

A Guide to Automation in Freshservice

Introduction

It's just another day at your Service Desk. Your team of trained tech experts is all set to provide customers with the best support ever, until they find some old tickets that need to be followed up on and some new tickets that need to be categorized and assigned to the right agent. Sound familiar?

An expert IT technician should not have to waste a part of his productive time on such mundane tasks when he has bigger things to worry about. In Freshservice, you can automate almost all of them by creating simple if-this-then-that rules.

Depending on the type of task you want to automate, you can choose one of the 3 automation tools available in the Admin console- The [Dispatch'r](#), the [Supervisor](#) and the [Observer](#). You can even carry out a bunch of updates with a single click using [Scenario Automations](#).

Here are some use cases to help you get started.

Dispatch'r

What exactly it does:

The Dispatch'r essentially helps you choose what needs to be done to a new ticket or change *right after it's created*, based on its properties.

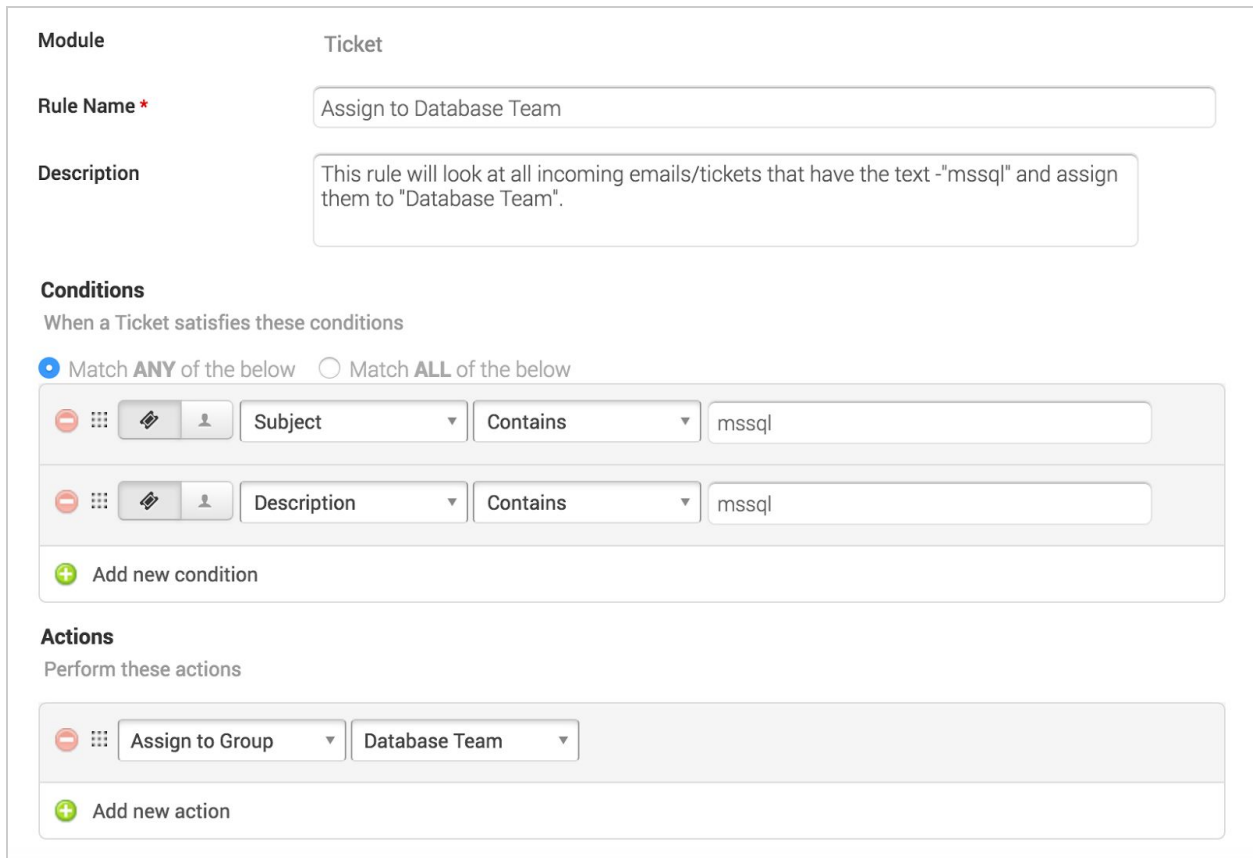
Especially helpful for automating tasks like:

Categorizing, prioritizing and assigning tickets.

