Communicating With Reps and Customers

In addition to chat, knowledge entries, and automated email notifications, iSupport® includes several features for communicating with and providing information to support representatives and customers. You can enable these features as needed:

Broadcast messages can display to all support representatives or to support representatives in selected groups. See "Sending a Broadcast Message" on page 2.

Alerts, **desktop notifications**, and **headlines** can display in the **Notification Center** on the Desktop. See "Creating Alerts and Desktop Notifications" on page 2.

Header text and images can display in the top frame of the Desktop. See "Creating Header Text and Images" on page 4.

Headlines can display in a desktop notification or view on the Desktop and mySupport portal. See "Creating Headlines" on page 4.

Frequently asked questions (FAQs) (informational documents in question and answer format) can display on the mySupport portal and in views on the Desktop. See "Entering FAQs" on page 8.

News feeds that contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. See "Configuring News Feeds" on page 10.

Tutorials with a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content, can be configured for display to support representatives and customers. "Configuring Tutorials" on page 14.

mySupport portals enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more. See "mySupport Portal Informational Options" on page 20.

LinkedIn and **Facebook** linked account functionality can be enabled for the mySupport portal, and Facebook integration can be configured for the Facebook Monitor Desktop component. **Twitter** notifications can be sent to customers and problems (Service Desk Edition) and headlines can be published to Twitter. See "Integrating with Social Media" on page 21.

Support representatives can send **correspondence** and utilize templates that can be configured to include defaults and field values when the email is sent. You can create **Others to Notify lists** of people that are not directly involved to be sent event notifications and other correspondence, and create a **personal contact list** of customers that will display by default when type ahead is used in the address fields in the Correspondence screen. See "Using iSupport's Correspondence Functionality" on page 23 for more information.

You can use the **View Subscription** feature to send an email with an attached file of exported view data to configured recipients on a schedule; support representatives can also configure view subscriptions via the Subscription icon in the View component on the Desktop. "Viewing and Creating View Subscriptions" on page 31 for more information.

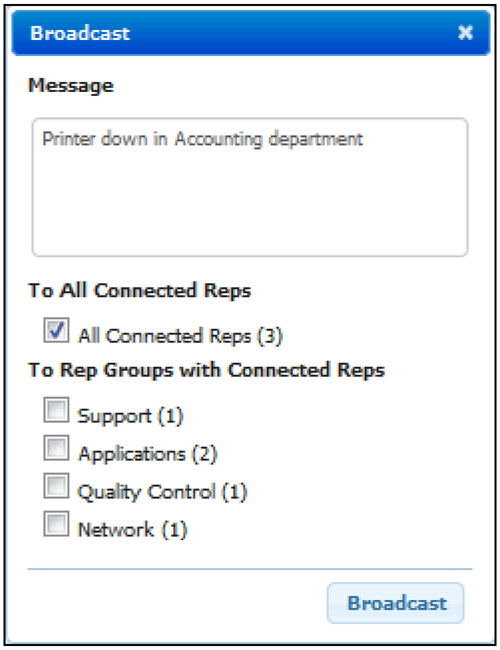
iSupport's **Mass Mailing Approvals** feature requires approvals on any correspondence sent from a customer view. The Mass Mailing component includes correspondence that is awaiting approval or has been rejected by an approver. See "Configuring Mass Mailing/Approvals" on page 31 for more information.

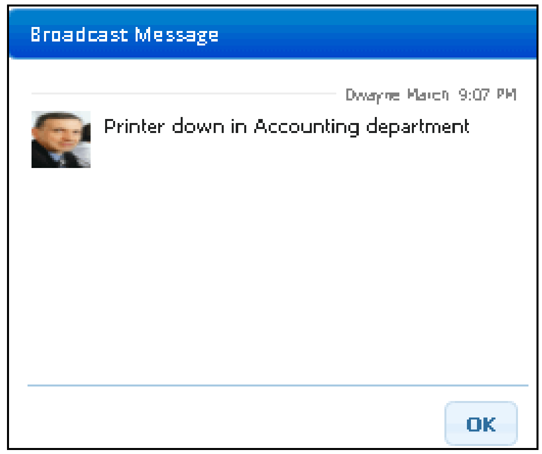
You can configure integration with Google Calendar, Google Meet, Microsoft Outlook, Zoom, and Microsoft 365 Teams to display an icon in the Incident screen for initiating a meeting. See "Configuring Calendar and Meeting Integrations" on page 33.

You can configure integration with Twilio for sending iSupport notifications to support representatives via SMS (Short Message Services) messaging. See "Configuring Twilio Integrations" on page 41.

