



End-User Guide

Learn how to access services, resolve issues on your own,
and enhance your IT Support experience.



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CHAPTER 1

About this Guide

This guide is created for end-users expecting to make use of the IT Support Portal/Helpdesk set up by their organizations with the help of [Freshservice](#).

An IT Support Portal can help you get access to multiple types of interactions such as solution articles, chat functions, request submissions, status monitoring, alert broadcasts, and service catalog. It will be your one-stop shop to find all services provided by your organization. These measures taken by your company provide self-help capabilities and are a way of empowering yourselves to resolve issues on your own. It also enables you to quickly make requests for what you need without constantly interacting with your IT teams through long calls and multiple email threads.

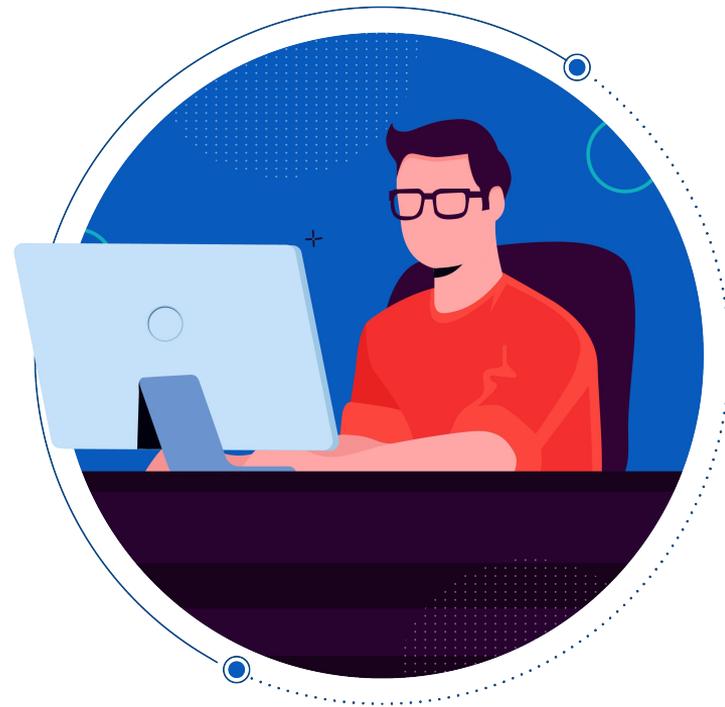


CHAPTER 2

Audience

End-Users = Requesters

Anyone in an organization requesting help/support from the IT Department.



Important Terminologies

Expand your knowledge of key terms used across this guide by referring to these definitions.

TERM	DEFINITION
Agent	An agent is a person within your company's ecosystem (internal or external) who can view, work, and respond to your tickets.
Announcements	Announcements are broadcasted alerts about company updates such as any upcoming releases, system, or application downtime.
Classic Portal	Classic portal is a type of portal view that allows end-users to raise tickets and experience seamless self-service from FAQs to common fixes. Users can also request items from a shopping cart-like service catalog.

TERM	DEFINITION
Conversational Portal	Conversational portal is a type of portal view that lets end-users report an issue, request for an item from your service catalog, and perform other self-service actions by chatting with a bot.
Helpdesk URL	A custom website address created by an organization through which end-users or other employees in the company can request help and services from IT teams. For example: <itsupport@acme.freshservice.com> or <itsupport.acme.com>
ID (Identifier)	A unique indicator for every ticket created within the IT Support Portal. The ticket ID has two parts: the ticket type indicator and the number. For example: in #INC-250, INC stands for incident, and 250 is the ticket number. Similarly, in #SR-20, SR stands for service request, and 20 is the ticket number.
Incident	An incident is any unplanned interruption in the day-to-day activities/tasks of an end-user.
Loaner Item	A service item that can be requested by an end-user for a specific period of time. For example, if a user is traveling to a 3-day event and needs an iPad or a tablet to use for that duration, it can be accessed or obtained as a loaner item after which it will have to be returned to the IT team.

TERM	DEFINITION
Request for Change	A formal request placed by end-users via the IT Support Portal for the implementation of a Change.
Reporting Manager	The direct team leader or supervisor who approves the requests placed by end-users belonging to his/her team.
Requested Items	Service items requested by an end-user that gets displayed in a service request ticket.
Requester	An end-user (external or internal) who raises incidents or service requests in the IT Support Portal.
Service Catalog	The Service catalog organizes and maintains a structured list of all the services and items that the company provides for end-users to browse through and request from.
Service Categories	Categories under which service items can be organized in the service catalog. For example: Hardware, Software, Finance, Marketing, etc.
Service Items	Assets, products, applications, or services that are listed on the service catalog for the end-users.

TERM

DEFINITION

Service Request

A type of ticket created in the IT Support Portal when end-users request items from the service catalog.

Support Channels

The various means or channels through which end-users can request help from IT teams or access the IT Support Portal.

IT Support Portal/ IT Helpdesk

A website/URL created by the organization for its end-users through which they can raise tickets for any concerns, request a service from the service catalog, browse for solutions, and resolve issues on their own.

Tickets

Incidents/Service Requests are commonly referred to as tickets and are captured, stored, managed, and updated as and when issues are resolved or requests are fulfilled by the IT team.

CHAPTER 4

Accessing the IT Helpdesk Portal

The IT Helpdesk Portal a.k.a. IT Support Portal is a customized website that every organization creates using a unique URL. Use the URL link created and assigned by your company to access the IT Helpdesk Portal.

For example: <itsupport@acme.freshservice.com> or
<it@support.acme.com>

NOTE

Make sure to activate your account in the IT helpdesk portal once you receive your verification link via email. If you do not receive the email, please contact your IT department.



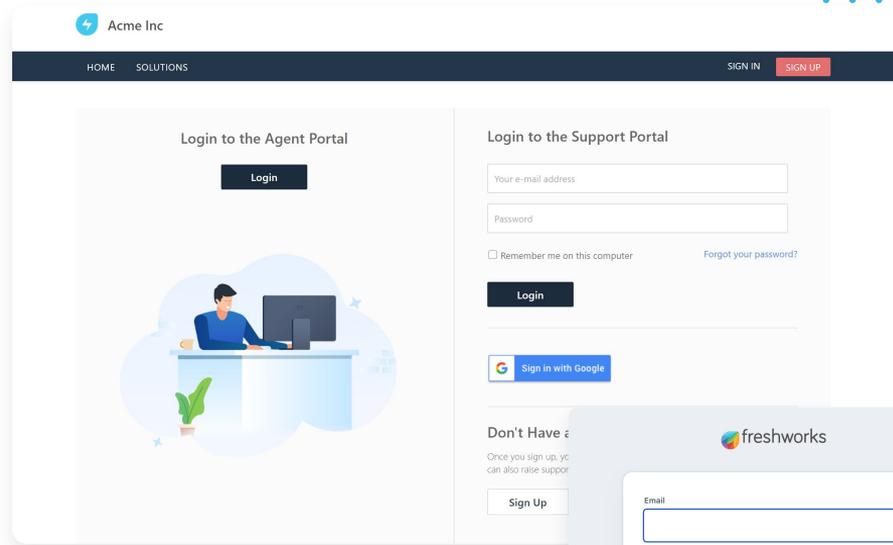
TO SIGN IN AND ACCESS THE IT SUPPORT PORTAL:

- 1 **Paste** the IT Helpdesk URL link in your browser and you will be redirected to the *Login Page*.

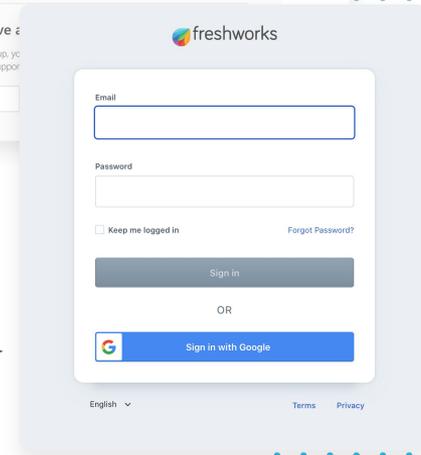
NOTE

Depending on when your organization signed up with Freshservice, your Login Page will look like either of the pages in the screenshots.

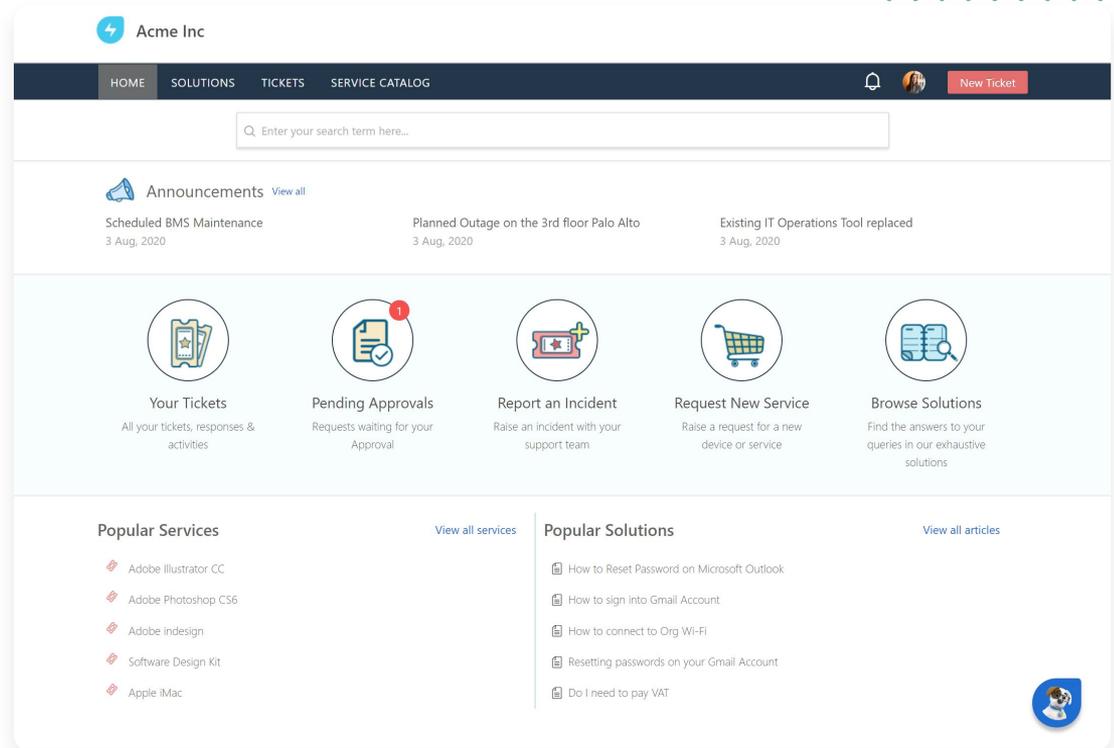
- 2 You can **Enter** your official credentials in the fields.
Alternatively, click **Sign in with Google** if your organization is integrated with G Suite Apps.



OR

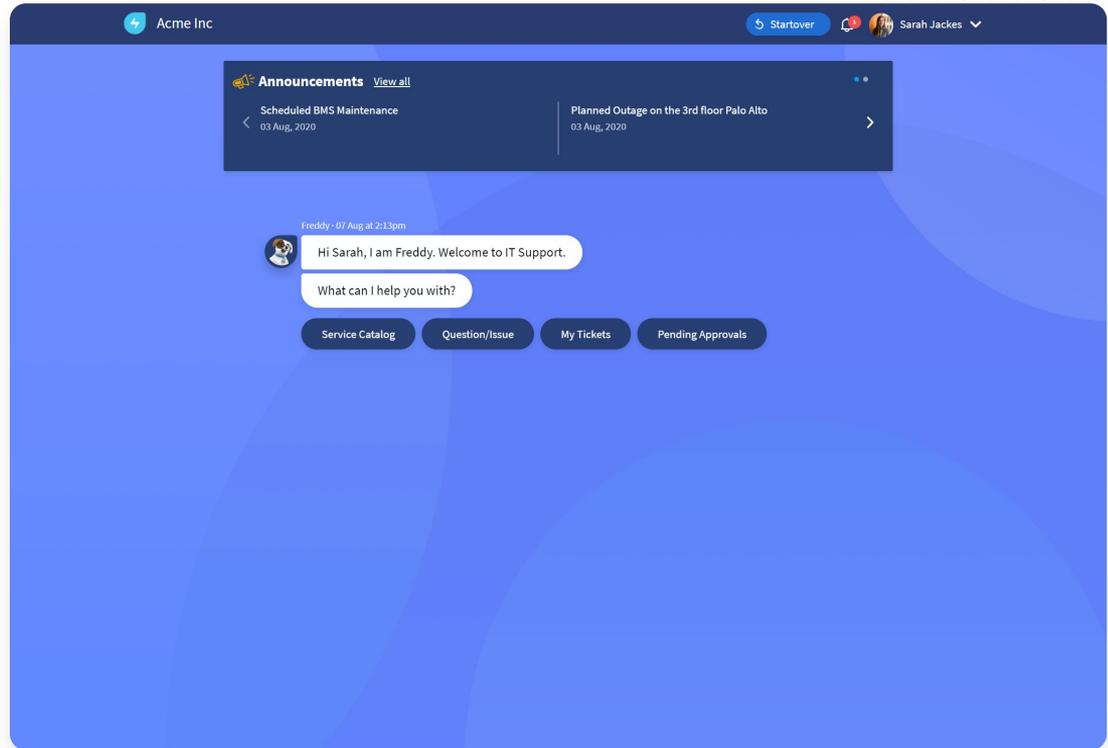


3 Your organization's IT Support Portal will appear (a customized version or a *Classic Portal View* similar to the screenshot).



NOTE

If your organization has enabled the **Conversational Portal View (Chatbot)** you can sign in by clicking the **Login** button and follow steps 2 & 3 mentioned earlier.

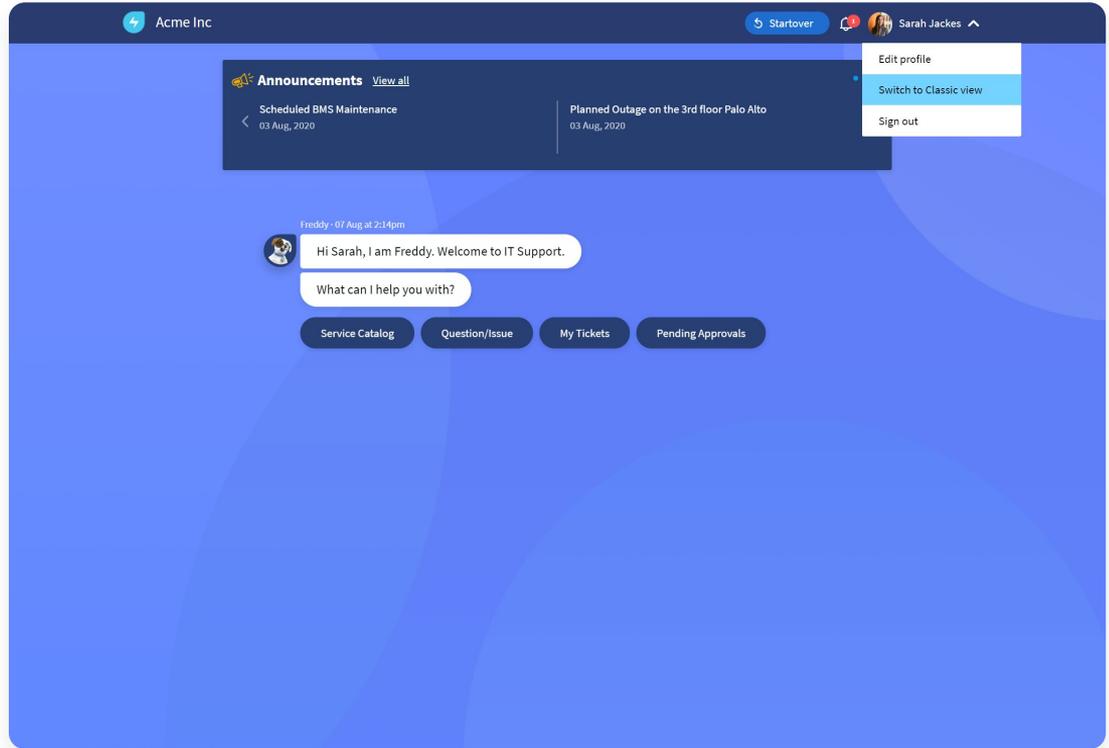


TO SWITCH TO CLASSIC PORTAL VIEW:

- 1 Hover over your *profile icon* in the top-right corner. A dropdown will appear.
- 2 Select **Switch to Classic View**.

TO SIGN OUT OF THE IT SUPPORT PORTAL:

- 1 Hover over your *profile icon* in the top-right corner. A dropdown will appear.
- 2 Select **Sign out**.