Some examples:

Tickets:

- If the ticket contains the word *"mssql"* in its subject line or description, **assign** it to the Database team.



The screenshot shows the configuration interface for a Dispatch'r rule in Freshservice. It is set for the 'Ticket' module. The rule name is 'Assign to Database Team'. The description states: 'This rule will look at all incoming emails/tickets that have the text -"mssql" and assign them to "Database Team".' Under the 'Conditions' section, it is configured to 'Match ANY of the below' with two conditions: 'Subject' contains 'mssql' and 'Description' contains 'mssql'. Under the 'Actions' section, it is configured to 'Perform these actions' with one action: 'Assign to Group' set to 'Database Team'.

Module		Ticket
Rule Name *	Assign to Database Team	
Description	This rule will look at all incoming emails/tickets that have the text -"mssql" and assign them to "Database Team".	
Conditions When a Ticket satisfies these conditions		
<input checked="" type="radio"/> Match ANY of the below <input type="radio"/> Match ALL of the below		
		Subject Contains mssql
		Description Contains mssql
Add new condition		
Actions Perform these actions		
		Assign to Group Database Team
Add new action		

[Here's what the rule would look like in Freshservice](#)

Quick Tip:

You can also have the ticket automatically assigned to the next available agent using **round-robin ticket assignment**. Go to *Admin* → *Groups* and enable “**Automatic Ticket Assignment**” for any of the existing groups.

Edit Group

Group Name

Database Team

Description

Database Management Team

Business Hours

Default

Agents

Alan Berkson ✕

Alec Hudson ✕

Gregory House ✕

Karen Jones ✕

Michael Steele ✕

Zack Wylde ✕

Automatic Ticket Assignment

ON









if a ticket remains un-assigned for more than :

30 Minutes

....then send escalation email to :

Select A...

- If a Service Request exceeds a certain amount, **send an approval request** to the Department Head.

Module	Ticket
Rule Name *	<input type="text" value="Send approval mail to the department head when a Service Request exceeds \$100"/>
Description	<div>This is a sample rule which will send approval mail to department head when a service request exceeds a hundred dollars. Feel free to edit or delete this rule</div>
Conditions	
When a Ticket satisfies these conditions	
<input type="radio"/> Match ANY of the below <input checked="" type="radio"/> Match ALL of the below	
<div><div><div><div>✖</div><div>⋮</div><div></div><div></div></div><div>Type</div><div>▼</div></div><div><div>Is</div><div>▼</div></div><div><div>Service Request</div><div>▼</div></div></div>	
<div><div><div><div>✖</div><div>⋮</div><div></div><div></div></div><div>Service Cost</div><div>▼</div></div><div><div>Greater than</div><div>▼</div></div><div><div>100</div></div></div>	
<div><div></div> Add new condition</div>	
Actions	
Perform these actions	
<div><div><div><div>✖</div><div>⋮</div><div></div><div></div></div><div>Send Approval mail t...</div><div>▼</div></div><div><div>Department Head</div><div>✖</div></div></div>	
<div><div></div> Add new action</div>	

Changes:

- If a request for a standard change comes in, bypass approval requests and **assign** it to the release team.

Module	Change
Rule Name *	<input type="text" value="Assign standard changes to Release team"/>
Description	<div>This is a sample rule which will assign standard changes to Release Team. Feel free to edit or delete this rule.</div>
Conditions When a Change satisfies these conditions	
<input checked="" type="radio"/> Match ANY of the below <input type="radio"/> Match ALL of the below	
<div><div><div>⊖</div><div>⋮</div><div>Change type</div><div>▼</div></div><div>Is</div><div>▼</div><div>Standard</div><div>▼</div></div>	
<div><div>⊕</div> Add new condition</div>	
Actions Perform these actions	
<div><div><div>⊖</div><div>⋮</div><div>Assign to Group</div><div>▼</div></div><div>Release Managemen...</div><div>▼</div></div>	
<div><div>⊕</div> Add new action</div>	

Supervisor

What exactly it does:

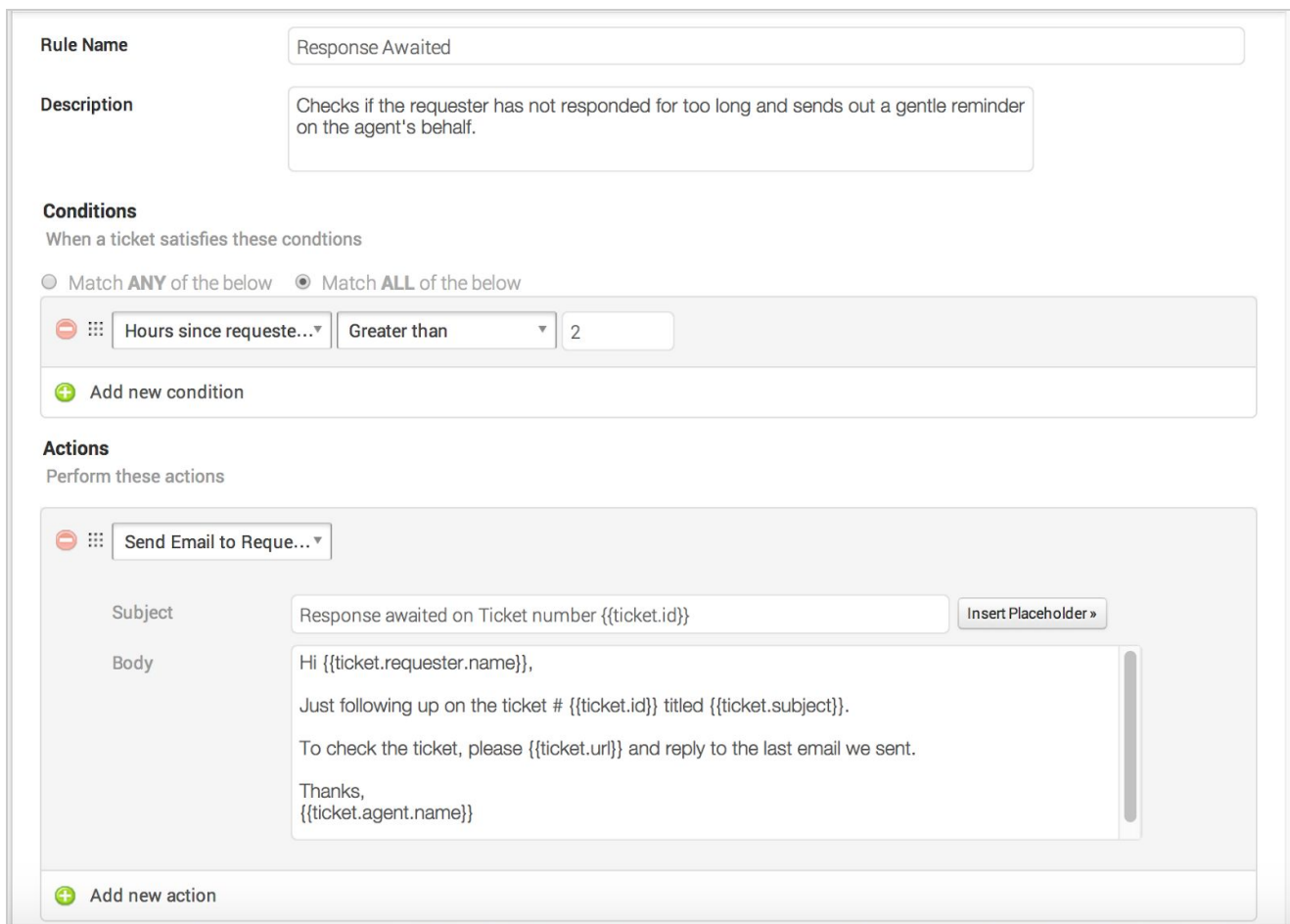
The Supervisor *runs every hour*, looks for loose ends in your Service Desk and ties them up.

Especially helpful for automating tasks like:

Following up on pending responses or overdue tickets and escalating tickets.

Some examples:

- **Send a reminder to customers** if they haven't responded to your email after 2 hours.



Rule Name Response Awaited

Description Checks if the requester has not responded for too long and sends out a gentle reminder on the agent's behalf.

Conditions
When a ticket satisfies these conditions

☐ Match **ANY** of the below ☒ Match **ALL** of the below

Hours since requeste... Greater than 2

Add new condition

Actions
Perform these actions

Send Email to Reque...

Subject Response awaited on Ticket number {{ticket.id}}

Body Hi {{ticket.requester.name}},
Just following up on the ticket # {{ticket.id}} titled {{ticket.subject}}.
To check the ticket, please {{ticket.url}} and reply to the last email we sent.
Thanks,
{{ticket.agent.name}}

Add new action

- **Automatically close resolved tickets** after 48 hours, unless the requester responds to the 'ticket resolved' notification.

