



FRESHWORKS ANALYTICS - USER GUIDE

About the Guide

Analytics is one of the most crucial features within Freshworks that helps you to leverage data and make business-critical decisions across the customer lifecycle.

The best part? **Freshworks Analytics** is not only fast and powerful, but it is also a no-code platform that anyone can use without any coding or querying.

This guide is to help new users get a glance at the features available, which in turn can help with creating and managing reports to derive insights.



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Analytics Glossary

Here are few terms that we commonly use in the context of **Freshworks Analytics**.

<p>Metrics</p> <p>Metrics are numbers you will use as a base for your charts.</p> <p>Example: Total Tickets, Number of Deals, Total Contacts etc.</p>	<p>Widgets</p> <p>Widgets are made up of one or more metrics put together in a single block.</p>	<p>Reports</p> <p>Reports is the page where you can analyze your data.</p> <p>A Report is made up of one or more Widgets.</p> <p>There are two types of Reports: Custom Reports and Curated Reports.</p>
<p>Filters</p> <p>Filters help you with narrowing down your datasets based on many parameters.</p> <p>Types of Filters</p> <ul style="list-style-type: none">Metric FiltersWidget FiltersPage FiltersReport FiltersInteractive FiltersQuick Filters	<p>Types of Widgets</p> <ul style="list-style-type: none">Text WidgetsChart WidgetsImage WidgetsInteractive Filter Widgets	<p>Homepage</p> <p>Homepage is where you will access all your reports from.</p> <p>This is where you will find Curated and Custom Reports.</p> <p>You can also delete a report, mark them as favorites, and access recent reports from the homepage.</p>

ABCs of Freshworks Analytics

While we pride in providing an offering that is vast and comprehensive, as a new user, it might be daunting at first glance. To make it easy for you to get up to speed, we have identified five critical pillars within analytics that cover the most important features you should know about.



Create

Reports, Widgets, Metrics & Attributes



Customize

Charts, Images



Slice & Dice

Metric Filters, Widget Filters, Page Filters, Interactive Filters, Quick Filters, Drill Downs, Underlying Data



Share

Report Sharing, Data Exports, Report Exports, Report Schedules, Presentation Mode



Access

No-Code Reporting, Mobile Analytics, Freddy - the AI buddy

Create

Create

A. Reports

There are two types of reports in Freshworks Analytics primarily:-

- 1 Curated Reports
- 2 Custom Reports

Curated Reports are pre-built, readily available reports that have been created by the domain experts and can be used right away. Custom Reports, on the other hand, are reports that you choose to create based on your business needs.

One thing to keep in mind when using reports is, in a Custom report, you can either add widgets or edit them. In a Curated report, you can only view them and not make any modifications to them. You can, of course, clone a curated report and make any edits you'd like in the cloned version.

Curated Reports	Custom Reports
Pre-built, readily available	Have to be built from scratch
Cannot add or delete metrics	Can add or delete metrics
Same report for users across the team	Visibility based on the report type
Visible to everyone	Available as per the pricing plans
Available across plans	

An important distinction between the two is, Curated Reports are visible to users across your team, Custom Reports have three visibility options that you can choose at the time of creating a report:

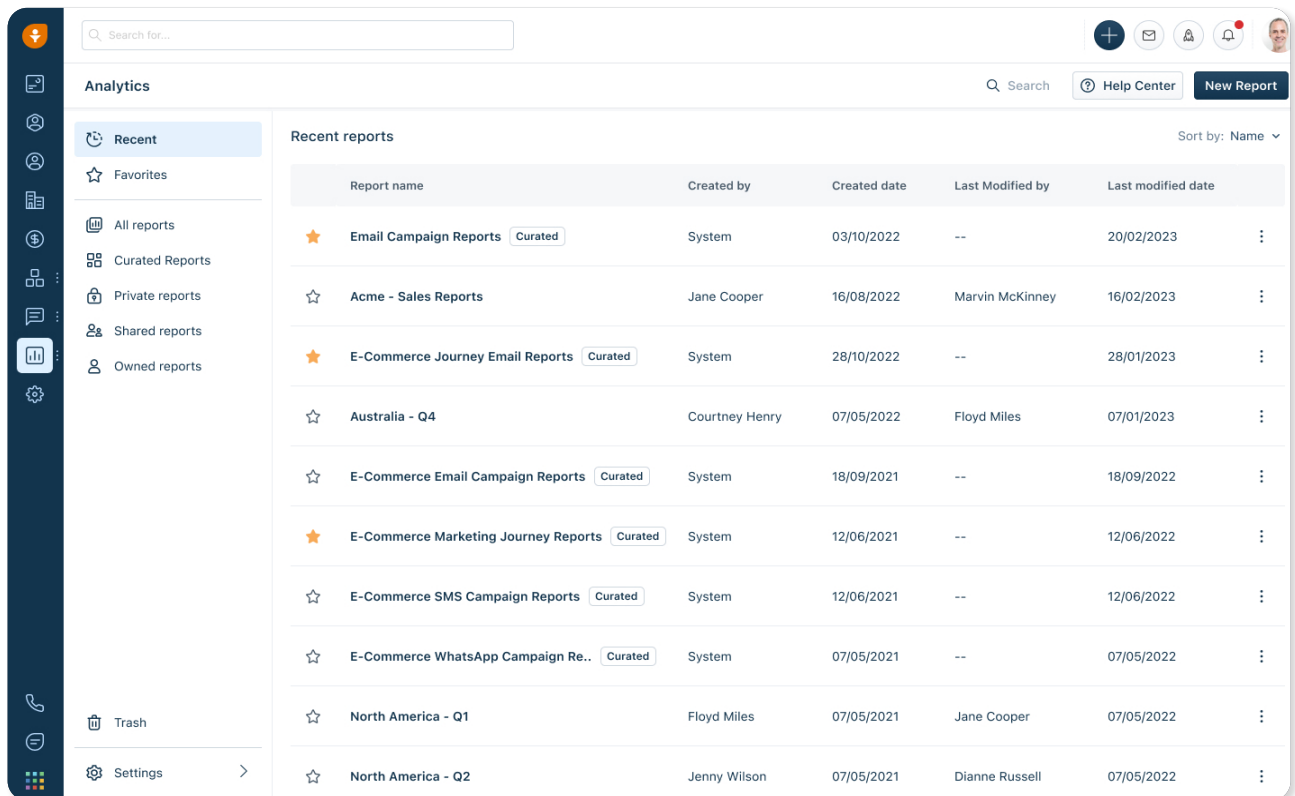
- 1 Private
- 2 Owned
- 3 Shared

Private Reports - Reports created by you and not shared with anyone.

Owned Reports - Reports created by you and shared with others.

Shared Reports - Reports created by someone else and shared with you.

Creating a Report



Homepage is the basecamp for all things Analytics. The top right corner of the **Home Page** contains the **'New Report'** button, which takes you to the **Reports page**.

In the top left, you have **'Recent'** which shows all the recent reports you opened.

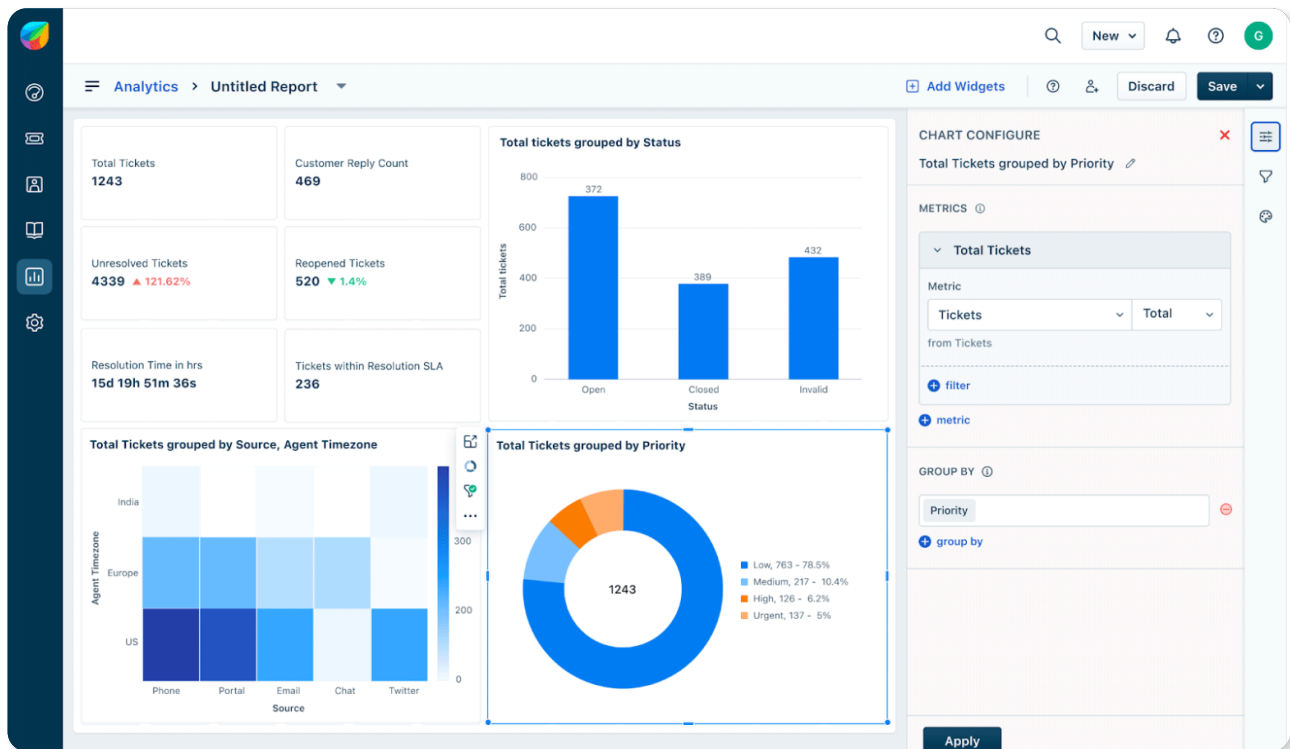
Below, you have **Favorites**, which are important widgets and reports you want to easily keep track of.

In the section right after that, you can find all your reports neatly categorized as **All**, **Curated**, **Owned**, **Shared with me**.

At the bottom left is the **Settings** icon, where you can set up schedules, export data, or create custom metrics and attributes.

Right above **Settings** is **'Trash'** where your reports are moved into when you delete them. You can delete a report from the Report page or the Analytics homepage. To delete a report from the homepage, click on the **three dots** symbol next to the report you want to delete and select **'Remove'**. All the deleted reports are moved to **'Trash'** from where they can either be retrieved or permanently deleted. If no action is taken, the reports are deleted after 180 days in the trash folder.

Custom Reports



When building a custom report, you can use the options on the right to edit your report.

