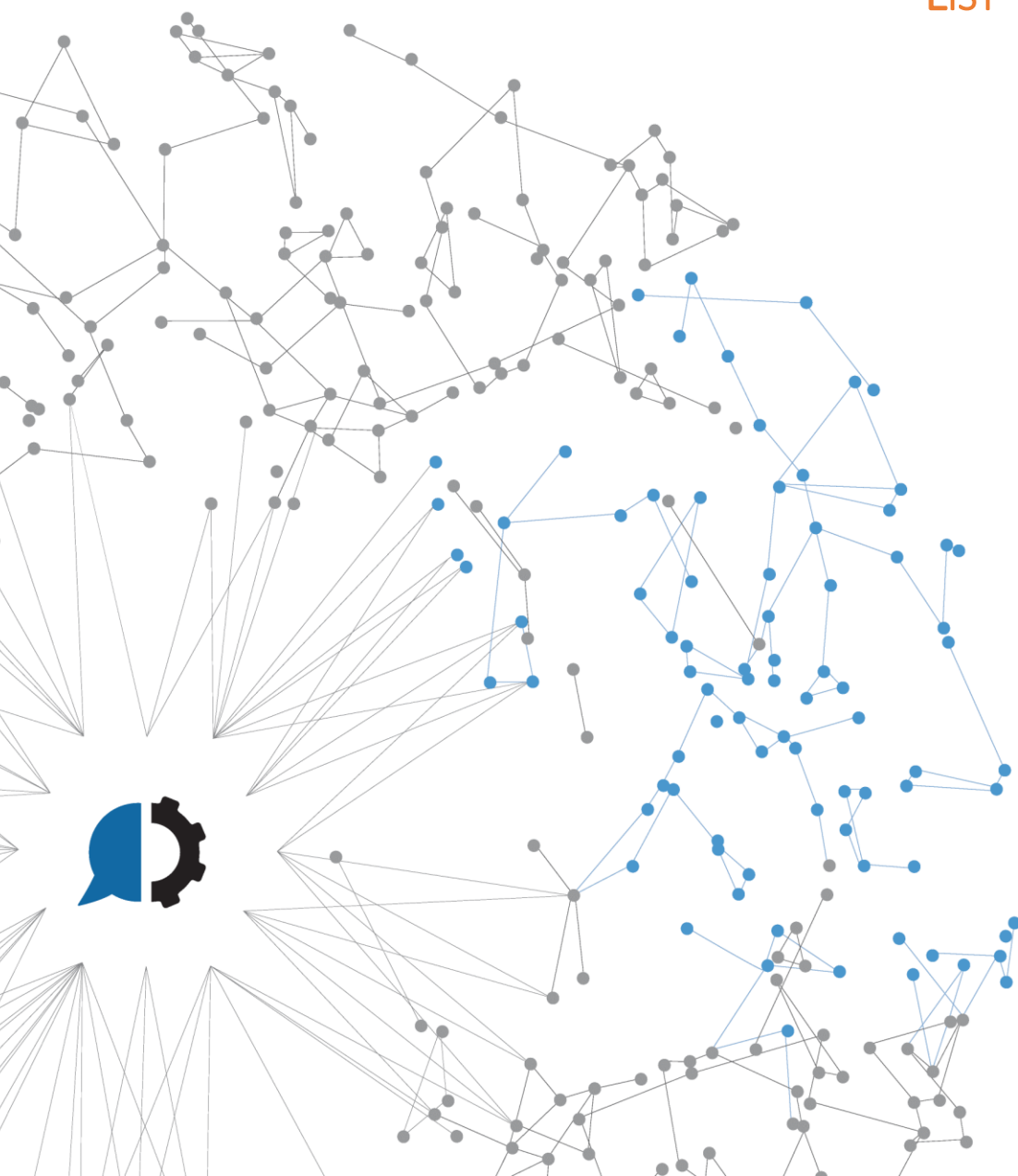




FRESHDESK BOT

LIST TICKETS TO EXCEL





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OVERVIEW

This how to guide introduces the *Freshdesk Bot - List Tickets to Excel*. 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 - List Tickets to Excel*** is based in the Freshdesk REST API. It lists Tickets in Freshdesk by executing the “***search tickets***” HTTP method and creates an Excel file with the resulting list in the task folder. This bot uses an API key authentication method to avoid using username and password. Check carefully the [PREREQUISITES](#) and the [HOW TO EXECUTE THE FRESHDESK BOT - LIST TICKETS TO EXCEL](#) 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, ask your Freshdesk administrator to help. 