

# FRESHCONNECT APP

Connect Salesforce with Freshdesk

## USER MANUAL

ASTREA IT SERVICES

C 52, SEC 65 Noida, U.P 201301

[www.astreait.com](http://www.astreait.com)

# FreshConnect

## App Overview:

FreshConnect is a Salesforce Application. This app is useful to integrate Salesforce with Freshdesk.

The app is providing bi-directional Sync functionality between Salesforce and Freshdesk.


User can perform operations like **“Create Ticket”**, **“Update Ticket”**, **“View Ticket(s) Reply”**, **“Create Reply”** and **“Create Private Note”** for any Contact record(s) of Salesforce using this app.

## Features:

1. Create Ticket(s) from Salesforce into Freshdesk.
2. Update Ticket(s) from Salesforce into Freshdesk.
3. Create Reply from Salesforce into Freshdesk.
4. Create private Note from Salesforce into Freshdesk.
5. View All Ticket(s) from Freshdesk in Salesforce.
6. View Ticket Replies from Freshdesk to Salesforce for a particular ticket.


# FreshConnect App Homepage

Home Accounts Contacts Freshdesk Configuration Freshdesk Tickets RemoteAuths List All Tickets **FreshConnect** +



## FreshConnect App

An Exclusive Integration App, Connect Salesforce with Freshdesk



-Sync Freshdesk Tickets with Salesforce -Support two way Sync -Easy Navigation for Integration

Astrea IT Services

FreshConnect is a Salesforce Application. This app is useful to connect Salesforce with Freshdesk and Freshdesk with Salesforce. It supports point and click graphical user interface which is easy and simple to use.

This app is providing bidirectional sync functionality i.e. Salesforce to Freshdesk and Freshdesk to Salesforce.

User can perform the following operation like Create Ticket, Update Ticket, View Ticket(s) Reply, Create Reply, Create Private Note for any Contact record(s) of Salesforce.

**Required Settings**

1. Goto **Setup > in Administer > Security Controls > Remote Site Settings** and add Freshdesk URL (eg : <https://domainname.freshdesk.com>)
2. Before creating OR fetching tickets from Freshdesk, Please ensure that there should be valid email id on contact record.

**Instructions :**  
Before Using the Freshdesk API Please Follow the below Steps :

1. User need to Authorize with Freshdesk Before Using Freshdesk API.
2. To Authorize Freshdesk, goto Freshdesk Configuration Tab.
3. Enter Freshdesk URL, API Key and then Click on Authorize button.
4. For Detailed Information about API Key/Freshdesk URL. Please refer User Manual.

## 1. CONFIGURATION SETTINGS

### i) ADMIN SETTING

Since this app uses Freshdesk URL and API Key for performing operation so user needs to add his/her Freshdesk Base URL in **Remote Site Settings**. Follow the below steps to add Remote Site Settings.

Steps:

1. Goto **Setup** > in **Administer** > **Security Controls** > **Remote Site Settings**.
2. Add Freshdesk URL (eg :- <https://domainname.freshdesk.com>).

Sample:-

#### Remote Site Details

[← Back to List: Remote Site Settings](#)