Sending a Broadcast Message

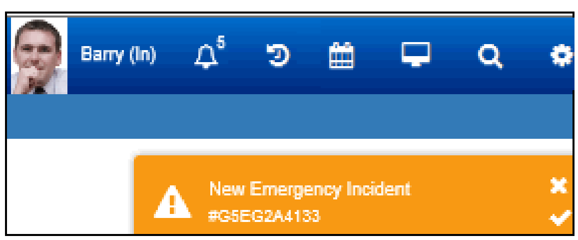
Broadcast messages appear to all support representatives or to support representatives in selected groups via the Send Broadcast option on the Desktop Create menu. Support representatives will need to individually close the message window.



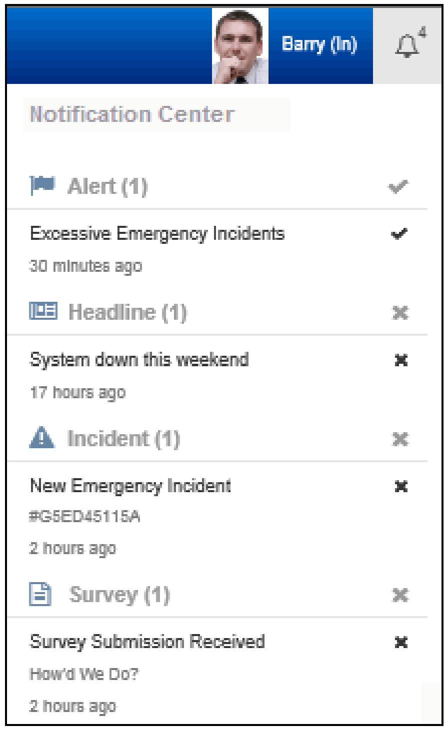


Creating Alerts and Desktop Notifications

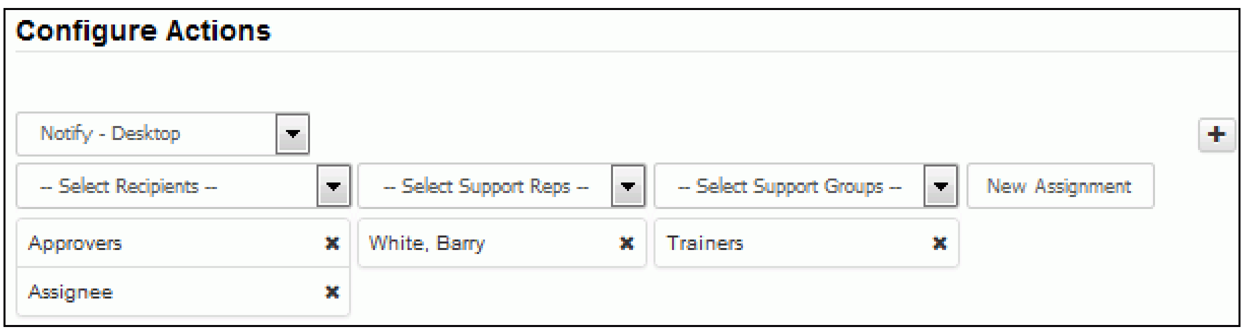
Use the **Notification Center** icon to display a list of notifications configured via the Rules, Alert Designer, and Headline screens. Options on the Desktop Notification Center tab in Preferences (accessed by clicking the avatar/ login) determine whether or not an entry will appear as a popup or list entry and the maximum number of entries that should appear in the list at one time. An example of a desktop notification popup is shown below:



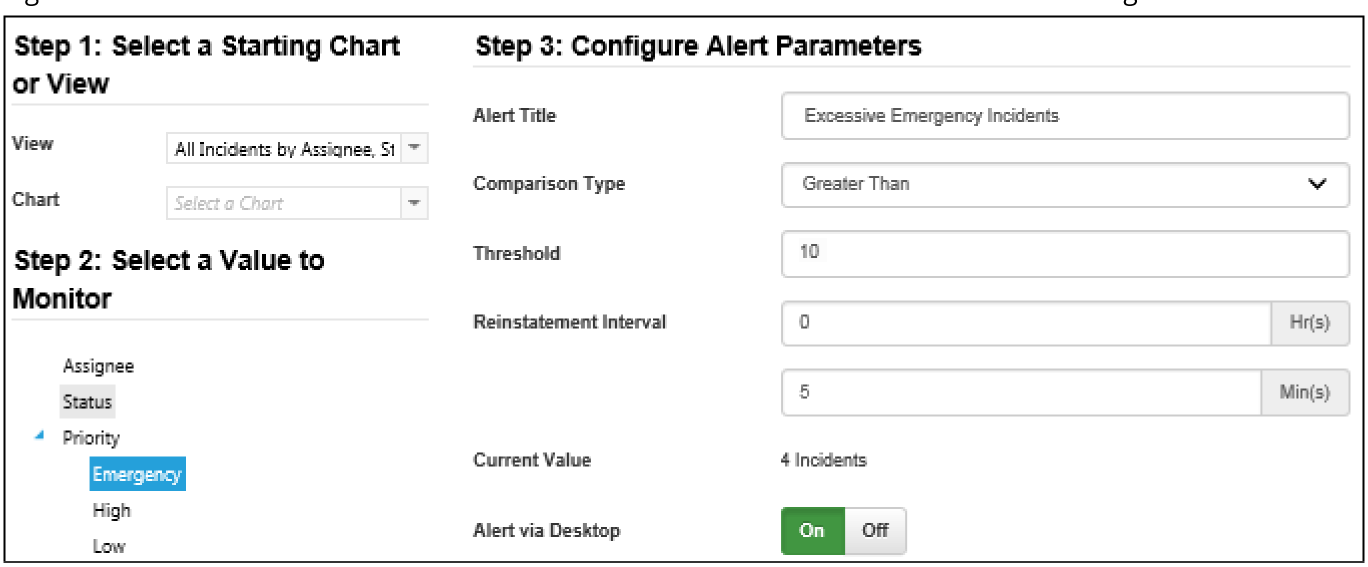
An example of the dropdown is shown below.