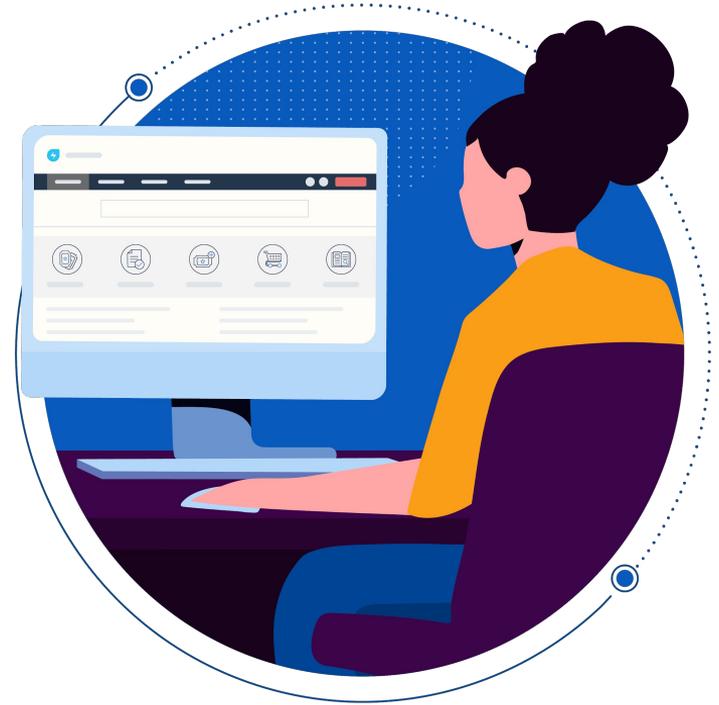
CHAPTER 5

Understanding the IT Helpdesk Home Page

The *Home Page* is the first page that will appear once you sign in to your IT Support Portal which will help you navigate to other pages. The *Home Page* includes tabs like *Solutions*, *Tickets*, *Service Catalog*, and a section for org-wide *Announcements*. A list of all the *Popular Services* that can be availed and links to *Popular Solutions* will also be indicated on the page.

NOTE

The look-and-feel of an IT Helpdesk will vary across different organizations depending on the custom branding, language, company logo, and color schemes in use. The default IT Helpdesk Portal (w/o customization) will be consistent with the items mentioned in this guide.

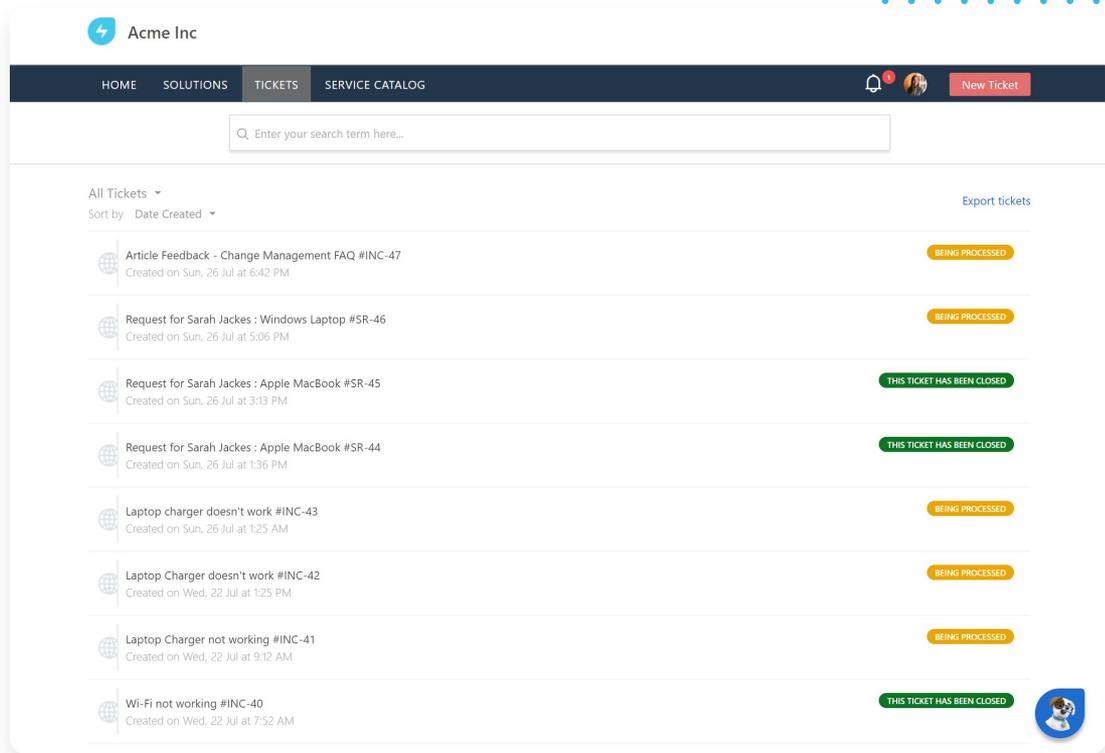


YOUR TICKETS

Clicking on this icon will lead you to the *Tickets* page. A list of all *Open* or *Pending* tickets will be populated by default. These tickets are logs of issues reported by you or service items requested by you that are yet to be addressed/resolved by your IT team. You can also choose a particular view (*Resolved* or *Closed*) or select **All Tickets** to view all your tickets (Open, Pending, Resolved, and Closed) at a glance.

To make it easier to understand and analyze your ticket data, you can click **Sort by** and arrange your tickets in the following ways:

- Date Created
- Last Modified
- Status
- Ascending
- Descending



The screenshot shows the 'Acme Inc' Tickets page. The navigation bar includes 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A search bar is present with the placeholder text 'Enter your search term here...'. The main content area displays a list of tickets with columns for ticket details and status. The status column shows 'BEING PROCESSED' in orange for open tickets and 'THIS TICKET HAS BEEN CLOSED' in green for closed tickets. A 'Sort by' dropdown is set to 'Date Created'. An 'Export tickets' link is visible in the top right. A profile icon and a 'New Ticket' button are also present in the top right corner.

Ticket ID	Description	Created On	Status
#INC-47	Article Feedback - Change Management FAQ	Sun, 26 Jul at 6:42 PM	BEING PROCESSED
#SR-46	Request for Sarah Jackes : Windows Laptop	Sun, 26 Jul at 5:06 PM	BEING PROCESSED
#SR-45	Request for Sarah Jackes : Apple MacBook	Sun, 26 Jul at 3:13 PM	THIS TICKET HAS BEEN CLOSED
#SR-44	Request for Sarah Jackes : Apple MacBook	Sun, 26 Jul at 1:36 PM	THIS TICKET HAS BEEN CLOSED
#INC-43	Laptop charger doesn't work	Sun, 26 Jul at 1:25 AM	BEING PROCESSED
#INC-42	Laptop Charger doesn't work	Wed, 22 Jul at 1:25 PM	BEING PROCESSED
#INC-41	Laptop Charger not working	Wed, 22 Jul at 9:12 AM	BEING PROCESSED
#INC-40	Wi-Fi not working	Wed, 22 Jul at 7:52 AM	THIS TICKET HAS BEEN CLOSED



PENDING APPROVALS

Some service requests or tickets will need approval before your IT team can make those requests fully serviceable. If you're a Manager, Supervisor, Head of Department, or even a CAB member, you're likely to receive requests from your team to approve leaves, software applications, hardware provisioning, and changes. Clicking on this icon will lead you to the *My Pending Approvals* page with a list of all requests that would require your approval.

The screenshot shows the Acme Inc. service desk interface. The top navigation bar includes links for HOME, SOLUTIONS, TICKETS, SERVICE CATALOG, and CHANGES. A user profile icon and a 'New Ticket' button are also visible. The main content area is titled 'My Pending Approvals' and lists four pending requests:

- Request for Hazel Stephens : Meeting Room #SR-54**
Approval request sent on Tue, 11 Aug at 2:56 PM
- Request for William Moreno : Microsoft Office 2013 #SR-53**
Approval request sent on Tue, 11 Aug at 2:55 PM
- Request for Adam Lainey : Guest Access #SR-52**
Approval request sent on Fri, 3 Aug at 2:53 PM
- Request for Colen Hall : Apple iMac #SR-39**
Approval request sent on Fri, 3 Aug at 7:27 AM

At the bottom right of the page, there is a link for 'Service Desk Software by Freshworks' and a 'Cookie policy' link. A small circular icon with a person's profile picture is located in the bottom right corner of the page.



REPORT AN INCIDENT

Incidents are unplanned events that disrupt day-to-day tasks and interfere with your productivity. A business application not working, web pages running slowly, personal devices broken are all examples of interruptions that can hold up important activities. Clicking on this icon will lead you to the *Submit Ticket* page which populates a form that will help you record details of the incident and associate an asset, thereby providing contextual information to your IT teams.

The screenshot shows the 'Submit a ticket' page in the Acme Inc service desk. The page has a dark blue header with the company logo and navigation links: HOME, SOLUTIONS, TICKETS, and SERVICE CATALOG. On the right side of the header, there is a notification bell icon with a red badge, a user profile picture, and a red 'New Ticket' button. The main content area is divided into two columns. The left column is titled 'Submit a ticket' and contains a form with the following fields: 'Search a requester' with the value 'sarahjacke.acme@gmail.com', 'Subject' with the value 'Wifi not working', and 'Description' with a rich text editor containing the text: 'Hi Team, I've been trying to connect my laptop to Acme Wi-Fi-AZ and haven't been successful. Could you please help me with this? Regards, Sarah Jackes'. Below the description field are links for 'Attach a file' and 'Associate Asset'. At the bottom of the form are 'Submit' and 'Cancel' buttons. The right column is titled 'Related articles' and shows a book icon with the text 'No articles found'. The footer of the page includes the text 'Service Desk Software by Freshworks | Cookie policy | Privacy Policy' and a circular profile picture of a dog.



REQUEST NEW SERVICE

Clicking on this icon will lead you to the *Service Catalog* page. A list of all the products and services that are currently offered by your organization will be listed. You can search for a service item, browse through service categories, and place a request for an item or service of your choice. The IT Service Catalog provides concise information with an eCommerce-like experience and will be updated by your company to reflect new, modified, or retired products and services.

The screenshot displays the 'Acme Inc' Service Catalog interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG' (the active page). A 'New Ticket' button is visible in the top right corner. Below the navigation bar is a search bar labeled 'Search for Service item'. On the left side, there is a 'SERVICE CATEGORIES' list with the following items: Hardware Provisioning, Software Installation, HR Management, Data Services, Application Access, Facilities Management, Marketing, Finance, and Travel Desk. The main content area is a grid of service items, each with an icon, a title, a description, and a price (where applicable):

- Apple Macbook pro**: Request for a new Apple M... \$1299.00
- Book Accomodation**: Request for booking acc...
- Data Backup**: Request to backup all your...
- Design Software Kit**: Request for design software
- Email Access**: Request to create an email ID
- Employee Off-boarding**: Request to off-board an em...
- Employee On-boarding**: Request a New Employee kit
- Employee Travel**: Request to process Employo...
- Development Laptop**: Request for a new develop...
- Event Registration**: Request to process event...
- File Restore**: Request to Restore file
- Maintenance Request**: Request for maintenance ser...

A small circular icon with a person's profile is located in the bottom right corner of the service catalog grid.



BROWSE SOLUTIONS

Clicking on this icon will lead you to the *Solutions* page. This page lists all the how-to content, best practices, and answers to FAQs curated by your organization. You can search articles for information, or browse by category to find solutions quickly and resolve issues on your own.

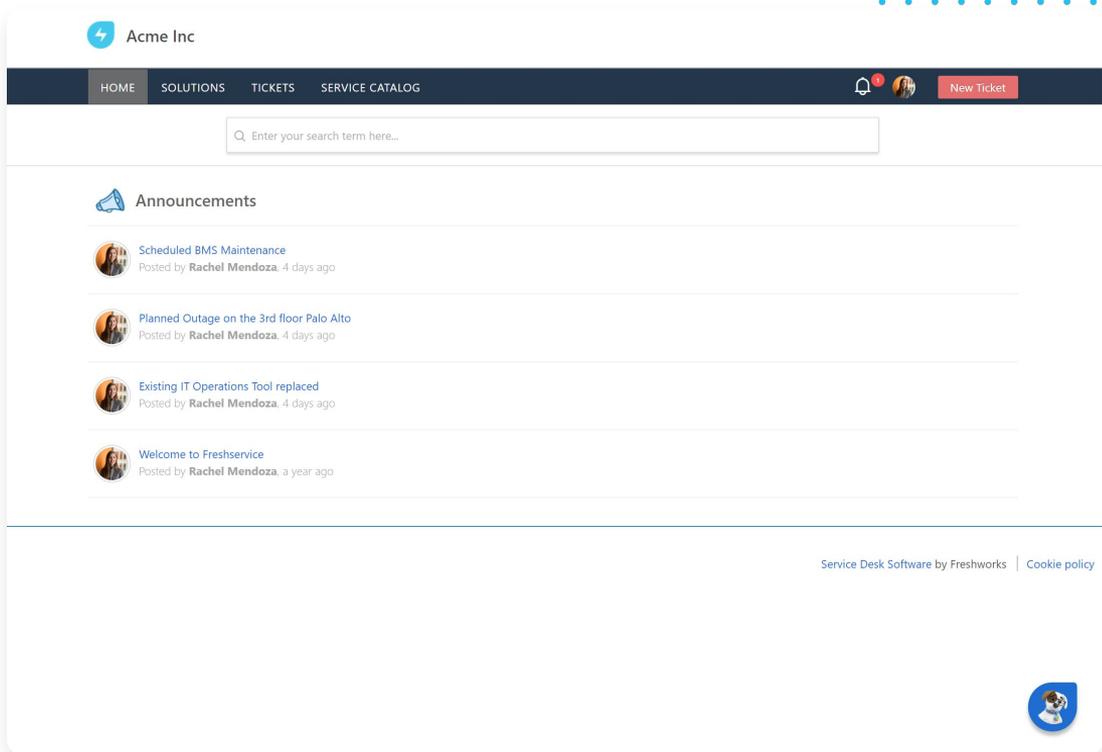
The screenshot shows the 'Solutions' page for Acme Inc. The page has a dark blue header with navigation links: HOME, SOLUTIONS (active), TICKETS, and SERVICE CATALOG. On the right side of the header, there is a notification bell icon with a red '1', a user profile icon, and a red 'New Ticket' button. Below the header is a search bar with the placeholder text 'Enter your search term here...'. The main content area is titled 'Solutions' with a sub-header 'Explore How-Tos and learn best practices from our knowledge base.' The content is organized into several categories, each with a sub-header and a list of articles:

- GENERAL**
 - FAQ (1)**
 - Change Management FAQ
 - Getting Started (1)**
 - How to sign into Gmail Account
 - Wi-Fi Connectivity (1)**
 - How to connect to Org Wi-Fi
 - Account Settings (2)**
 - How secure is my password?
 - Can I change my username?
 - Billing (2)**
 - Do I need to pay VAT
 - How can I get a refund?
- EMAIL PASSWORD RESET**
 - Resetting Password on Gmail (2)**
 - Resetting passwords on your Gmail Account

In the bottom right corner of the page, there is a circular icon featuring a dog's head.

ANNOUNCEMENTS

The *Announcements* section is used by your organization to communicate and notify you about system outages, upcoming events, alerts, or anything that is deemed important by your IT department and will be in accordance with the services they are delivering.



The screenshot displays the user interface of the Acme Inc Freshservice portal. At the top, the company logo and name "Acme Inc" are visible. Below this is a navigation bar with links for "HOME", "SOLUTIONS", "TICKETS", and "SERVICE CATALOG". On the right side of the navigation bar, there are icons for a notification bell and a user profile, along with a red "New Ticket" button. A search bar is located below the navigation bar with the placeholder text "Enter your search term here...". The main content area is titled "Announcements" and features a list of four announcement cards. Each card includes a profile picture of Rachel Mendoza, the title of the announcement, and the text "Posted by Rachel Mendoza, 4 days ago" (or "a year ago" for the last one). The announcements are: "Scheduled BMS Maintenance", "Planned Outage on the 3rd floor Palo Alto", "Existing IT Operations Tool replaced", and "Welcome to Freshservice". At the bottom right of the page, there is a footer with the text "Service Desk Software by Freshworks" and a "Cookie policy" link. A small circular logo is also present in the bottom right corner.

