# Title: Support - New Member Onboarding

# **Onboarding Guide for (Product/Sr.Product Specialist - Freshsales Support)**

## Congratulations on joining Freshworks and welcome to the Freshsales team!

## Freshsales is a fast-paced startup-like team that is building a new age CRM for high-velocity sale

## s teams. Being a fast paced developing product, the emphasis is on **“Make it work, Make it better”.** Adopt an inquisitive attitude when you join the team. We love for you to ask questions. There are no silly questions. Ask in email, group, personal chat or in person. We believe in open, transparent and frequent communication.

Get to know your Team

Freshsales support team is a small team of 11 members. This team stands directly in front of customers and Product team. The Support team helps in coordinating and identifying the feature requests & Bugs raised by the customers and prioritize it with Engineering/Product management team.

The core value of Support personnel to think from the customer’s standpoint. And we always encourage our team members to do what's right for the customer.

|  |  |  |
| --- | --- | --- |
| **Team Members** | **Name** | **Email** |
| **Manager** | Stephen Francis | [stephen.francis@freshworks.com](mailto:stephen.francis@freshworks.com) |
| **Mentor** | Manikandan VVS | [manikandan.venkatesan@freshworks.com](mailto:manikandan.venkatesan@freshworks.com) |
| **Mentor** | Shravan Kumar | [shravan.kumar@freshworks.com](mailto:shravan.kumar@freshworks.com) |
| **Mentor** | Kavitha Kamaleshlal | [kavitha.kamaleshlal@freshworks.com](mailto:kavitha.kamaleshlal@freshworks.com) |
|  | Srivenkatesh Raja Raja Cholan | [srivenkatesh.cholan@freshworks.com](mailto:srivenkatesh.cholan@freshworks.com) |
| Vignesh Sivakumar | [vignesh.sivakumar@freshworks.com](mailto:vignesh.sivakumar@freshworks.com) |
| Pradipta Chandra | [pradipta.chandra@freshworks.com](mailto:pradipta.chandra@freshworks.com) |
| Manoj Kumar T | [manoj.tamilvel@freshworks.com](mailto:manoj.tamilvel@freshworks.com) |
| Adarsh Thampi | [adarsh.thampi@freshworks.com](mailto:adarsh.thampi@freshworks.com) |
| Praneshwar Chandramohan | [praneshwar.chandramohan@freshworks.com](mailto:praneshwar.chandramohan@freshworks.com) |
| Giridharan V | [giridharan.venkatasubramaniyan@freshworks.com](mailto:giridharan.venkatasubramaniyan@freshworks.com) |
| Sharadh Shankar | [sharadh.shankar@freshworks.com](mailto:sharadh.shankar@freshworks.com) |

We have a team of brilliant engineers working on the product. We have different squads, containing the team leads, PMs and the developers, dedicated to specific modules.

The following are the squad details:

|  |  |  |  |
| --- | --- | --- | --- |
| **Squad** | **Modules** | **Tech Lead** | **PMs** |
| [Westwing - Q2 2019 Aspirations](https://confluence.freshworks.com/display/freshsales/Westwing+-+Q2+2019+Aspirations) | Leads/contacts/accounts/deals, anything related to the backend, CSV imports enhancements | Vijayaragavan V | Venkat, Swati Sharma, Vinay K, Aditi Balaji |
| [Sleeper Cells - Q2 2019 Aspirations](https://confluence.freshworks.com/display/freshsales/Sleeper+Cells+-+Q2+2019+Aspirations) | Reporting, Workflows, Sales campaigns, FS phone | Sivalingam | Aditi, Swati, Manikandan S(Squad lead) |
| [The Usual Suspects - Q2 2019 Aspirations](https://confluence.freshworks.com/display/freshsales/The+Usual+Suspects+-+Q2+2019+Aspirations) | Email, search and Filters | Sivakumar | Aditi, Vinay, Manikandan S(Squad lead) |
| [Hacker Hostel - Q2 2019](https://confluence.freshworks.com/display/freshsales/Hacker+Hostel+-+Q2+2019+Aspirations) | Lead scoring, lead assignment, Deal pipeline, API, FreshID, forms | Vijayaragavan V(Engineering Manager), Bhagirath(Squad Lead) | Swati, Aditi, Vinay |
| [DevOps - Q2 2019 Aspirations](https://confluence.freshworks.com/display/freshsales/DevOps+-+Q2+2019+Aspirations) | Production Issues | Sivakumar, Madhava Reddy SV |  |
| [Mobile - Q2 2019 Aspirations](https://confluence.freshworks.com/display/freshsales/Mobile+-+Q2+2019+Aspirations) | Mobile App(iOS & Android) | Rinoy Chacko, Saravanan P | Swathi Yerram, Manikandan S(Squad Lead) |