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	• Global Access Can view all Tickets in the Helpdesk
Agent Role	• Agent Can log, view, reply, update and resolve tickets and manage contacts.

- **Freshdesk API Key:** The API key will be associated with the agent account that was assigned for the bot executions. You can find it in Freshdesk by logging in 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 created 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.

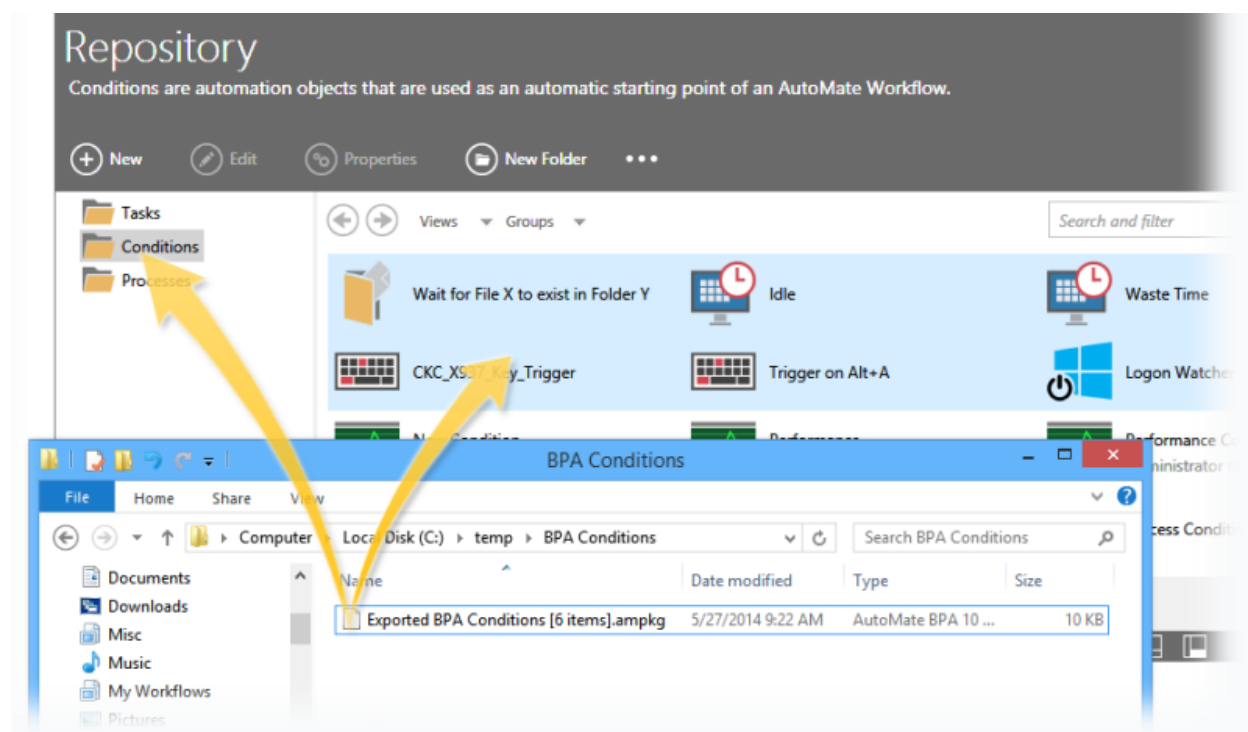


HOW TO IMPORT AN AUTOMATE TASK

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.



