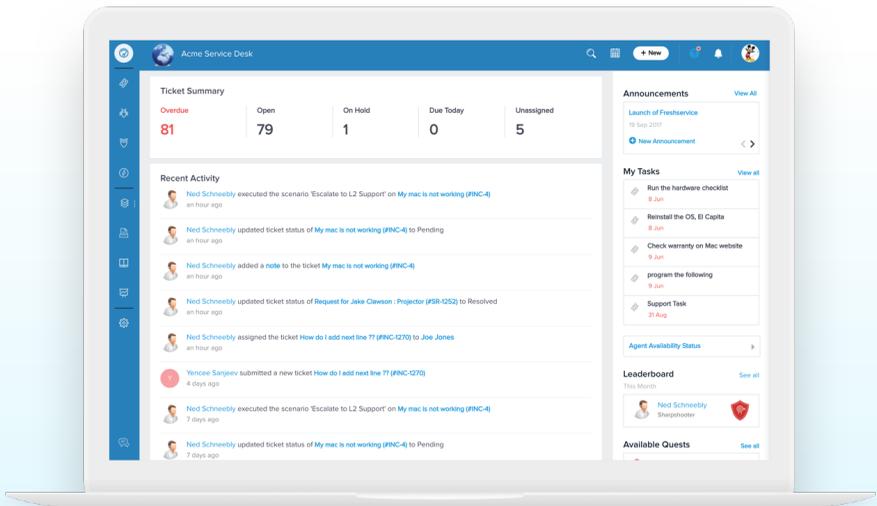
Freshservice marketplace allows third-party app integrations grouped under various categories such as agent productivity, assets & alerts monitoring, chat, phone, and video. You can browse through the App gallery and install the relevant ones.

# About Freshservice

Freshservice is a cloud-based IT service desk and IT service management (ITSM) solution that is quick to setup and easy to use and manage. Freshservice leverages ITIL best practices to enable IT organizations to focus on what's most important - exceptional service delivery and customers satisfaction. With its powerfully simple UI, Freshservice can be easily configured to support your unique business requirements and integrated with other critical business and IT systems. Are you trying to keep up with the current ITSM trends? Freshservice is on a constant mission to innovate and deliver great experience.

Start your free trial now :

[www.freshservice.com/signup](http://www.freshservice.com/signup)



Visit [www.freshservice.com](http://www.freshservice.com) for the latest in the world of ITSM.

Author: Padmavathy Sankaran

Copyright © Freshworks Inc. All Rights Reserved