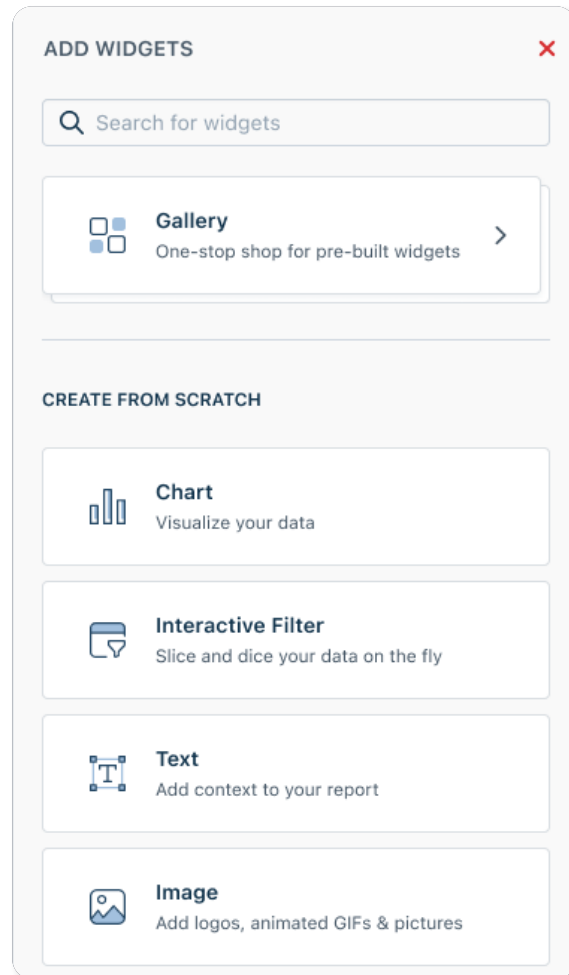
Note: You have to click on the 'Edit' button to start editing

You can:

- Add widgets by clicking on the 'Add Widgets' button
- Click on 'Configure' icon to change your report layout, orientation, etc
- Add Filters by clicking on the 'Filter' icon
- Customize styling options by clicking on the 'Palette' icon

B. Widgets

When adding widgets to your reports, you can either choose them from 'Gallery' (contains popular widgets, templates and custom gallery) or build from scratch with metrics and attributes of your choice using the chart widgets.



Building Widgets from scratch

Chart

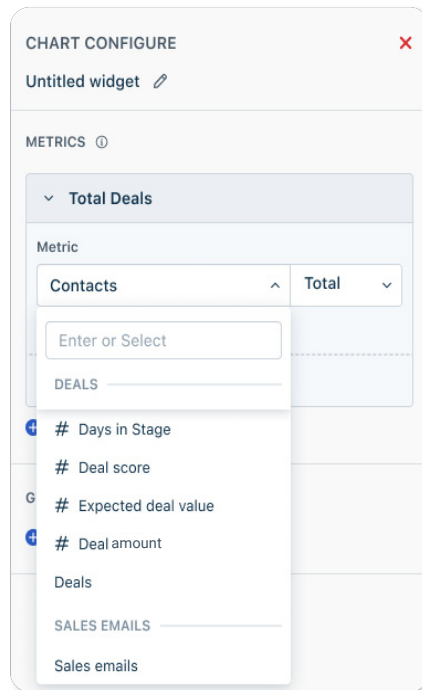
Charts are the most popular widgets in Analytics - you can add multiple metrics to a Chart and visualize the data however you'd like - bar chart, horizontal bar chart, line chart, donut chart, summary table, pie chart, matrix, bubble, heatmap, or tabular.

There are three components to every chart widget:

- 1 Metrics
- 2 Filters
- 3 Group By

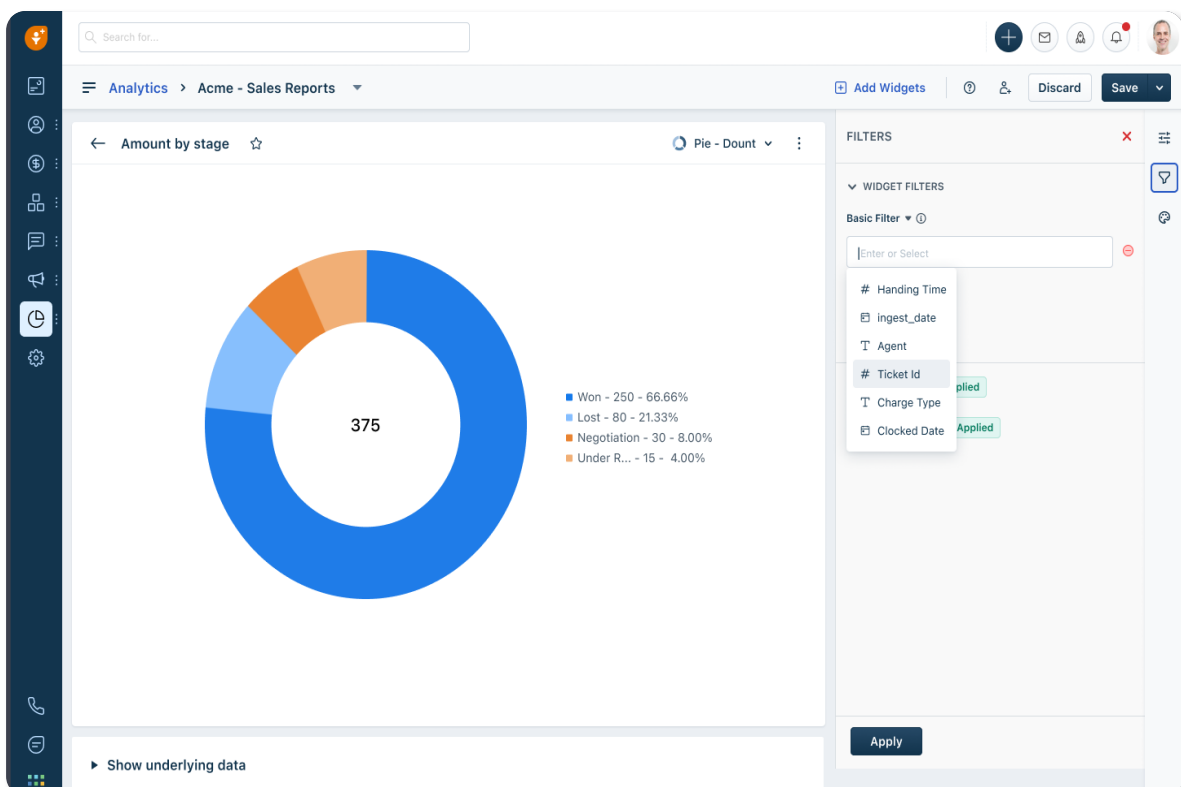
1 Metrics

Metrics are categorized by module (for example, the 'Ticket' module contains all the metrics related to tickets)



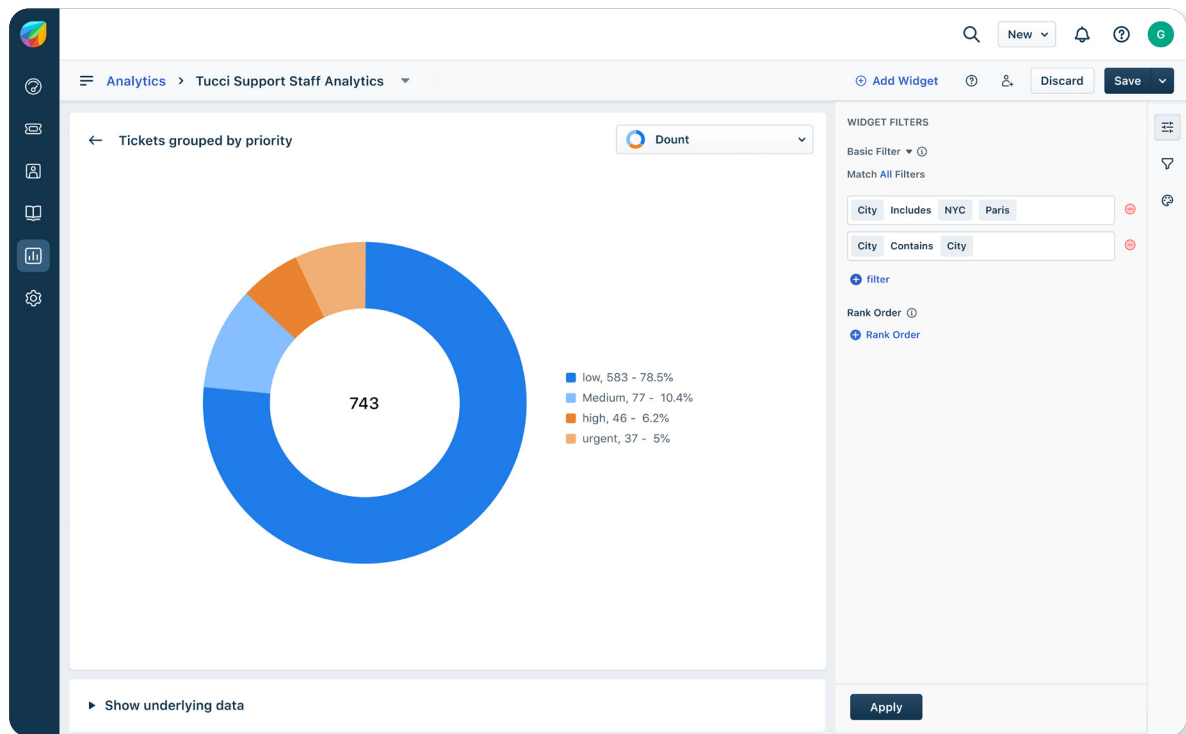
2 Filters

Filters are one of the most commonly used Analytics features to get a more nuanced look of the data.. A filter component can either be a date (calendar icon), a text (font icon), or simply a number (# icon).