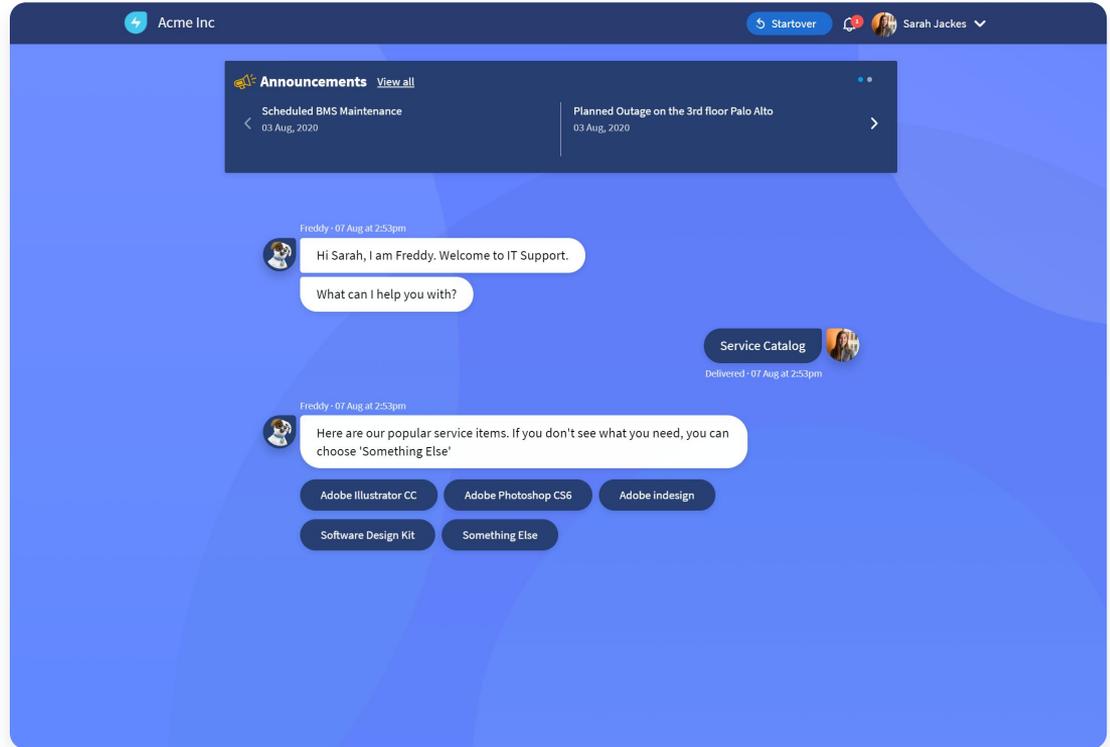


Conversational Chatbot

Clicking on the chatbot will lead you to the *Conversational Portal* page. Through this portal, you will be able to chat/interact with our default Chatbot - Freddy and place requests, report issues, and perform actions similar to the Classic Portal.

NOTE

This Chatbot option will be visible only if your organization has enabled it. If your company has customized the [Conversational Portal](#), then you would be viewing different bot avatars and names, themes, and welcome messages.





SEARCH

Entering a key term or a query in the *search bar* will fetch relevant results in a dropdown and list them under *Tickets*, *Service Items*, or *Solutions*. A snippet of the result will get displayed with the keyword highlighted allowing you to skim through quickly and click on the most relevant result.

The screenshot shows the Acme Inc Freshservice portal with a search bar containing the text "laptop". The search results are displayed in a dropdown menu, categorized into "TICKETS" and "SERVICE ITEMS".

TICKETS

- Request for Sarah Jackes : Windows Laptop #SR-46
- Laptop Charger not working #INC-41
- Laptop Charger doesn't work #INC-42
- Laptop charger doesn't work #INC-43
- Wi-Fi not working #INC-40

SERVICE ITEMS

- Windows Laptop HARDWARE PROVISIONING
- Development Laptop HARDWARE PROVISIONING
- Employee On-boarding HR MANAGEMENT
- Apple MacBook HARDWARE PROVISIONING

The main page also features a navigation bar with "HOME", "SOLUTIONS", "TICKETS", and "SERVICE CATALOG", a "New Ticket" button, and sections for "Your Tickets", "Popular Services", and "Popular Solutions".



NOTIFICATIONS

You can keep up with the latest updates and information regarding your tickets, requests, approvals, and changes in the *Push Notifications* section within the *Bell* icon. You can also configure *Notification Preferences* by clicking **Settings** and marking/unmarking checkboxes against items.

NOTE

Switching between Classic Portal and Conversational Portal

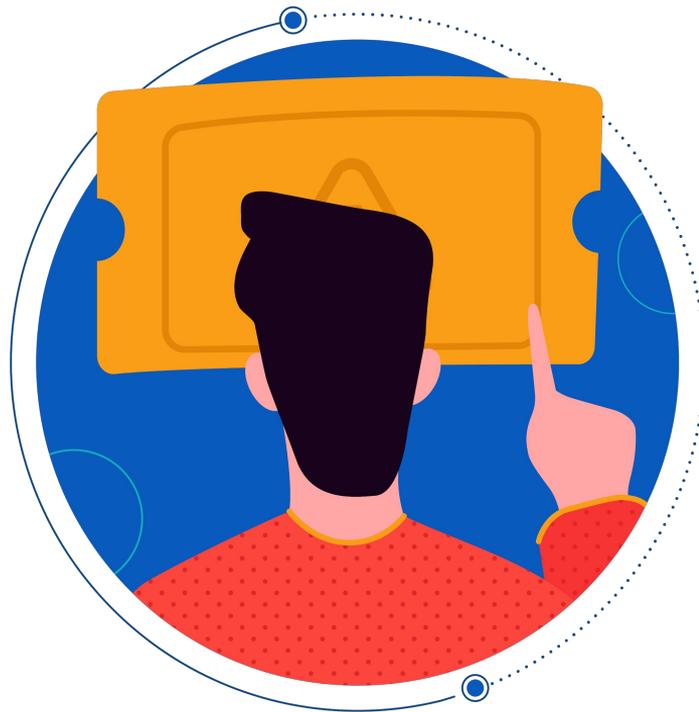
Click on the Chatbot to switch between two different portal views. The Chatbot will be available if your organization has enabled the option.

The screenshot shows the Acme Inc user portal interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A search bar is located below the navigation bar. The main content area is divided into several sections: 'Announcements' with two items, 'Your Tickets', 'Pending Approvals', and 'Report an Incident'. Below these are 'Popular Services' and 'Popular Solutions'. A 'Notifications' dropdown menu is open, showing a list of recent notifications with options to 'Mark all as read' and 'Settings'. The notifications include ticket status updates and approval requests.

CHAPTER 6

Raising a Ticket/ Reporting an Incident

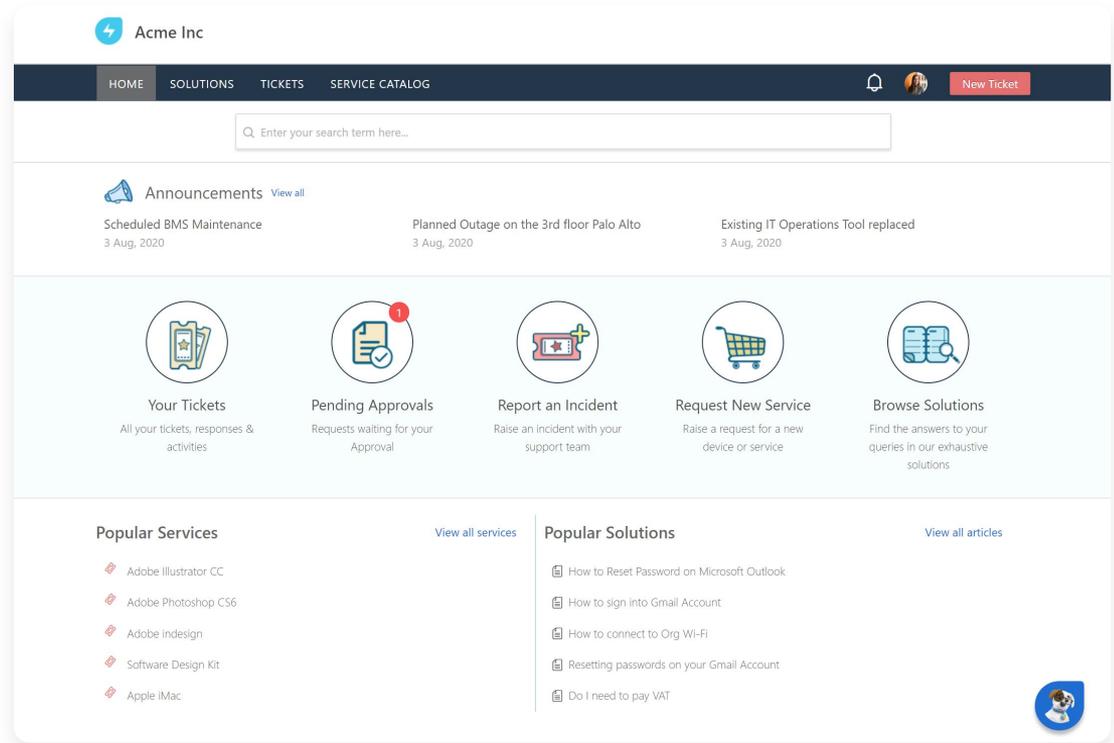
You can raise a ticket to communicate the issues you're experiencing while carrying out your day-to-day tasks. These may be password resets, Wi-Fi connectivity issues, security breach, malware attacks, app login problems, etc. Your IT team will analyze and resolve these incidents to restore services.



Classic Portal View

TO RAISE A TICKET AFTER SIGNING IN:

- 1 Click the **Report an Incident** icon.
Alternatively, click the **New Ticket** button in the top-right corner of the page. A form for ticket submission will open.



- 2 Your email address will get automatically populated in the *Requester Email* field.
- 3 **Enter** other details in the fields displayed.
- 4 **Note:** While entering a subject, how-to-articles will be populated under *Related Articles* if they have been curated and logged by your IT department. You can choose to read the article if it's relevant to your problem or continue to enter other details.
- 5 (Optional) Click **Associate Asset** if your issues pertain only to your device. This makes it easy for your IT team to track impact and infer from past issues.
- 6 Click **Submit**.
- 7 Your ticket gets created and will be logged in the **Tickets** tab.

Acme Inc

HOME SOLUTIONS TICKETS SERVICE CATALOG

Submit a ticket

Search a requester * sarahjacke.acme@gmail.com

Subject * Wifi not working

Description *

Hi Team,
I've been trying to connect my laptop to Acme Wi-Fi-AZ and haven't been successful.
Could you please help me with this?

Regards,
Sarah Jackes

Attach a file

Associate Asset

Submit Cancel

Related articles

No articles found

Service Desk Software by Freshworks | Cookie policy | Privacy Policy

NOTE

If your organization has opted for customization of the Helpdesk portal and you can't find the buttons, text, or fields displayed in the images, please contact your IT team to understand where you can raise tickets.

TO RAISE A TICKET WITHOUT SIGNING IN:

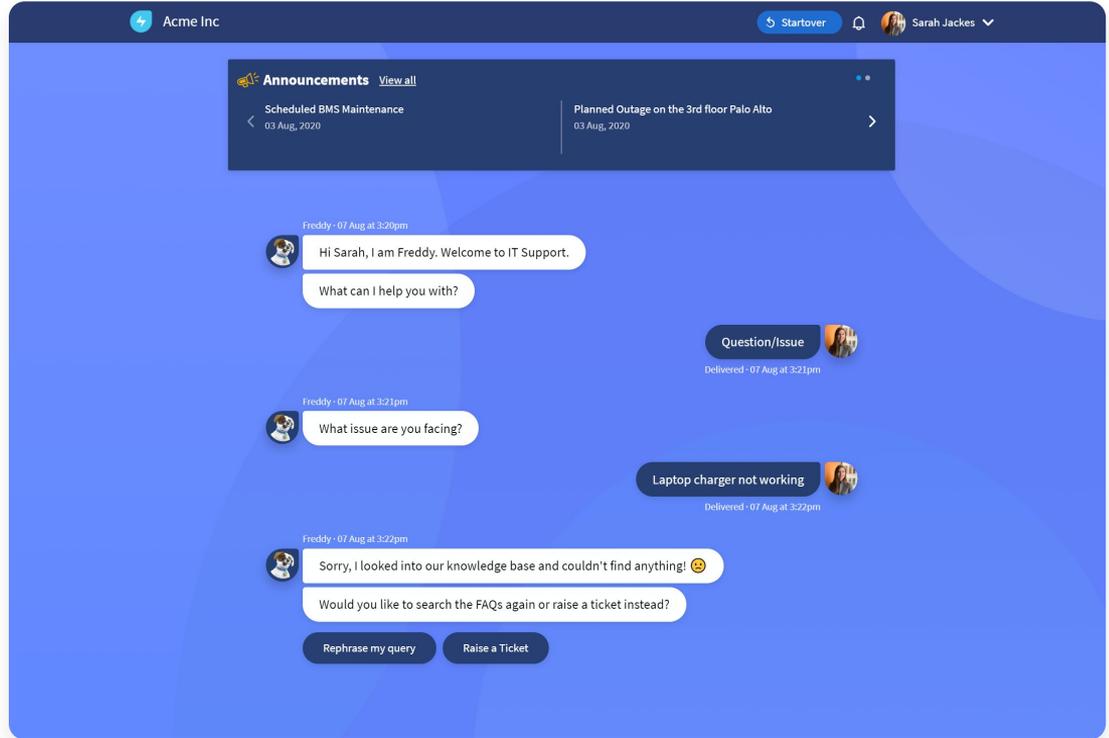
- 1 Click the **Report an Incident** icon.
- 2 Enter your official email address in the *Requester Email* field.
- 3 Provide other details in the *Subject* and *Description* fields.
- 4 Click **Submit** and your ticket gets created.
- 5 **Note:** You will need to sign in to view the details of your ticket.

The screenshot shows the Acme Inc Helpdesk portal. At the top, there is a navigation bar with 'HOME' and 'SOLUTIONS' tabs, and 'SIGN IN' and 'SIGN UP' buttons. Below the navigation bar is a search bar with the placeholder text 'Enter your search term here...'. The main content area is divided into several sections. The first section is 'Announcements' with a 'View all' link. It contains three items: 'Scheduled BMS Maintenance' (3 Aug, 2020), 'Planned Outage on the 3rd floor Palo Alto' (3 Aug, 2020), and 'Existing IT Operations Tool replaced' (3 Aug, 2020). The second section is a grid of five icons with corresponding text: 'Your Tickets' (Login or Sign up to view your requests), 'Pending Approvals' (Requests waiting for your Approval), 'Report an Incident' (Raise an incident with your support team), 'Request New Service' (Raise a request for a new device or service), and 'Browse Solutions' (Find the answers to your queries in our exhaustive solutions). The third section is 'Popular Solutions' with a 'View all articles' link. It lists five articles: 'How to Reset Password on Microsoft Outlook', 'How to sign into Gmail Account', 'How to connect to Org Wi-Fi', 'Resetting passwords on your Gmail Account', and 'Do I need to pay VAT'.

Conversational Portal View

TO RAISE A TICKET AFTER SIGNING IN:

- 1 Click the **Question/Issue** button.
- 2 Type your issue in the field box.
- 3 If the Bot is unable to fetch relevant results, you will get options to rephrase your query or raise a ticket.
- 4 Click **Raise a Ticket**. A side pane with a ticket form will open.



- 5 Details such as your *Requester email* address and *Subject* will be automatically populated.
- 6 Enter a *Description* of the issue.
- 7 (Optional) Click **Associate Asset** if your issues pertain only to your device. This makes it easy for your IT team to track impact and infer from past issues.
- 8 Click **Submit**.
- 9 The ticket gets created and you will receive a confirmation on chat with a snippet link to view details of your ticket.

The screenshot displays a chat window on the left and a 'Create a ticket' form on the right. The chat window has a dark blue background and shows a conversation with an agent named Freddy. The messages are as follows:

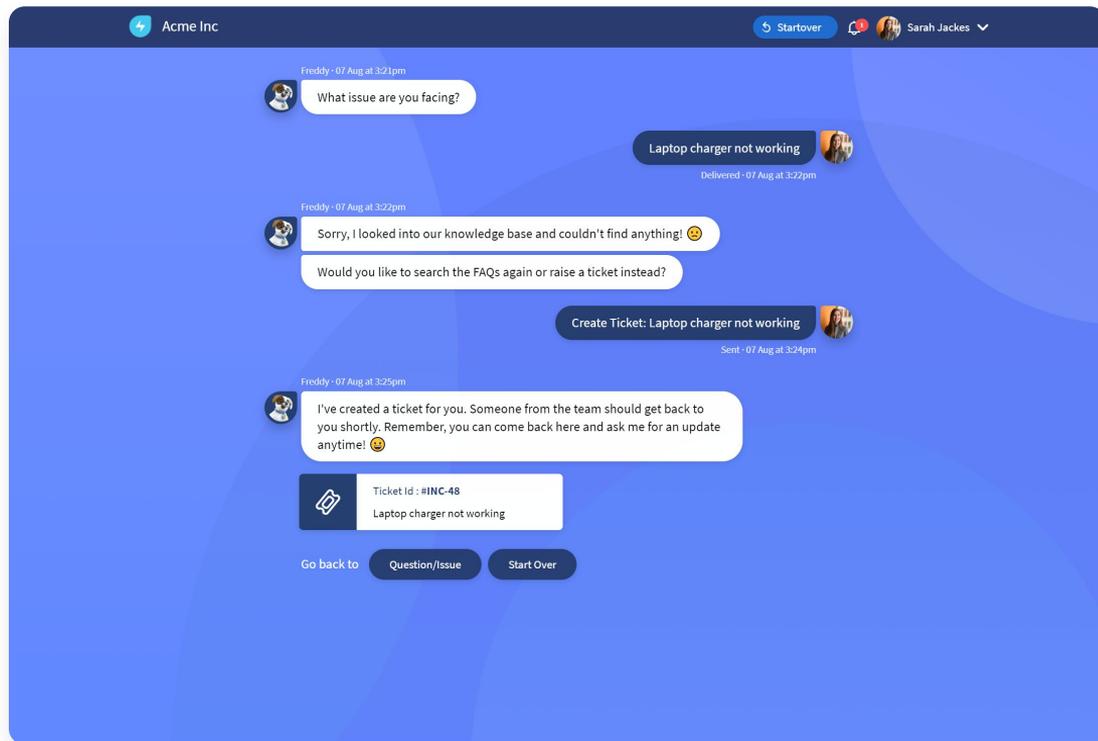
- Freddy - 07 Aug at 3:20pm: Hi Sarah, I am Freddy. Welcome to IT Support.
- User: What can I help you with?
- Freddy - 07 Aug at 3:21pm: What issue are you facing?
- User: Thanks,
- Freddy - 07 Aug at 3:22pm: Sorry, I looked into our knowledge base and couldn't find...
- User: Would you like to search the FAQs again or raise a ticket?
- User: Buttons: Rephrase my query, Raise a Ticket

The 'Create a ticket' form on the right has a white background and includes the following fields and options:

- Scheduled BMS Maintenance** (03 Aug, 2020) and **Planned** (03 Aug, 2020) headers.
- Search a requester** field with the value: sarahjacke.acme@gmail.com
- Subject** field with the value: Laptop charger not working
- Description** field with a rich text editor containing: Hi Team, My mac laptop charger isn't working. I've tried all charging outlets, seems to be a problem with the charger itself. Could you please help with this?
- Thanks,** text below the description.
- Attach a file** and **Associate Asset** options.
- Cancel** and **Submit** buttons at the bottom right.