Tools & Access

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| **No** | **Access to** | **How to get it** |
| 1 | [Freshdesk.Freshsales.io](http://freshdesk.freshsales.io) | <https://lighthouse.freshservice.com/support/catalog/items/136> |
| 2 | Jira Access | <https://lighthouse.freshservice.com/support/catalog/items/73> |
| 4 | Support Portal | <https://lighthouse.freshservice.com/support/catalog/items/135> |
| 5 | Freshchat Access | Shravan/Kavitha |
| 6 | HR/IT requirements | <https://lighthouse.freshservice.com/support/catalog/items> |
| 7 | Freshrelease | <https://freshworks.freshrelease.com/FSALES/backlogs> |
| 8 | Freshcaller | <https://freshdesksupport.freshcaller.com/dashboard> |
| 9 | Admin Console | Shravan/Kavitha |

Training Schedule

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| --- | --- | --- | --- |
| **Day** | **Module** | **Module Owner** | **Module details** |
| Day1 | CRM introduction | Kavitha | Basic Intro |
|  | Support Basics | Kavitha | Support process/SLAs/Best Practices |
|  |  |  |  |
| Day2 | Freshsales introduction | Kavitha | Detailed introduction to Freshsales |
|  | Leads/Lead score/Territories | Giridharan | Views,Fields,Functionality,Import,Bulk operations |
|  |  |  |  |
| Day3 | Contacts/Accounts/Deals | Giridharan | Views,Fields,Functionality,Import,Bulk operations |
|  | Multiple views/Google contact sync |  | Pipeline views and its operations/Google contacts |
|  |  |  |  |
| Day4 | Emails/Phone | Sharadh | Basic emailing, Emailing options, bulk emails, connecting email and Basics of Freshcaller |
|  | Tasks/Appointments/Calendar sync |  | Tasks/Appointments view and calendar sync |
|  |  |  |  |
| Day5 | User Roles/Scopes | Vignesh | Details on roles and scopes |
|  | Plan details |  | Detailed subscription information and plans/billing in Freshsales |
|  |  |  |  |
| Day6 | Sales Campaign | Srivenkatesh | Detailed knowledge transfer |
|  | Profile settings |  | Notifications, Personal settings |
|  |  |  |  |
| Day7 | Reports | Pradipta | Detailed knowledge transfer |
|  | Dashboards | Pradipta | Detailed knowledge transfer |
|  |  |  |  |
| Day8 | Workflows | Shravan | Detailed knowledge transfer |
|  | Webhooks |  | Basics |
|  |  |  |  |
| Day9 | Integrations basic |  | Introduction to Apps and usage/ Basics of Marketplace |
|  | Webforms/smartforms | Kavitha | Classic and smart forms |
|  |  |  |  |
| Day10 | Freshsales for web |  | Basics |
|  | Freshdesk/Mailchimp/Freshchat/Freshcaller integrations | Adarsh | Detailed integrations |
|  |  |  |  |
| Day11 | API | Shravan | Basics |
|  |  |  |  |
| Day12 | Integrations details |  | Basics of all native integrations |

Course to complete online on Freshworks Academy

Please login into [Academy.freshworks.com](https://freshdesk.com/academy) using your Freshworks username and password.

**Please complete the following Courses:**

1. Freshsales CRM Admin Fundamentals
2. Freshsales User Fundamentals

# [Freshsales Support L2 process](https://confluence.freshworks.com/display/freshsales/Freshsales+Support+L2+process)

### **Freshsales Support Agent :**

Will gather all the details regarding the reported issue and adds a detailed private note.

* Mark the Category and Sub-Category according to the issue.
* Status : Awaiting L2 response
* Internal Group : Based on the category of the issue
* Type   : L2- Analysis / Troubleshooting
* Priority : Urgent/ High/Medium/Low

#### **Private Note Template to be followed by Freshsales Support Agent:**

* Account Id:
* Issue Description:
* Locally Reproducible: Yes / No
* Steps to Reproduce:
* Supporting Logs: Code / Timestamp of when it happened with Time Zone.

#### **Custom View Setup - (Freshsales Support Agent):**

1. Set the “**Group**” Field as “Freshsales Support”.
2. Set the “**Agents**” Field as “**Me**”. This will show the tickets assigned to the concerned agent
3. Set the **Status** field as “Open”, “Pending”, “Customer Responded”, “L2 Responded”.

### [**Freshsales L2 Team**](https://confluence.freshworks.com/pages/viewpage.action?pageId=218073692#FreshsalesSupportL2process-internalgroups)**:**

* Freshsales Engineering team will keep monitoring the L2 tickets from the support portal:
  + The QAs from the corresponding Internal group will be doing the first level of analysis, and will come up with their observations. (Can assign themselves as an "**Internal Agent**" for the corresponding ticket)
  + If any Dev assistance is required, the QA will get support from the corresponding Dev POC
* L2 agent (mostly QA) will add a private note to the *support agent* with their initial observations. The ticket will automatically be moved to **“L2 Responded”** status by an observer rule configured.
* If the initial observation is already communicated to the *support agent* over Freshconnect/ Chat, the L2 agent will still go ahead and add a private note about the corresponding discussion to the support ticket. The ticket will automatically be moved to **“L2 Responded”** status by an observer rule configured.
* The Initial response to be provided **within 24 hours** of assigning to the group.

