End-User Guide

Learn how to access services, resolve issues on your own, and enhance your IT Support experience.
<table>
<thead>
<tr>
<th>CHAPTER</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>About this Guide</td>
<td>01</td>
</tr>
<tr>
<td>2</td>
<td>Audience</td>
<td>02</td>
</tr>
<tr>
<td>3</td>
<td>Important Terminologies</td>
<td>03</td>
</tr>
<tr>
<td>4</td>
<td>Accessing the IT Helpdesk Portal</td>
<td>07</td>
</tr>
<tr>
<td>5</td>
<td>Understanding the IT Helpdesk Home Page</td>
<td>12</td>
</tr>
<tr>
<td>6</td>
<td>Raising a Ticket/Reporting an Incident</td>
<td>22</td>
</tr>
<tr>
<td>7</td>
<td>Requesting Services/Service Items</td>
<td>29</td>
</tr>
<tr>
<td>8</td>
<td>Browsing Knowledge Base Solutions</td>
<td>38</td>
</tr>
<tr>
<td>9</td>
<td>Tracking and Exporting Tickets</td>
<td>44</td>
</tr>
<tr>
<td>10</td>
<td>Viewing Announcements</td>
<td>56</td>
</tr>
<tr>
<td>11</td>
<td>Approving Requests</td>
<td>59</td>
</tr>
<tr>
<td>12</td>
<td>Requesting Changes</td>
<td>62</td>
</tr>
<tr>
<td>13</td>
<td>Setting Notification Preferences</td>
<td>66</td>
</tr>
<tr>
<td>14</td>
<td>About Freshservice</td>
<td>69</td>
</tr>
</tbody>
</table>
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.
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.

<table>
<thead>
<tr>
<th>TERM</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent</td>
<td>An agent is a person within your company’s ecosystem (internal or external) who can view, work, and respond to your tickets.</td>
</tr>
<tr>
<td>Announcements</td>
<td>Announcements are broadcasted alerts about company updates such as any upcoming releases, system, or application downtime.</td>
</tr>
<tr>
<td>Classic Portal</td>
<td>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.</td>
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<td>TERM</td>
<td>DEFINITION</td>
</tr>
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</tr>
<tr>
<td>Conversational Portal</td>
<td>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.</td>
</tr>
<tr>
<td>Helpdesk URL</td>
<td>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: <a href="mailto:itsupport@acme.freshservice.com">itsupport@acme.freshservice.com</a> or &lt;itsupport.acme.com&gt;</td>
</tr>
<tr>
<td>ID (Identifier)</td>
<td>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.</td>
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<tr>
<td>Incident</td>
<td>An incident is any unplanned interruption in the day-to-day activities/tasks of an end-user.</td>
</tr>
<tr>
<td>Loaner Item</td>
<td>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.</td>
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<tr>
<td>TERM</td>
<td>DEFINITION</td>
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<tr>
<td>Request for Change</td>
<td>A formal request placed by end-users via the IT Support Portal for the implementation of a Change.</td>
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<tr>
<td>Reporting Manager</td>
<td>The direct team leader or supervisor who approves the requests placed by end-users belonging to his/her team.</td>
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<tr>
<td>Requested Items</td>
<td>Service items requested by an end-user that gets displayed in a service request ticket.</td>
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<tr>
<td>Requester</td>
<td>An end-user (external or internal) who raises incidents or service requests in the IT Support Portal.</td>
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<tr>
<td>Service Catalog</td>
<td>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.</td>
</tr>
<tr>
<td>Service Categories</td>
<td>Categories under which service items can be organized in the service catalog. For example: Hardware, Software, Finance, Marketing, etc.</td>
</tr>
<tr>
<td>Service Items</td>
<td>Assets, products, applications, or services that are listed on the service catalog for the end-users.</td>
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<tr>
<td>TERM</td>
<td>DEFINITION</td>
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<tr>
<td>Service Request</td>
<td>A type of ticket created in the IT Support Portal when end-users request items from the service catalog.</td>
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<tr>
<td>Support Channels</td>
<td>The various means or channels through which end-users can request help from IT teams or access the IT Support Portal.</td>
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<tr>
<td>IT Support Portal/</td>
<td>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.</td>
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<tr>
<td>IT Helpdesk</td>
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<td>Tickets</td>
<td>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.</td>
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</tbody>
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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.
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*.
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
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.
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.
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.
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 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.
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.
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.
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.
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.
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.
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.
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.
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.
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.
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.
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.
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.
A ticket gets created and you will receive a confirmation on chat with a snippet link to view details of your ticket.
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.
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.
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.
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**.

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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.
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.
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.
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**.
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.
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.
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.
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.
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**.
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.
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.
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.
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:


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.
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.
7 Click **Submit**.

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