Select the Notify - Desktop rule action Desktop Notification in the Rules screen as shown in the example below:

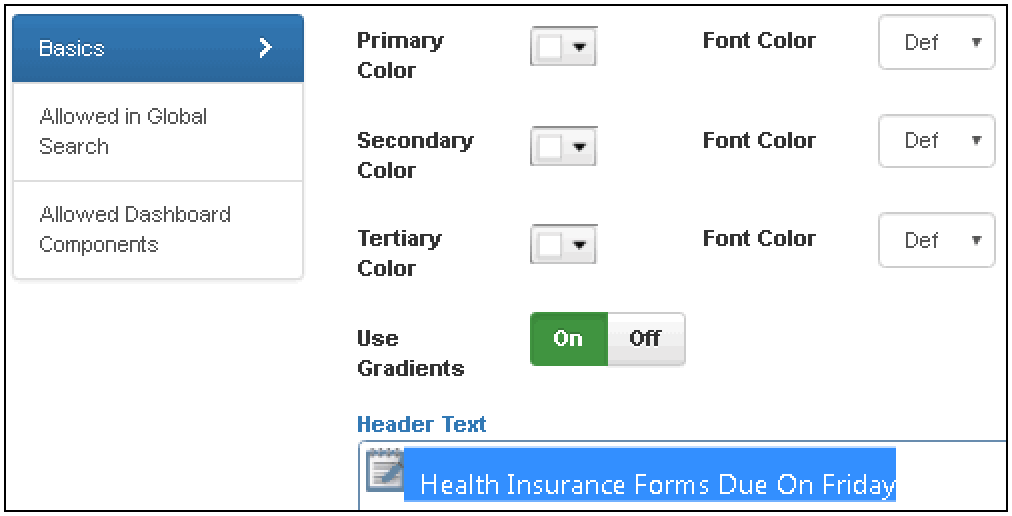


Alerts display when a view field reaches a certain threshold; select Yes in the Alert via Desktop field in the Alert configuration screen to enable it. Note that alerts are evaluated on the schedule of the Alert agent.

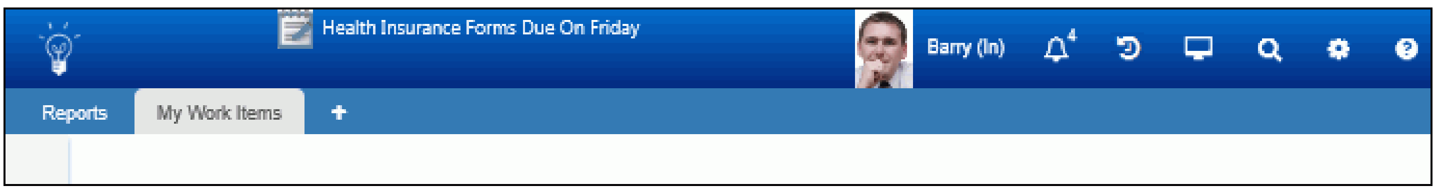


Creating Header Text and Images

Use the Options and Tools | Customize | Dashboard Settings screen to enter text and images to appear at the top of the Desktop page between the Desktop Create icon and the Profile avatar/name. You can format the text and include images via the text editor toolbar.