Rule Name

Automatically close resolved tickets after 48 hours

Description

This rule will close all the resolved tickets after 48 hours.

Conditions

When a ticket satisfies these conditions

☐ Match **ANY** of the below

☒ Match **ALL** of the below

✖

⋮

Status

▼

Is

▼

Resolved

▼

✖

⋮

Hours since resolved

▼

Greater than

▼

48

+

Add new condition

Actions

Perform these actions

✖

⋮

Set Status as

▼

Closed

▼

+

Add new action

Observer

What exactly it does:

The Observer *keeps an eye out for events (triggers)* that call for certain actions. It then performs the actions without you needing to worry about it.

You can set Observer rules for Service Requests, Incidents, Problems, Changes and Releases.

Especially helpful for automating tasks like:

Sending an alert to the CTO when there is an update in a product's module.

Some examples:

Tickets:

● Automatically assign tickets to the first responder.

Module	Ticket
Rule Name *	Automatically assign ticket to first responder
Description	When an agent replies to, or adds a note to an unassigned ticket, it gets assigned to him/her automatically.
When Any of these events occur	
<div>⊖ :: Reply is sent</div>	
<div>⊖ :: Note is added Type Public</div>	
<div>+ Add new event</div>	
and the events are performed by	
<div><input type="radio"/> Anyone <input type="radio"/> Requester <input checked="" type="radio"/> Agent</div> <div>Anyx</div>	
on ticket with these properties	
<div><input checked="" type="radio"/> Match ANY of the below <input type="radio"/> Match ALL of the below</div>	
<div>⊖ :: Agent Is None</div>	
<div>+ Add new condition</div>	
perform these actions	
<div>⊖ :: Assign to Agent Event Performing Ag...</div>	
<div>+ Add new action</div>	

- **Automatically reopen tickets** when the requester responds

Module

Ticket

Rule Name *

Automatically reopen tickets when the requester responds

Description

When a requester replies to a ticket in any state (pending, resolved, closed or a custom status), its status is changed back to open.

When Any of these events occur

⊞

⋮

⊞

Reply is sent

⌵

+

Add new event

and the events are performed by

⊙

Anyone

⊙

Requester

⊙

Agent

on ticket with these properties

⊙

Match ANY of the below

⊙

Match ALL of the below

⊞

⋮

⊞

Status

⌵

Is not

⌵

Open

⌵

+

Add new condition

perform these actions

⊞

⋮

⊞

Set Status as

⌵

Open

⌵

⊞

⋮

⊞

Send Email to Agent

⌵

To

Assigned Agent










⌵

Subject

Ticket re-opened - [#{{ticket.id}}] {{ticket.subject}} [EOM]

Insert Placeholder »

- **Notifying the requester** about the ticket being assigned to an agent.

Module	Ticket		
Rule Name *	Agent assigned acknowledgement		
Description	Sends a mail to the requester when an agent is assigned to the ticket.		
When Any of these events occur			
		Agent is updated	From None To Any
 Add new event			
and the events are performed by			
<input checked="" type="radio"/> Anyone <input type="radio"/> Requester <input type="radio"/> Agent			
on ticket with these properties			
<input type="radio"/> Match ANY of the below <input checked="" type="radio"/> Match ALL of the below			
		Select Condition	
 Add new condition			
perform these actions			
		Send Email to Reque...	
Subject		Ticket ID {{ticket.id}} assigned to the Database team. 	
Body		Hi {{ticket.requester.name}}, This is with reference to your ticket ID {{ticket.id}}. Thanks for bringing the issue to our attention. Your ticket has been assigned to {{ticket.agent.name}} from the Database team.	

Problems:

- **Close all the associated incidents** when a problem is closed.

Module	Problem
Rule Name *	<input type="text" value="Close all the associated tickets - Sample Problem Observer rule"/>
Description	<input type="text" value="When a Problem is closed, this rule will be triggered and it will close all the associated tickets."/>
When Any of these events occur	
<div><div><div>⊖</div><div>⋮</div><div>Status is changed</div><div>▼</div></div><div>From</div><div><div>Any Status</div><div>▼</div></div><div>To</div><div><div>Closed</div><div>▼</div></div></div> <div><div>⊕</div> Add new event</div>	
on problem with these properties	
<div><input checked="" type="radio"/> Match ANY of the below <input type="radio"/> Match ALL of the below</div> <div><div><div>⊖</div><div>⋮</div><div>Select Condition</div><div>▼</div></div></div> <div><div>⊕</div> Add new condition</div>	
perform these actions <div><div>Associated tickets</div><div>▼</div></div>	
<div><div><div>⊖</div><div>⋮</div><div>Set Status as</div><div>▼</div></div><div>Closed</div><div>▼</div></div> <div><div>⊕</div> Add new action</div>	

Changes:

- **Close all the associated problems** when a change is closed.