TO RAISE A TICKET WITHOUT SIGNING IN:

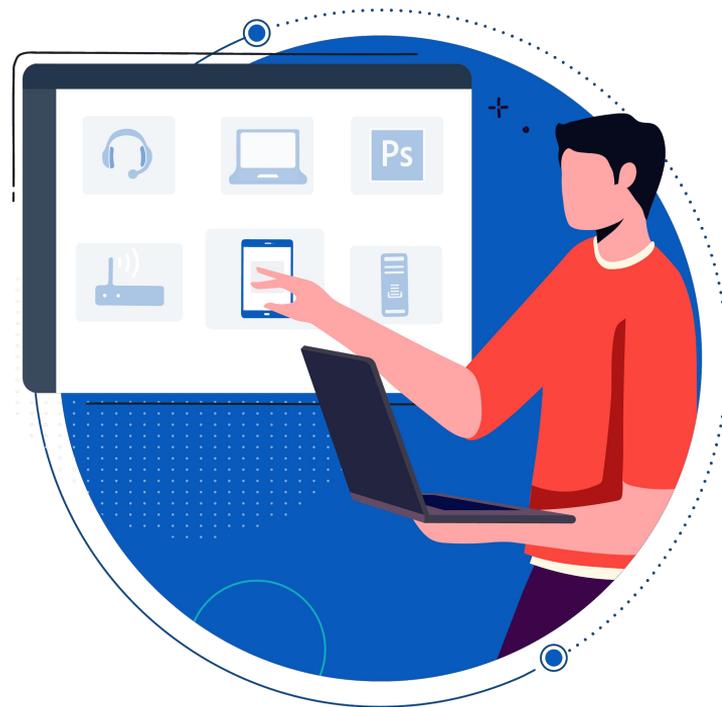
- 1 Go to your Helpdesk Portal.
- 2 Click **Skip Login**.
- 3 Type your query in the field box.
- 4 If the Bot is unable to fetch relevant results, you will get options to rephrase your query or raise a ticket.
- 5 Click **Raise a Ticket**. A side pane with a ticket form will open.
- 6 Enter your official email address the *Requester Email* field. The Subject field is automatically populated with the query you entered earlier.
- 7 Provide details of the issue in the *Description* field.
- 8 Click **Submit** and your ticket gets created.
- 9 **Note:** You will need to sign in to view details of your ticket.



CHAPTER 7

Requesting Services/ Service Items

Whether you're searching for forms to onboard a new employee or placing a request for access to an application, the *Service Catalog* is your go-to place. The services are divided into *Service Categories* to help navigate your search, give a clear picture of approved services, and what to expect from each service item.



Classic Portal View

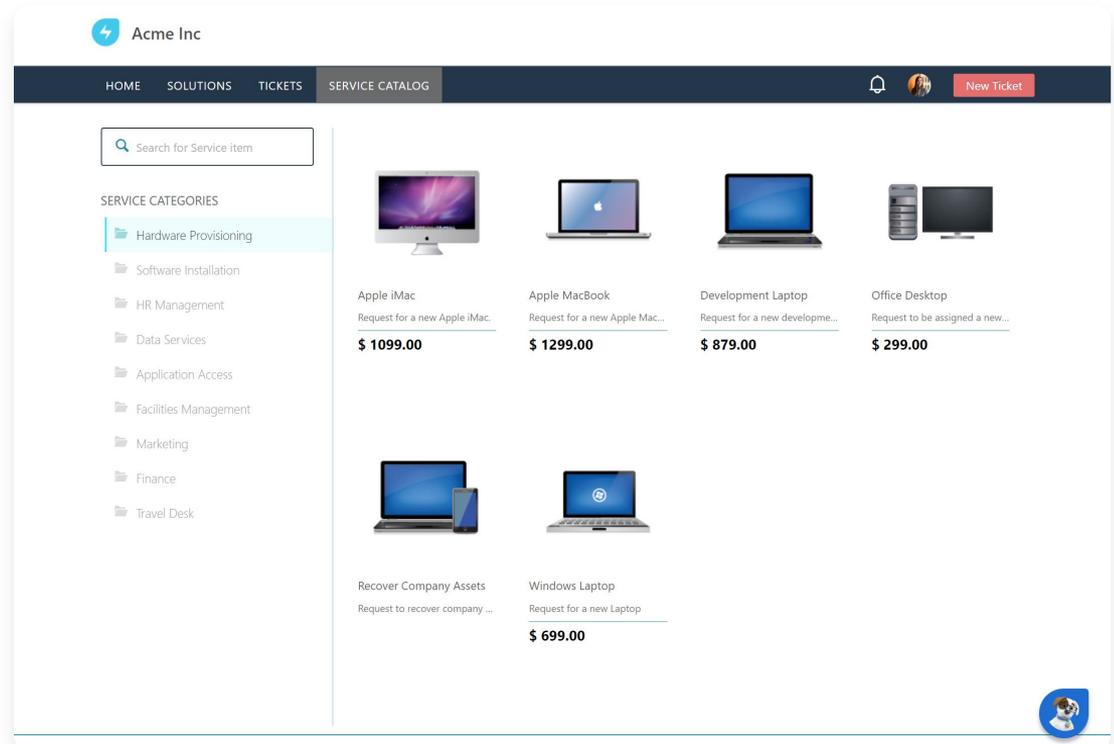
TO PLACE A REQUEST FOR A SERVICE ITEM:

- 1 Click the **Request New Service icon**.
Alternatively, click the **Service Catalog** tab. A list of all the available service items and categories will be populated.

NOTE

Service items/services are exclusively made available by your organization.

- 2 Select a **Service Category** in the left tab. A list of all service items available in that category will be populated.



The screenshot displays the Acme Inc. Service Catalog interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG' tabs. A search bar is located below the navigation. On the left, a 'SERVICE CATEGORIES' sidebar lists various categories, with 'Hardware Provisioning' selected. The main content area shows a grid of service items:

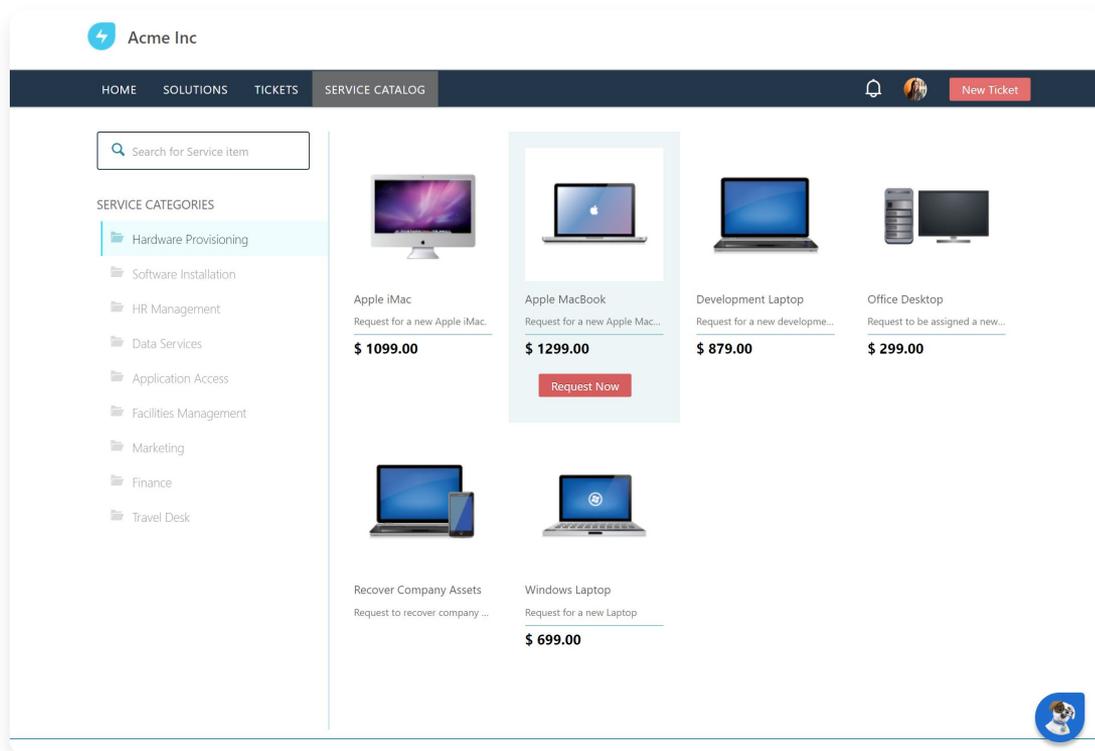
Service Item	Price
Apple iMac Request for a new Apple iMac...	\$ 1099.00
Apple MacBook Request for a new Apple Mac...	\$ 1299.00
Development Laptop Request for a new developme...	\$ 879.00
Office Desktop Request to be assigned a new...	\$ 299.00
Recover Company Assets Request to recover company ...	
Windows Laptop Request for a new Laptop	\$ 699.00

- 3 (Optional) **Enter** a key term in the *search field* box to quickly locate your service item.

 **NOTE**

Depending on the services approved by your organization, you will notice differences in the number of service categories and items.

- 4 Hover over the item of your choice and click **Request Now**. A page will open with details such as title, cost, and expected time of delivery of the service item.



- 5 Your email address will be automatically populated in the *Requester* field.
- 6 (Optional) Click **View more** to read about the product/service details.
- 7 (Optional) If you need multiple orders of the same item, click the **number field** under *Items Requested* and change the default number 1 to the value of your choice.

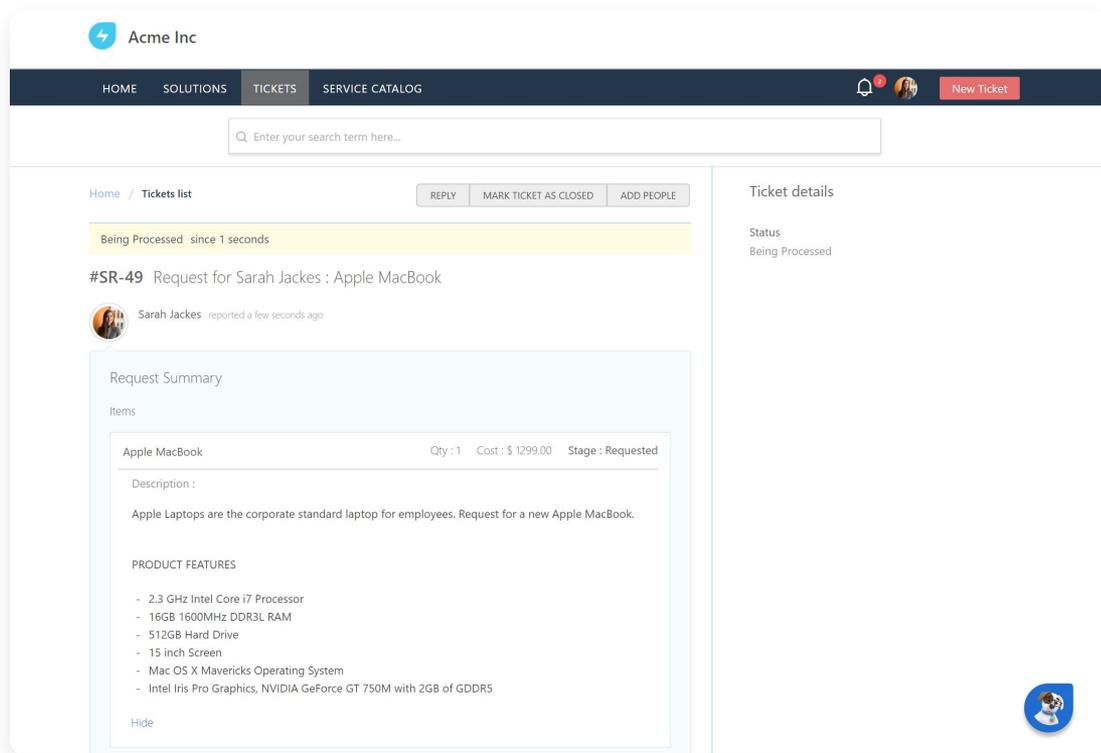
The screenshot shows a web interface for Acme Inc. The top navigation bar includes 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A 'New Ticket' button is visible in the top right. The breadcrumb trail reads 'SERVICE CATALOG / HARDWARE PROVISIONING / APPLE MACBOOK'. A 'Place Request' button is located in the top right of the main content area.

The main content area is divided into three columns:

- Image:** A photograph of an Apple MacBook.
- Product Details:**
 - Apple MacBook**
 - \$ 1299.00** (with a warning icon and text: 'Approximately available in 48 hours')
 - Description: 'Apple Laptops are the corporate standard laptop for employees. Request for a new Apple MacBook.'
 - PRODUCT FEATURES:**
 - 2.3 GHz Intel Core i7 Processor
 - 16GB 1600MHz DDR3L RAM
 - 512GB Hard Drive
 - 15 inch Screen
 - Mac OS X Mavericks Operating System
 - Intel Iris Pro Graphics, NVIDIA GeForce GT 750M with 2GB of GDDR5
 - Hide** (link)
- Items Requested:**
 - Apple MacBook x \$ 1299.00
 - TOTAL \$ 1299.00**
 - Requester:**
 - Request for someone else

At the bottom right, there is a link for 'Service Desk Software by Freshworks' and a 'Cookie policy' link. A small circular icon with a person's profile is in the bottom right corner.

- 8 (Optional) **Mark** the checkbox against *Request for someone else* and enter their email address in the *Request for* field if you're placing a request on behalf of your coworker.
- 9 Once you've confirmed the details, click **Place Request**.
- 10 Your request gets created as a ticket and will be logged in the **Tickets** tab.

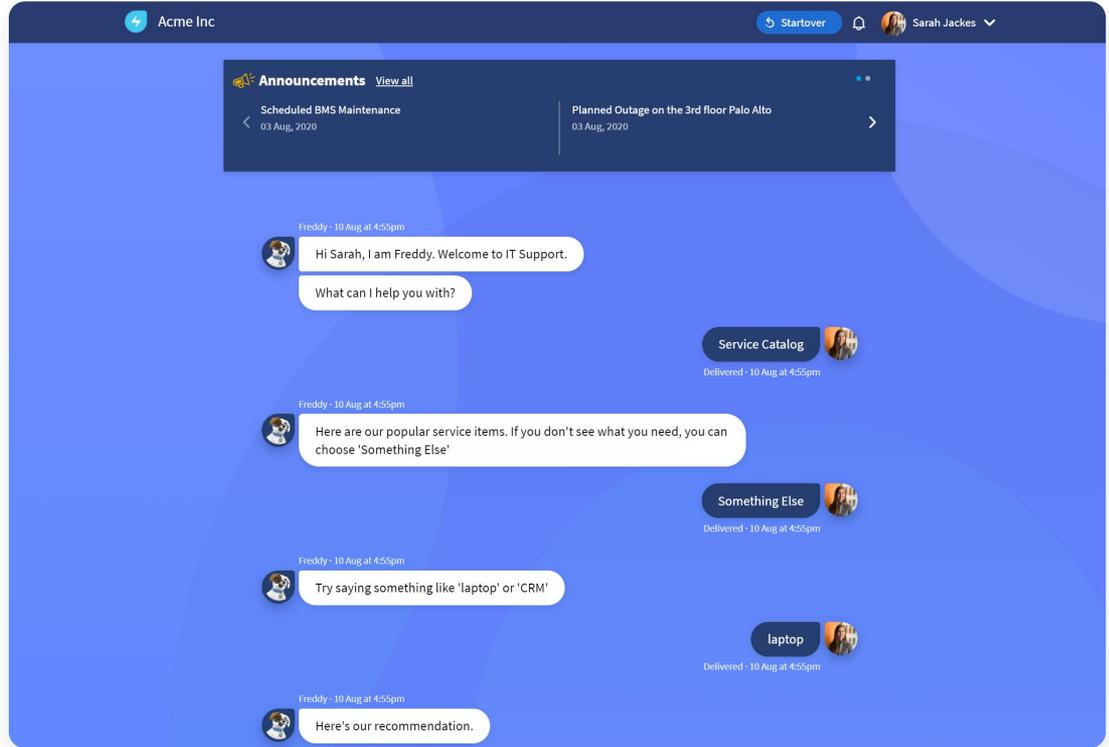


The screenshot displays the Acme Inc. Freshservice interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A search bar is located below the navigation bar. The main content area shows a ticket titled '#SR-49 Request for Sarah Jackes : Apple MacBook'. The ticket status is 'Being Processed' and it was reported 'a few seconds ago' by Sarah Jackes. A 'Request Summary' section is visible, containing an 'Items' table with one entry: 'Apple MacBook' (Qty: 1, Cost: \$ 1299.00, Stage: Requested). Below the table is a 'Description' field with the text: 'Apple Laptops are the corporate standard laptop for employees. Request for a new Apple MacBook.' Underneath the description is a 'PRODUCT FEATURES' section with a bulleted list: '2.3 GHz Intel Core i7 Processor', '16GB 1600MHz DDR3L RAM', '512GB Hard Drive', '15 inch Screen', 'Mac OS X Mavericks Operating System', and 'Intel Iris Pro Graphics, NVIDIA GeForce GT 750M with 2GB of GDDR5'. The interface also includes buttons for 'REPLY', 'MARK TICKET AS CLOSED', and 'ADD PEOPLE'.

