Freshservice Agent Quick Start Guide

This guide provides essential steps to help agents get up and running quickly in Freshservice. It aligns with ITIL principles to ensure structured and compliant service delivery.

# 1. Logging In and Navigating the Dashboard

* Log in using your company credentials at the Freshservice URL provided.
* The Dashboard gives a summary of open tickets, SLA compliance, and alerts.
* Familiarize yourself with ticket views such as 'My Tickets', 'Group Tickets', and 'Unassigned'.

# 2. Understanding Ticket Types (Incident vs. Request)

* Incidents refer to unplanned service interruptions (e.g., Wi-Fi not working).
* Requests are standard service needs (e.g., software install).
* Classify tickets accurately for proper routing and SLA tracking.

# 3. Responding to and Updating Tickets

* Open the ticket to view details, requester info, and previous activity.
* Add private or public notes and update ticket status accordingly (e.g., In Progress, Resolved).
* Always document resolution steps and attach relevant files or links.

# 4. SLA Awareness and Escalation

* Each ticket is subject to a Service Level Agreement (SLA).
* Freshservice alerts you when a ticket is nearing breach.
* Use escalation rules or notify leads if you're unable to resolve the ticket within SLA.

# 5. Using the Knowledge Base

* Search for articles in the Solutions section to assist with faster resolution.
* Use KB articles when responding to users, and flag outdated content to improve accuracy.

# 6. Working with Tasks, Changes, and Problems

* Break large tickets into smaller Tasks and assign them as needed.
* If the ticket requires system changes, escalate to Change Management.
* Link recurring incidents to a Problem to investigate root causes.

# 7. ITIL Best Practices to Remember

* - Record and categorize all interactions accurately.
* - Prioritize based on impact and urgency.
* - Communicate clearly and often.
* - Document resolution thoroughly.
* - Always consider user satisfaction and continual improvement.