Freshservice

Freshservice mobile app
Quick start guide

Congratulations!

You have taken the first step towards increasing agents' performance and delighting your employees by choosing to move to Freshservice mobile app.

Benefits of using the mobile app:

- Manage your organizations' IT needs at the touch of a button
- Resolve incidents and requests, manage your laptops and phones, and access company resources anywhere using the Freshservice mobile app
- Easily add track and manage your assets across the organization
- Share your tickets with other agents, admins, or other requesters (mobile-only feature)
- Access multiple accounts from a single portable device

Get the App

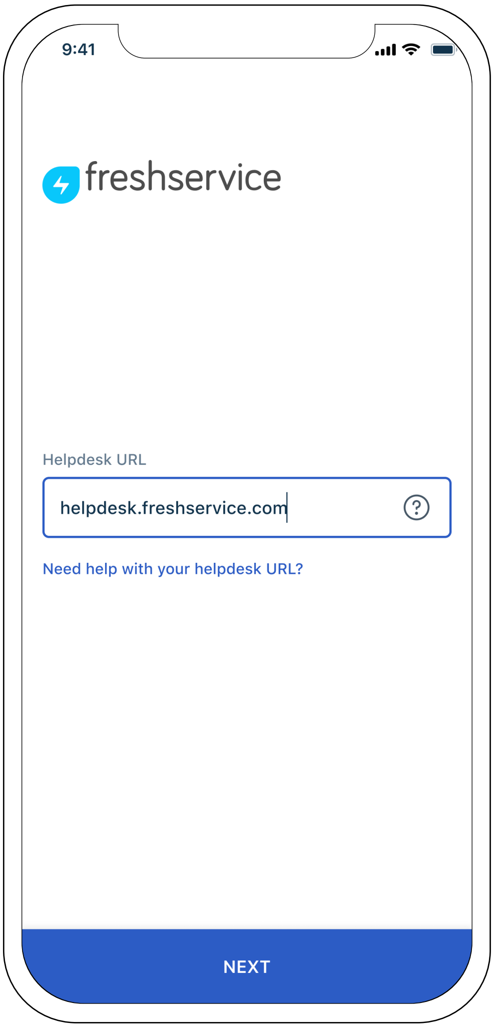
Download the app from your app store. Here is the link for it:

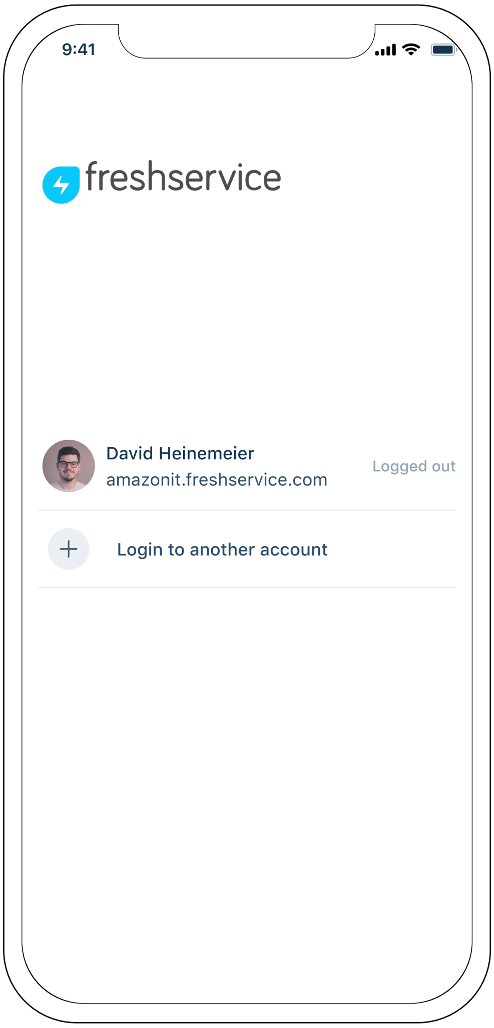
Android: **Click here**

iPhone: **Click here**

How to Login?