Module	Change
Rule Name *	<input type="text" value="Close all the associated problems - Sample Change Observer rule"/>
Description	<input type="text" value="When a Change is closed, this rule will be triggered and it will close all the associated problems."/>
When Any of these events occur	
<div><div><div>⊖</div><div>⋮</div><div>Status is changed</div><div>▼</div></div><div>From</div><div><div>Any Status</div><div>▼</div></div><div>To</div><div><div>Closed</div><div>▼</div></div></div> <div><div>⊕</div> Add new event</div>	
on change with these properties	
<div><input checked="" type="radio"/> Match ANY of the below <input type="radio"/> Match ALL of the below</div> <div><div><div>⊖</div><div>⋮</div><div>Select Condition</div><div>▼</div></div></div> <div><div>⊕</div> Add new condition</div>	
perform these actions <div><div>Associated probl...</div><div>▼</div></div>	
<div><div><div>⊖</div><div>⋮</div><div>Set Status as</div><div>▼</div></div><div>Closed</div><div>▼</div></div> <div><div>⊕</div> Add new action</div>	

Releases:

- **Close all the associated changes** when a release is completed.

Module	Release
Rule Name *	<input type="text" value="Close all the associated changes - Sample Release Observer rule"/>
Description	<input type="text" value="When a Release is closed, this rule will be triggered and it will close all the associated changes."/>
When Any of these events occur	
<div><div><div>⊖</div><div>⋮</div><div>Status is changed</div><div>▼</div></div><div>From</div><div><div>Any Status</div><div>▼</div></div><div>To</div><div><div>Completed</div><div>▼</div></div></div> <div><div>⊕</div> Add new event</div>	
on release with these properties	
<div><input checked="" type="radio"/> Match ANY of the below <input type="radio"/> Match ALL of the below</div> <div><div><div>⊖</div><div>⋮</div><div>Select Condition</div><div>▼</div></div></div> <div><div>⊕</div> Add new condition</div>	
perform these actions <div><div>Associated changes</div><div>▼</div></div>	
<div><div><div>⊖</div><div>⋮</div><div>Set Status as</div><div>▼</div></div><div>Closed</div><div>▼</div></div> <div><div>⊕</div> Add new action</div>	

Scenario Automations

What exactly it does:

Scenario Automations let you carry out a bunch of pre-set updates to a ticket with a *single click*.

Especially helpful for automating tasks like:

Recurring scenarios where you have to carry out the same series of tasks every time.

Some examples:

- **Send Known Error Notification:** When you encounter a known error, you can set up a scenario automation that sets the ticket status as resolved and notifies the requester.

Edit Scenario

Scenario Label

Known error notification

Description

Known error notification

Actions

Perform these actions

Send Email to Reque...

Subject

Ticket {{ticket.id}} Resolved

Insert Placeholder »

Body

Hi {{ticket.requester.name}},

Your ticket {{ticket.id}} {{ticket.url}} has been resolved. If the issue comes up again, please refer to <http://acmeinc.freshservice.com/solution/articles/7036> for steps to fix it.

We're working on resolving the problem permanently. Thanks for your patience.