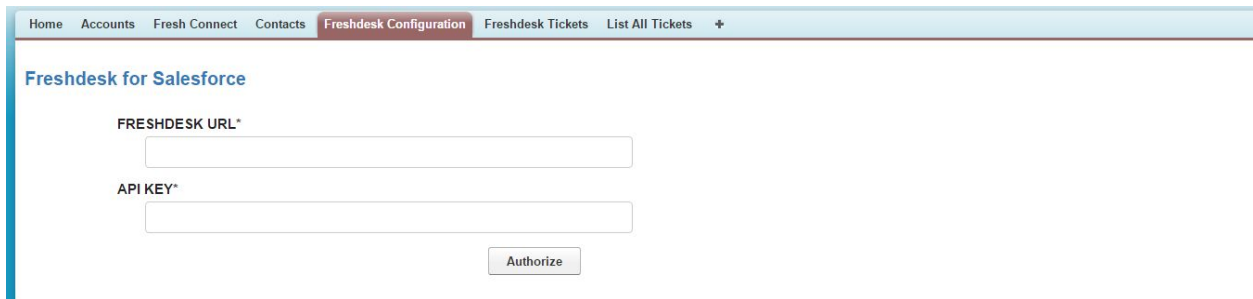
<b>Remote Site Detail</b>		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>	Your freshdesk Domain for e.g. <a href="https://astrea.freshdesk.com">https://astrea.freshdesk.com</a>
Remote Site Name	Freshdesk_API		Modified By <a href="#">Sunil Sharma</a> , 7/5/2016 12:26 AM
Namespace Prefix	tast		
Remote Site URL	<a href="https://domainname.freshdesk.com">https://domainname.freshdesk.com</a>		
Disable Protocol Security	<input type="checkbox"/>		
Description			
Active	<input checked="" type="checkbox"/>		
Created By	<a href="#">Sunil Sharma</a> , 7/5/2016 12:26 AM	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>	

### ii) END USER Configuration

User needs to create the Contact in Salesforce, and ensure that email provided to the contact record is a valid email. An Email will be send to this contact email address when a new ticket will be created from

Salesforce into Freshdesk for first time and email will also save into freshdesk account .

### iii) Freshdesk Configuration



Home Accounts Fresh Connect Contacts Freshdesk Configuration Freshdesk Tickets List All Tickets +

Freshdesk for Salesforce

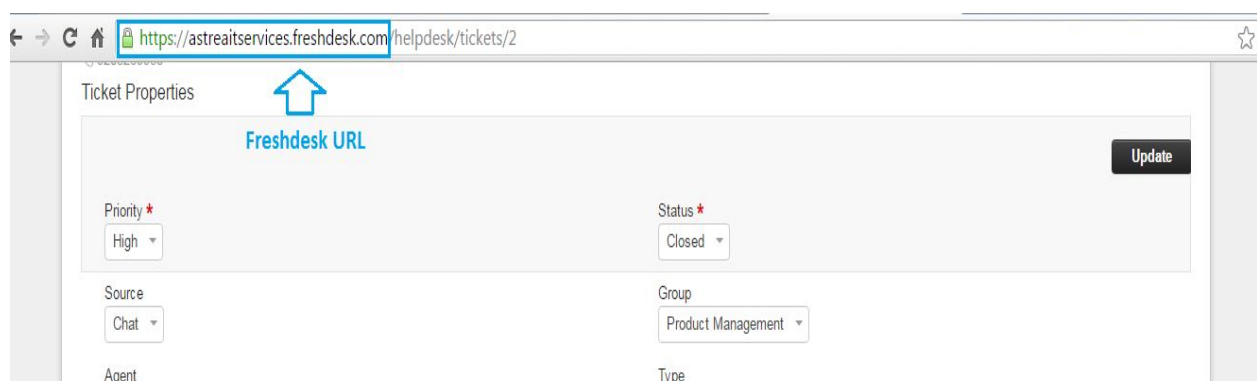
FRESHDESK URL\*

API KEY\*

Authorize

User needs to Authenticate with Freshdesk from Salesforce before using Freshdesk, for this User needs to enter valid **Freshdesk URL** and **API Key**. If Freshdesk URL and API Key is valid then both values will be saved in custom object "**RemoteAuth**" of Salesforce and will be redirect to the contact list view page otherwise it will show error message returned by the API.