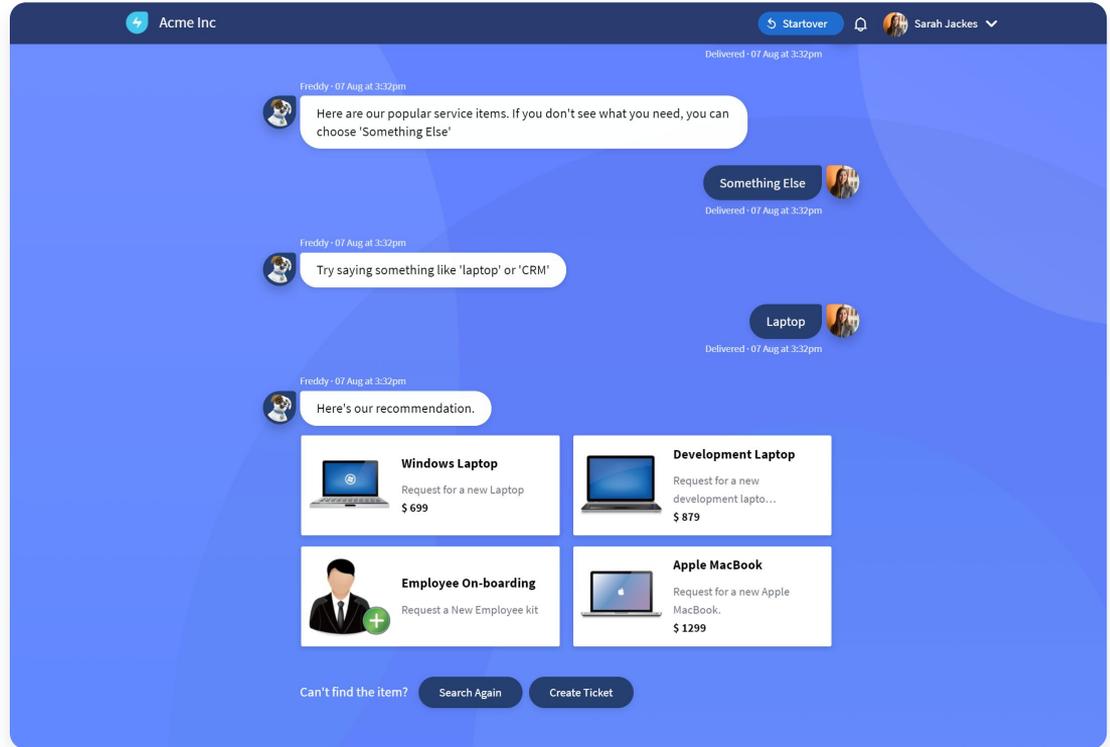
Conversational Portal View

TO PLACE A REQUEST FOR A SERVICE ITEM:

- 1 Click the **Service Catalog** button. The Bot will suggest some popular service items.
- 2 Click **Something Else** if you can't spot the item you require amongst the suggested items.
- 3 **Enter** the name of the product/service in the *chat* field. A snippet of the items will appear as recommendations.



- 4 Hover over a service item.
- 5 Select **Place Request**. A pop-up window will open with details such as title, cost, and expected time of delivery of the service item.



- 6 Your email address will be automatically populated in the *Requester* field.
- 7 (Optional) Click **View more** to read about the product/service details.
- 8 (Optional) If you need multiple orders of the same item, click the **number field** under *Items Requested* and change the default number 1 to the value of your choice.
- 9 (Optional) **Mark** the checkbox against Request for *someone else* and enter their email address in the *Request for* field if you're placing a request on behalf of your coworker.
- 10 Once you've confirmed the details, click **Place Request**.

The screenshot displays a request form for a "Windows Laptop". The form is set against a dark blue sidebar on the left. The main content area is white and contains the following elements:

- Item Name:** Windows Laptop
- Price:** \$ 699.00
- Availability:** Approximately available in 48 hours
- Description:** Windows Laptops are the corporate standard laptop for employees. Request for a new Windows laptop.
- Product Features:**
 - 2.5 GHz Intel Core i5 Processor
 - 750 GB Hard Drive
 - 8 GB RAM
 - Microsoft Windows 8
 - Microsoft Office
- Requester:** sarahjacke.acme@gmail.com
- Request for someone else:**
- Buttons:** Cancel, Place Request

On the right side of the form, there is a summary table for "Items requested":

Items requested		
Windows Laptop	x 1	\$ 699.00
TOTAL		\$ 699.00

- 11 A ticket gets created and you will receive a confirmation on chat with a snippet link to view details of your ticket.

The screenshot displays a chat window for 'Acme Inc' with a user named Sarah Jackes. The chat history shows a message from 'Freddy' at 3:34pm: 'Here's our recommendation.' This message includes four recommendation cards:

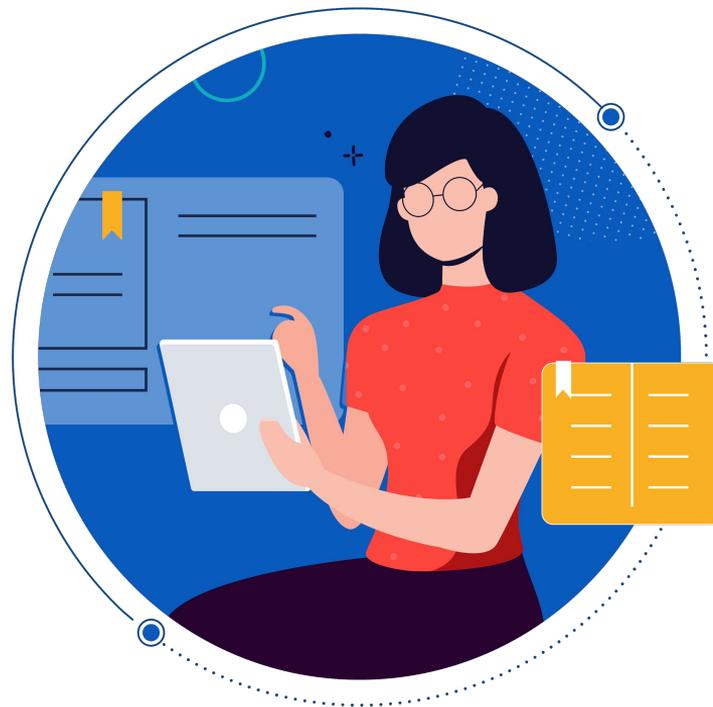
- Windows Laptop**: Request for a new Laptop, \$ 699
- Development Laptop**: Request for a new development lapto..., \$ 879
- Employee On-boarding**: Request a New Employee kit
- Apple MacBook**: Request for a new Apple MacBook, \$ 1299

A second message from 'Freddy' at 3:35pm shows a 'Delivered' status for the 'Windows Laptop' card, with a price of \$ 699. Below this, a confirmation message from 'Freddy' at 3:36pm states: 'All done! Your request has been placed! You should hear back from us soon! 🙌'. At the bottom of the chat, there are buttons for 'Go back to Service Catalog' and 'Start Over'.

CHAPTER 8

Browsing Knowledge Base Solutions

You can find answers to recurring issues or common challenges through a Knowledge Base maintained by your organization. It is a quick self-service option instead of raising a ticket. The Knowledge Base provides access to frequently asked questions, product tutorials, how-to articles, troubleshooting guides, instructional videos, and solution updates.



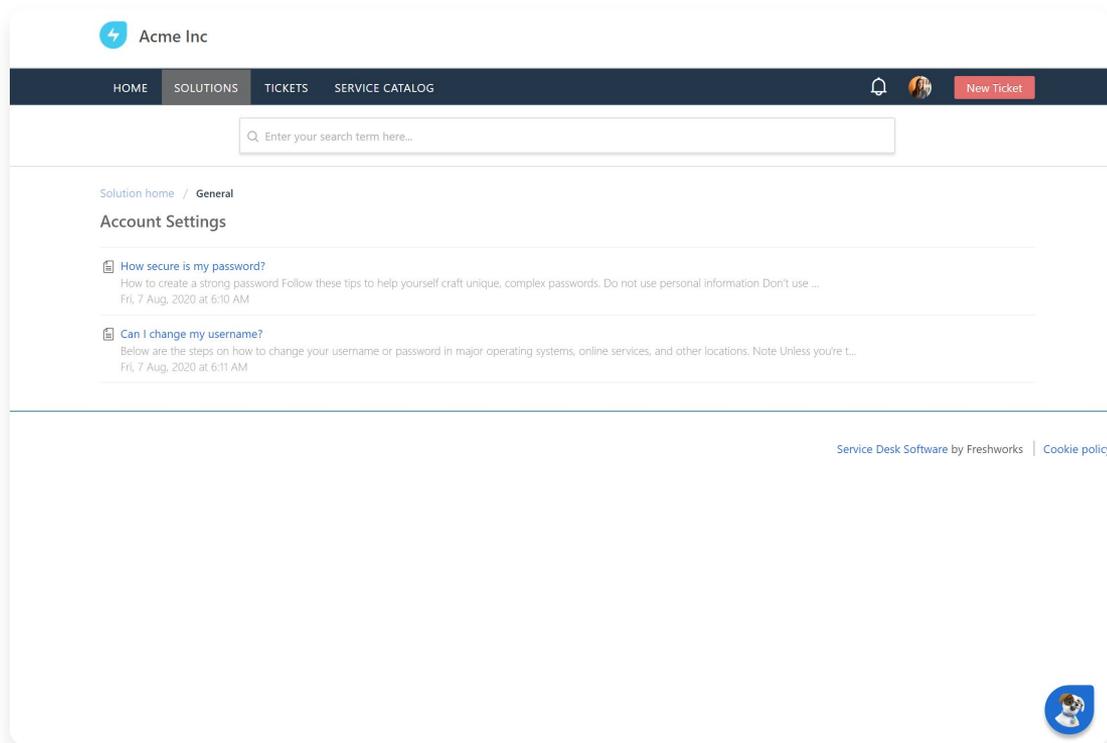
Classic Portal View

TO VIEW A SOLUTION ARTICLE:

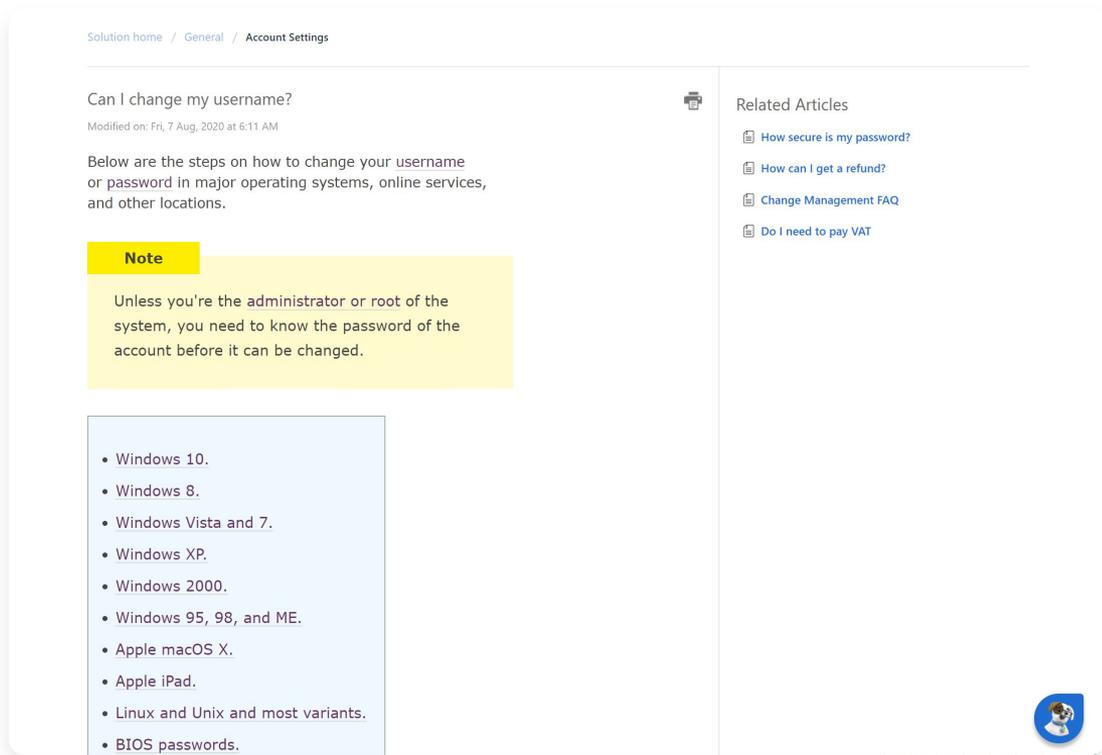
- 1 Click the **Browse Solutions** icon or; Alternatively, click the **Solutions** tab.
- 2 A page with the list of available articles will appear.

NOTE

The Knowledge Base is organized by your IT team and will have content exclusive to your organization.



- 3 Click on the **link** to an article of your choice.
Alternatively, you can also click the *Article Category or Folder* to navigate through article links.
- 4 (Optional) Enter a *search* term in the search bar if you can't find what you're looking for at first glance.



The screenshot shows a Freshservice article page. At the top, there is a breadcrumb trail: "Solution home / General / Account Settings". The article title is "Can I change my username?" with a print icon to its right. Below the title, it says "Modified on: Fri, 7 Aug, 2020 at 6:11 AM". The main content area contains the text: "Below are the steps on how to change your username or password in major operating systems, online services, and other locations." Below this is a yellow "Note" box with the text: "Unless you're the administrator or root of the system, you need to know the password of the account before it can be changed." At the bottom of the article is a light blue box containing a bulleted list of operating systems and devices: Windows 10, Windows 8, Windows Vista and 7, Windows XP, Windows 2000, Windows 95, 98, and ME, Apple macOS X, Apple iPad, Linux and Unix and most variants, and BIOS passwords. On the right side of the page, there is a "Related Articles" section with three links: "How secure is my password?", "How can I get a refund?", and "Change Management FAQ". Below that is another link: "Do I need to pay VAT". In the bottom right corner of the article area, there is a small circular icon with a person's face.

TO PROVIDE ARTICLE FEEDBACK:

- 1 Click on the **link** to an article of your choice.
- 2 A feedback question will appear at the bottom of the page.
- 3 Click **Yes** if you found the article helpful.
- 4 Click **No** if you thought the article wasn't relevant.
- 5 **Mark** the checkbox against the list of feedback comments.
- 6 (Optional) **Enter** details or elaborate your feedback in the *Comments* field box.
- 7 Click **Send feedback**.
- 8 The feedback gets created as a ticket and will be logged in the **Tickets** tab.

3. In *PC Settings*, select **Users**.
4. Select the **Change your password** option to change the password for your local Windows account.

Change username

1. From the Windows desktop, open the *Charms menu* by pressing the "Windows key" plus the "C" key and select **Settings**.
2. In Settings, select **Control Panel**.
3. Select **User Accounts**.
4. In the User Accounts window, select **Change your account name** to change the username for your local Windows account.

Sorry we couldn't be helpful. Help us improve this article with your feedback.

Your feedback *

- Need more information
- Difficult to understand
- Inaccurate/irrelevant content
- Missing/broken link

Hi Team,
Could you please help add links to this article? Some are missing.