- Once you have downloaded the app, you will get a prompt to enter your domain ID Helpdesk URL. (And if you don't remember, the app will assist you in finding it).
- You can then log in via the login mechanism configured by your account administrator.
- Our SSO login makes it easier for you to sign in to all of your accounts quickly and easily.
- If you juggle between multiple Freshservice accounts, you can add them all to one app. Click on the settings button and then the profile and the bottom. Here you will get an option to add more accounts and manage your accounts

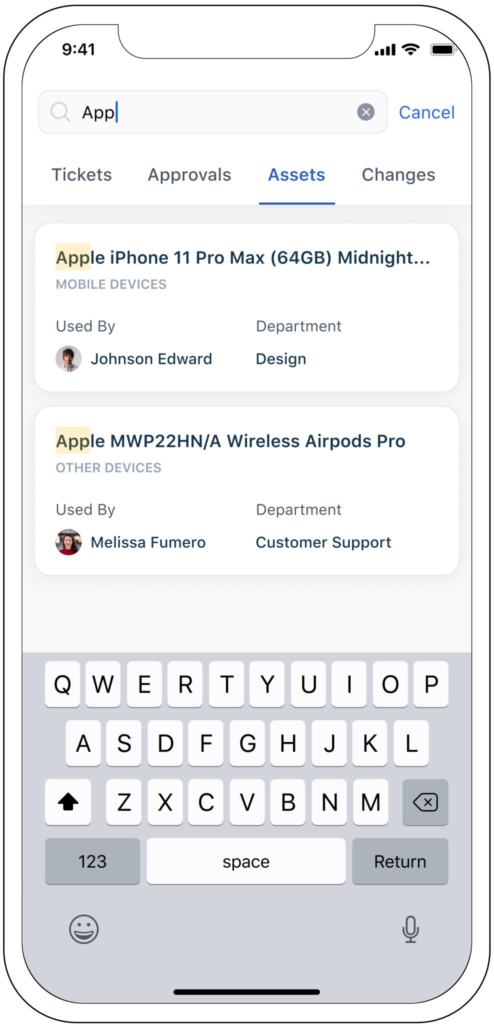


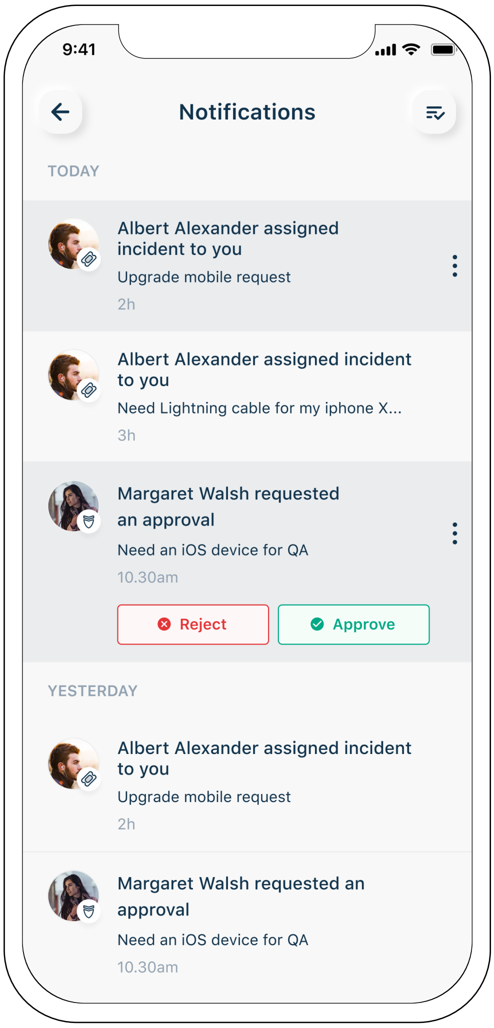


Search & Notifications

Global search support to look for assets, tickets, requesters, solution articles, service items and much more.

Quickly view all your notifications. This section separately shows 'Unread' notifications and 'All' notifications. Based on the type of notification, specific actions are suggested to the users at the end of the notification.



