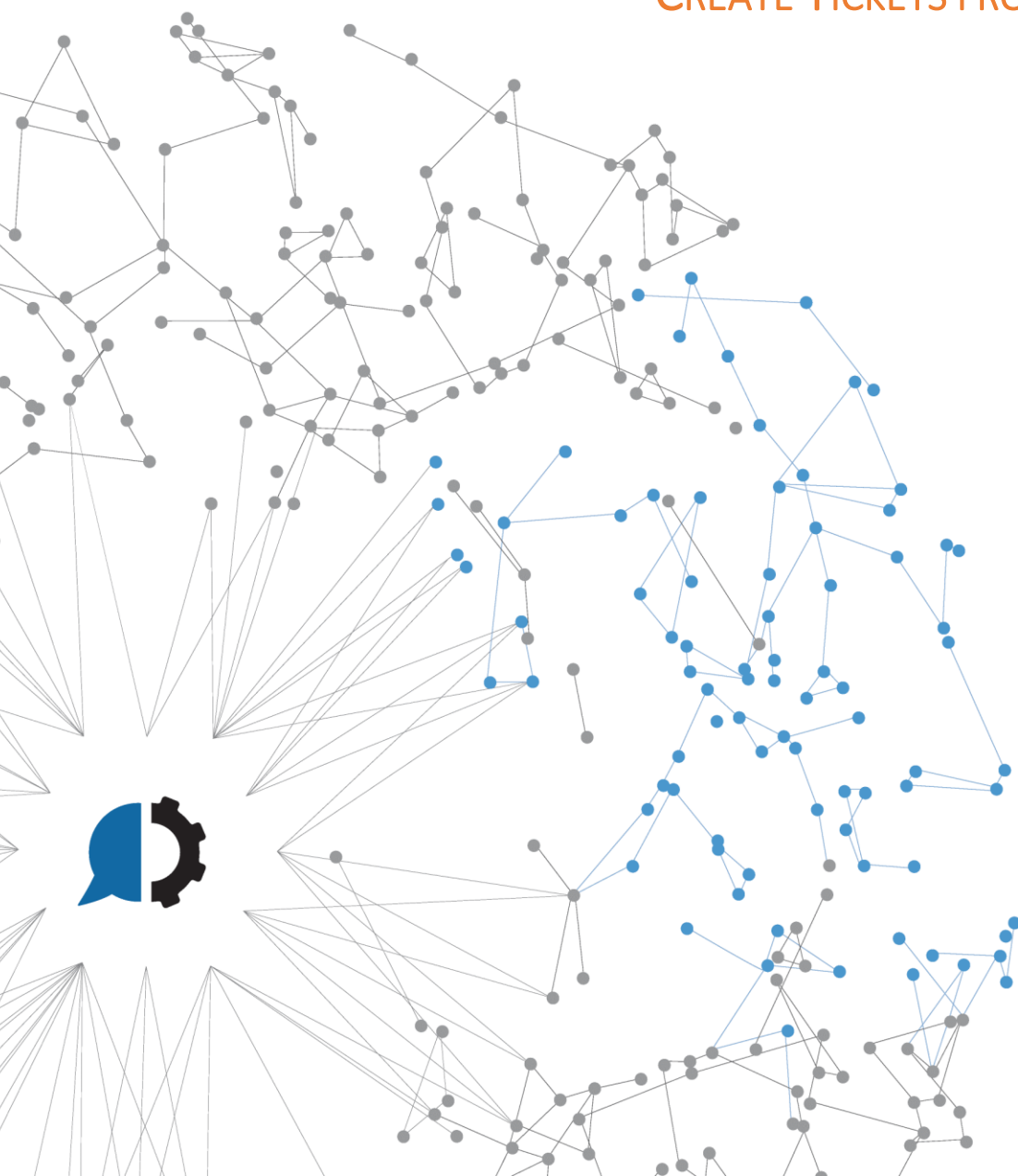




FRESHDESK BOT

CREATE TICKETS FROM EXCEL INPUT





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OVERVIEW

This how to guide introduces the *Freshdesk Bot - Create Tickets from Excel INPUT*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. Automate can take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being automated are reports generation, file movement, data import and export, and scheduling batch processing.