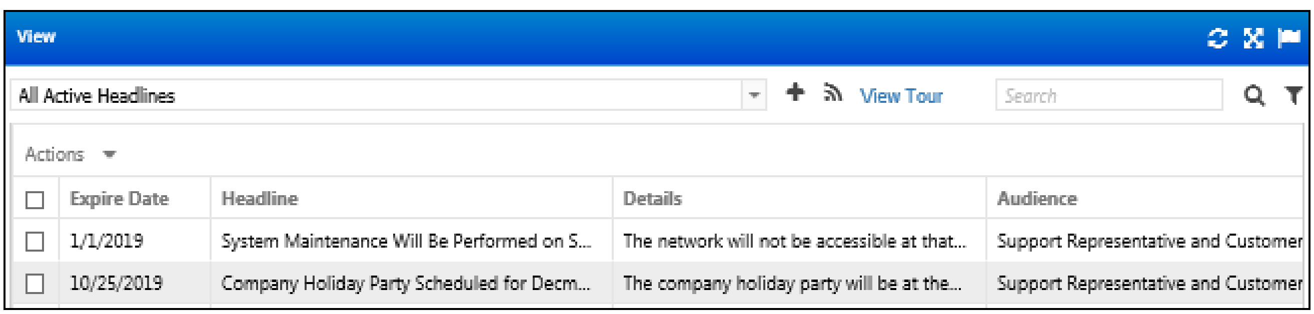


The text will appear as shown in the example below.

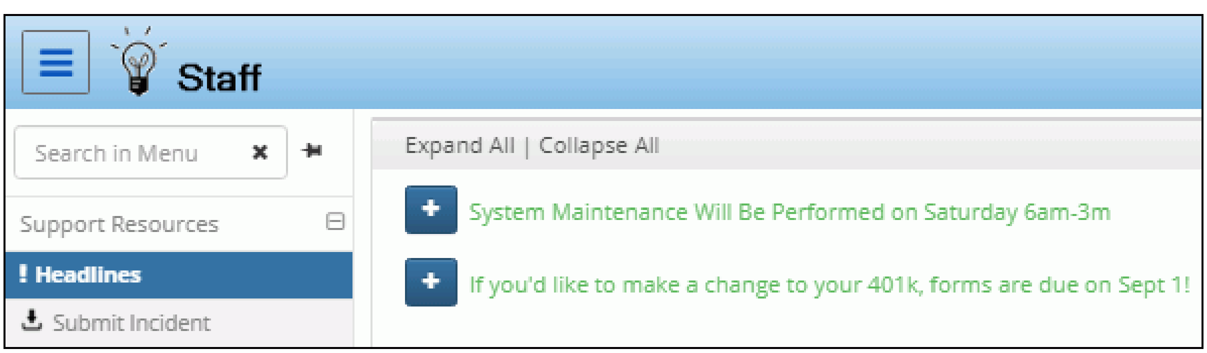


Creating Headlines

You can create informational headlines for display in a desktop notification or view on the Desktop and mySupport portal.