- To find your Freshdesk URL, please refer to Screenshot below:



← → ↻ 🏠 <https://astreatservices.freshdesk.com/helpdesk/tickets/2> ☆

Ticket Properties

Freshdesk URL

Update

Priority \*  
High ▾

Status \*  
Closed ▾

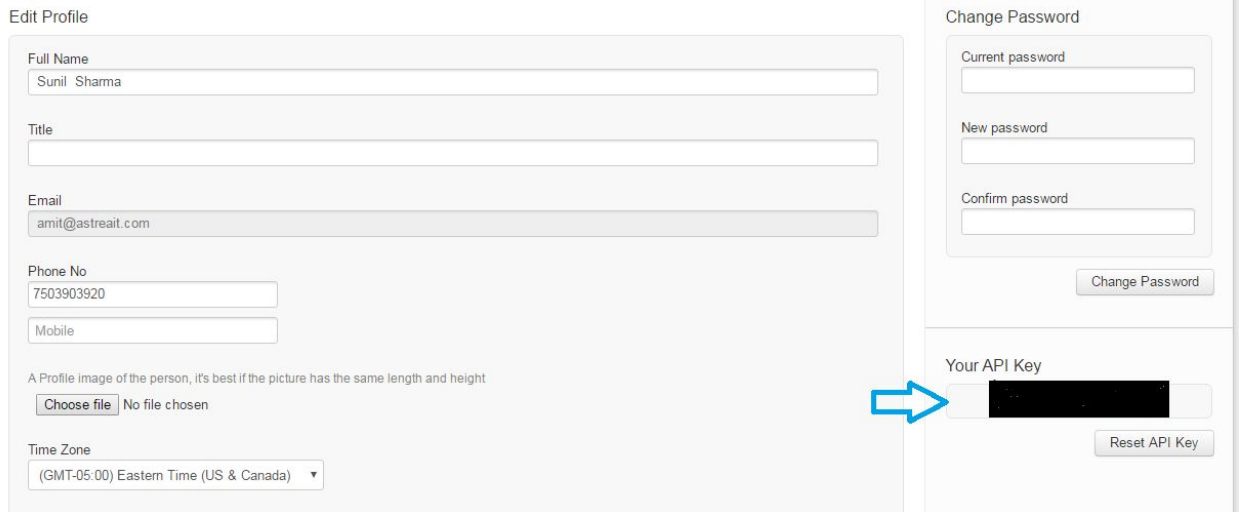
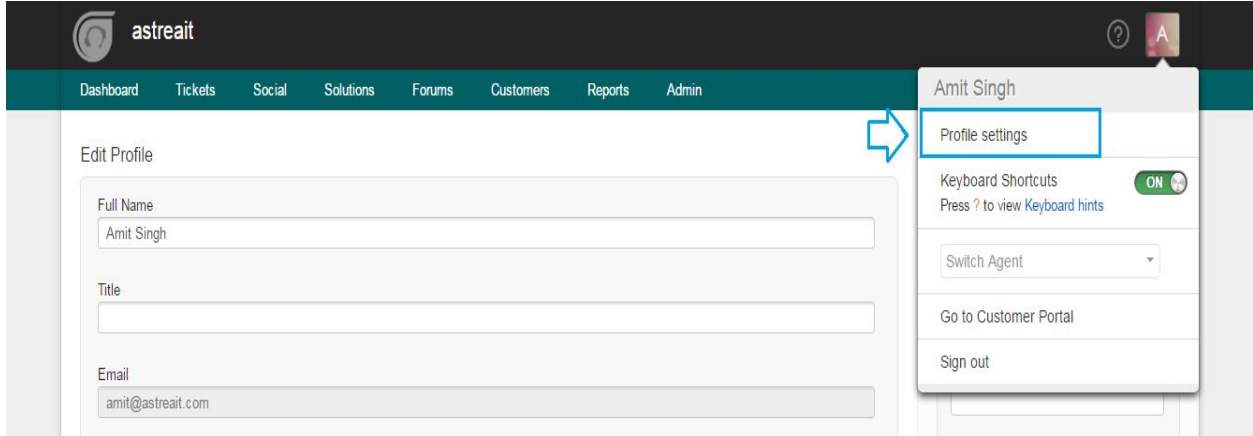
Source  
Chat ▾