The ***Freshdesk Bot - Create Tickets from Excel INPUT*** is based in the Freshdesk REST API. It creates Tickets in Freshdesk by executing the “***tickets***” HTTP method and update the Input Excel file with the result of the execution. This bot uses an API key authentication method to avoid using username and password. Check carefully the [PREREQUISITES](#) and the [HOW TO GENERATE THE INPUT FILE](#) sections to get detailed information.



PREREQUISITES

- **Automate:** The Freshdesk bot depends on Automate software in order to work. The minimal supported versions are:
 - [Automate Ultimate 11.2](#)
 - [Automate Plus 11.2](#)
 - [Automate Desktop 11.2](#)
- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps of our Freshdesk bot task
- **Freshdesk:** Our minimal requirements are
 - **Freshdesk Agent account with proper permissions:** In order to be able to create, update, and list Freshdesk tickets from an Automate bot, you will need to create a new account or use an existing one with the necessary Roles and Scope. You can get further information in the next Freshdesk [link](#). To verify this configuration within Freshdesk go to Admin > Agents (in the general settings section) > select the Agent account that was created or assigned. If you don't have an administration role, you can ask your Freshdesk administrator. Here's an image that shows the necessary Roles and Scope:

Roles and Scope
You will only be able to view your roles and scope, not edit them.

Ticket Scope	<ul style="list-style-type: none">• Global Access Can view all Tickets in the Helpdesk
Agent Role	<ul style="list-style-type: none">• Agent Can log, view, reply, update and resolve tickets and manage contacts.

- **Freshdesk API Key:** The API key will be associated to the agent account that was assigned for the bot executions. You can find it in Freshdesk by login with the assigned account, then clicking on the profile picture on the top right and select 'Profile Settings'. There you will find something like:

Your API Key

76pL71SOIQJYE2lwSU1a

Reset API Key

You can find more information on how to find your API key in this Freshdesk [link](#).



- [Freshdesk API Version](#): This bot was created using the API v2.
- [Automate constants to be create to set the Freshdesk connection values](#):
 - [const_FreshdeskDomainName](#): The Freshdesk URL for your domain (Provided by Freshdesk).
 - Example: *https://YourDomainName.freshdesk.com*
 - [const_FreshdeskApiKey](#): Freshdesk API Key to execute the connection/request with.