Examples of Filters

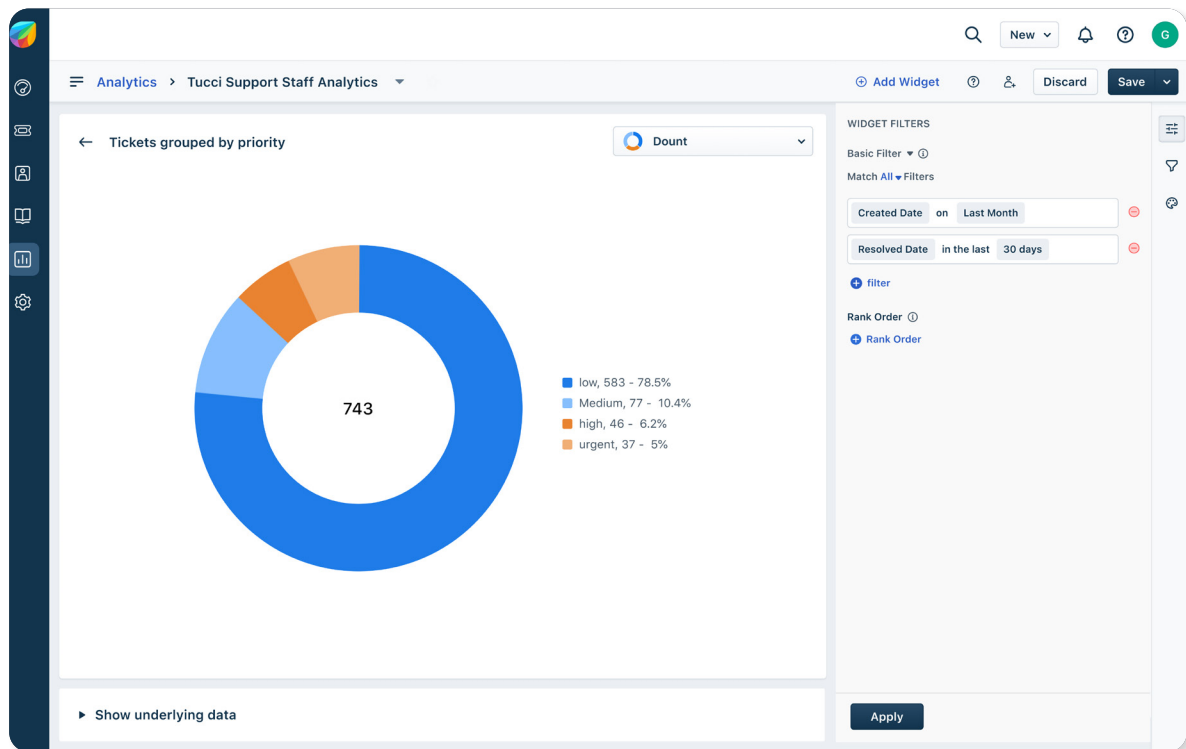
Text:



- If you're filtering your dataset for both NYC and Paris, you will use **City includes NYC, Paris**.
- If you're filtering your dataset for a list of all cities that include the word 'city, you'd use contains: New York City, Vatican City, Mexico City etc.

Examples of Filters

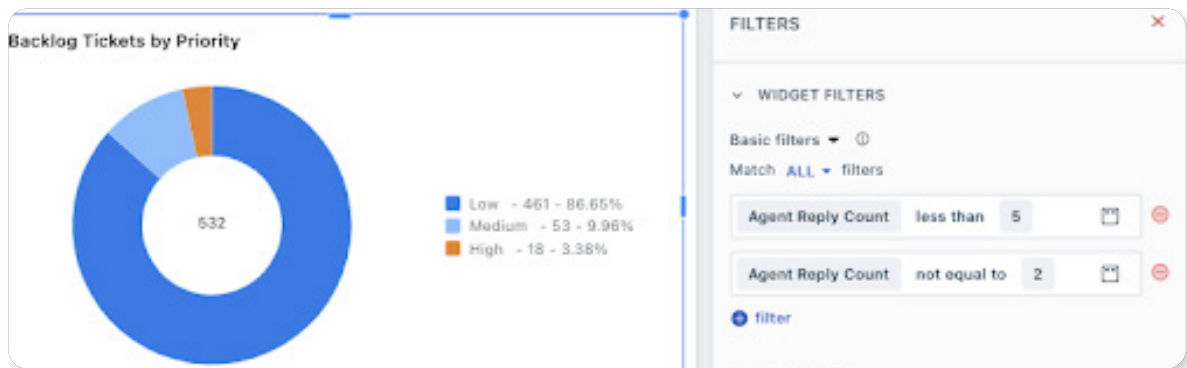
Date:



- When you use last month, Analytics will take it to be calendar month i.e August? if you're in September.
- When you use 30 days, Analytics will take it as the last 30 days from today i.e if today is Oct 30: Oct 1 to Oct 30.

Examples of Filters

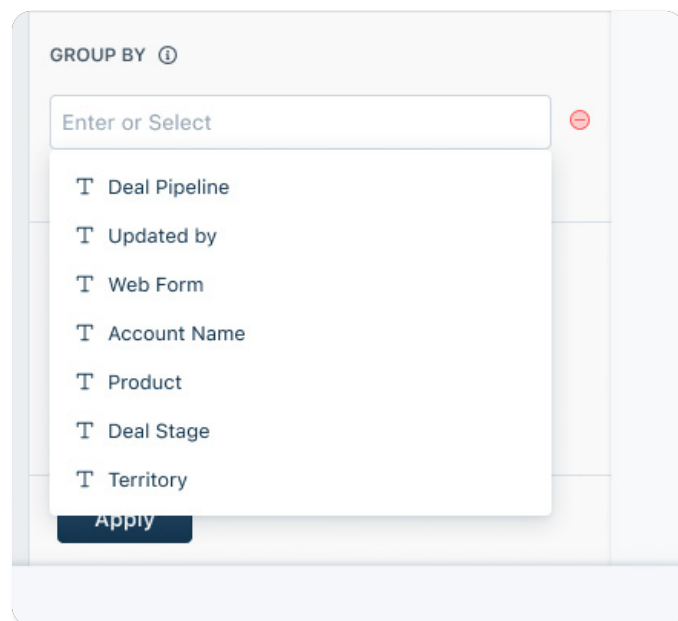
Number:



- If your 'Agent Reply Count' is less than 5, Analytics will filter all tickets where the agent reply was less than 5.
- If your 'Agent Reply Count' not equal to 2, is less than 5, Analytics will filter all agent reply counts except for ones with 2 replies.

3 Group by:

As the name suggests, 'Group By' allows you to summarize rows of data with attributes of same value into groups. For example, like Priority or Region.



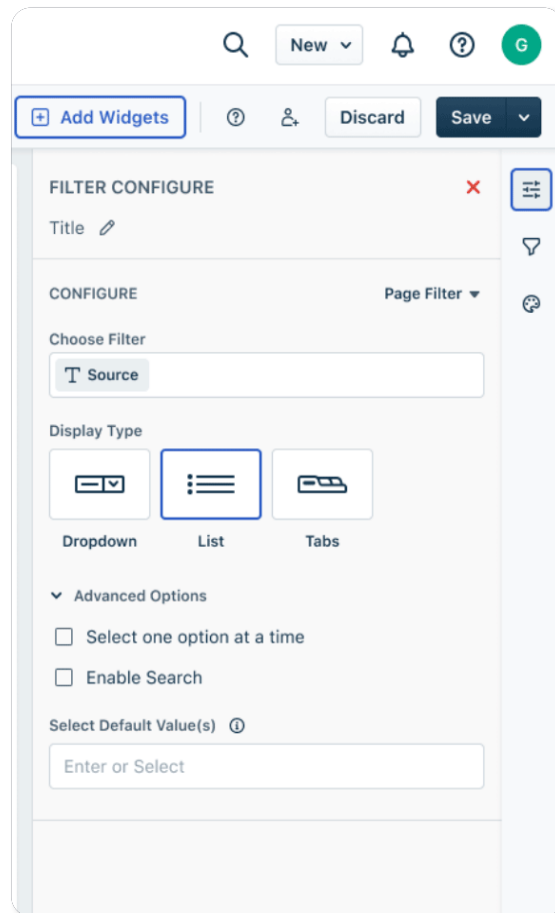
- Like filters, they also have Text, Date, and Number components.

Examples of Group by

- A 'Group By' based on priority will return all tickets with low, medium, and high priorities.

Note: The visualization options available for a particular Chart depends on the kind of metric you are adding, and not all options may be available for every metric.

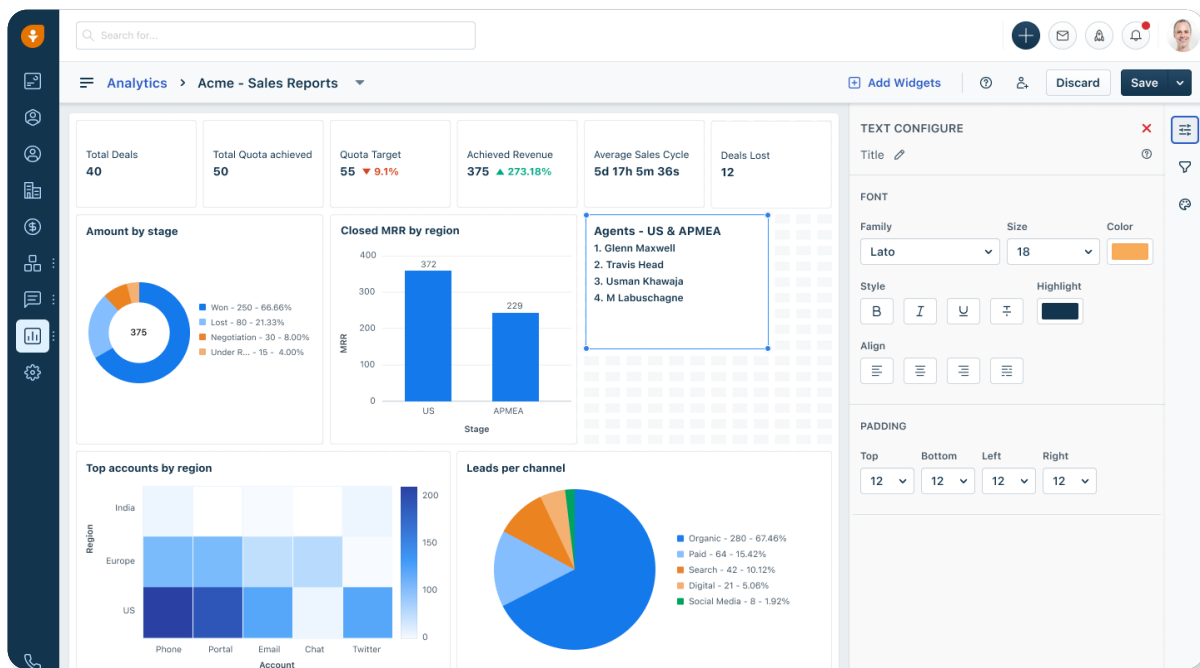
Interactive Filter Widget



Interactive Filters are page level, report level filters that help you narrow down and focus on a specific subset of data.

Rather than having to modify a filter setting or set up new filters from scratch every time you want to view a specific date range, Interactive Filters allow you to do the same in a single click for a single page or across multiple pages of a report.

Text Widget



Text Widgets are a simple and efficient way to give more context to your reports. They can be used to add more details to a particular chart or like a summary for the report. They can even be styled with different fonts, colors and sizes to suit the need.