Cancel

Send feedback

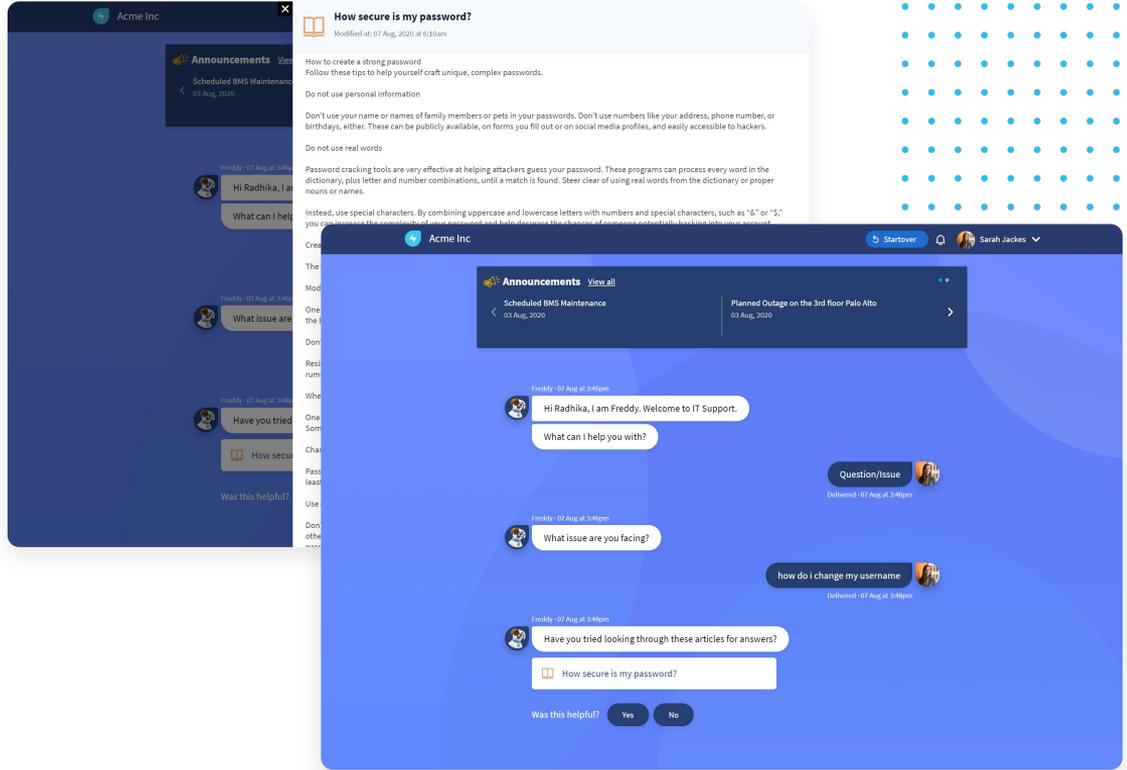


Conversational Portal View

- 1 Click the **Question/Issue** button.
- 2 Type your query in the field box. The Bot will scour through the Knowledge Base and present a list of relevant articles.
- 3 Click on the article of your choice. A pop-up window will open with the solution article displayed.

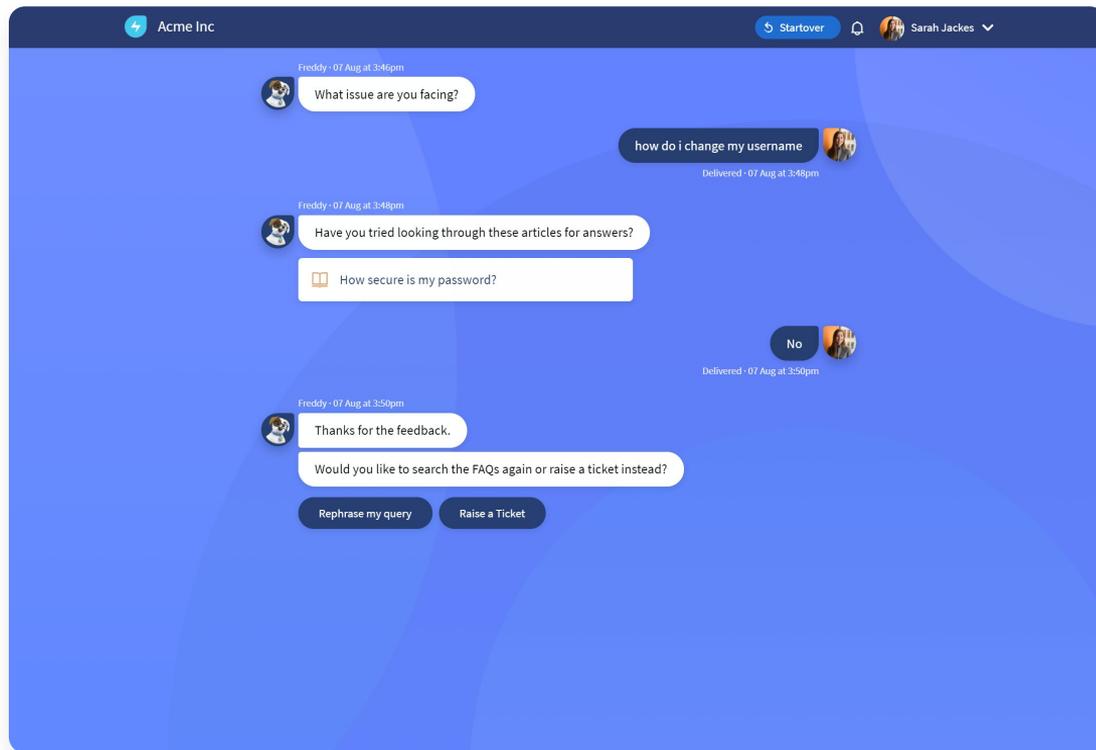
NOTE

If the Bot is unable to fetch relevant results, you will get options to rephrase your query or raise a ticket.



TO PROVIDE ARTICLE FEEDBACK:

- 1 **Close** the pop-up window of the solution article.
- 2 A feedback question will be displayed on chat.
- 3 Click **Yes** if you found the article helpful.
- 4 Click **No** if you thought the article wasn't relevant.
- 5 The feedback gets created as a ticket and will be logged in the **Tickets** tab.



CHAPTER 9

Tracking and Exporting Tickets

All your issues or requests are captured within the IT helpdesk portal and can be monitored and tracked at every stage of your ticket fulfillment. You can also export your tickets in .CSV or .XLS formats, capture detailed information over a specific period and even locate distinct field values.



Classic Portal View

TO TRACK YOUR TICKET:

- 1 Click the **Your Tickets** icon or;
Alternatively, you can also click the **Tickets** tab
- 2 The *Ticket list* page will open with a default view of your *Open or Pending* tickets.
- 3 (Optional) To view all your tickets, click the **Open or Pending dropdown** and select **All Tickets**.
- 4 (Optional) To view your closed tickets, click the **Open or Pending dropdown** and select **Resolved or Closed**.

The screenshot displays the Acme Inc. Classic Portal View. The header includes the company logo, navigation tabs (HOME, SOLUTIONS, TICKETS, SERVICE CATALOG), a search bar, and a 'New Ticket' button. The main content area shows a list of tickets under the 'Open or Pending' filter. A dropdown menu is open, showing options: 'All Tickets', 'Open or Pending' (selected), and 'Resolved or Closed'. The ticket list includes details such as the ticket title, creation date, and a 'BEING PROCESSED' status indicator. The footer contains the text 'Service Desk Software by Freshworks' and a 'Cookie policy' link.

- 5 Click on the **link** to a ticket you want to track. The *Ticket* details page will open and display the Ticket Details, Request Summary, Stage, Status, and Items.

The screenshot displays the Acme Inc. Service Desk interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A search bar is located below the navigation bar. The main content area is divided into two columns. The left column shows the ticket details for '#INC-48 Laptop charger not working', reported by Sarah Jackes 3 hours ago. The ticket status is 'Being Processed' and has been in that state for 2 hours and 52 minutes. The ticket description reads: 'Hi Team, My mac laptop charger isn't working. I've tried all charging outlets, seems to be a problem with the charger itself. Could you please help with this? Thanks, Sarah'. Below the description is a text input field with the placeholder text 'Click here to reply to this ticket'. The right column shows the 'Ticket details' section with the status 'Being Processed'. At the bottom right, there is a logo for Freshworks and a link to the 'Cookie policy'.

TO SORT YOUR TICKETS:

- 1 Click the **Your Tickets** icon or;
Alternatively, you can also click the **Tickets** tab
- 2 The *Ticket list* page will open with a default view of your *Open or Pending* tickets.
- 3 Click the **Sort by** dropdown
- 4 Select from the options:
 - Date Created
 - Last Modified
 - Status
 - Ascending
 - Descending
- 5 The *Ticket list* page will be displayed according to the options you have selected.

The screenshot displays the Acme Inc. service desk interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A search bar is located below the navigation bar. The main content area shows a list of tickets under the 'Open or Pending' filter. A 'Sort by' dropdown menu is open, showing options: 'Date Created' (checked), 'Last Modified', 'Status', 'Ascending' (checked), and 'Descending'. The ticket list includes entries such as 'Laptop charger doesn't work #INC-41', 'Laptop charger not working #INC-42', 'Laptop charger doesn't work #INC-43', 'Article Feedback - Change Management FAQ #INC-47', and 'Laptop charger not working #INC-48'. Each ticket has a 'BEING PROCESSED' status indicator. The footer of the interface includes 'Service Desk Software by Freshworks' and 'Cookie policy'.

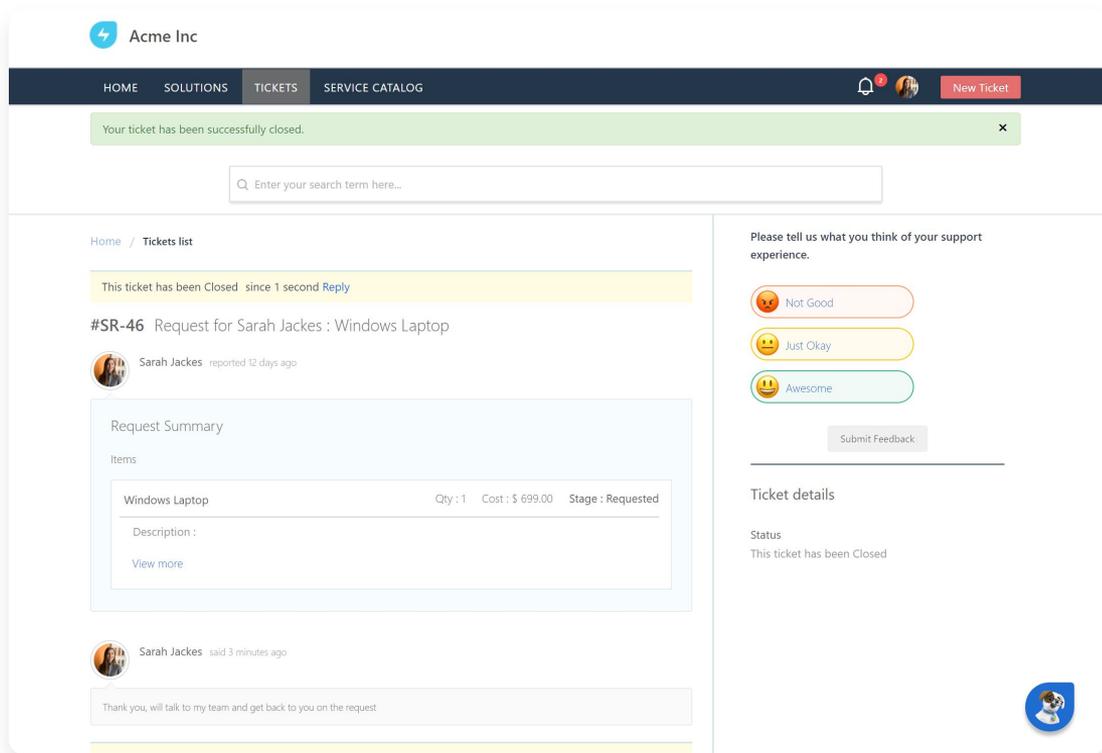
TO REPLY TO YOUR TICKET:

- 1 Click the **Your Tickets** icon or;
Alternatively, you can also click the **Tickets** tab
- 2 The *Ticket list* page will open with a default view of your *Open or Pending* tickets.
- 3 Click on the **link** to a ticket you want to add a comment/reply to.
- 4 Click the *Reply* field box or;
Alternatively, you can also click the **Reply** button.
- 5 Enter details and click **Reply**.
- 6 Your reply/comment will get added as a note to the ticket and you can view it as thread within the *Ticket Details* page.

The screenshot displays the Freshservice user interface. At the top, a dark navigation bar contains 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. On the right, there are notification and user profile icons, and a 'New Ticket' button. A green notification banner at the top states 'The note has been added to your ticket.' Below this is a search bar with the placeholder 'Enter your search term here...'. The main content area is split into two columns. The left column shows a breadcrumb 'Home / Tickets list' and a 'REPLY' button. A yellow status bar indicates 'Being Processed since 15 days 17 hours'. The ticket title is '#INC-42 Laptop Charger doesn't work'. The thread shows a message from Sarah Jackes: 'Hi Team, My laptop charger hasn't been working. Could you please help me with this?'. Below it is another message from Sarah Jackes: 'Hi Team, Could you please help me with some updates on this? I would love to get this sorted asap. Please let me know how I can be of help.' At the bottom of the thread is a text input field with the placeholder 'Click here to reply to this ticket'. The right column is titled 'Ticket details' and shows the 'Status' as 'Being Processed'. A small circular profile icon is visible in the bottom right corner of the interface.

TO RESOLVE/CLOSE YOUR TICKET:

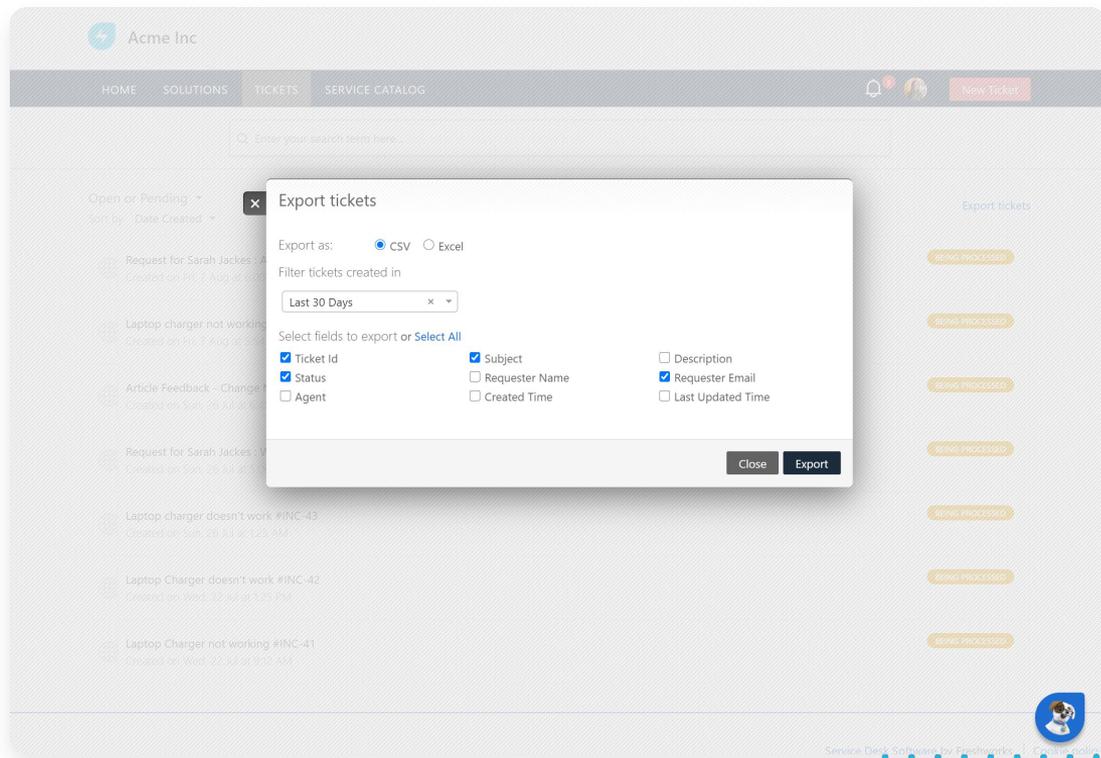
- 1 Click the **Your Tickets** icon or;
Alternatively, you can also click the **Tickets** tab.
- 2 The *Ticket list* page will open with a default view of your *Open* or *Pending* tickets.
- 3 Click on the **link** to a ticket you want to resolve or close.
- 4 Click the **Mark Ticket as Closed** button. The Status will change to **this ticket has been Closed**.
- 5 (Optional) A support experience question will appear after you close the ticket. Choose an option relevant to your experience and click **Submit Feedback**.