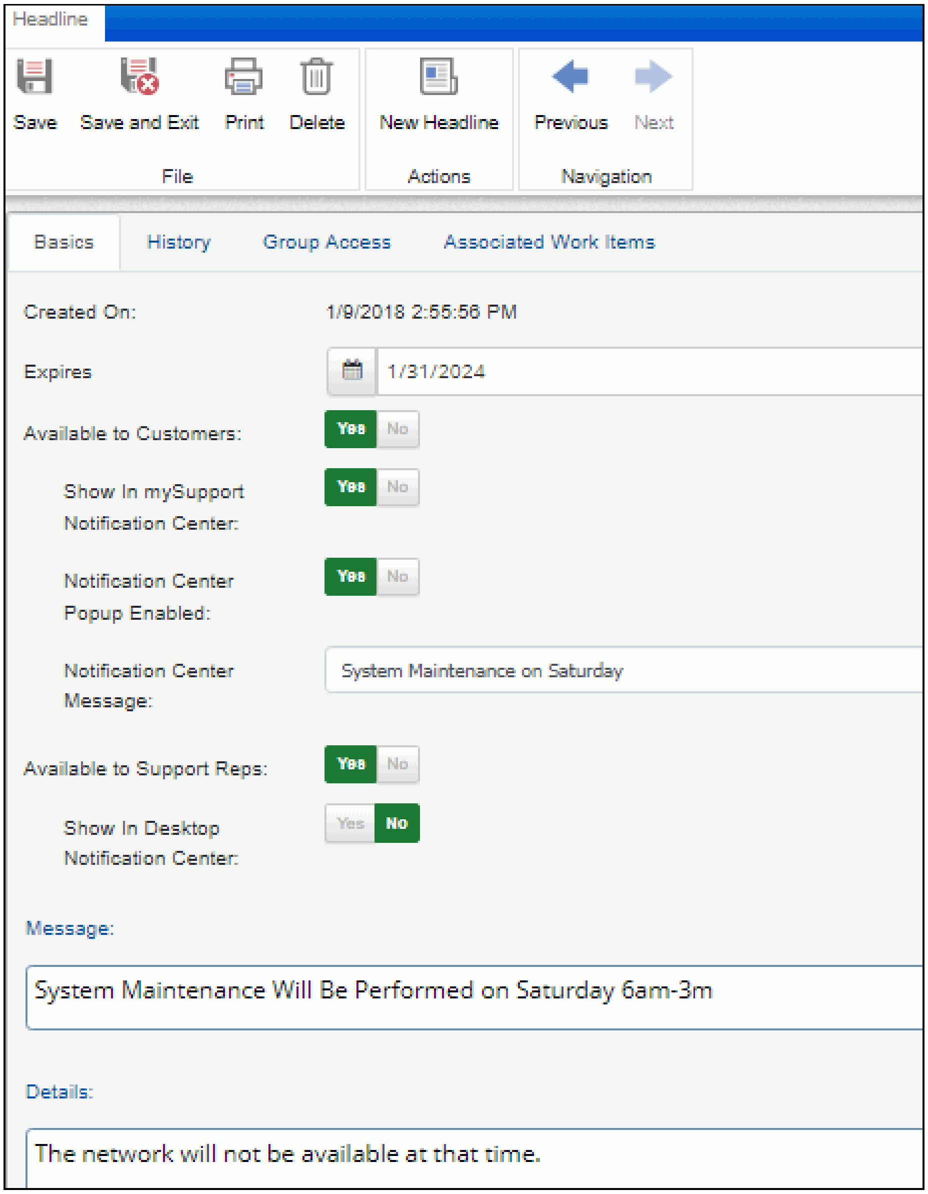


Headlines that are enabled for display to customers can be included on a mySupport portal via a view in a component, feed, or navigator link. The navigator link is shown below.



Entering Headline Basics

To access the Headline entry screen, select Headlines under Create on the Desktop menu.



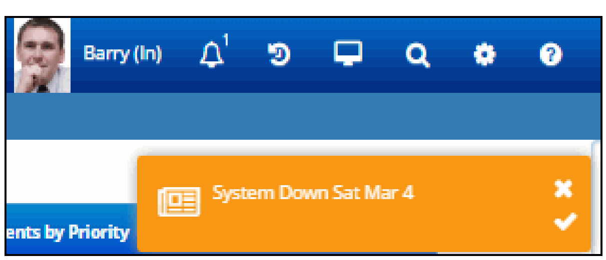
Expires - Select the day on which the headline should no longer display. (The headline will not display on this day.)

Available to Customers - Select Yes to enable display of the headline on a mySupport portal.

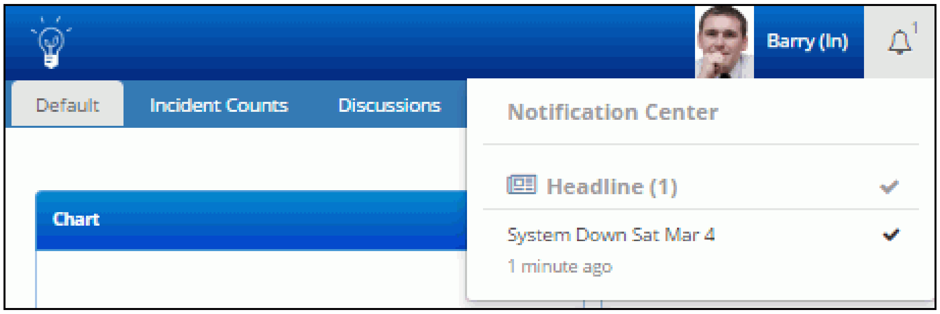
Available to Support Reps - Select Yes to enable display the headline in views and in the Notification Center, and in a popup on the Desktop.

Show in Desktop Notification Center - Select Yes to enable the headline for display in the Notification Center list and popup.

Notification Center Popup Enabled - Select Yes to display the headline in a popup as shown in the example below:



An example of the dropdown is shown below.



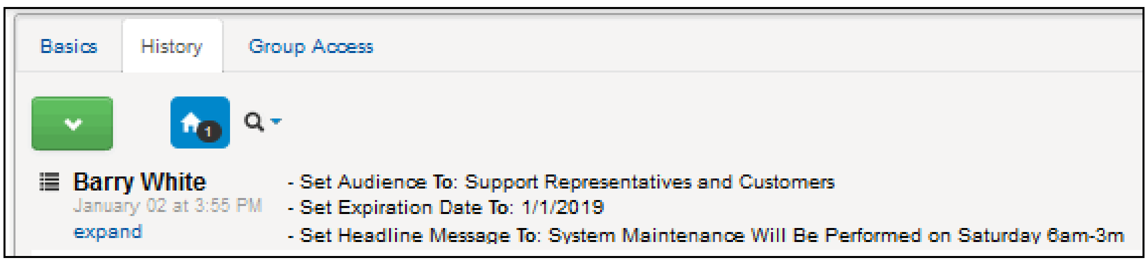
Desktop Notification Message - Select Yes to display the headline in the list of notifications accessed via the **Desktop Notifications** icon.

Message - Enter the headline to display on the Desktop and/or mySupport portal. You can use HTML tags to format the text.

Details - Enter additional information to display on the Desktop and/or mySupport portal.

