# Task 5 – Instance Access & Setup Checklist and Documentation Guide

# 1. Confirm Provisioning

• Verify that Freshservice has provisioned the environment.

• Note instance URL (e.g., yourcompany.freshservice.com).

• Confirm receipt of welcome/access email from Freshworks.

# 2. Validate Admin Access

• Log in using admin credentials.

• Navigate to Admin Console and check access to:

* Workflow Automator
* Email & Notification Settings
* Roles & Permissions
* Service Catalog
* Custom Objects (Enterprise tier only)

# 3. Invite the Project Team

• Add Admins, Consultants, and Stakeholders with correct roles.

• Use Groups if role-based segmentation is needed later.

# 4. Check License Tier

• Go to Admin > Global Settings > Account > Plans & Billing.

• Confirm plan (Growth, Pro, Enterprise).

• List unavailable features based on tier and notify stakeholders.

# 5. Environment Setup Best Practices

• Enable login banner under Admin > Helpdesk Rebranding.

• Confirm authentication (SSO vs. Manual).

• If using a sandbox, document refresh and migration plan.

# ITIL Alignment Summary

• Access Management – Ensure correct roles are provisioned.  
• Information Security Management – Enforce SSO or secured login.  
• Service Configuration Management – Start documenting change boundaries.  
• Design Coordination – Validate license tiers and ensure access aligns with project expectations.