The screenshot displays the Acme Inc. support portal interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A notification banner at the top center states 'Your ticket has been successfully closed.' Below this is a search bar with the placeholder text 'Enter your search term here...'. The main content area is divided into two columns. The left column shows the 'Tickets list' with a breadcrumb 'Home / Tickets list'. A yellow banner indicates 'This ticket has been Closed since 1 second Reply'. The selected ticket is '#SR-46 Request for Sarah Jackes : Windows Laptop', reported by Sarah Jackes 12 days ago. The 'Request Summary' section shows 'Items' with 'Windows Laptop' (Qty: 1, Cost: \$ 699.00, Stage: Requested) and a 'Description' field with a 'View more' link. A response from Sarah Jackes, said 3 minutes ago, reads 'Thank you, will talk to my team and get back to you on the request'. The right column contains a feedback survey titled 'Please tell us what you think of your support experience.' with three radio button options: 'Not Good' (red), 'Just Okay' (yellow), and 'Awesome' (green). A 'Submit Feedback' button is located below the survey. Under 'Ticket details', the status is 'Status: This ticket has been Closed'. A small dog icon is visible in the bottom right corner of the page.

TO EXPORT YOUR TICKETS:

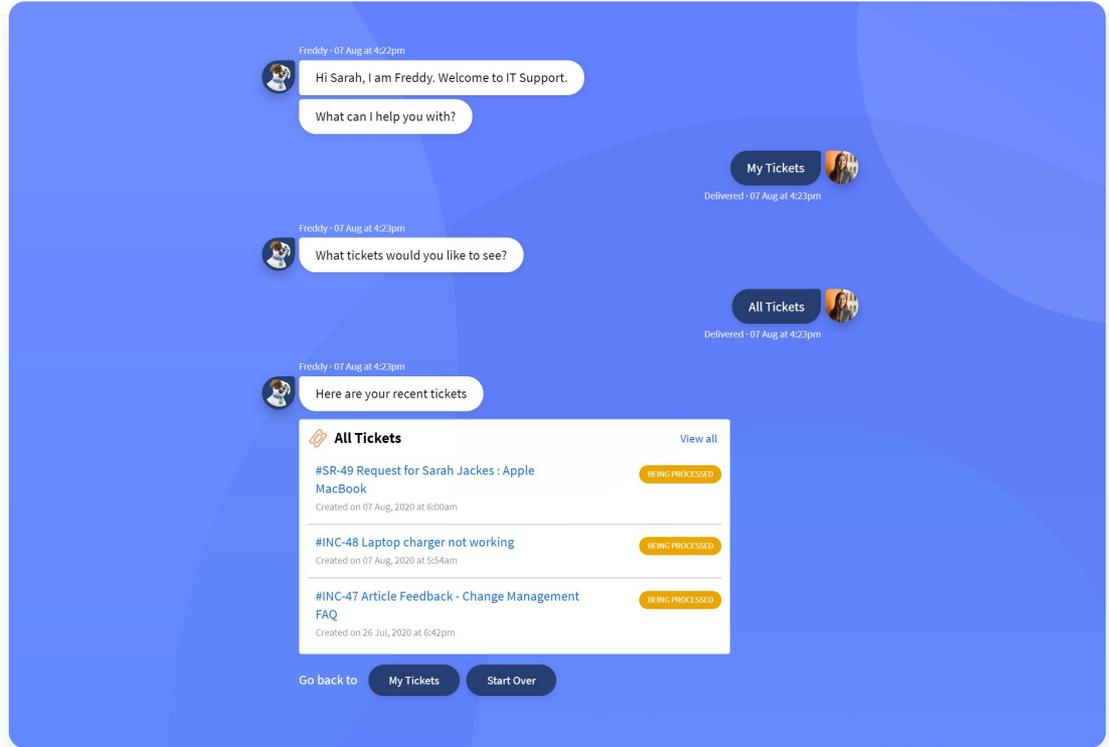
- 1 Click the **Your Tickets icon** or;
Alternatively, you can also click the **Tickets** tab.
- 2 Click **Export tickets** on the top-right of the page.
A pop-up window will appear.
- 3 Select a *File Type* from the radio button options.
- 4 Click the *Filter tickets* dropdown and select
from the following options:
 - Last 30 Days
 - Last 7 Days
 - From yesterday
 - Set date
- 5 **Mark** the checkbox against required fields.
- 6 Click **Export**.



Conversational Portal View

TO TRACK YOUR TICKETS:

- 1 Click the **My Tickets** button. The Bot will present two options to choose from.
- 2 Select **All Tickets**. A snippet of three recently logged tickets will appear.
- 3 Click on the **link** to a ticket if you want to view more details. A pop-up window of the *Ticket Details* page will open and display the Ticket Details, Request Summary, Stage, Status, and Items.



TO REPLY TO YOUR TICKET:

- 1 Click the **My Tickets** button. The Bot will present two options to choose from.
- 2 Select **All Tickets**. A snippet of three recently logged tickets will appear.
- 3 Click on the **link** to a ticket you want to add a comment/reply to. A pop-up window of the *Ticket Details* page will open and display the Ticket Details, Request Summary, Stage, Status, and Items.

The screenshot shows a chat interface on the left and a detailed view of a ticket on the right. The chat shows a conversation with a bot named 'Freddy' and a user named 'Sarah'. The bot asks 'Hi Sarah, I am... What can I help you with?' and 'What tickets would you like to view?'. The user replies 'Here are your...'. The bot then shows a list of tickets under the heading 'All Tickets':

- #SR-49 Request for Sarah Jackes : Apple MacBook
Created on 07 Aug, 2020 at 6:00am - via Portal
- #INC-48 Laptop
- #INC-47 Article
FAQ
Created on 26 Jul, 2020

The detailed view of ticket #SR-49 is shown on the right. It has a title 'Request for Sarah Jackes : Apple MacBook' and a status of 'BEING PROCESSED'. The ticket was created on Fri, 7 Aug, 2020 at 6:00am - via Portal. A 'TICKET DETAILS' sidebar shows the status as 'Being Processed'. The 'Request Summary' section shows:

Apple MacBook		
Qty: 1	Cost: \$ 1299	Stage: Requested

The 'Description' section states: 'Apple Laptops are the corporate standard laptop for employees. Request for a new Apple MacBook.' There is a 'View more' link. At the bottom, there is a text input field with the placeholder text 'Click here to reply to this ticket'.

- 4 Click the *Reply* field box or;
Alternatively, you can also click the **Reply** button.
- 5 Enter details in the text box and click **Send**.
- 6 Your reply/comment will get added as a note to the ticket and you can view it as thread within the *Ticket Details* page.

The screenshot displays a Freshservice ticket interface. On the left, a dark blue sidebar shows a list of tickets, including '#SR-49 Request for Sarah Jackes : Apple MacBook'. The main area is split into two views. The top view shows a reply being composed in a text box with a rich text editor (bold, italic, underline, list, link, image, video, link icon) and buttons for 'Attach a file', 'Cancel', and 'Send'. The bottom view shows the 'Ticket Details' page for '#SR-49 Request for Sarah Jackes : Apple MacBook', which is 'Being Processed'. The ticket details include a 'Request Summary' table with columns for 'Qty: 1', 'Cost: \$ 1299', and 'Stage: Requested', and a 'Description' section with the text 'Apple Laptops are the corporate standard laptop for employees. Request for a new Apple MacBook.' and a 'View more' link. The 'TICKET DETAILS' sidebar on the right shows the status as 'Being Processed'.

TO RESOLVE/CLOSE YOUR TICKET:

- 1 Click the **My Tickets** button. The Bot will present two options to choose from.
- 2 Select **All Tickets**. A snippet of three recently logged tickets will appear.
- 3 Click on the **link** to a ticket you want to resolve or close. A pop-up window of the *Ticket Details* page will open and display the Ticket Details, Request Summary, Stage, Status, and Items.

The screenshot shows a chatbot conversation on a blue background. The bot, Freddy, greets Sarah and asks what she needs help with. She selects 'My Tickets'. Freddy then asks what tickets she wants to see, and she selects 'All Tickets'. Freddy then displays a list of recent tickets:

All Tickets		View all
#SR-49 Request for Sarah Jackes : Apple MacBook	Created on 07 Aug, 2020 at 6:00am	BEING PROCESSED
#INC-48 Laptop charger not working	Created on 07 Aug, 2020 at 5:54am	BEING PROCESSED
#INC-47 Article Feedback - Change Management FAQ	Created on 26 Jul, 2020 at 6:42pm	BEING PROCESSED

At the bottom, there are buttons for 'Go back to My Tickets' and 'Start Over'.

- 4 Click the **Mark Ticket as Closed** button. The Status will change to **this ticket has been Closed**.
- 5 (Optional) A support experience question will appear after you close the ticket. Choose an option relevant to your experience and click **Submit Feedback**.

The screenshot displays a Freshservice ticket interface. On the left is a dark blue sidebar with a list of tickets, including '#SR-49 Request for Sarah Jackes : Apple MacBook'. The main content area shows the details for this ticket, which is titled '#SR-49 Request for Sarah Jackes : Apple MacBook'. A green banner at the top of the ticket details states 'The ticket has been updated'. Below this, a 'Request Summary' box contains the following information: 'Apple MacBook', 'Qty: 1', 'Cost: \$ 1299', and 'Stage: Requested'. A 'Description' box follows, stating 'Apple Laptops are the corporate standard laptop for employees. Request for a new Apple MacBook.' and includes a 'View more' link. A chat message from 'Sarah Jackes' is visible, with the text: 'Hi Team, Could you please give me an update on the requested item? Would need this asap as my laptop isn't working. Please let me know how can i be of help'. To the right of the chat is a feedback form titled 'Please tell us what you think of your support experience.' with three radio button options: 'Not Good' (with a sad face icon), 'Just Okay' (with a neutral face icon), and 'Awesome' (with a happy face icon). A 'Submit Feedback' button is located below these options. Below the feedback form is a 'TICKET DETAILS' section showing the status as 'This ticket has been Closed'. The interface is decorated with a pattern of blue dots in the top right and bottom right corners.

CHAPTER 10

Viewing Announcements

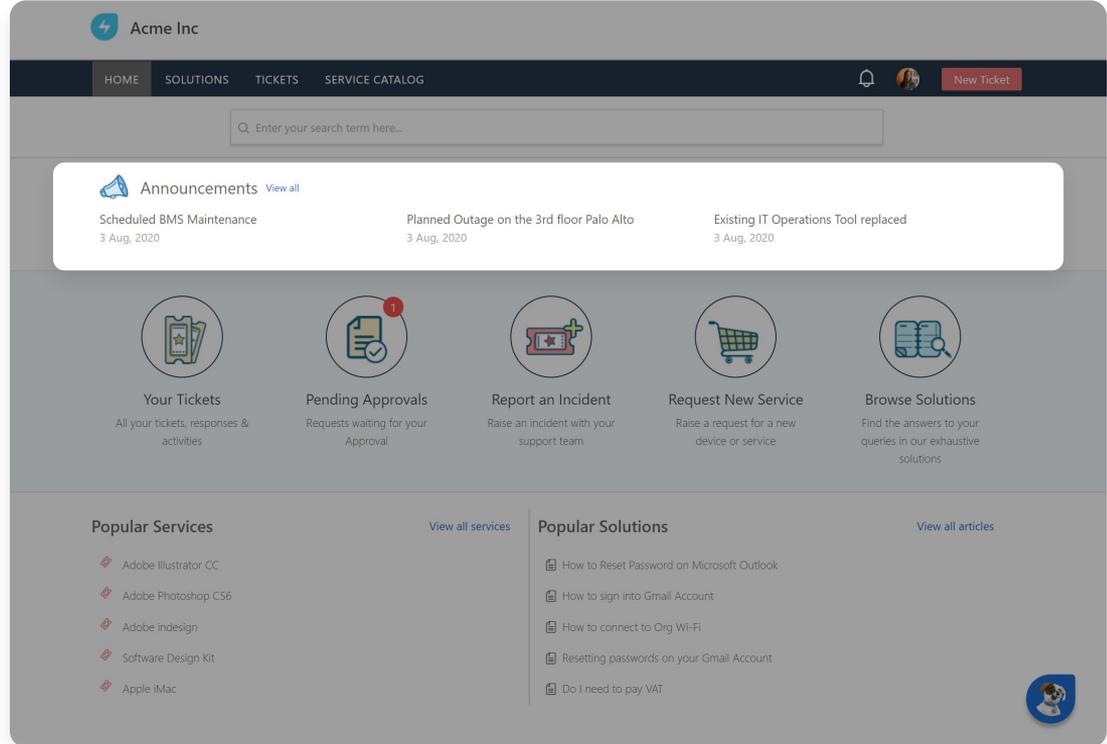
Your organization would want to keep you on the same page about company changes, strengthen company culture, and even make or break processes, like software updates, organizational restructuring, and other IT initiatives. Your IT department will need to update/alert you about upcoming events like server migrations and possible downtimes that might affect your operational productivity. All of these messages get displayed under the *Announcements* section on the *Home Page*.



Classic Portal View

TO VIEW ANNOUNCEMENTS:

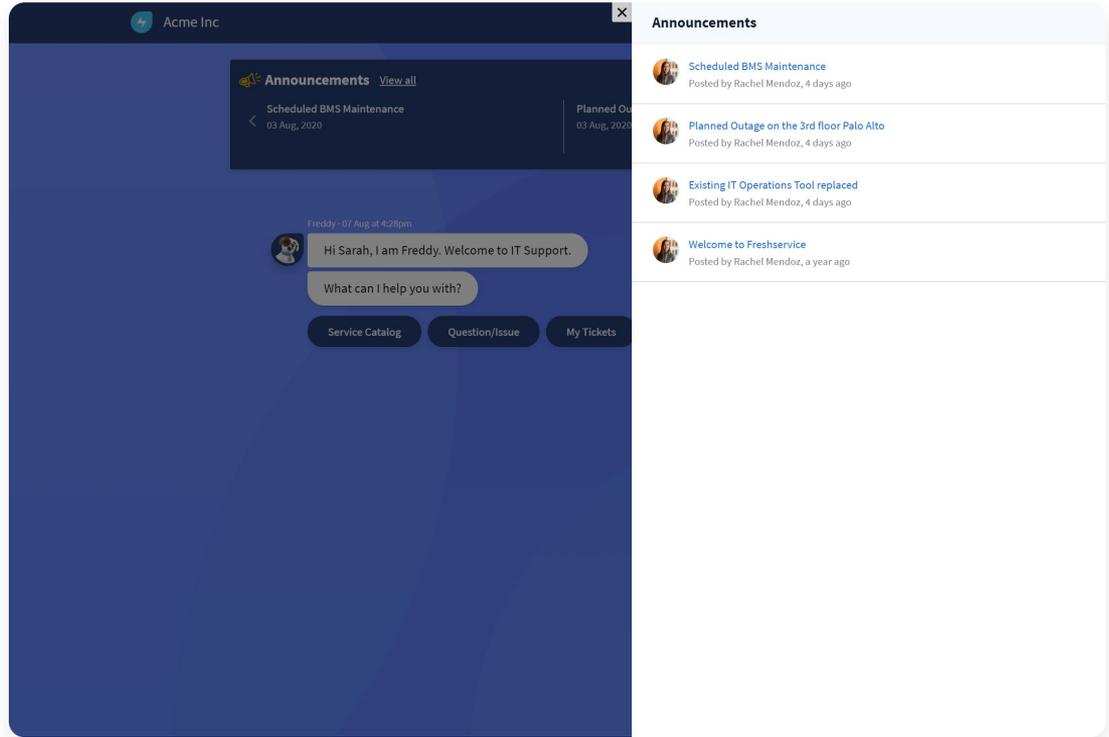
- 1 Go to your IT Support Portal *Home Page*.
- 2 Navigate to the *Announcements* section.
This will display the recent announcement/
broadcast.
- 3 Click **View all**. A list of all announcements
will be displayed.
- 4 Click on the **link** to an announcement to
view details.



Conversational Portal View

TO VIEW ANNOUNCEMENTS:

- 1 Go to your IT Support Portal *Home Page*.
- 2 Navigate to the *Announcements* section. This will display the recent announcement/broadcast.
- 3 Click on the **link** to the announcement. A pop-up window of the announcement will appear with detailed information.



CHAPTER 11

Approving Requests

If you're a Manager, Team Leader, or a member of CAB, you can use the IT Helpdesk portal to approve service requests or change requests from your team members. You will be notified every time an approval is pending from your end and you can manage all the items you've received for approval from the *Pending Approvals* page.



Classic Portal View

TO APPROVE A SERVICE REQUEST:

- 1 Click the **Pending Approvals** icon on the *Home Page*. All approvals pending on your confirmation/rejection will be listed.
- 2 Click on the **link** to a pending request. The *Approval Confirmation* page will open in a new tab with details such as Requester Info, Priority, Status, and Product Description.
- 3 To approve, click the **Approve** button and enter a remark.
- 4 The remark will be added as a note to the request.

The screenshot displays the 'Confirm Approval' page for a service request. At the top, the user is logged in as 'Acme Inc'. The page title is 'Confirm Approval - #5R-46'. There are two buttons: 'Approve' (highlighted with a blue box) and 'Reject'. The main content area shows the request details for 'Request for Sarah Jackes : Windows Laptop'. It includes a section for 'Service items (1)' with details for 'Windows Laptop' (Qty: 1, Cost: \$ 699.00, Stage: Requested). Below this is a 'Description' and a 'PRODUCT FEATURES' list. On the right side, there is a 'REQUESTER INFO' section with the requester's name, profile picture, and email address. At the bottom of the page, there is a footer with links for 'Service Desk Software by Freshworks', 'Submit Feedback', 'Browse Community', and 'Privacy Policy'. A notification bell icon is visible in the bottom right corner.

