

# Freshservice

Last Modified on 06/25/2026 2:08 pm EDT

## CUSTOMER ONBOARDING · FRESHSERVICE · SETUP GUIDE

This guide walks the IT/Freshservice administrator through creating a dedicated read-only role, creating a service-account agent to host the API key, generating and verifying the key, and entering the key in the Info-Tech portal. It includes the Freshservice tables/objects that need read-only access so the administrator can complete setup without a separate access-requirements document.

### A Before you start

You will need:

- Administrator access to your Freshservice tenant
- An available Freshservice agent license for the integration account
- A service-account email address you control (e.g., `cioanalytics@yourcompany.com` )
- Access to the Info-Tech portal where the API key and Freshservice subdomain will be entered

### B Freshservice tables/objects required

The integration requires read-only API access to the following Freshservice tables/objects:

#### REQUIRED OBJECTS

- `agent`
- `business_hour`
- `conversation`
- `department`
- `group`
- `location`

#### REQUIRED OBJECTS (CONT.)

- `requester`
- `role`
- `satisfaction_rating`
- `sla_policy`
- `ticket`
- `time_entry`

No create, edit, delete, or write-back permissions are required.

**Important – Freshservice's permission model**

Freshservice grants API access through the permissions assigned to the integration agent. For this setup, only enable read/view access to the Freshservice tables/objects listed above. Do not use a personal admin account or a broad admin role.

#### STEPS IN THIS GUIDE

- 1 Create a reference-data read role
- 2 Create an Agent Role
- 3 Create a dedicated agent and assign both roles
- 4 Generate the API key
- 5 Verify the API key works
- 6 Enter the API key in the Info-Tech portal

#### Step 1 Create a reference-data read role

Admin → Global Settings → Roles → New Role

This role grants the integration account **read-only** access to the reference and administrative objects it needs (agents, roles, groups, departments, locations, surveys, and SLA/business-hours metadata). In Freshservice this is created as an "Admin" role type because those reference objects live under the admin permission set — but it is view-only and grants no ability to change settings or write data. Creating a dedicated role (rather than reusing an existing one) keeps the integration's permissions scoped tightly and makes them easy to audit and revoke.

1. **Open the Admin panel.** Click the Admin gear icon in the left sidebar of Freshservice.
2. **Navigate to Roles.** Under **User Management**, click **Roles**.
3. **Click New Role.** Give the role a clear name — for example, `CIOAnalytics Reference Read-Only` — and a description like *Read-only access to reference data for the Info-Tech Customer Data Store integration*.
4. **Grant the following permissions:**
  - View Agents and Agent Groups
  - View Roles
  - Manage Locations \*
  - View Requesters
  - View Department
  - Manage Business Hours, SLA Policies, and OLA Policies \*
  - View Surveys
5. **Do not enable create, edit, delete, or write permissions** beyond what is listed above. The integration is read-only and never writes back to Freshservice.
6. **Save the role.**

\* **This is a Freshservice UI limitation, not a write-back requirement.** Freshservice does not offer a separate view-only toggle for Locations and for Business Hours / SLA / OLA Policies — it bundles read access under a single "Manage" permission, so enabling "Manage" is the only way to grant the **read** access the integration needs. The integration never creates, edits, or deletes these objects; the API key is used read-only.

## Step 2 Create an Agent Role

Admin → Global Settings → Roles → New Role

This role grants the integration account read-only access to tickets and related operational data.

1. **Navigate to Roles.** Under **User Management**, click **Roles** (you should still be in the Admin panel from step 1).
2. **Click New Role.** Give the role a clear name – for example, `CIOAnalytics Agent Read-Only` – and a description like *Agent-level read-only access for the Info-Tech Customer Data Store integration*.
3. **Grant the following permissions:**
  - View Tickets
  - View or Edit Time Entries \*
  - View Survey Responses
4. **For Tickets, set the scope to View All Tickets.** This ensures the integration sees every ticket across the tenant, not just tickets in a specific group or department.
5. **Do not enable create, edit, delete, or write permissions** beyond what is listed above.
6. **Save the role.**

\* The integration only requires read access. Freshservice combines view and edit permissions for Time Entries into a single option, so enabling it is the only way to grant the read access we need. The integration will not edit Time Entries.

## Step 3 Create a dedicated agent and assign both roles

Admin → Global Settings → Agents → New Agent

We will create a new agent account whose sole purpose is to host the API key. Using a dedicated agent (rather than tying the key to a person's account) means the key survives staff turnover and can be deactivated without affecting any human user. Both the Admin Role and Agent Role must be assigned to this agent.