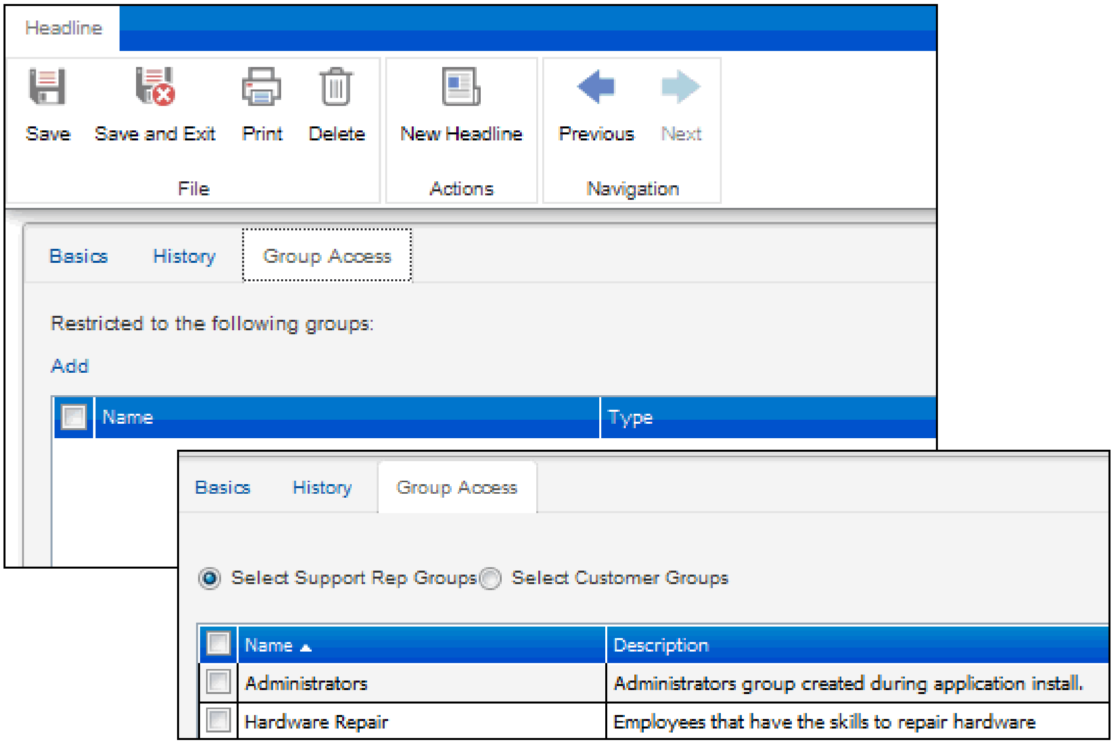
Viewing History

Use the History tab to view notations on all headline actions.



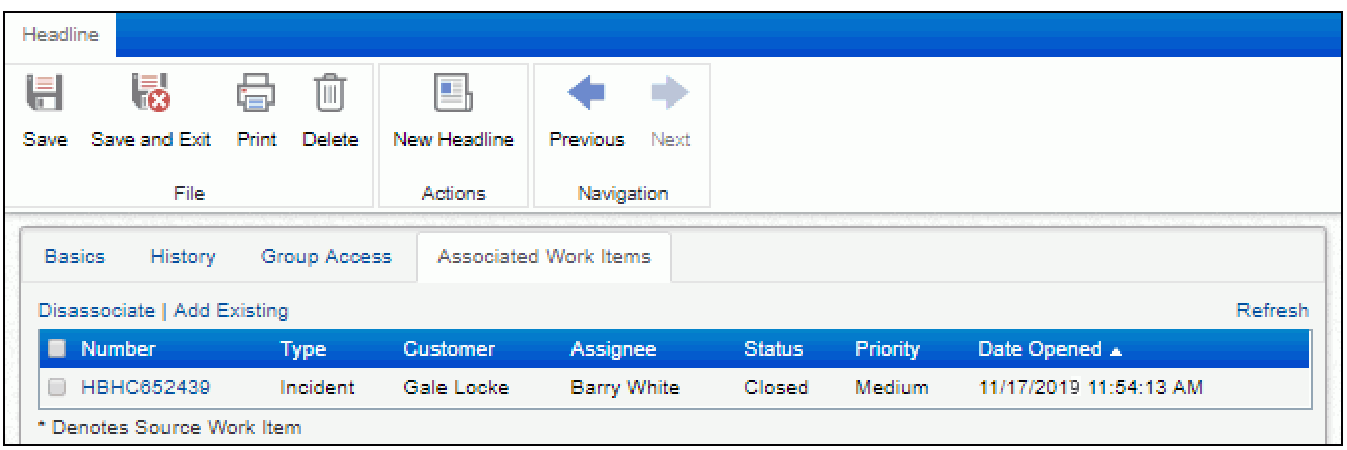
Restricting Access

Use the Group Access tab to restrict display of a headline to members of support representative and customer groups. Click the Add link to display the following dialog for selecting the groups. ***After you add one or more groups and save, the headline will display only to members of the selected groups.***