TO REJECT A SERVICE REQUEST:

- 1 Click the **Pending Approvals** icon on the *Home Page*. All approvals pending on your confirmation/rejection will be listed.
- 2 Click on the **link** to a pending request. The *Approval Confirmation* page will open in a new tab with details such as Requester Info, Priority, Status, and Product Description.
- 3 To reject, click the **Reject** button and enter a remark.
- 4 The remark will be added as a note to the request.

The screenshot shows a web interface for 'Acme Inc' with a 'Confirm Approval' page for request #5R-46. The page title is 'Request for Sarah Jackes : Windows Laptop'. It displays service items, a description, and product features. On the right, there is a sidebar with 'Requester Info' for Sarah Jackes and a 'Reject' button highlighted in a blue box. The bottom of the page includes navigation links for 'Service Desk Software by Freshworks', 'Submit Feedback', 'Browse Community', and 'Privacy Policy', along with a notification bell icon.

Acme Inc

Get started Submit a ticket

Confirm Approval - #5R-46 Approve **Reject**

Request for Sarah Jackes : Windows Laptop

Service items (1)

Windows Laptop
Qty : 1 Cost : \$ 699.00 Stage : Requested

Description:
Windows Laptops are the corporate standard laptop for employees. Request for a new Windows laptop.

PRODUCT FEATURES

- 2.5 GHz Intel Core i5 Processor
- 750 GB Hard Drive
- 8 GB RAM
- Microsoft Windows 8
- Microsoft Office

Hide

Priority : Medium
Status : Being Processed
Request for:
sarahjacke.acme@gmail.com
Approval Requested by:
Rachel Mendoza, 5 days ago

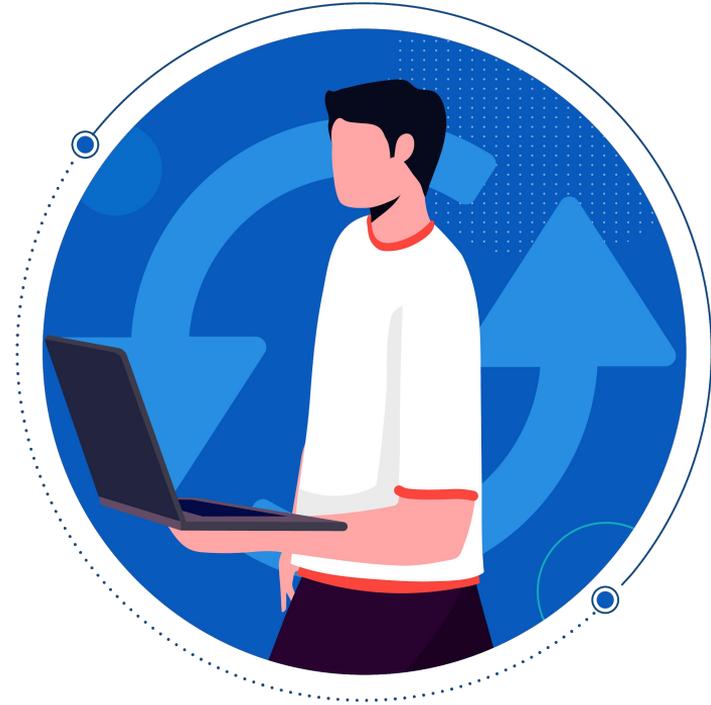
REQUESTER INFO
Sarah Jackes
Email
sarahjacke.acme@gmail.com

Service Desk Software by Freshworks | Submit Feedback | Browse Community | Privacy Policy

CHAPTER 12

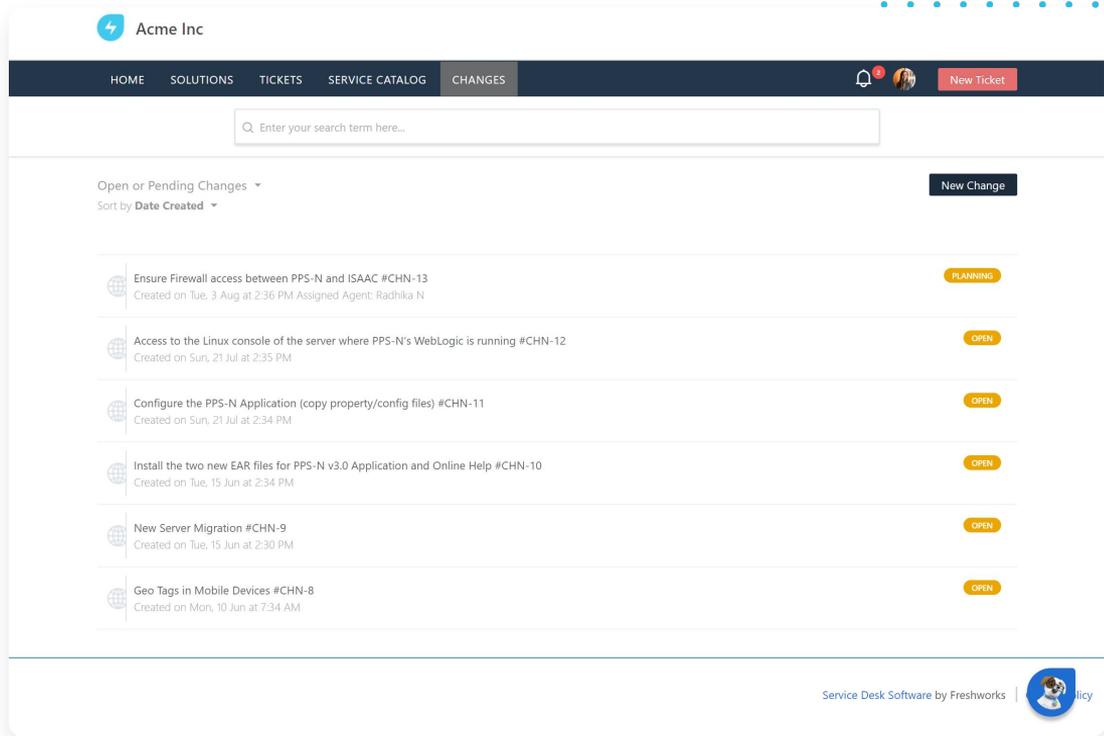
Requesting Changes

If you're a key stakeholder of organization projects, you can submit a formal request to make changes to a project and work on a revised change order. You can manage your Change Requests through the IT Support Portal by making sure they are appropriately approved, incorporated, and communicated on time so that they don't cause significant issues or have negative impacts that spiral out across the organization.



TO PLACE A CHANGE REQUEST:

- 1 Go to your IT Support Portal *Home Page*.
- 2 Click the **Changes** tab. A list of all *Open or Pending Changes* will be populated.
- 3 Navigate to the top-right and click **New Change**.
A change request form will open.



The screenshot shows the Acme Inc IT Support Portal interface. The top navigation bar includes 'HOME', 'SOLUTIONS', 'TICKETS', 'SERVICE CATALOG', and 'CHANGES'. A search bar is located below the navigation. The main content area displays a list of change requests under the heading 'Open or Pending Changes'. The list includes the following items:

- Ensure Firewall access between PPS-N and ISAAC #CHN-13
Created on Tue, 3 Aug at 2:36 PM Assigned Agent: Radhika N (Status: PLANNING)
- Access to the Linux console of the server where PPS-N's WebLog is running #CHN-12
Created on Sun, 21 Jul at 2:35 PM (Status: OPEN)
- Configure the PPS-N Application (copy property/config files) #CHN-11
Created on Sun, 21 Jul at 2:34 PM (Status: OPEN)
- Install the two new EAR files for PPS-N v3.0 Application and Online Help #CHN-10
Created on Tue, 15 Jun at 2:34 PM (Status: OPEN)
- New Server Migration #CHN-9
Created on Tue, 15 Jun at 2:30 PM (Status: OPEN)
- Geo Tags in Mobile Devices #CHN-8
Created on Mon, 10 Jun at 7:34 AM (Status: OPEN)

A 'New Change' button is located in the top right corner of the list. The footer of the page includes the text 'Service Desk Software by Freshworks' and the Freshworks logo.

4 Your email address will get automatically populated in the *Requester Email* field.

5 Enter other details in the Planning fields.

6 (Optional) Click **Associate Asset** if the Changes pertain to your devices. This makes it easy for your IT team to track impact.

Acme Inc

HOME SOLUTIONS TICKETS SERVICE CATALOG CHANGES

🔔 👤 New Ticket

Raise a New Change Request

Requester sarahjacke.acme@gmail.com

Subject • New Server Migration

➕ Associate Asset

📎 Attach a file

Planning

Reason for Change

B I U | [List] [Align] [Link] [Image] [More]

- Existing hosting is on internal servers that can no longer take the strain
- Existing hosting is provided by a third party that's no longer suitable
- Existing hosting is offshore and it needs to be moved closer
- The client wants to have more control over the server
- Most people are already working with a third party in the form of their hosting company, and it's

📎 Attach a file

Impact

B I U | [List] [Align] [Link] [Image] [More]

After you have tested your sites and applications on the new server and found them to be working, we will then schedule the DNS update or IP swap as well as the final data sync. If we have control over DNS, then we will update that for you when scheduled; if not, we will rely on you to make that change.

At the same time that either the DNS is being updated or the IP is being swapped, we will start the final sync.

📎 Attach a file

7 Click **Submit**.

8 Your change request gets created as a ticket and will be logged in the **Changes** tab.

The screenshot displays the Acme Inc. Freshservice portal interface. At the top, the navigation bar includes 'HOME', 'SOLUTIONS', 'TICKETS', 'SERVICE CATALOG', and 'CHANGES' (which is highlighted). A 'New Ticket' button is visible in the top right corner. A green notification banner at the top of the main content area states 'The change has been created.' Below this is a search bar with the placeholder text 'Enter your search term here...'. The main content area shows the 'Changes List' with a 'REPLY' and 'ADD PEOPLE' button. The selected ticket is titled 'CHN-9 New Server Migration', created on Tue, 3 Aug at 2:30 PM via Portal. It was reported by Sarah Jackes a minute ago. The ticket description includes a 'Planning' section with a 'Reason for Change' and an 'Impact' section. The 'Reason for Change' lists four bullet points: existing hosting is on internal servers that can no longer take the strain; existing hosting is provided by a third party that's no longer suitable; existing hosting is offshore and it needs to be moved closer; and the client wants to have more control over the server. The 'Impact' section states that after testing on the new server, the DNS update or IP swap will be scheduled, and the final data sync will be performed. A note at the bottom indicates that the final sync will occur at the same time as the DNS or IP swap, and that website content, data, and mail will be copied over.

Home / Changes List

REPLY ADD PEOPLE

CHN-9 New Server Migration

Created on Tue, 3 Aug at 2:30 PM via Portal

Sarah Jackes reported a minute ago

Not given.

Planning

Reason for Change

- Existing hosting is on internal servers that can no longer take the strain
- Existing hosting is provided by a third party that's no longer suitable
- Existing hosting is offshore and it needs to be moved closer
- The client wants to have more control over the server
- Most people are already working with a third party in the form of their hosting company, and it's often a dispute with an existing host that pushes people to go out and look for a new one.

Impact

After you have tested your sites and applications on the new server and found them to be working, we will then schedule the DNS update or IP swap as well as the final data sync. If we have control over DNS, then we will update that for you when scheduled; if not, we will rely on you to make that change.

At the same time that either the DNS is being updated or the IP is being swapped, we will start the final sync. Website content, data, and mail will be copied over. (The mail final sync only works if both servers are running the

Approval Status

Not Requested

Change properties

Type
Minor

Priority
Low

Impact
Low

Risk
Low

Department
Development

CHAPTER 13

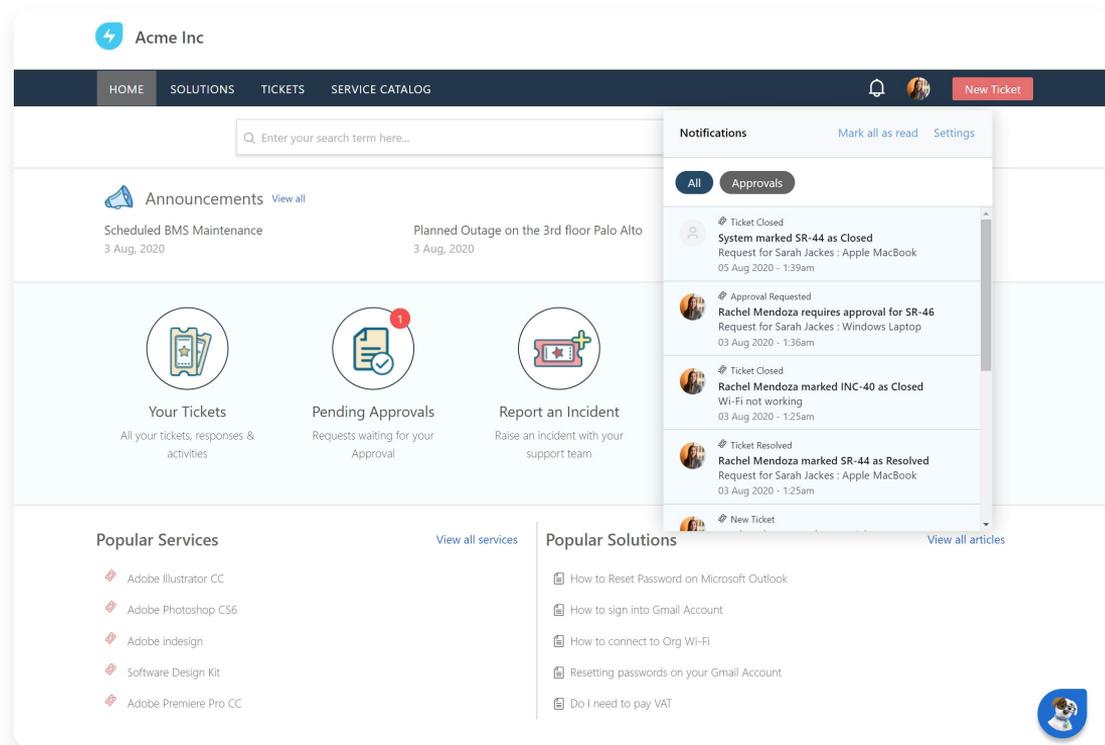
Setting Notification Preferences

You can enable in-app, browser, or desktop notifications for approvals, requests, replies, and modifications to all your tickets. This helps you stay informed and updated on all your requests. You also have the flexibility to define your notification settings based on any new tickets created, services/changes requested, and status updates.



TO VIEW NOTIFICATIONS:

- 1 Click the **Bell** icon next to your profile picture.
By default, All *notifications* will get displayed.
- 2 To view more notifications, scroll down and click **Load More**.
- 3 To view notifications specific to **Approvals**, click Approvals.



The screenshot displays the Acme Inc user interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A search bar is located below the navigation bar. The main content area is divided into several sections: 'Announcements' with two items, 'Your Tickets', 'Pending Approvals' (with a red notification badge), and 'Report an Incident'. Below these are 'Popular Services' and 'Popular Solutions'. A 'Notifications' dropdown menu is open, showing a list of notifications including 'System marked SR-44 as Closed', 'Rachel Mendoza requires approval for SR-46', 'Rachel Mendoza marked INC-40 as Closed', and 'Rachel Mendoza marked SR-44 as Resolved'. The dropdown menu also includes options to 'Mark all as read' and 'Settings'.

TO SET NOTIFICATION PREFERENCES:

- 1 Click the **Bell** icon next to your profile picture. By default, All *notifications* will get displayed.
- 2 Click **Settings**. The Notification Preferences section will open.
- 3 Some checkboxes against notification would've been marked by default. You can mark/unmark against the items.
- 4 (Optional) Click **Enable** to turn on desktop notifications.

The screenshot displays the Acme Inc user interface. At the top, there is a navigation bar with 'HOME', 'SOLUTIONS', 'TICKETS', and 'SERVICE CATALOG'. A search bar is located below the navigation bar. The main content area is divided into several sections: 'Announcements' with two items, 'Your Tickets', 'Pending Approvals', and 'Report an Incident'. A 'Notification Preferences' modal is open, showing a list of notification types with checkboxes. The 'Your Tickets' section has a red notification badge with the number '1'. Below the main content, there are sections for 'Popular Services' and 'Popular Solutions'. The 'Notification Preferences' modal is titled 'Notification Preferences' and has a back arrow and a speaker icon. It lists the following notification types with their respective checkboxes:

- Notify me when:
- Service Request sent for my approval
- Change sent for my approval
- New tickets created
- New reply on my ticket
- Status updated on my ticket

CHAPTER 14

About Freshservice

Freshservice is a right-sized, intelligent, service management solution that extends digital capabilities and delivers exceptional employee productivity for modern enterprises that are looking to digitally transform their businesses.

Leveraging Freshworks' experience to build world-class products, Freshservice offers a cutting edge yet user-friendly solution with multichannel support.



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