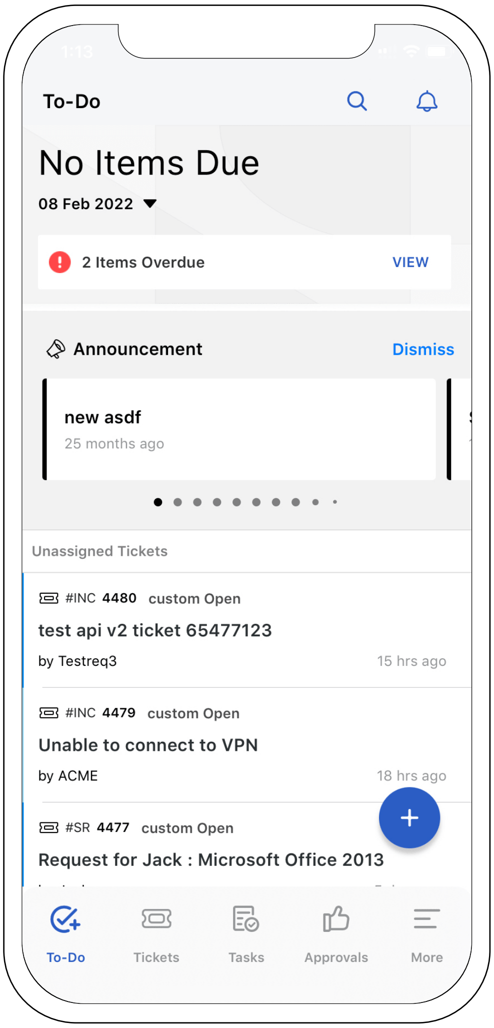


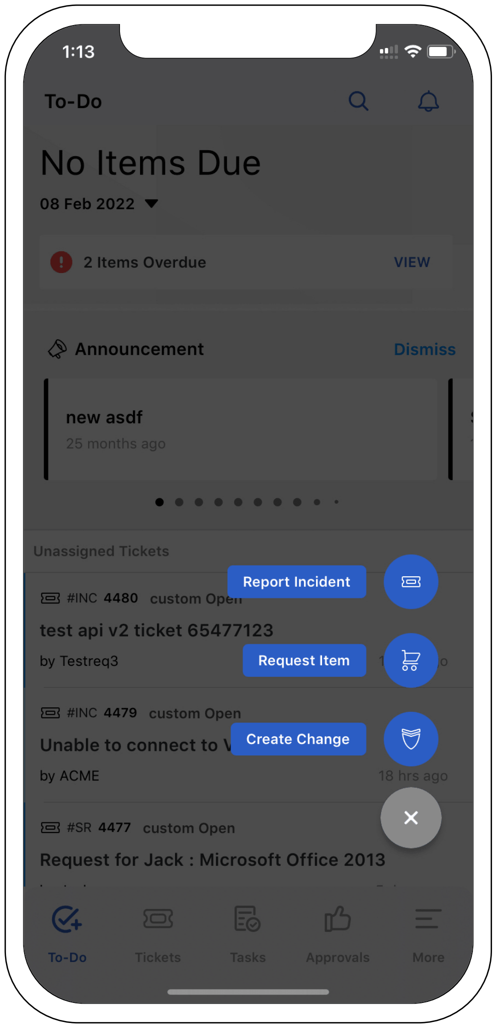
To-do Page

Once logged in you will be able to see the home page which is also called the To-do page. This page shows all the items that are due for the agent. It also lists all the unassigned items. You can click on any of the unassigned tickets to view its content as well as the promised SLA and assign it to yourself as well. You can also change the ticket properties and view items that are pending on any date. It also shows all the announcements that are made and agents can dismiss it from their screen.

Click on the + icon to report an incident, raise a request for an item or to create a change.

Note: By default, the landing page for the app is the 'To-do' page. Agents can change the landing page to the 'Tickets' page in the settings option.





Tickets

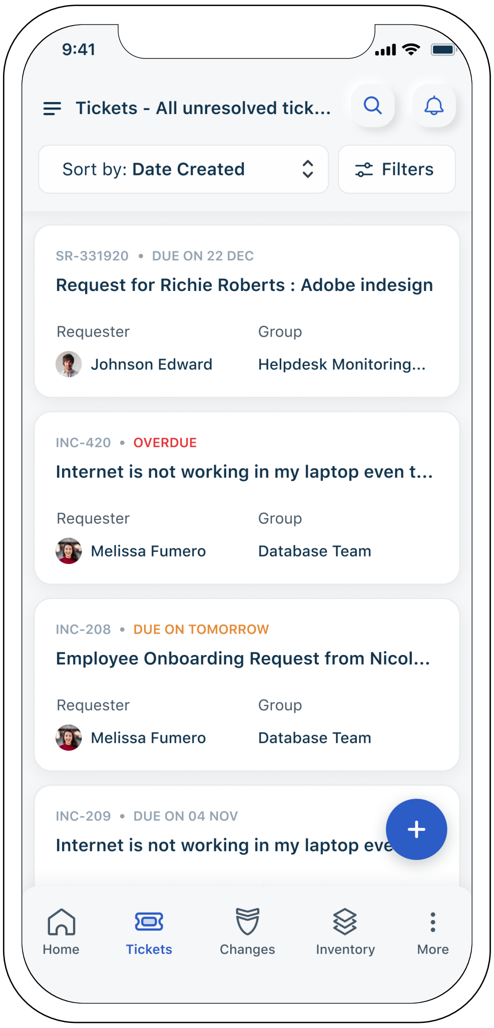
Shows the list of tickets. Agents can customize the view from the drop-down options available on top of the screen. Users can view the ticket, their status and the agent the ticket is assigned to and also make changes to the status or agent without even opening the ticket. Users can also filter & sort tickets on the go so that you can focus on Tickets that need your attention.