Image Widget

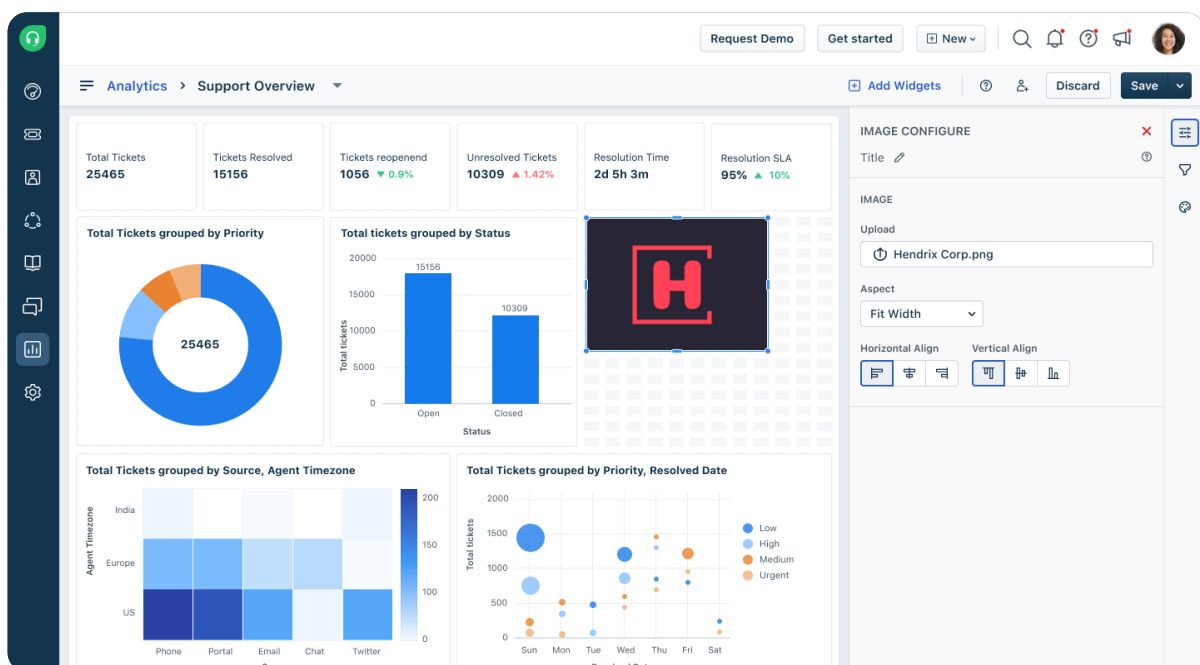


Image widgets can be a vivid addition to your reports. The jpegs can also be your brand logos to make your reports look more personalised. You can infact use GIFs to make your reports interactive.

C. Custom Metrics and Custom Attributes

While Freshworks Analytics has an exhaustive and ever-growing list of metrics, each business may still need metrics and attributes that are unique to their needs.

Custom Metrics can be created by using a combination of metrics with different functions and operators.

For example:

A support agent may want to track a metric like “Total Replies” which would be a combination of both “Agent Replies” and “Customer Replies”. He can now create a custom metric, on his own, by using operators as follows:

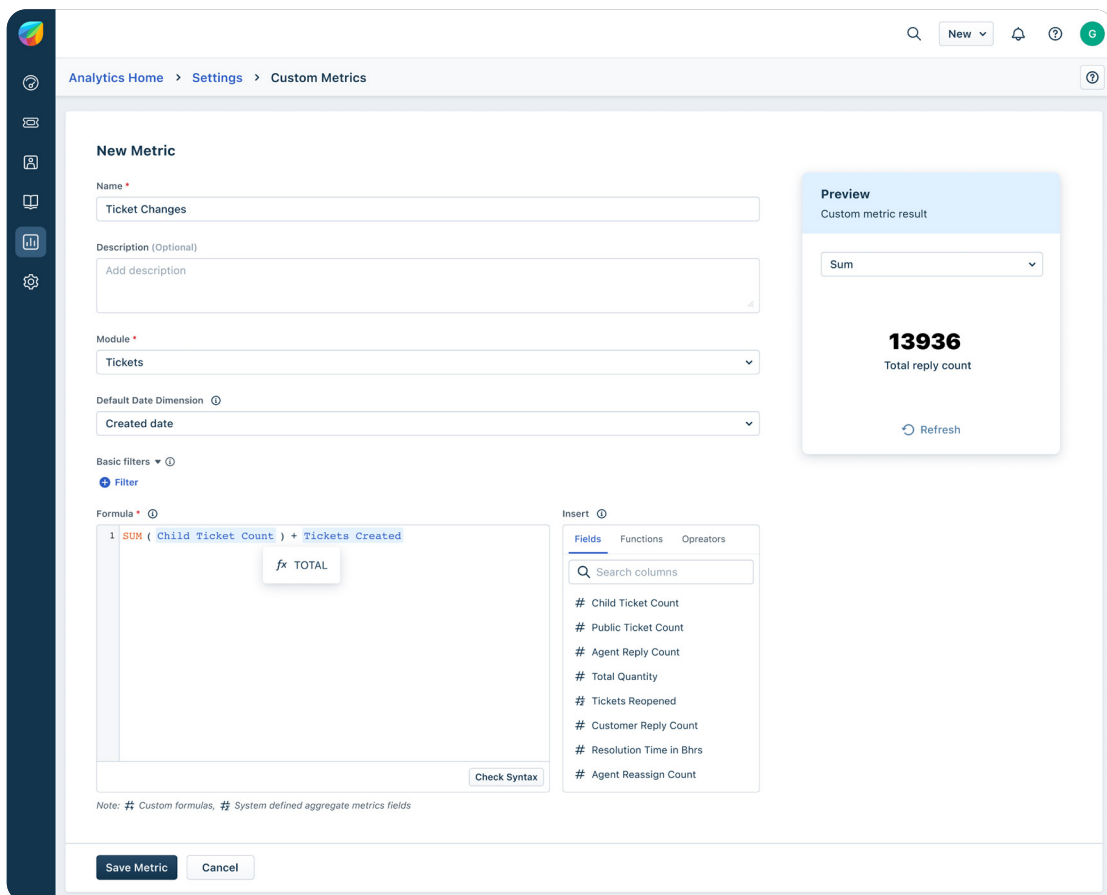
Total Replies = Agent reply count + Customer Reply count

Custom Attributes can help with customizing how you want to view or group your data.

For example:

To determine the total ticket resolution time, you can create a custom attribute as follows:
DATEDIFF_DAYS(Created date, Resolved date)

There is also a preview window available on the right side that validates the syntax and returns values if its right. These custom metrics and attributes can then be used across chart widgets as needed.

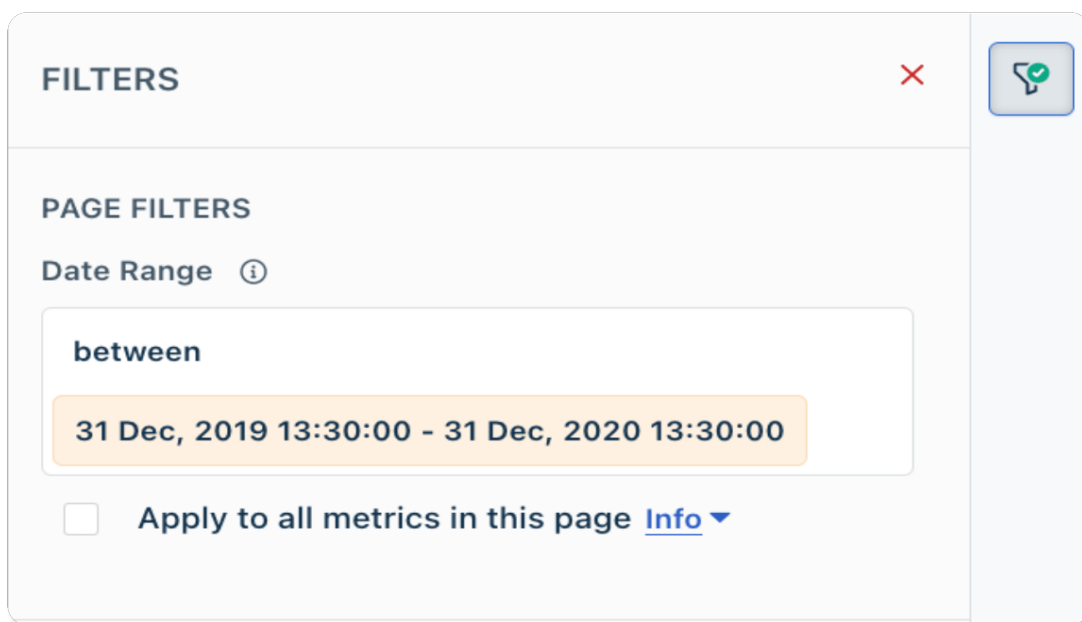


Things to keep in mind when creating reports

To give you powerful reporting capabilities without compromising on the smooth experience, Freshworks Analytics follows certain certain limits that you should be aware of.

You can add a maximum of 4 Metrics per Widget, 33 Widgets per page, and 10 Pages per Report.

Date Range Dimensions



Date Range Dimensions are filters that are enabled by default when you create reports in Analytics.

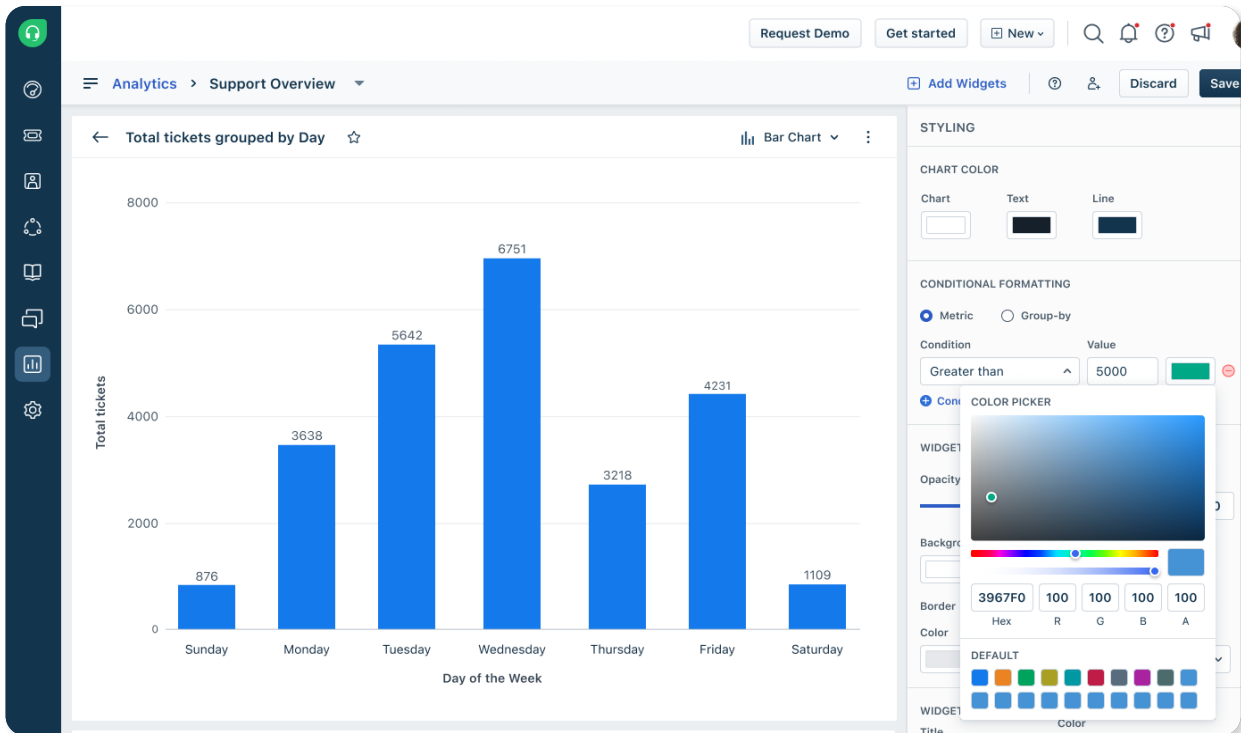
Why do we apply this by default?