Group  
Product Management ▾

Agent

Type

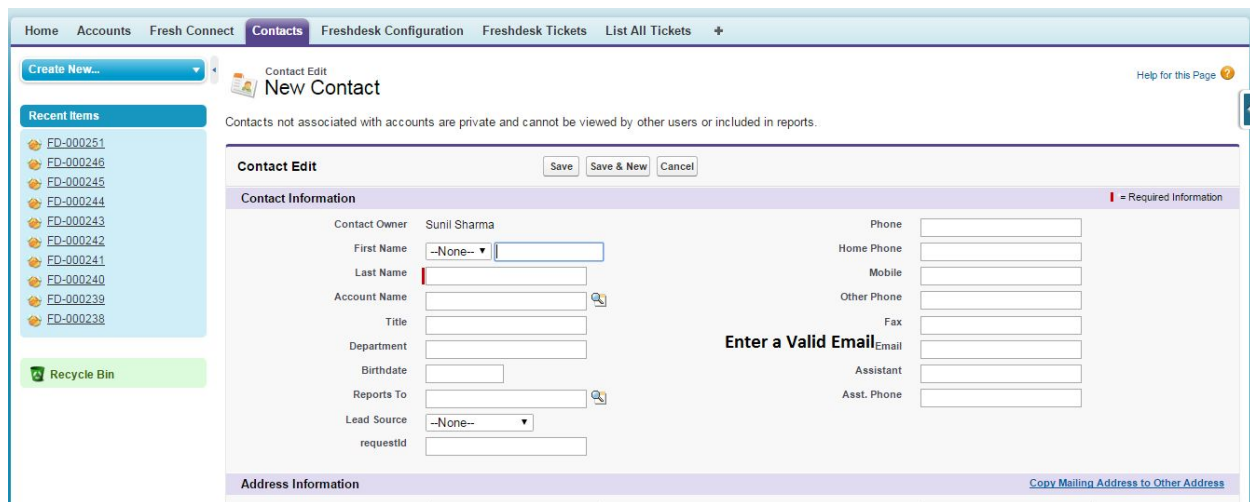
- To find API key go to Profile Setting in Freshdesk and note the API key :



## 2. Freshdesk Functionality

### Steps to be followed and Navigation Screenshots

i) User needs to create the contact in Salesforce, and ensure that email provided to the contact record is a valid email as this email id will be used in Freshdesk for creating and fetching the tickets.



The screenshot shows the 'New Contact' form in the Salesforce interface. The navigation bar at the top includes 'Home', 'Accounts', 'Fresh Connect', 'Contacts', 'Freshdesk Configuration', 'Freshdesk Tickets', and 'List All Tickets'. The left sidebar contains a 'Recent Items' list with ticket IDs (e.g., FD-000251) and a 'Recycle Bin' button. The main form area is titled 'New Contact' and includes a 'Contact Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Contact Information' section contains fields for 'Contact Owner' (Sunil Sharma), 'First Name' (with a dropdown set to '--None--'), 'Last Name', 'Account Name', 'Title', 'Department', 'Birthdate', 'Reports To', 'Lead Source' (with a dropdown set to '--None--'), and 'requestId'. On the right side, there are fields for 'Phone', 'Home Phone', 'Mobile', 'Other Phone', 'Fax', 'Email', 'Assistant', and 'Asst. Phone'. A red exclamation mark icon next to the 'Email' field is accompanied by the text 'Enter a Valid Email'. At the bottom, there is an 'Address Information' section with a 'Copy Mailing Address to Other Address' link. A note at the top of the form states: 'Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.'

ii) After Creating Contact, go to Contact Details and add “**Freshdesk Tickets**” custom button and “**requestId**” custom field to the page layout.

click to override.