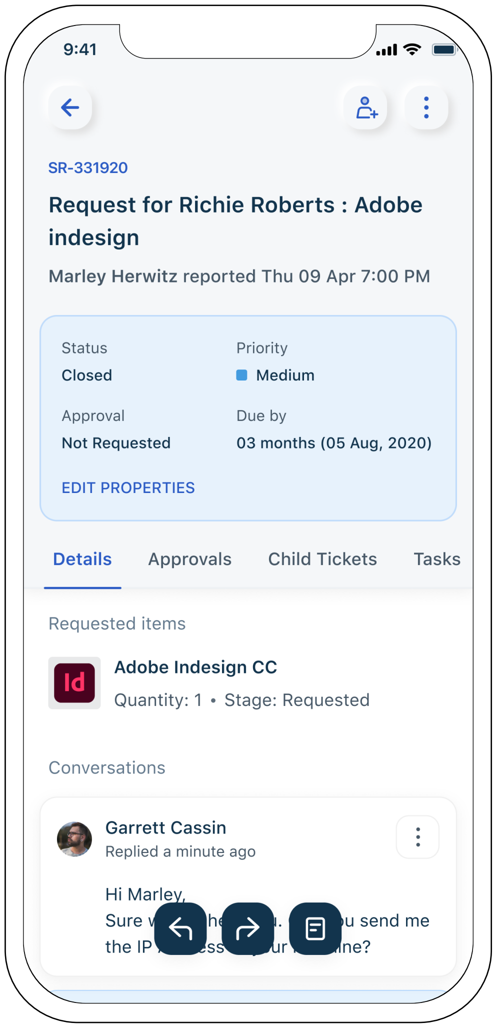
On clicking on a particular ticket in the list view, a detailed ticket page will open. From this view agents can edit the ticket, modify ticket properties, respond to the ticket, close it, merge the ticket with another ticket and execute scenario automations.

Agents can also subscribe to a ticket and whenever any changes are made to that ticket by some other user, a push notification will be triggered. Click on the icon next to ticket ID to see all the notes, tasks, changes and assets associated with the ticket.

Users can click on the + icon to either report an incident or request a service item.

One unique feature of the mobile app is that agents can share the ticket on mail, whatsapp, and via other apps.