As your company grows, you will have large volumes of data to analyze, most of which might just be historical data and not relevant right now. The date range filter narrows down the data to just the past year so your reports are a lot more contextual. You can always go ahead and change the filters to view older data.

Customize

Customize

Freshworks Analytics offers you a range of customizing capabilities that give you the flexibility to change the look and feel of the reports, according to your preference.



Your customizing options include:-

Layout:

Select a custom layout or choose from the available configurations (16:9, 21:9, 4:3, 3:2, 1:1)

Display Mode:

Choose display modes like portrait or landscape to suit your widget types.

Colors:

Paint the reports in your favorite colors from the color gradients or even choose based on their Hex code.

Background:

Differentiate or highlight widgets by applying background colors of choice.

Opacity:

Make widgets transparent or opaque or anything in between using the opacity slider.

Borders:

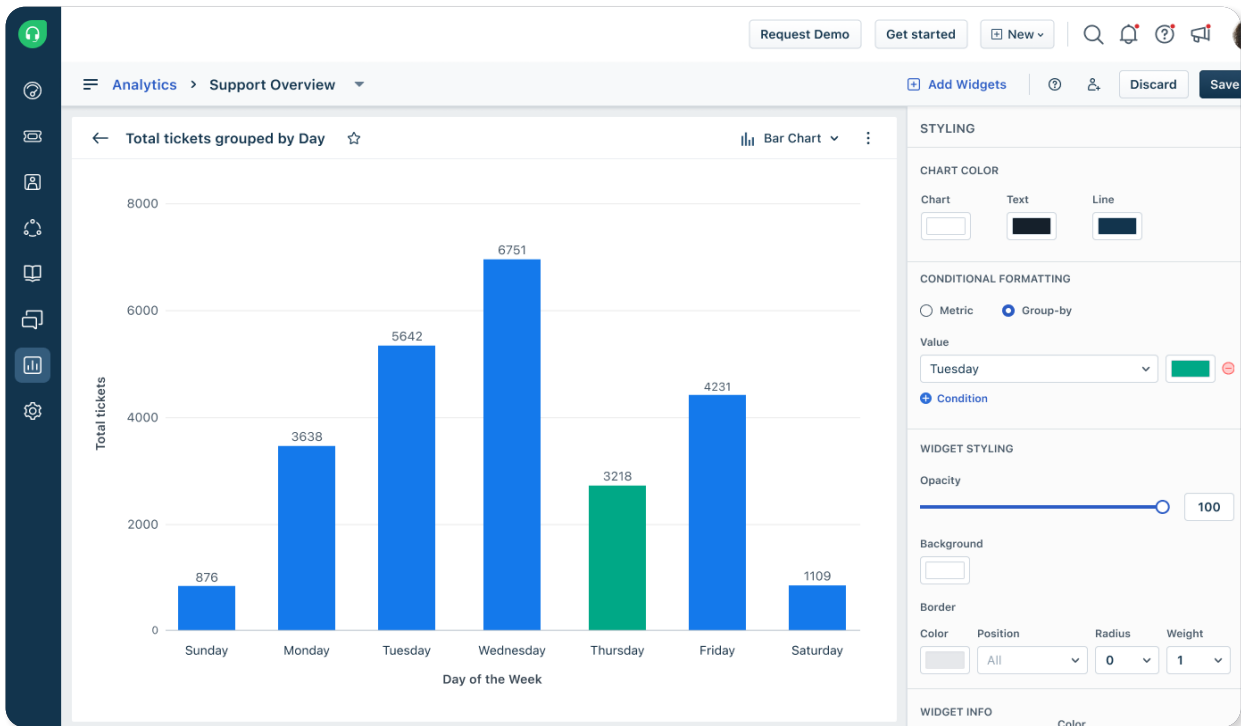
Customize borders by choosing colors, position, radius, and weight.

Color Palette:

The color palette allows you to re-arrange the order of colors for charts or even add new ones using Hex codes.

Conditional Formatting:

Conditional formatting allows you to create conditinal criteria and thereby customize the colors of your charts based on them. This can applied to either metric or group-by values.



Slice and Dice

Slice and Dice

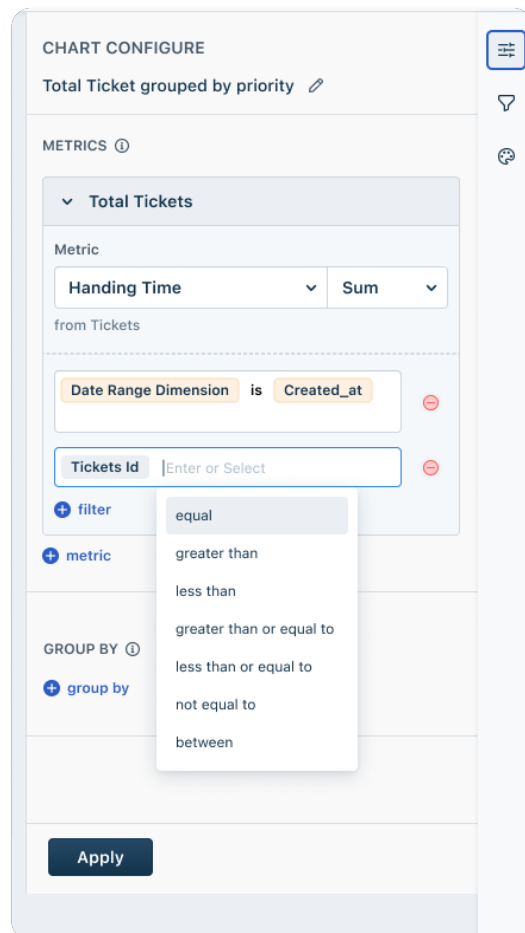
One of the distinctive offerings of **Freshworks Analytics** is its extensive filtering capabilities that help in getting a view of the data, to the most granular degree possible.

Types of Filters:

1 Metric Filters	2 Widget Filters	3 Page Filters
4 Report Filters	5 Interactive Filters	6 Quick Filters
7 Drill Down	8 Underlying Data	

1 Metric Filters

Metric filters can be applied to any metric within a widget. Each filter criteria is defined by functions or operators specific to that criteria. You can apply multiple filters for a single metric.



2

Widget Filters

Widget filters are filters that can be applied across all metrics of a widget.

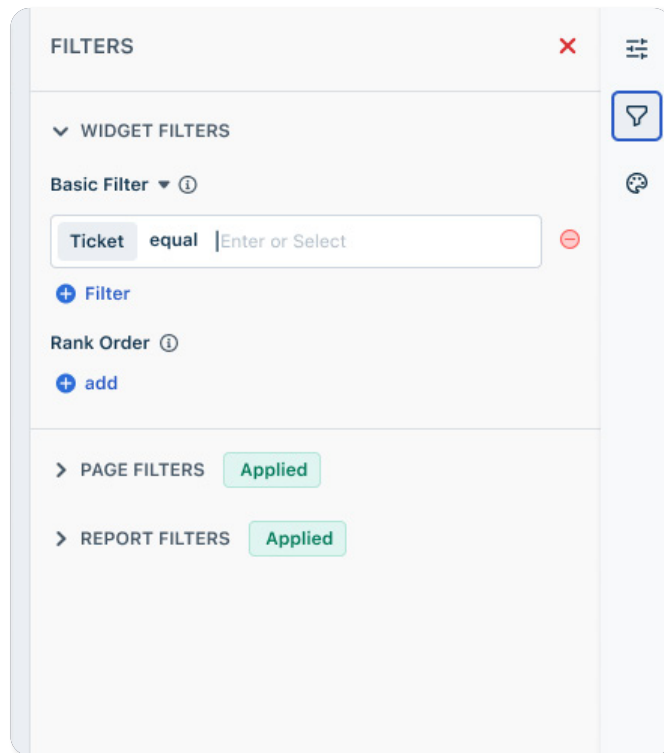
There are 2 types of widget filters:

A. Basic Filters

Any number of basic filters can be applied per widget and depending on the data filtration conditions, “all” or “any” option can be applied.

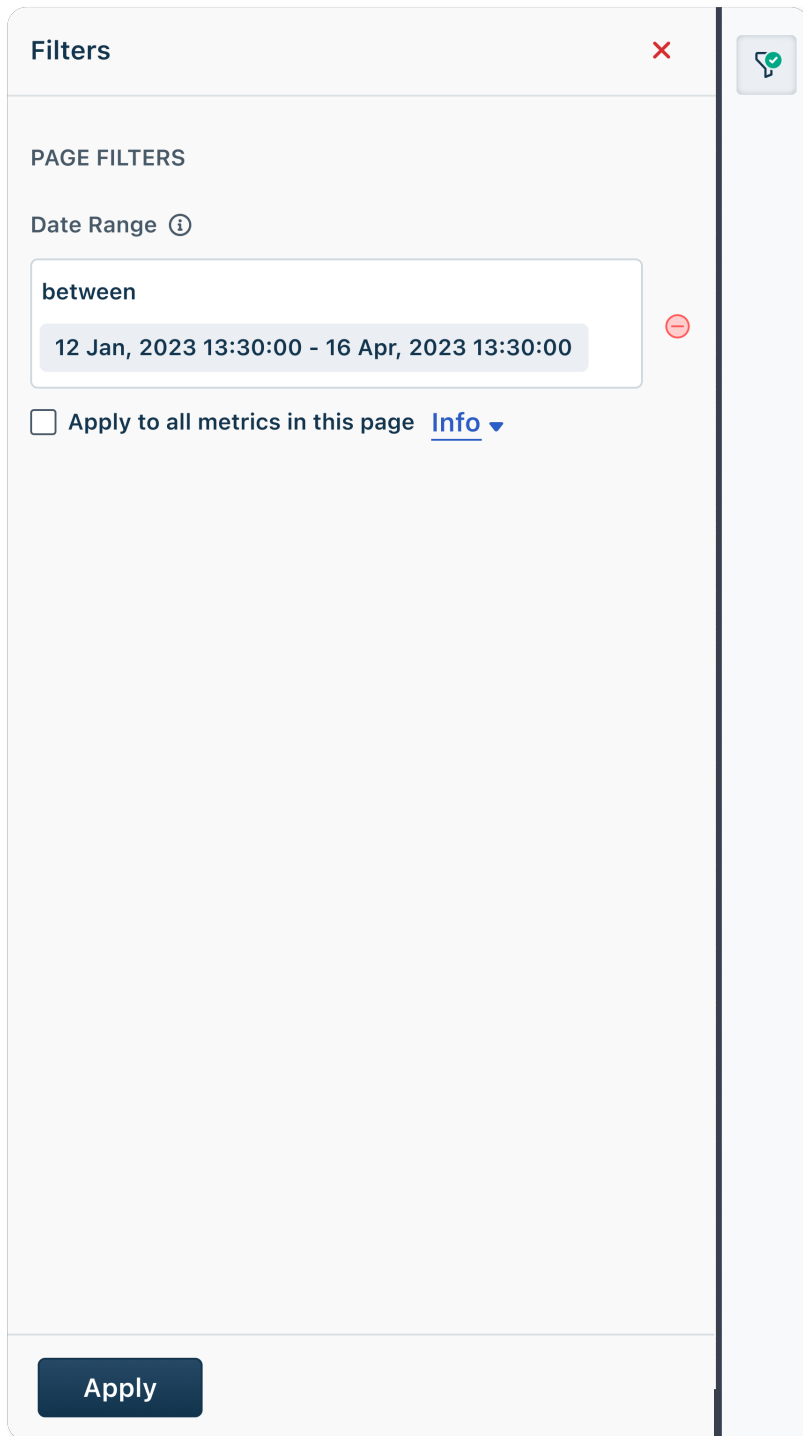
B. Advanced Filters

Filters for a granular set of data can be applied by combining the criteria set in 2 or more basic filters



3 Page Filters

Page filters are exactly like Report filters but applied to the particular page where you create the filter.