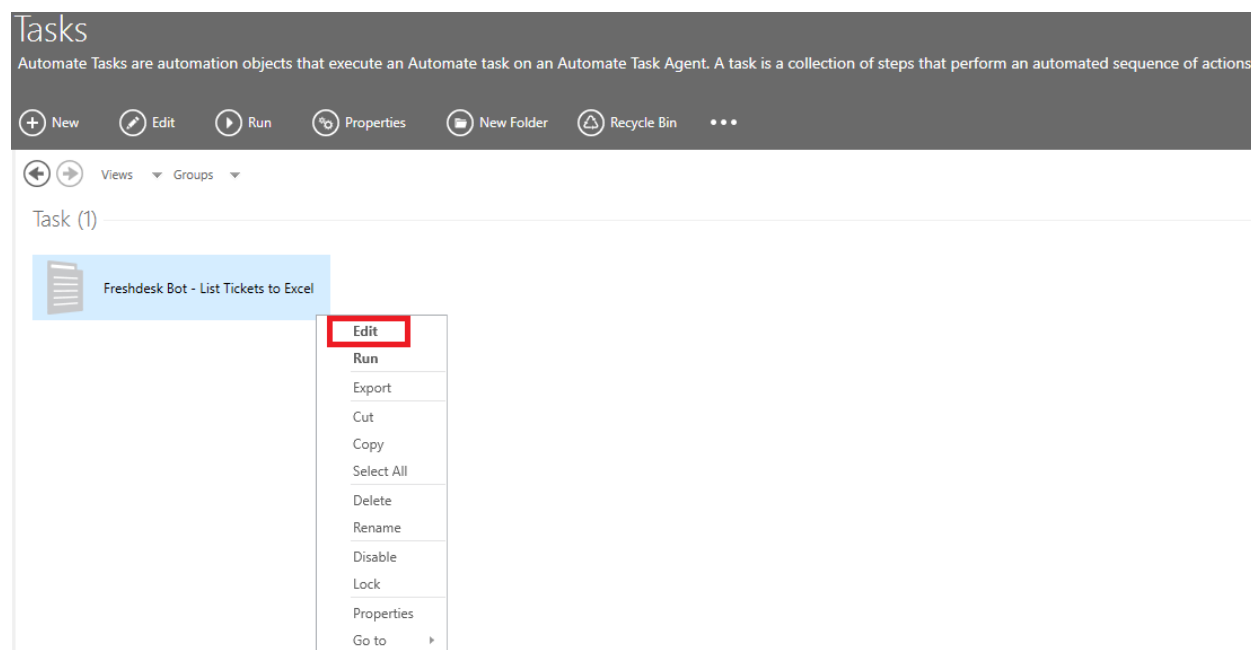


HOW TO EXECUTE THE FRESHDESK BOT - LIST TICKETS TO EXCEL

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_AlertStatus](#)**: Set a particular Status for the tickets that you want to retrieve or leave it in blank for all. Possible values include 2 (Open), 3 (Pending), 4 (Resolved) and 5 (Closed). Note: use the numbers.
- **[var_FromDaysBefore](#)**: From ticket created date. Number of back days to calculate the FROM date for list generation.

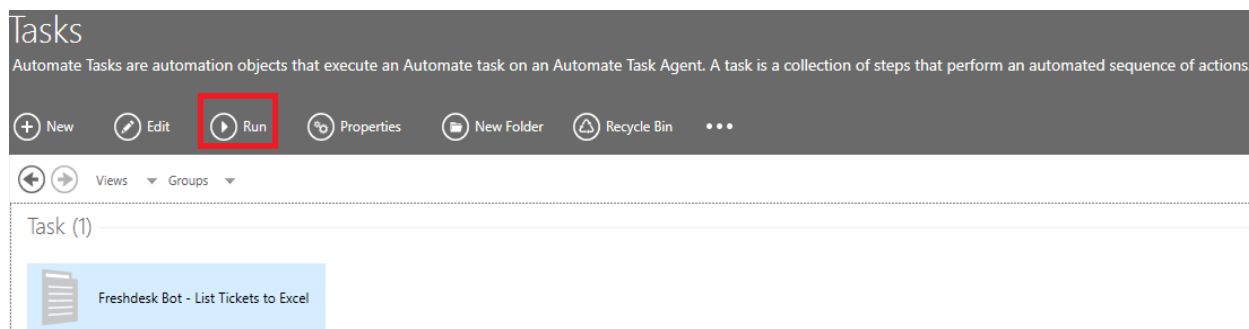
The output file will be automatically generated in the task folder with the next fields:

id, type, description_text, subject, priority, status, source, is_escalated, spam, requester_id, created_at, updated_at and associated_tickets_count.