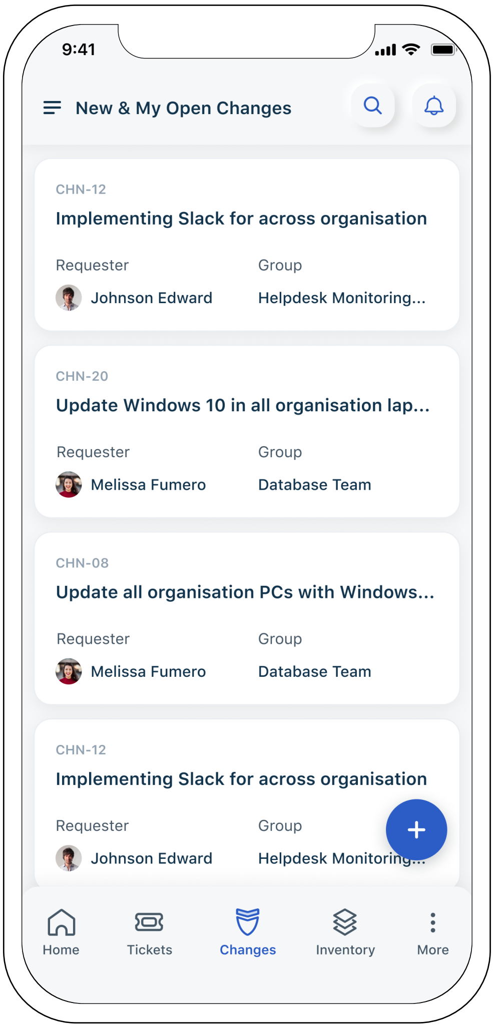
Changes

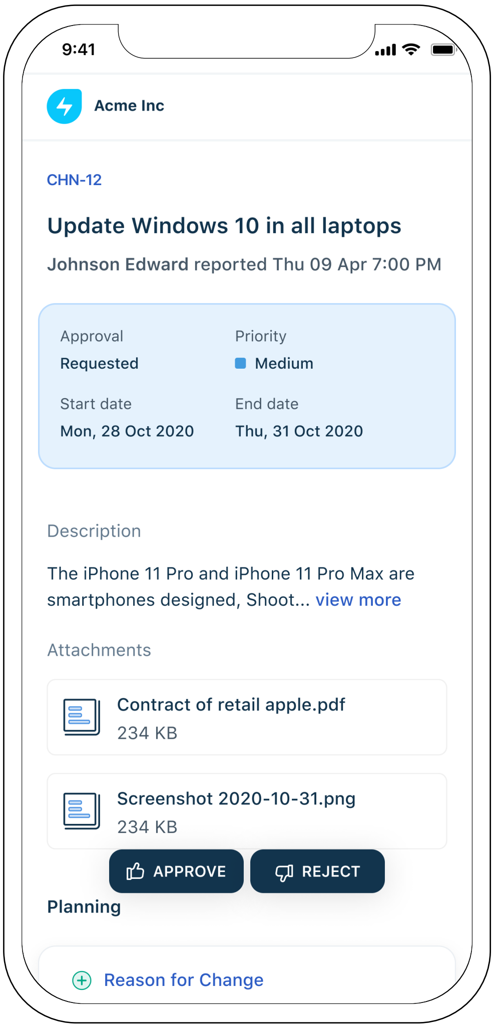
Shows the list of changes. Agents can filter the changes from the four options: Open, Planning, Awaiting Approval and Pending Request.

The Change page is further divided into three tabs: Overview, Planning and Approvals.

- The Overview tab contains all the notes related to the change. Agents can also add amaintenance window here and assign the change to themselves.
- The Planning tab contains all the planning section fields. Click on the pencil icon to add all the planning details.
- The Approvals tab allows you to request for a CAB approval

Click on the icon next to the change ID to see all the notes, tasks, tickets and assets associated with the change.