**Contact Detail**

Standard Buttons: [Edit](#) [Delete](#) [Clone](#) [Change Owner](#) [Sharing](#) [Request Update](#) [Send an Email](#) [Check Clean Status](#) [Freshdesk Tickets](#)

Custom Buttons: [Freshdesk Tickets](#)

|| Contact Information (Header visible on edit only)

Contact Owner	<a href="#">Sample User</a>	requestId	Sample requestId	←
Name	Sarah Sample	Phone	1-415-555-1212	
Account Name	<a href="#">Sample Account</a>	Home Phone	1-415-555-1212	
Title	Sample Title	Mobile	1-415-555-1212	
Department	Sample Department	Other Phone	1-415-555-1212	
Birthdate	7/28/2016	Fax	1-415-555-1212	
Reports To	<a href="#">Sample Contact</a>	Email	sarah.sample@company.com	
Lead Source	Sample Lead Source	Assistant	Sample Assistant	
		Asst. Phone	1-415-555-1212	

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|| Address Information (Header visible on edit only)

Mailing Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Other Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
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|| Additional Information (Header visible on edit only)

Languages	Sample Languages	Level	Sample Level
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iii) Click **“FreshDesk Ticket”** button to perform intended operation in Freshdesk.

Home Accounts Fresh Connect **Contacts** Freshdesk Configuration Freshdesk Tickets List All Tickets +

Freshdesk Action

**Perform Operation**

[Create New Ticket](#) [Get All Ticket](#)

iv) To create a new Ticket, Click on **“Create New Ticket”** button and enter all the valid details then click on **“Submit”** button. If all the details are valid and ticket is created in freshdesk then it will redirect to **“FreshdeskAction”** visualforce page otherwise error message will show on the page.












## Create New Ticket

**Email\***

**Subject\***

**Description\***

← → **B** *I* U **S**         

**Type**

**Status**

**Priority**

**Source**

**Agent**

**Group**

v) To View all tickets related to the contact, click on **“Get All Ticket”** button in Salesforce. After clicking on the button, the details of all tickets will show on the visualforce page which is related to the contact.

**Freshdesk Action**

### Perform Operation

OverDue Ticket(s)

[Create New Ticket](#) [Get All Ticket](#)

Ticket(s) Related to Contact : Sunil Sharma

	Subject	Status	Priority	Type	Description	Agent Name	Created Date	Response Date	Due Date
<a href="#">Create Reply</a> <a href="#">Create Note</a>	Testing 26 July	Open	Low	Question	Testing 26 July	Sunil Sharma	Tue Jul 26 09:11:57 GMT 2016	Tue Jul 26 21:18:05 GMT 2016	Thu Jul 28 21:00:00 GMT 2016
<a href="#">View Replies</a> <a href="#">Edit</a>									
<a href="#">Create Reply</a> <a href="#">Create Note</a>	Test July 26	Closed	Medium	Feature Request	Test July 26	Amit Singh	Tue Jul 26 06:58:59 GMT 2016	Tue Jul 26 09:11:27 GMT 2016	Tue Jul 26 21:00:00 GMT 2016
<a href="#">View Replies</a> <a href="#">Edit</a>									
<a href="#">Create Reply</a> <a href="#">Create Note</a>	Create Ticket Test	Open	Low	Question	This is test	Aishwarya Kumar	Thu Jul 14 07:52:12 GMT 2016	Mon Jul 18 21:01:39 GMT 2016	Mon Jul 18 21:00:00 GMT 2016
<a href="#">View Replies</a> <a href="#">Edit</a>									
<a href="#">Create Reply</a> <a href="#">Create Note</a>	Agent Test	Closed	Medium	Feature Request	This is Sample Ticket	Sunil Sharma	Tue Jul 12 10:50:06 GMT 2016	Mon Jul 18 12:01:08 GMT 2016	Tue Jul 12 21:00:00 GMT 2016
<a href="#">View Replies</a> <a href="#">Edit</a>									

vi) To update a ticket in Freshdesk, Click on **“Edit”** button , enter updated content and click on **“submit”** button. If ticket is successfully updated in freshdesk then it will redirect to **“FreshdeskAction”** visualforce page otherwise it will show error message on the page.

## Update Ticket

Email\* ssharma@astreat.com

Subject\*

Description\*

← → **B** *I* U **S**

Testing 26 July

Status  Priority  Source  Type

vii) To Creating Reply, Click on **“Create Reply”** button for any Ticket, enter the description and click on “submit” button. If reply is successfully created in freshdesk then page will redirect to “FreshdeskAction” visualforce page otherwise error message will show on the page.