4 Report Filters

You can also use a Report Filter as an interactive filter by simply clicking on the '+' icon next to the Report filter.

FILTERS ✕

> WIDGET FILTERS Applied

> PAGE FILTERS Applied

> REPORT FILTERS

Basic Filter ▾ ⓘ

Match **All** ▾ filters

Agent is anything ⊖

Change Type is anything ⊖

⊖

+ Filter

Date Range ⓘ

+ date range

Apply

5 Interactive Filter

Filters can also be applied in the form of interactive widgets and data can be filtered across the page or even across multiple pages of a report.

There are 5 types of interactive widgets available in the form of List, Drop-down, Button, Slider and Toggle.

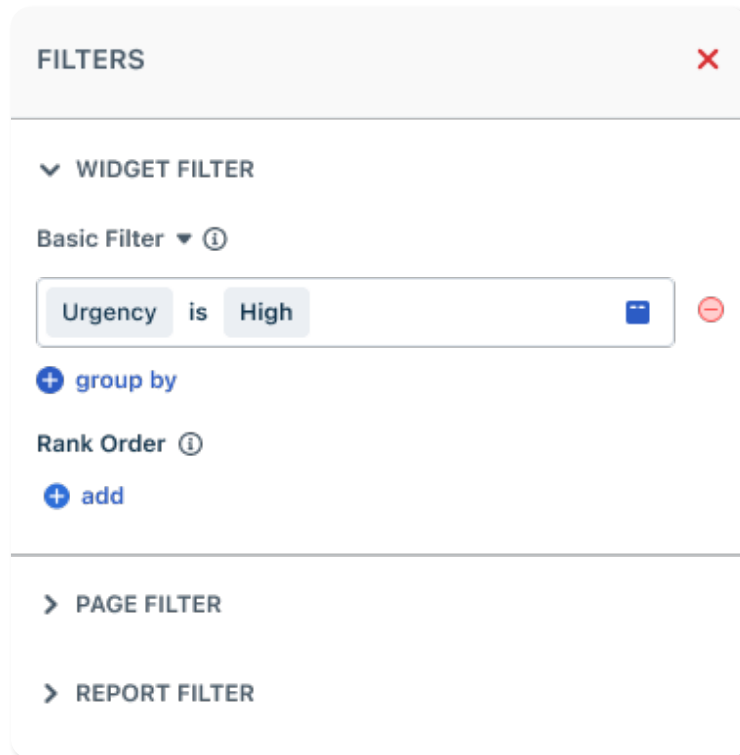
Note: A report filter can also be converted to an interactive filter



6 Quick Filters

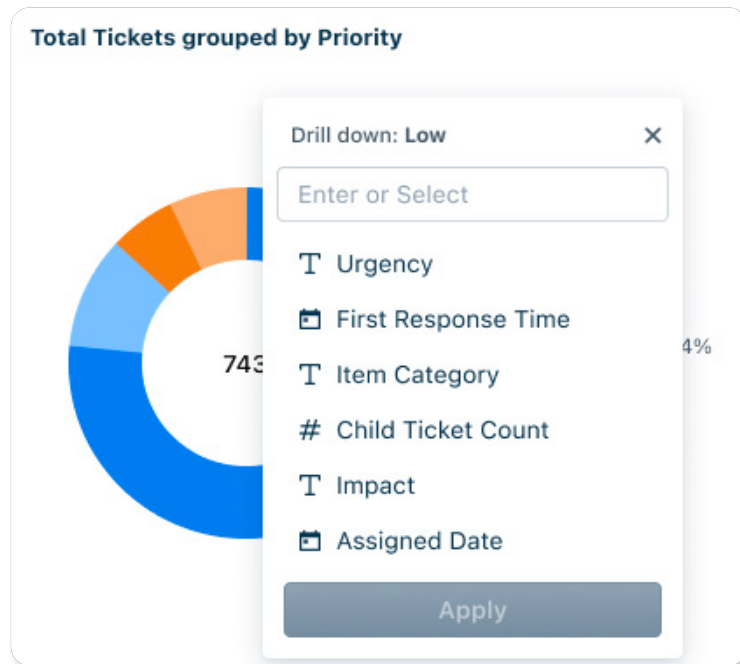
Interact with widgets directly on the reports page using quick filters.

Note: Any filter can be converted to a quick filter by selecting the square icon on the right (this will turn blue on selection).



7 Drill Down

Drill-downs help you slice and dice your data as much as you want to help you find insights in your reports.



For example, say you are viewing how many support tickets you received for a particular month by email source. Now you want to understand which agent had most email conversations. You can further drill-down by, say, the 'Last assigned date' to get a better idea of agent workload.

8 Underlying Data

Underlying data helps you go from a bird eye view to a microscopic view of data. It helps you understand and deduce the outcomes of the chart visualisations.

Showing underlying data for : Won

Deal Stage	ID	Company Name	Deal amount	Account Owner	Territory
Won	15000516185	Acme Inc	\$80	Glenn Maxwell	Asia
	15000516239	Solaris	\$80	Glenn Maxwell	Asia
	15000516287	Strive	\$80	Glenn Maxwell	Asia
	15000516237	Hemley's	\$400	Glenn Maxwell	Rest of Europe
	15000516145	Cesar's	\$160	Marnus Labuschagne	Rest of Europe
	15000516190	Meza	\$100	Marnus Labuschagne	Rest of Europe
	15000516176	Llyod	\$160	Marnus Labuschagne	Rest of Europe
	15000516112	Sentinel	\$160	Marnus Labuschagne	UK
	15000516148	Bakely	\$100	Steve Smith	UK
	15000516109	Pristine	\$240	Steve Smith	UK
	15000516221	Taurus	\$400	Steve Smith	US
	15000516166	GrowSimthio	\$80	Travis Head	US
	15000516233	Simpli	\$80	Travis Head	US
	15000516191	Lava AI	\$240	Travis Head	US
	15000516132	Bartel	\$320	Travis Head	US

< Previous 1 2 3 4 5 6 7 8 9 10 11 12 13 Next > Showing 20 / page

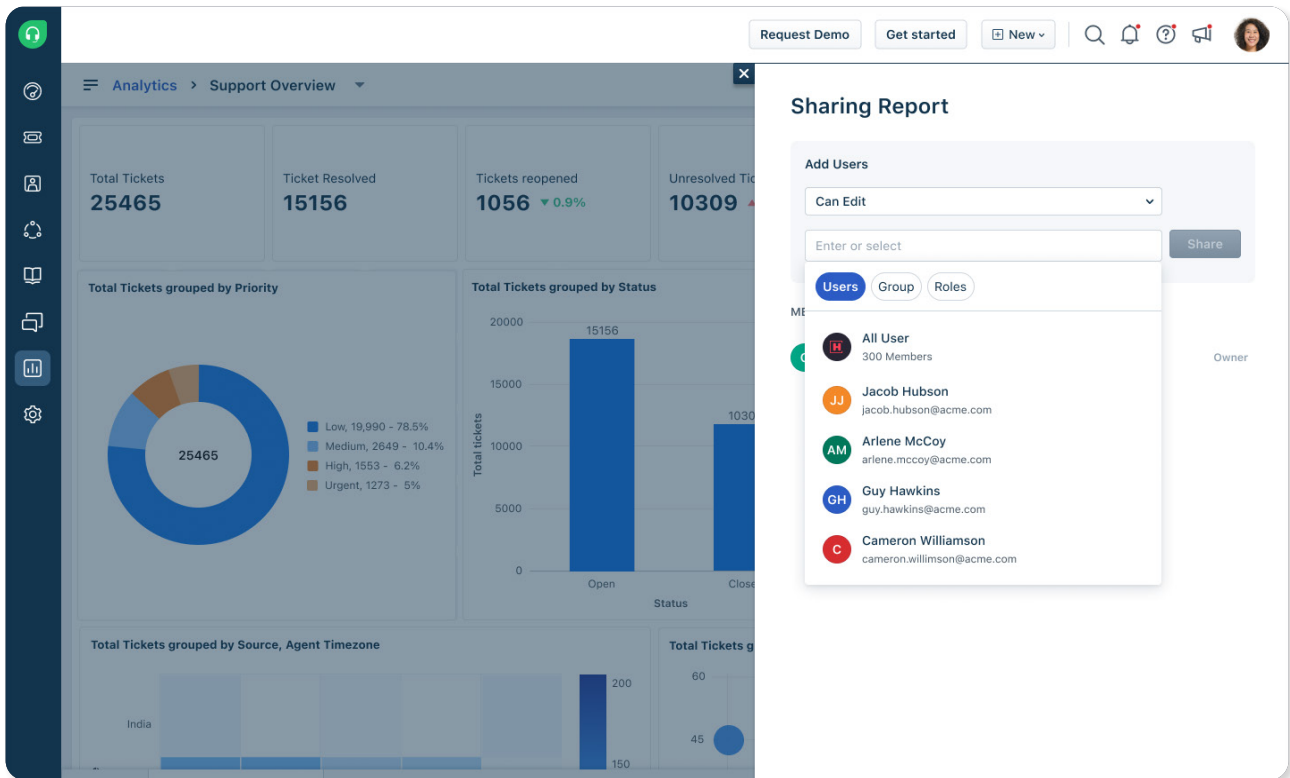
Note: The underlying data will always be in the form of a table.

Share

Share

Collaboration is an integral part of team work and Freshworks Analytics offers multiple features to seamlessly share data and insights across different stakeholders.

Report Sharing



Report Sharing allows you to share reports with individual users or even user groups. It also gives the flexibility to customise user controls with view, edit or manage access to the reports.