1. **Navigate to Agents.** Under **User Management**, click **Agents**.
2. **Click New Agent.**
3. **Fill in the agent details.** Use a service-account email like `cioanalytics@yourcompany.com` . Suggested display name: `CIOAnalytics` . The mailbox does not need to be monitored – Freshservice only uses it for the initial activation email.
4. **Assign both roles.** Under **Roles**, select both **CIOAnalytics Reference Read-Only** (from step 1) and **CIOAnalytics Agent Read-Only** (from step 2). Do not assign any other roles.
5. **Choose the agent license type.** Use the license type approved by the customer's Freshservice administrator.

6. **Save the agent.** Freshservice will send an activation email to the address you specified.
7. **Activate the account.** Open the activation email, set a password, store it in your password manager, and complete first-time login.

#### Step 4 Generate the API key

Profile (top-right avatar) → Profile Settings → API Key

Each Freshservice agent has a single API key tied to their account. The API key inherits the agent's role permissions, which is why we created dedicated read-only roles and a dedicated agent in steps 1 through 3.

1. **Sign in as the integration agent.** Use the credentials from step 3.
2. **Open Profile Settings.** Click your avatar in the top-right corner and select **Profile Settings**.
3. **Locate the API Key section.** It appears in the right-hand sidebar of the profile page.
4. **Click View API Key or Copy.** Freshservice may prompt you to re-enter the password or complete a verification step to reveal the key. The API key is a long alphanumeric string.
5. **Record the API key securely.** Copy it directly into your password manager or your organization's secrets vault. Do not paste it into chat, email, or unencrypted documents.

#### Step 5 Verify the API key works

Run a test API call from your machine, or from Postman / curl.

Before entering the key in the Info-Tech portal, confirm it can read tickets, reference objects, and the Freshservice ticket stats used by the integration.

1. **Test basic ticket read.** Run the following from a terminal, replacing `YOUR_API_KEY` with the key from step 4 and `yourcompany` with your Freshservice subdomain:

```
curl -u YOUR_API_KEY:X -H "Content-Type: application/json" \
  "https://yourcompany.freshservice.com/api/v2/tickets?per_page=1"
```

You should see a JSON response containing one ticket. If you get `401 Unauthorized`, the key is wrong or the role lacks ticket access.

2. **Test the stats include block.** Run:

```
curl -u YOUR_API_KEY:X -H "Content-Type: application/json" \
  "https://yourcompany.freshservice.com/api/v2/tickets?include=stats&per_page=1"
```

The response should include a `stats` object on the ticket with fields such as `first_responded_at`, `resolved_at`, and `closed_at`. If the `stats` object is missing, flag this with your Info-Tech onboarding contact.

3. **Test reference-table reads.** Confirm each of these endpoints returns data:

- `/api/v2/agents`
- `/api/v2/departments`
- `/api/v2/locations`
- `/api/v2/groups`
- `/api/v2/sla_policies`
- `/api/v2/roles`
- `/api/v2/tickets/{ticket_id}/conversations` (replace `{ticket_id}` with a ticket ID from the ticket-read test above)
- `/api/v2/tickets/{ticket_id}/time_entries` (returns the worklog / time-tracking entries for that ticket – used for technician work-effort and cost-per-ticket reporting)
- `/api/v2/surveys/satisfaction_ratings` (returns CSAT / satisfaction survey responses; the exact path can vary by tenant – if it 404s, confirm the satisfaction survey feature is enabled and flag it with your Info-Tech onboarding contact)

If any return `403 Forbidden`, the service account is missing the required view permission for that Freshservice object. Add the minimum read-only permission required, then test again.

#### Step 6 Enter the API key in the Info-Tech portal

Info-Tech portal

The API key gives bearer access to your Freshservice data. Treat it like a password. **DO NOT SEND THIS TO INFO-TECH.** See the **Submit to Info-Tech Portal** article for the portal submission steps. You will also need your Freshservice subdomain (e.g., `yourcompany.freshservice.com`).

#### NOTES ON THIS DOCUMENT

- Freshservice navigation can vary by tenant. If a menu item is not in the exact location shown, use the closest matching Admin, Roles, Agents, or Profile Settings page.
- Questions about anything in this guide can be directed to your Info-Tech onboarding contact.