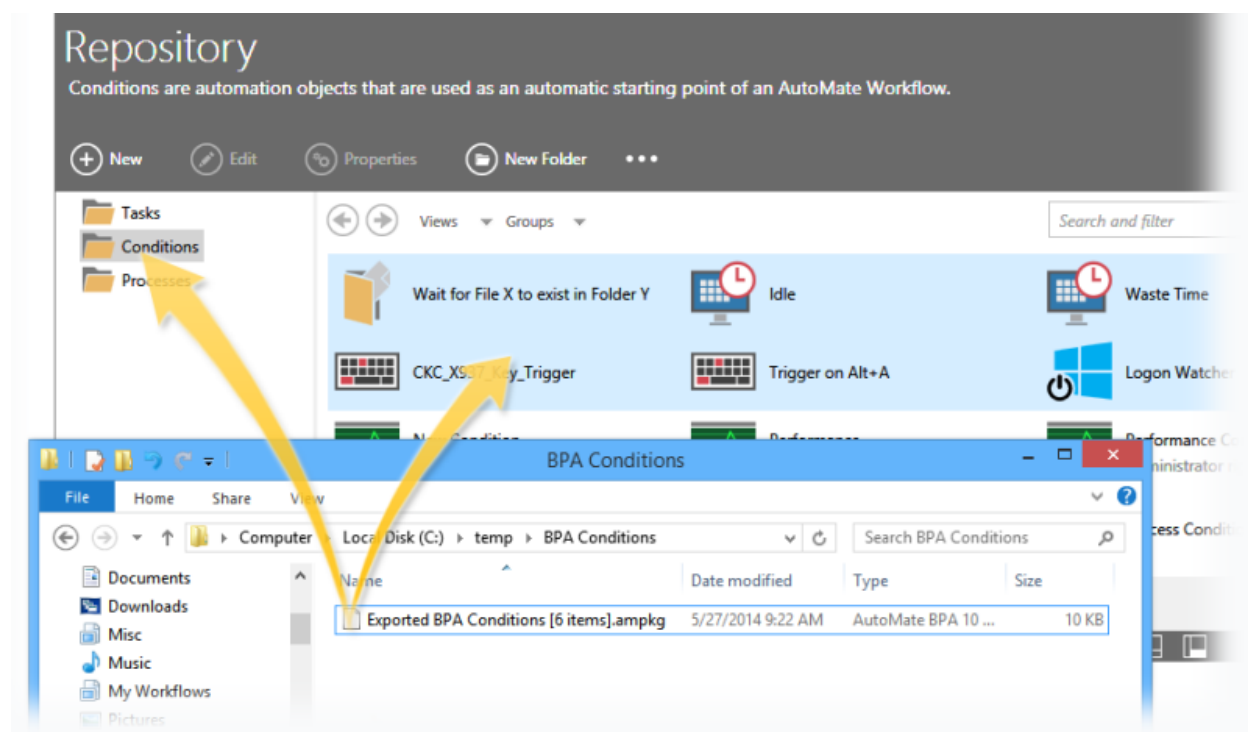


HOW TO IMPORT AN AUTOMATE TASK

Compatible file types can be imported to the repository via drag-and-drop

From the [Server Management Console](#), navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the [SMC](#). Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.





HOW TO GENERATE THE INPUT FILE

The input file “**Freshdesk Create Tickets INPUT.xlsx**” shipped with the Freshdesk bot provides a self-explanatory guide to complete all the fields in your transaction automatically.

The Freshdesk create Ticket screen:

The Excel INPUT file

	A	B	C	D	E	F	G	H
1	Freshdesk Ticket Fields							
2	Subject	Description	Email (Email address of the requester)	Priority Possible values are: 1 (Low), 2 (Medium), 3 (High) and 4 (Urgent)	Status Possible values are: 2 (Open), 3 (Pending), 4 (Resolved) and 5 (Closed)	Type Possible values are: Question, Incident, Problem, Feature Request, Refund and Request.	Source Possible values are: 1 (Email), 2 (Portal), 3 (Phone), 7 (Chat), 8 (Mobihelp), 9 (Feedback Widget) and 10 (Outbound Email)	Tag Only one is supported

I	J	K
Created?	Result Details	
Yes/No	Date	Ticket ID / Result Message

NOTES:

- **Red fields** are mandatory.
- The field **Email** will be the corresponding email for the **contact** of the ticket (must be an existing contact).
- Columns I to K in the INPUT file will be filled with the result of the execution and the Ticket ID. See [APPENDIX A](#) for an example on the resulting.