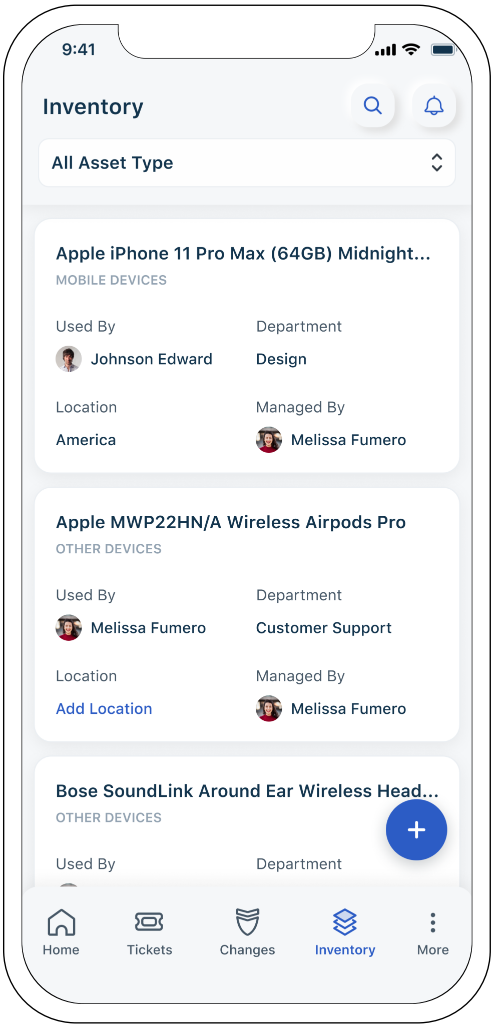
Assets

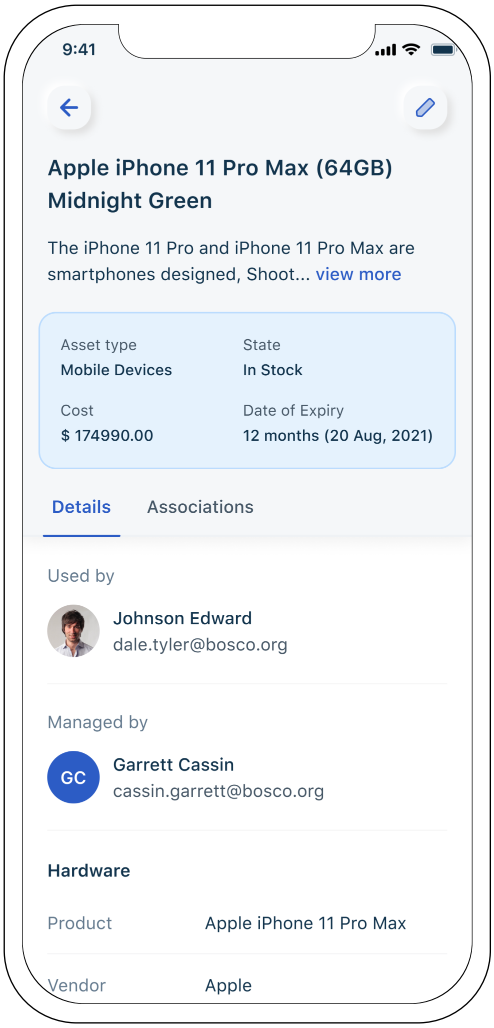
Shows the list of assets. Agents can customize their view by selecting from the dropdown or by searching for a particular group of assets. This will show assets of the selected type with some basic information (which is customizable from the 'Settings pane). Click on a particular asset from the list to see a detailed view. The detailed view has two tabs: Details and Associations:

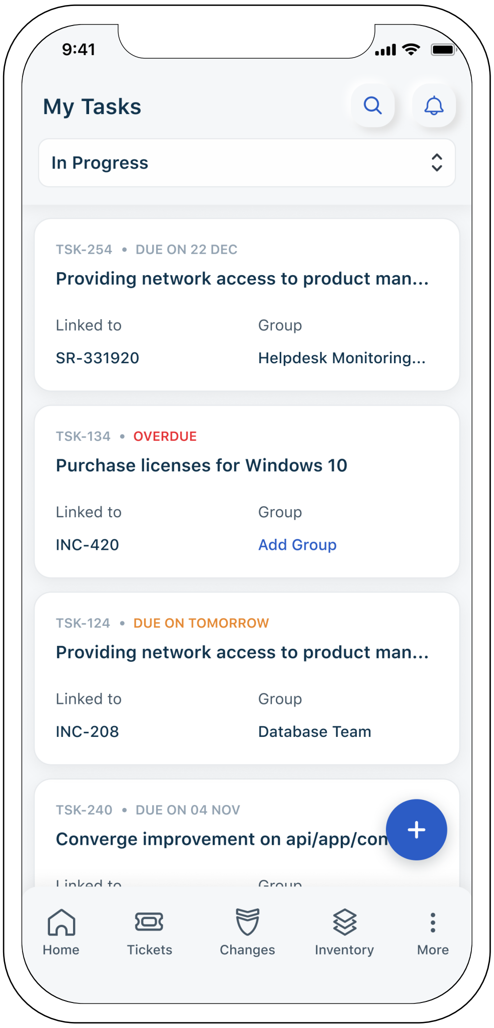
- The Details tab shows all the asset properties like cost warranty, location, etc.
- The Associations tab shows all the tickets or changes associated with the asset. Users can also raise a ticket or change from this tab by clicking on the 'Associate' button.

On the Assets home page, agents can add more assets by clicking on the + icon. This gives the agents two options to add a new asset: **Add Asset** and **Scan Asset.**

- The Add Asset option will open a form where agents can enter all the asset details and properties.
- The Scan Asset option opens the scanner and the agents can scan a barcode, QR code, text that has asset information to get and add all the asset details into the system.