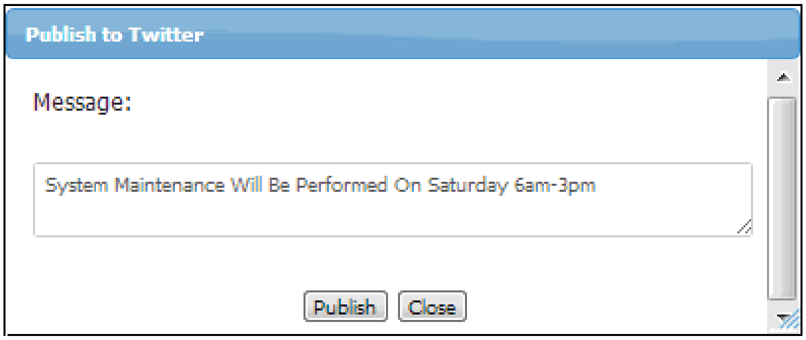
Associating Work Items

Use the Associated Work Items tab to associate an existing incident or problem with the headline.



Publishing to Twitter

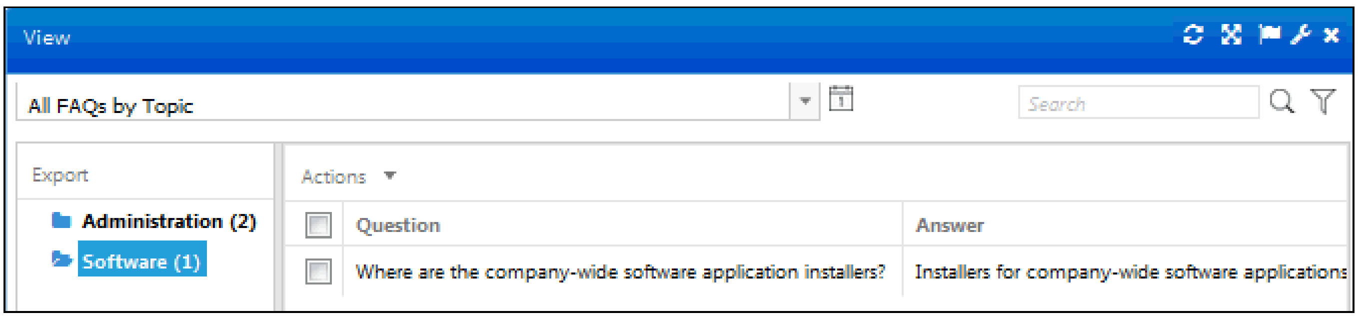
The Twitter® icon will appear in the Headline screen if you have the Publish to Twitter permission and a Twitter application has configured; when clicked, the Publish to Twitter dialog will appear with the contents of the message and details (for headlines) or the short description (for problems). If multiple Twitter applications have been created, you can select the account to which the headline or problem should be published.



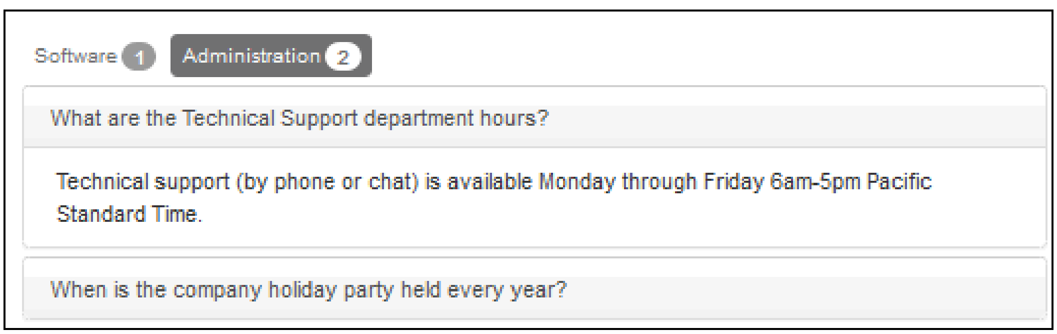
See "Integrating with Social Media" on page 21 for more information.

Entering FAQs

Frequently asked questions (FAQs) are informational documents in question and answer format on the Desktop and mySupport portal. You can create topics to sort FAQs.