#### **Private Note Template to be followed by L2 Agent:**

* Initial Observation:
* Next steps:
* Root cause:
* ETA: (This alone can be given by TL/EM/PM)
* Fix:

#### **Custom View Setup - (L2 Agent):**

1. Set the “**Group**” Field as “Freshsales Support”.
2. Set the "**Status"** field as “Awaiting L2 Response".
3. Set the "**Internal Group**" field to your appropriate group

### **L4 Workflow (Bugs):**

* After the initial observation, the L2 team will add a detailed private note on what has been fixed / acknowledge it as a bug.
* The Support agent would
  + Update the type as L4
  + Create a bug in Freshrelease with the "**Freshdesk Tickets**" field updated with the link to the support ticket
  + Add a tag "**L2-Freshsales**" to the Freshrelease bug, to differentiate them from the other backlog bugs
  + Assign the Freshrelease ticket to the **corresponding PM/ EM**
  + Inform the customer and update the status of the ticket as ‘**Awaiting developer fix**’.
* For all the issues identified over the discussion in "Freshsales - Queries" or "Freshsales - Production 24x7" chat rooms, the Support agent would
  + Create a bug in Freshrelease with the "**Freshdesk Tickets**" field updated with the link to the support ticket (if any) OR the source of the issue
  + Add a tag "**L2-Freshsales**" to the Freshrelease bug, to differentiate them from the other backlog bugs
  + Assign the Freshrelease ticket to the **corresponding PM/ EM**
* The PMs/ EMs would then prioritise the Freshrelease bugs and plan them for upcoming releases

#### **Further Transitions**

* If the issue is NOT a bug, the Support agent will update the customer and will await customer’s response. (Set status to “**Awaiting Customer Response**”).
* If the Customer acknowledge that the issue is fixed, Support agent will move the ticket to “**Resolved**” status.
* If the issue is not fixed, The Support agent will get the required information from the customer and will assign it back to the Dev (Set status as “**Awaiting L2 response**”).

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| **Internal Groups** | **L2 Team** | **Point of Contact** |
| Freshsales - Core | Guru, Praveen, Anushia, Gowthaman, Meenaloshani, Dheena  Vaidhyanathan, Vijay, Bhagirath, Buden, Irfan, Ashish, Ayush, Bhuvanesh, Nivedita, Robin, Sakrishna, Prabhu, Umashankar  Swathi, Vinay | Swati,  Guru, Vaidhyanathan |
| Freshsales - Email | Uma  Sivakumar, Mani, Dwarak, Kalai, Hariharasuthan  Aditi, Sujitha | Aditi, Uma, Sivakumar |
| Freshsales - Phone | Athish  Kathir, Mani  Aditi | Aditi, Athish, Kathir |
| Freshsales - Reports | Ram, Balasubramanian  Sivalingam, Mani, Prakash, Varshitha  Aditi | Aditi, Ramkumar, Sivalingam |
| Freshsales - Integrations and Marketplace(Except FD-FS, Hubspot and Mailchimp) | Gowthaman  Vaidhyanathan, Vijay, Vipul, Bhuvanesh  Venkat | Venkat, Gowthaman, Vaidhyanathan |
| Freshsales - Workflow & Sales Campaigns | Ram, Athish  Sivalingam, Mani, Bivil, Varshitha  Swati | Swati, Ramkumar, Sivalingam |
| Freshsales - Migration, Import & Export | Praveen  Vaidhyanathan, Vijay, Irfan  Vinay | Vinay, Praveen, Vaidhyanathan |
| Freshsales - Plans and Billing | Athish,  Kathir, Mani, Mudhabir, Ajeet  Vinay | Vinay, Athish, Kathir |
| Freshsales - Mobile | Senthil, Sathish  Saravanan, Rinoy, Mani, Ramanathan, Satya, Saranya  Swathi Y | Swathi, Senthil, Saravanan, Rinoy |
| Freshsales - iPass(FD-FS, Hubspot and Mailchimp) | Venkat, Vijay | Venkat, Vijay |
| Freshsales - General | Vijay, Mani, Nivedhana | Vijay, Mani, Nivedhana |
| Freshsales - Freddy | Logesh  Swaminathan, Mani  Aditi | Aditi, Logesh, Swaminathan |
| Freshsales - Search and Filters | Uma  Sivakumar, Mani, Dwarak  Vinay | Vinay, Uma, Sivakumar |
| Freshsales - Onboarding | Prem, Ishwaryaa | Prem, Ishwaryaa |