Home Accounts Fresh Connect Contacts Freshdesk Configuration **Freshdesk Tickets** List All Tickets +

### Create Reply

Subject After BootStrap

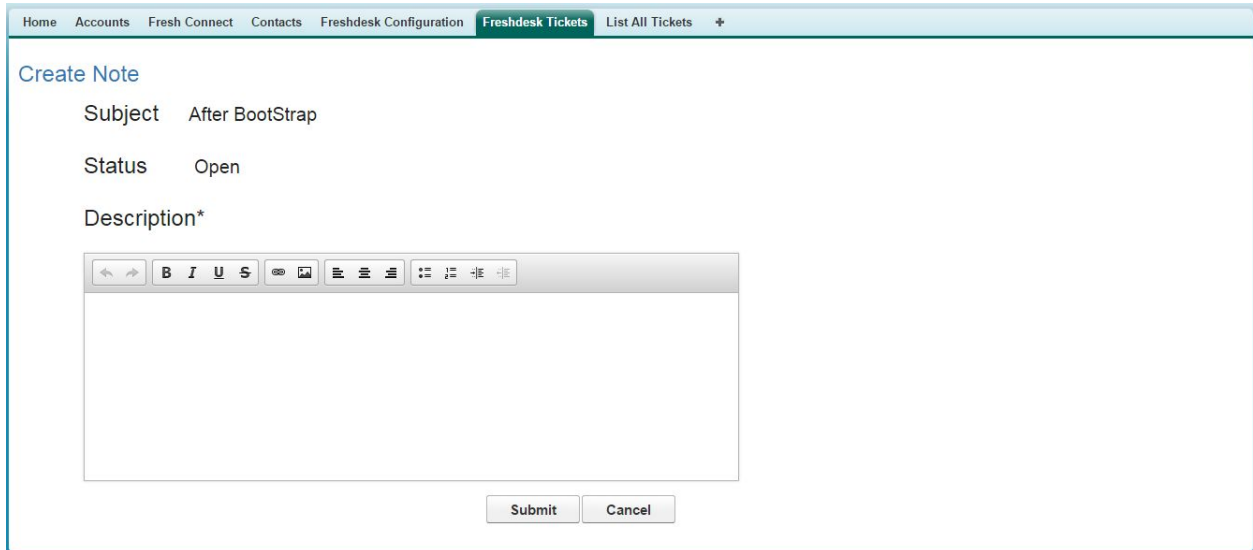
Status Open

Description\*

← → **B** *I* U **S**

viii) For creating Note, Click on **“Create Note”** button , enter the description and click on “submit” button. If note is successfully created then page will redirect to

“FreshdeskAction” visualforce page otherwise it will show error message on the page.



ix) To View replies of ticket, Click on “**View Replies**” button, all the replies related to ticket will show on the page.

Replies	Response date	Related Attachment(s)
<a href="https://www.google.co.in/?gfe_rd=cr&amp;ei=e1mPV8bBKrP98weXsYf4AQ">https://www.google.co.in/?gfe_rd=cr&amp;ei=e1mPV8bBKrP98weXsYf4AQ</a> Testing	2016-07-20T10:59:25Z	
Testing Team	2016-07-20T11:20:23Z	

x) To view the All Open Ticket Information, Click on “**List All Tickets**” Tab. Number of open tickets with contact name will show on visualforce page.

salesforce  Search Sunil Sharma Setup Help FreshConnect

Home Accounts Fresh Connect Contacts Freshdesk Configuration Freshdesk Tickets **List All Tickets** +

Contact Name	Number of Open Ticket(s)	
Geeta Garg	6	<a href="#">View Tickets</a>
Shikha Goyal	6	<a href="#">View Tickets</a>
Test Sunil	1	<a href="#">View Tickets</a>

xi) When User Clicks on **“View Tickets”** button for a particular contact, user can view more info about Open Tickets.

Assigned to	Created By
Archit Agarwal	Test Sunil