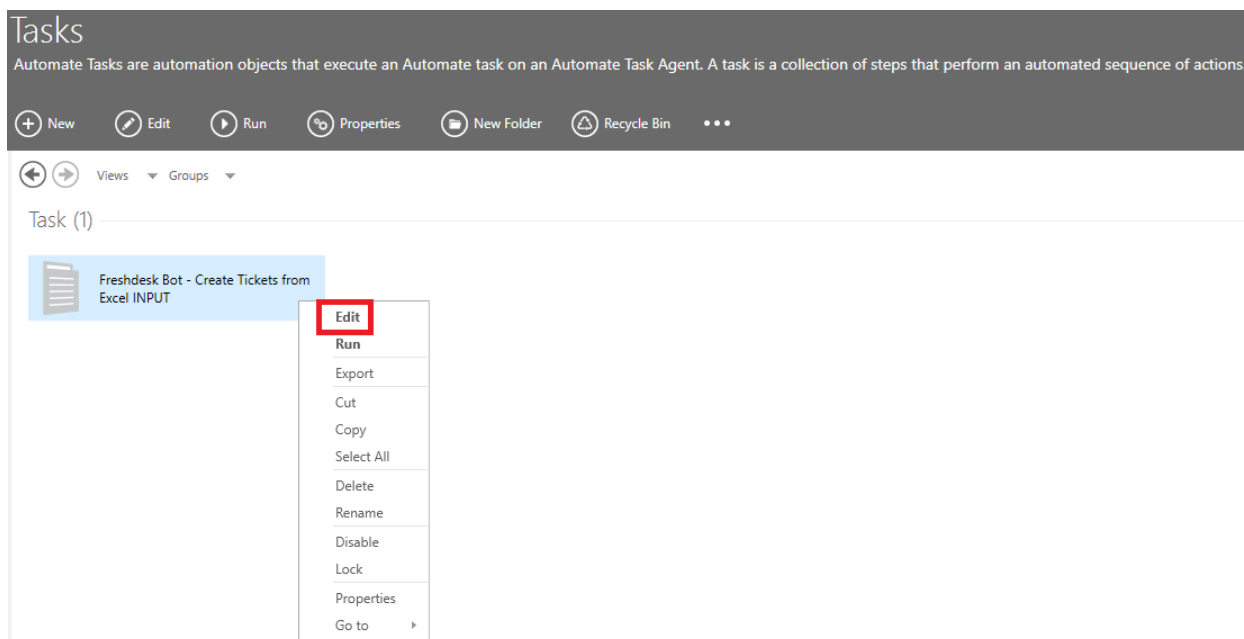


HOW TO EXECUTE THE FRESHDESK BOT - CREATE TICKETS FROM EXCEL INPUT

If this is the first time running this task, we will need to set some parameters

Open the [Server Management Console](#) and locate the imported task

Edit the imported task by right clicking on the task and selecting [edit](#)



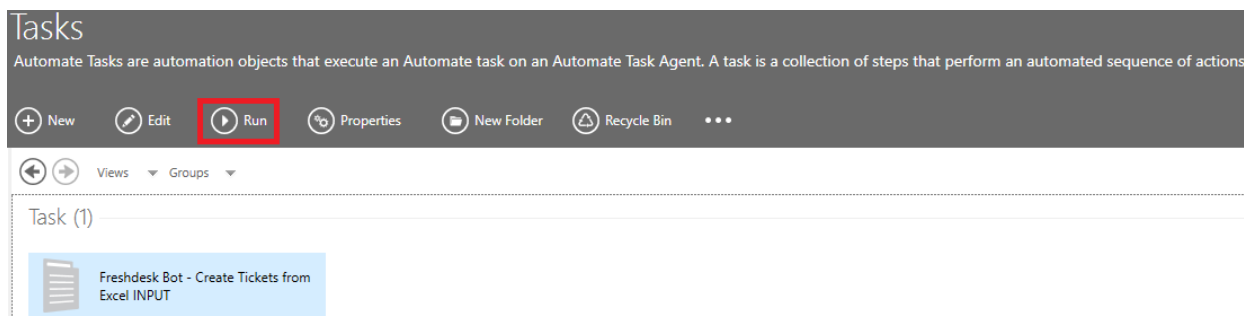
From [step 2](#) edit the next variables according to you desired output:

- [var_ExcelInputFile](#): The complete path and filename of the Freshdesk Create Tickets INPUT.xlsx.
Example: ***"D:\Automate\Freshdesk Create Tickets INPUT.xlsx"***