Note: Report sharing can only be done with users having access to Freshworks Analytics.

Report Exports

There are three levels of export in Freshworks Analytics. You can either export at a Report level or at a Widget level - at a Report level, you can export the PDF of your report. At a Widget level, you can export as PDF, CSV, or in tabular format.

In addition to this, there is also a master export option in the **Settings** page.

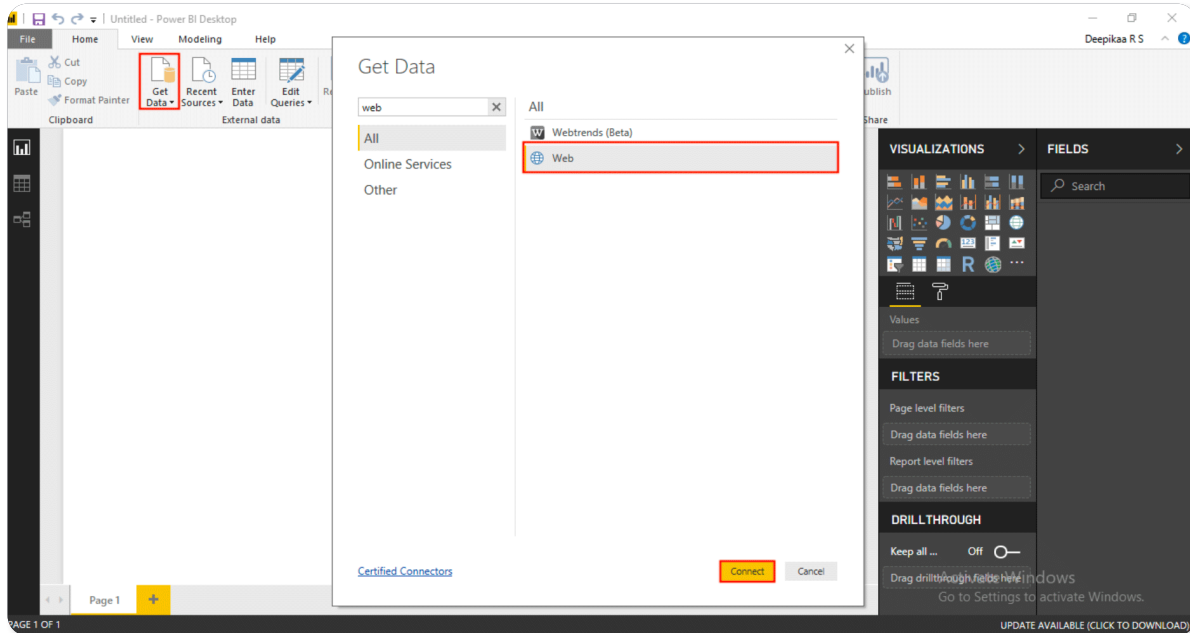
The screenshot displays the 'New Data Export' configuration interface. At the top, there are navigation links for 'Analytics Home', 'Settings', and 'Data Export'. The main form includes a 'Data Exports' dropdown set to 'Ticket Changes', a description field containing 'A quick glance at how our team is doing!', and a 'Schedule' section set to 'Monthly' on the 1st of each month at 20:00 in the '(GMT+05:30) Asia/Kolkata' time zone. A 'Basic filters' section with a 'Filter' button and an 'Apply' button is also present. The 'Choose fields to export' section (Max 70 fields) is divided into three categories: 'Total Tickets' (0 fields chosen), 'Tag fields' (0 fields chosen), and 'Survey fields' (1 field chosen). The 'Survey results' field is selected under 'Survey fields'. At the bottom, the 'Receive At' option is set to 'API'.

Here, you will have options to choose which fields from your report as well as whether you want to receive the file via an API or email.

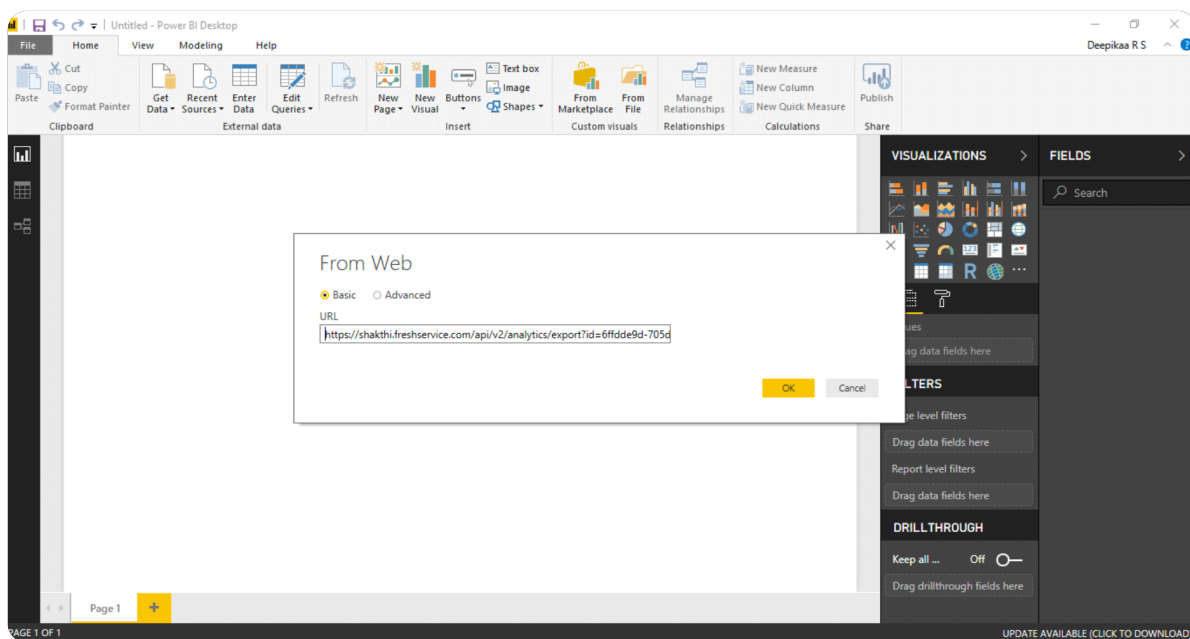
The API URL will hold the link to the export file. Feeding this into your BI tool will allow it to automatically fetch data from Analytics.

Integrating Power BI with Freshworks Analytics

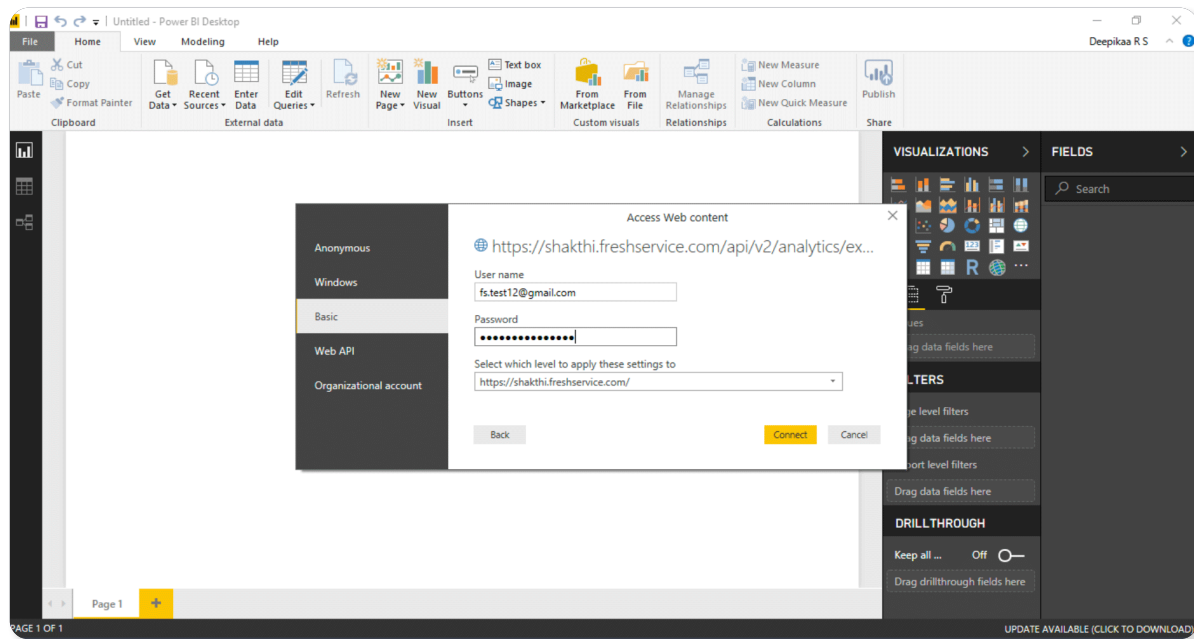
Freshworks Analytics also offers integration with Power BI. To do this, log in to your Power BI Desktop and click on Get Data. From the Get Data window, select Web and click on Connect.



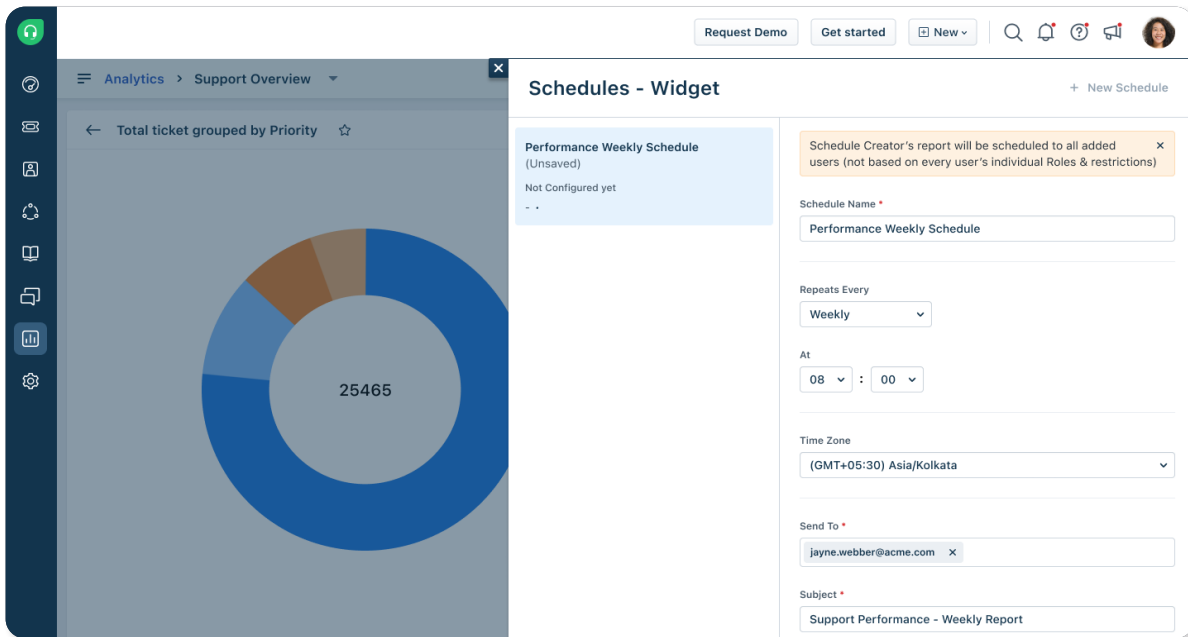
In the From Web window, paste the Freshservice API URL in the URL field and click on OK.