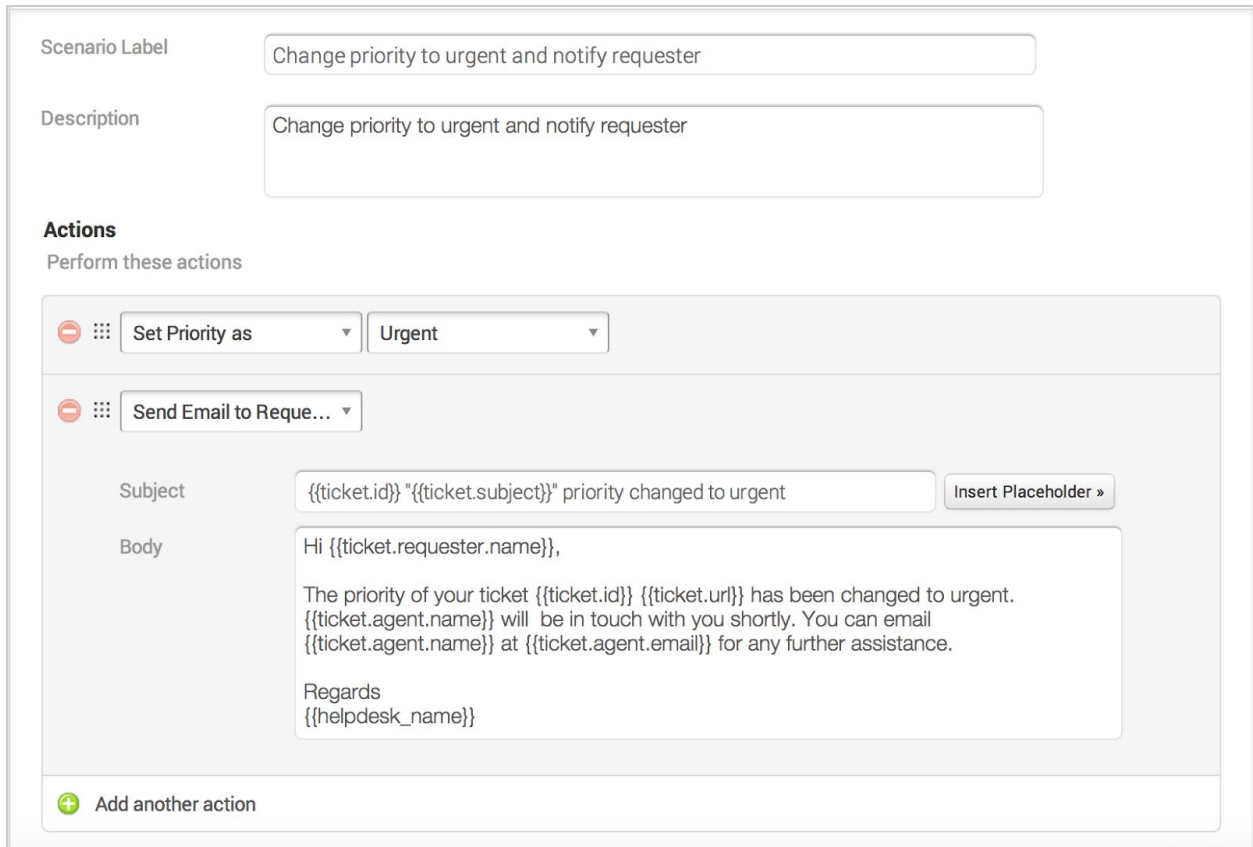
Regards,
{{ticket.agent.name}}

Set Status as

Resolved

Add another action

- **Change priority of ticket and notify requester:** In case a specific ticket needs to be resolved urgently, you can change its priority and send a notification to the requester about the change.



The screenshot shows the configuration interface for a workflow rule in Freshservice. It includes fields for 'Scenario Label' and 'Description', both containing the text 'Change priority to urgent and notify requester'. Below these is the 'Actions' section, titled 'Perform these actions'. It contains two actions: 'Set Priority as' with a dropdown set to 'Urgent', and 'Send Email to Reque...' with a dropdown. The email configuration shows a subject line using placeholders for ticket ID and subject, and a body text that includes a greeting, a notification of the priority change, and contact information for the agent. An 'Add another action' button is at the bottom.

Scenario Label: Change priority to urgent and notify requester

Description: Change priority to urgent and notify requester

Actions
Perform these actions

- Set Priority as: Urgent
- Send Email to Reque...

Subject: {{ticket.id}} "{{ticket.subject}}" priority changed to urgent

Body: Hi {{ticket.requester.name}},
The priority of your ticket {{ticket.id}} {{ticket.url}} has been changed to urgent.
{{ticket.agent.name}} will be in touch with you shortly. You can email {{ticket.agent.name}} at {{ticket.agent.email}} for any further assistance.
Regards
{{helpdesk_name}}

+ Add another action

We're just scratching the surface here. There's a ton of other tasks and workflows that you can automate using one (or a combination) of these rules. Here are [some videos](#) you might find helpful.

Go on. Explore these features for yourself and leave all the boring work to them.

For other questions and clarifications, please contact support@freshservice.com.