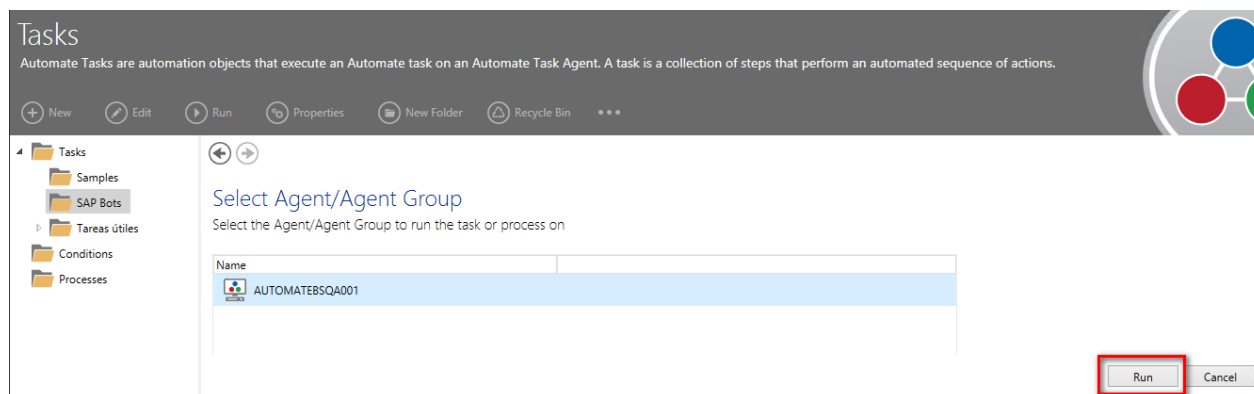
[Save and close](#) the task



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



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





APPENDIX A – FRESHDESK TICKETS VIEW AND EXCEL RESULT EXAMPLE

Freshdesk Tickets view:

☰ All tickets Explore your plan +

Sort by: Date created ▾ Layout: Card view ▾

☐

New Automate Bot

A

Automate ticket 3 #34

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

High ▾
--/-- ▾
Open ▾

☐

New Automate Bot

A

Automate ticket 2 #33

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

Medium ▾
--/-- ▾
Open ▾

☐

New Automate Bot

A

Automate ticket 1 #32

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

Low ▾
--/-- ▾
Open ▾

Excel file with results:

A	B	C	D	E	F	G	H	I	J	K	L	M
id	type	description_text	subject	priority	status	source	is_escalated	spam	requester_id	created_at	updated_at	associated_tickets_count
25	Incident	This ticket was created by AutoMate	Automate ticket 3	3	5	2	False	False	43072885289	2020-05-05T14:28:56Z	2020-05-05T16:18:10Z	
24	Request	This ticket was created by AutoMate	Automate ticket 2	2	2	2	False	False	43072885289	2020-05-05T14:28:54Z	2020-05-05T14:28:54Z	
23	Question	This ticket was created by AutoMate	Automate ticket 1	1	2	2	False	False	43072885289	2020-05-05T14:28:51Z	2020-05-05T14:28:51Z	

Freshdesk_tickets_05052020_132803.xlsx

File naming pattern:

Freshdesk_tickets_

Base Name

05052020

Represents the date of execution (ddMMyyyy)

132803

Represents the time of execution (Hmss)

Note: The output file will be created in the task folder: C:\Automate\Tasks\<<TASK NAME>>.



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 - List Tickets to Excel*.



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