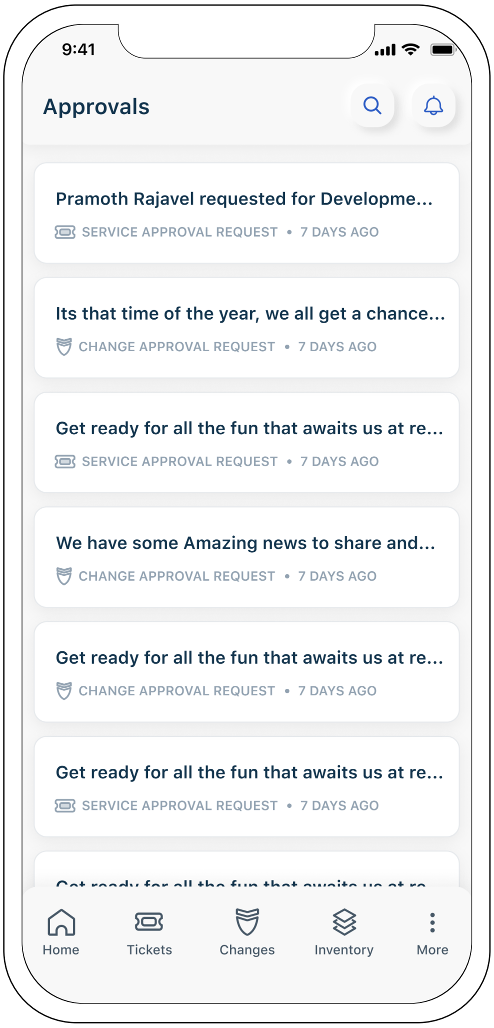






My Tasks

Shows the list of tasks for the agents. Agents can customize the view to show 'Open', 'In-progress', or 'Completed' tasks from the drop-down options available on top of the screen.

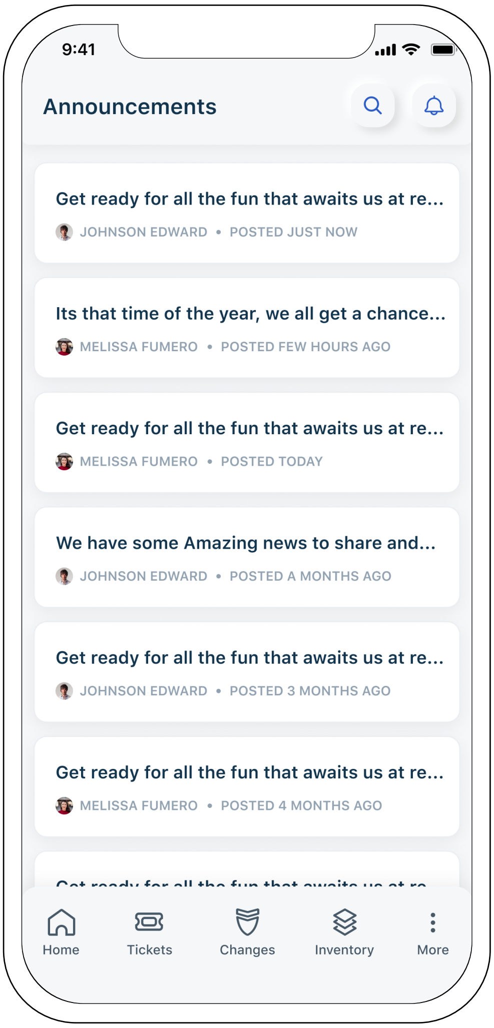


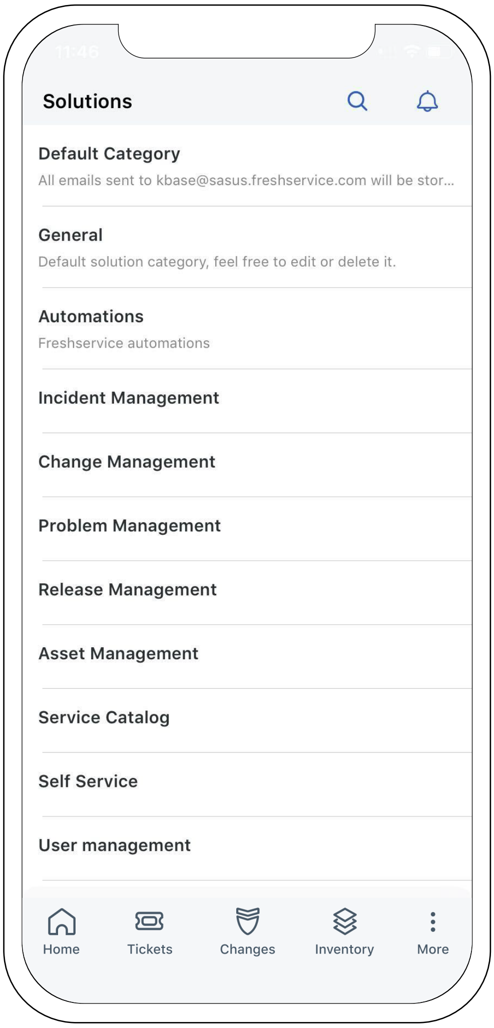
Approvals

Shows the list of pending approvals. Requesters and Agents can approve or request an approval directly from the list view. In case of an agent, clicking on the change approvals will take them to the change request page.