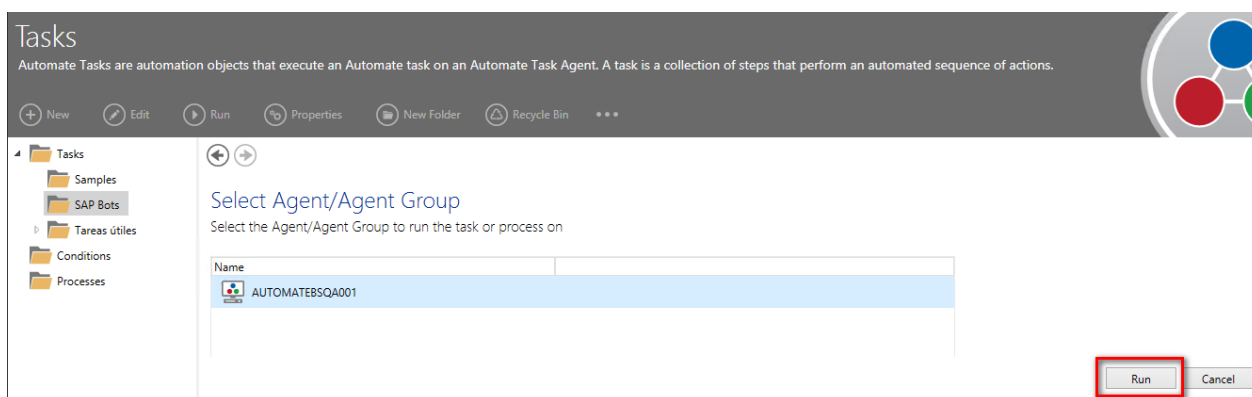
[Save and close](#) the task



Select the task and click on [Run](#)



Select your [Agent](#) and click on [Run](#) again





APPENDIX A – FRESHDESK TICKETS VIEW AND EXCEL OUTPUT EXAMPLE

INPUT Excel file with results:

	A	B	C	D	E	F	G	H
1	Freshdesk Ticket Fields							
2	Subject	Description	Email (Email address of the requester)	Priority Possible values are: 1 (Low), 2 (Medium), 3 (High) and 4 (Urgent)	Status Possible values are: 2 (Open), 3 (Pending), 4 (Resolved) and 5 (Closed)	Type Possible values are: Question, Incident, Problem, Feature Request, Refund and Request.	Source Possible values are: 1 (Email), 2 (Portal), 3 (Phone), 7 (Chat), 8 (Mobihelp), 9 (Feedback Widget) and 10 (Outbound Email)	Tag Only one is supported
3	Automate ticket 1	This ticket was created by AutoMate	automatebot@freshdesk.com	1	2	Question	2	Automate Bot
4	Automate ticket 2	This ticket was created by AutoMate	automatebot@freshdesk.com	2	2	Request	2	Automate Bot
5	Automate ticket 3	This ticket was created by AutoMate	automatebot@freshdesk.com	3	2	Incident	2	Automate Bot

I	J	K
Created?	Result Details	
Yes/No	Date	Ticket ID / Result Message
YES	05/05/2020 11:28:53 AM	23
YES	05/05/2020 11:28:55 AM	24
YES	05/05/2020 11:28:57 AM	25

Note that the execution result is written from column I to K. Column K will have the internal ID of the Ticket created in Freshdesk.

Freshdesk Tickets view result:

All tickets

Explore your plan

Sort by: Date created

Layout: Card view

New Automate Bot

Automate ticket 3 #34

Automate Bot • Created 3 minutes ago • First response due in 4 hours

High

--/--

Open

New Automate Bot

Automate ticket 2 #33

Automate Bot • Created 3 minutes ago • First response due in 8 hours

Medium

--/--

Open

New Automate Bot

Automate ticket 1 #32

Automate Bot • Created 3 minutes ago • First response due in a day

Low

--/--

Open



APPENDIX B - TROUBLESHOOTING

- Logs: Each iteration of our BOT creates a Log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *Freshdesk Bot - Create Tickets from Excel INPUT*.



About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and AutoMate processes, encrypt and secure data, and provide easy access to the information people