Go to Basic Auth. Here enter your Freshservice Username and Password.



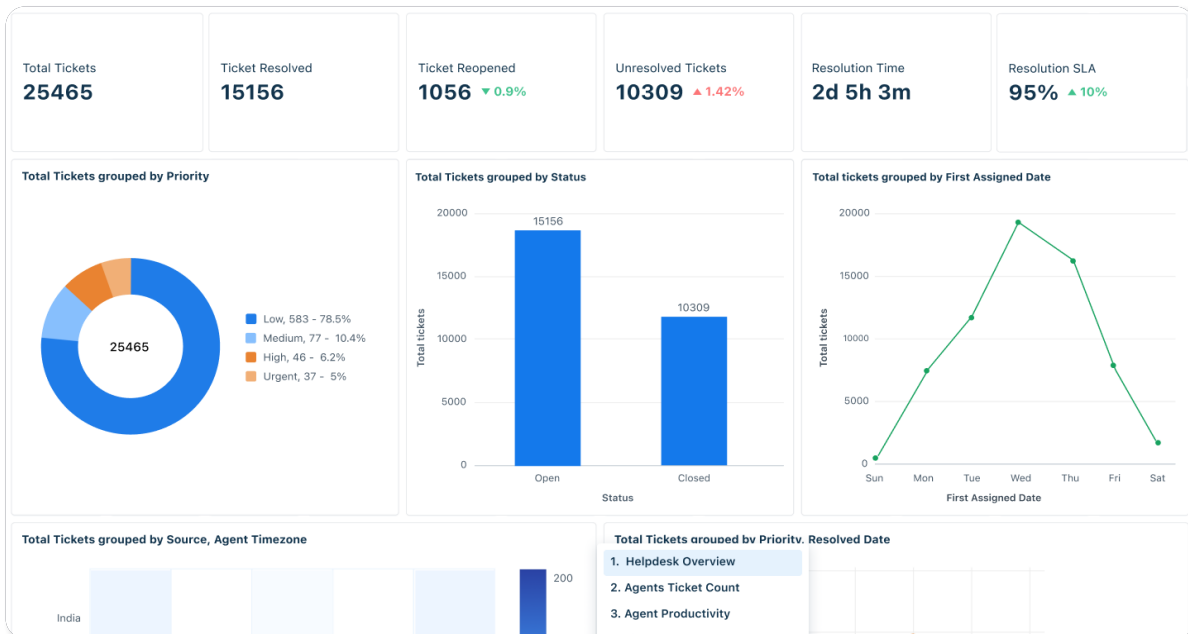
Schedules



In addition to exporting reports, you can also set up schedules that will automatically send reports at a set frequency, such as Daily, Weekly, or Monthly. The recipients will receive an email of the report as a PDF which can be shared with even external users.

Note: Multiple schedules can be created for the same report for different distribution frequencies and recipients.

Presentation mode



Analytics also offers a convenient presentation mode to present your reports and insights directly to your audience. The presentation mode offers flexibility to set timers and pause or display a particular page of the report.

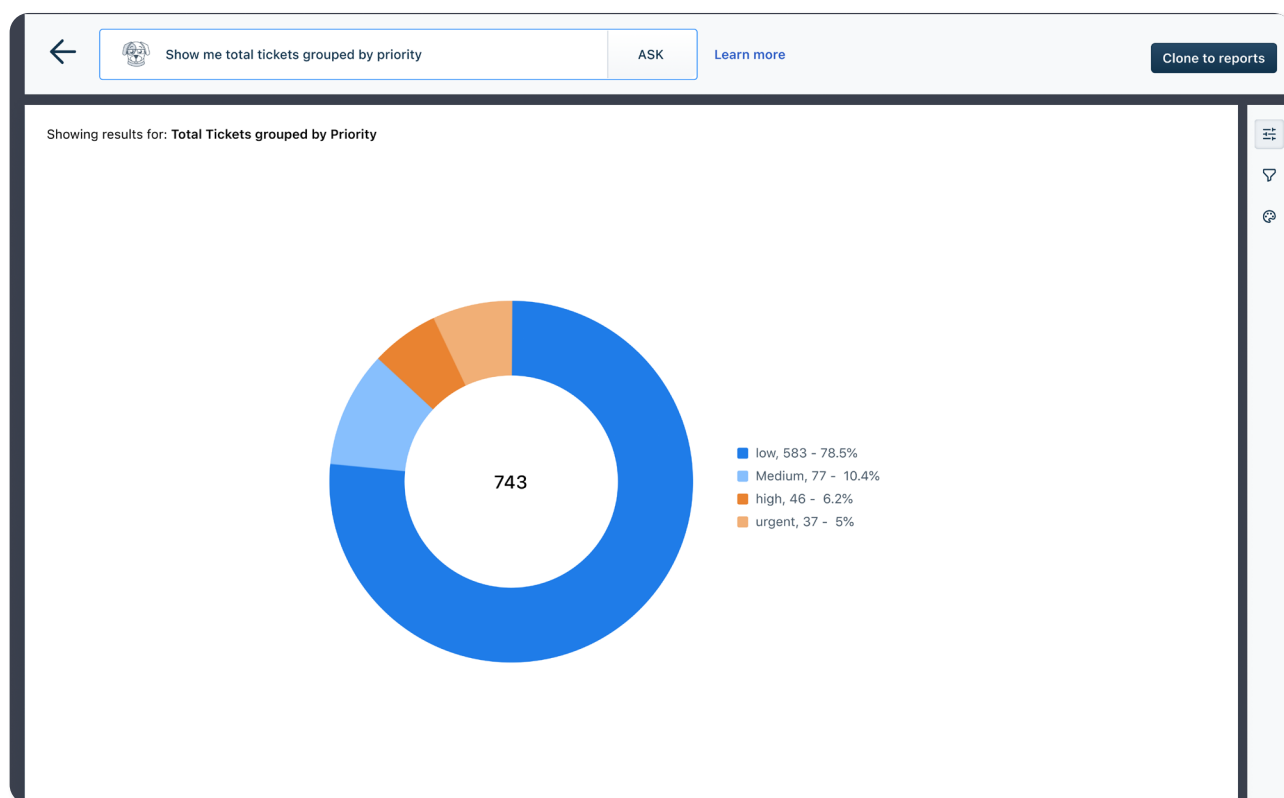
Access

Access

Mobile Analytics

Freshworks Analytics is also available on the go if you are someone who prefers to look at your reports on mobile. You can access the Favorite Widgets in the mobile app.

Freddy - the AI buddy



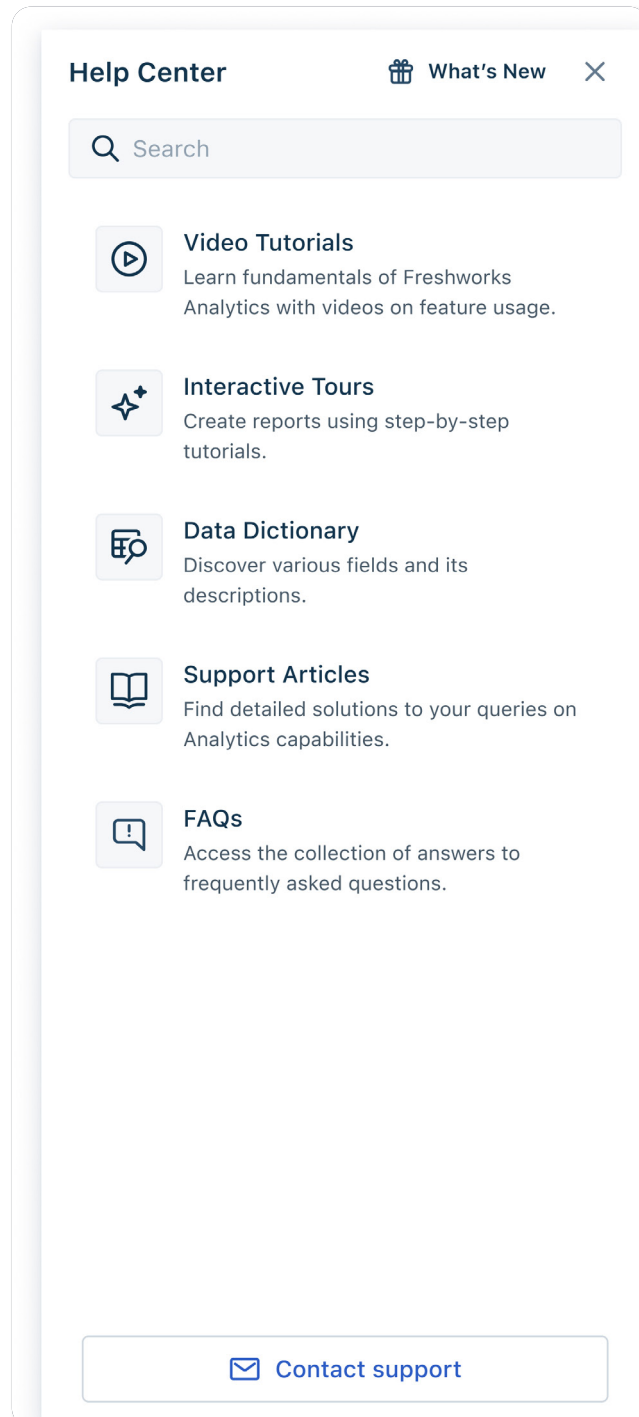
Freshworks Analytics also offers AI-powered capabilities through Freddy, for effortless insight management.

Freddy AI can convert simple text commands to charts using its state-of-the-art NLP technology.

Not only showing the present data, Freddy AI can also predict future trends of certain metrics like Ticket Volume, Average Resolution Time, First Response Time through Forecasting etc.

Help Center:

If you are new to **Freshworks Analytics** or need a refresher incase you are stuck anywhere, do check out our Help Center on the Analytics Homepage. It has a comprehensive list of video tutorials, interactive product tours, data dictionary, support articles and FAQs.



Video Tutorials

Video Tutorials are short videos to assist in understanding the how-to aspects of Analytics.

Interactive Tours

Interactive tours are step-by-step walkthroughs to get a guided experience of Analytics capabilities.

Data Dictionary

Data Dictionary is a repository of metric definitions that are used within Freshworks Analytics, with examples to illustrate their usage.

Support Articles

Support Articles are comprehensive documents that detail various Analytics features and give a deep-dive of their usage.

FAQs

FAQs is a repository of the most frequently asked questions by Freshworks Analytics users.

For any feedback, support or questions about the user guide, feel free to drop us a note on neo-pmms@freshworks.com



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