Announcements

Shows the list of all announcements that are added to the system.You can share announcements with agents and end-users. This is particularly helpful for bringing teams up to speed with new releases and posting downtime alerts.





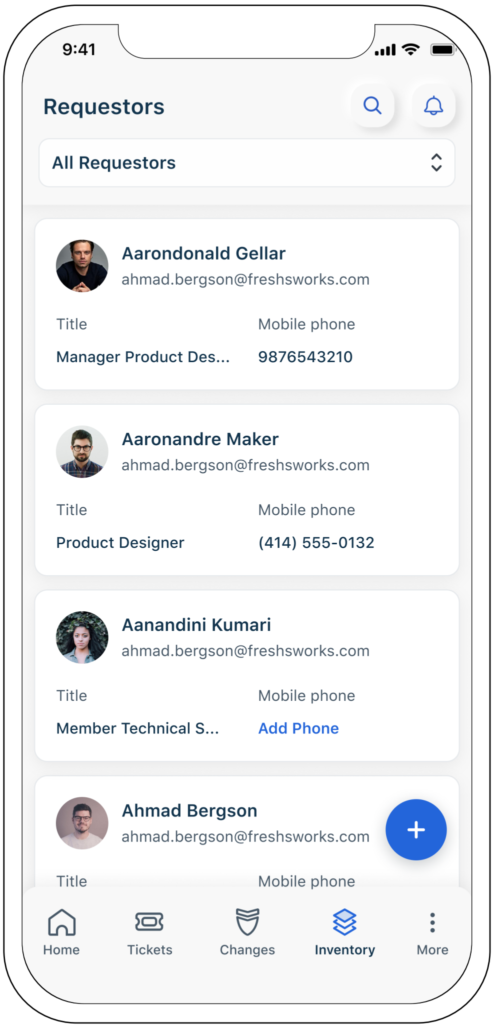
Solutions

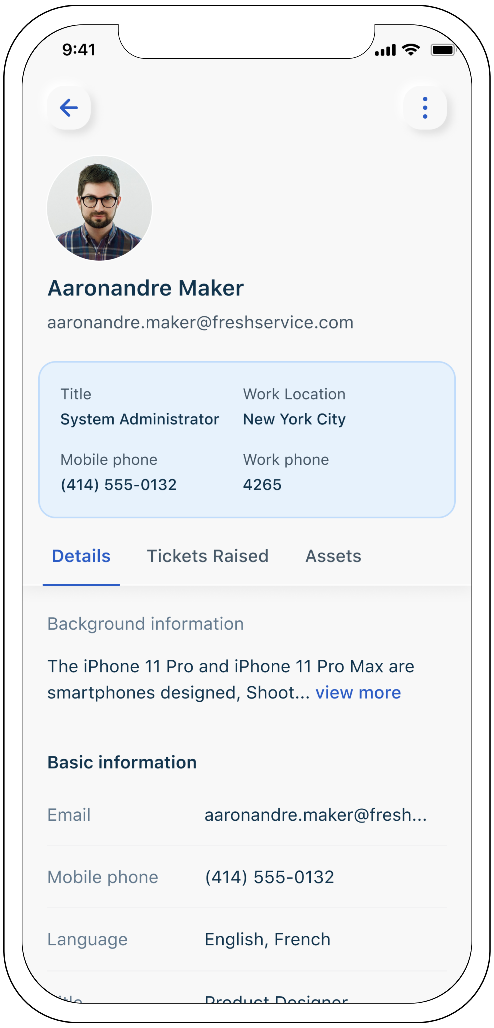
Users can browse their knowledge base at the touch of a button. Solutions contains a list of all the solution articles that are categorized under a few major categories.

Requesters

Shows the list of all requesters present in the system. Agents can customize the view from the drop-down options available on top of the screen.

Click on the **+** icon to add a new requester in the system.





Clicking on a particular requester will display an overview of the requester like language, time zone, department, etc. It also shows all the list of tickets associated with the requester and assets assigned to them.

Settings

Use the Account Preferences options to edit account details and manage preferences in case of multiple accounts.

A. Click on Notifications to manage various notifications related to tickets, changes and service requests.

B. Use the Landing Page option to switch the landing page between To-do page and Tickets page.

C. Click on Customize Ticket List option to customize the ticket list view. Agents can choose to add different fields that should be visible in the list view, from the list of fields.

D. Click on Customize Asset List option to customize the asset list view. Agents can choose to add different fields that should be visible in the list view, from the list of fields.

E. Click on the Support option to reach out to us in case any support is required.