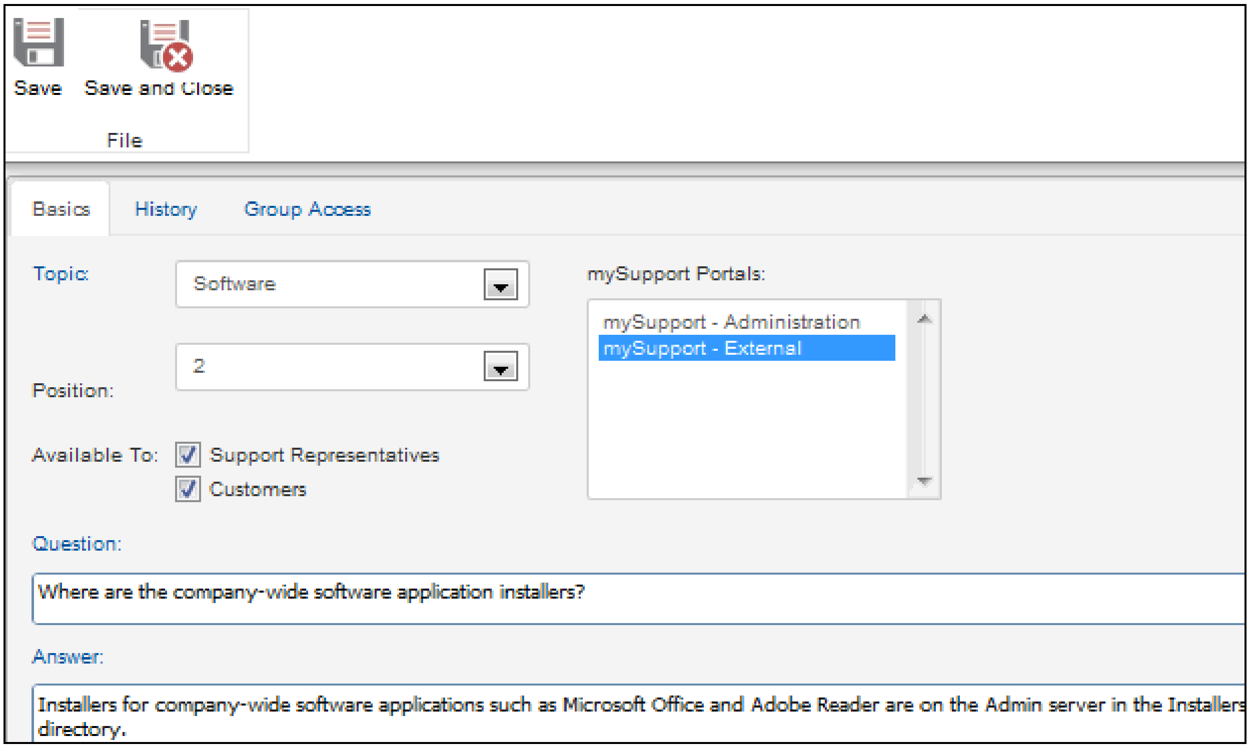


Customers can view frequently asked questions if you add a link on the mySupport portal.



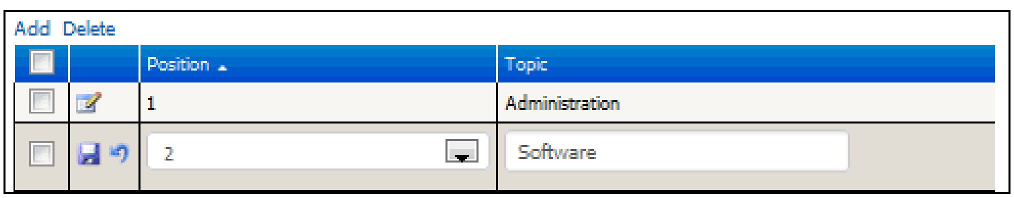
Completing the Basics Tab

To access the FAQ entry screen, select FAQ under Create on the Desktop menu.



Topic - Select the topic under which the FAQ should be displayed. If you select None, the FAQ will appear at the top of the FAQ topics.

To enter a new topic, click the Topic link. In the Manage FAQ Topics dialog, click the Add link. Use the Position field to select the row number for the position of the topic; row one will be listed first, row two will be located under the first row, and so on.



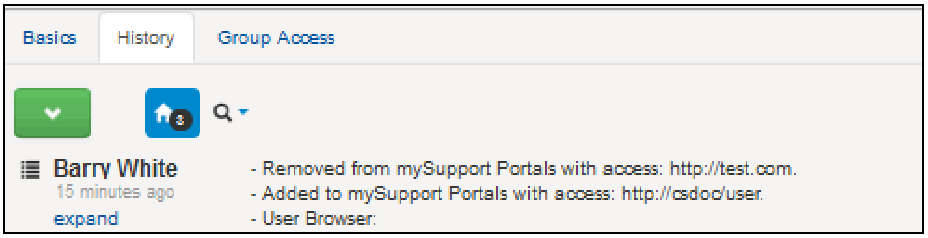
Available To - Select one or both of the following: Support Representatives to allow the frequently asked question to display to support representatives on the Desktop. Select Customers to allow the frequently asked question to display to customers on the mySupport portal.

mySupport Portals - Select the configured mySupport portals on which the frequently asked question should appear.

Question/Answer - Enter the frequently asked question and answer to display to support representatives and/or customers.

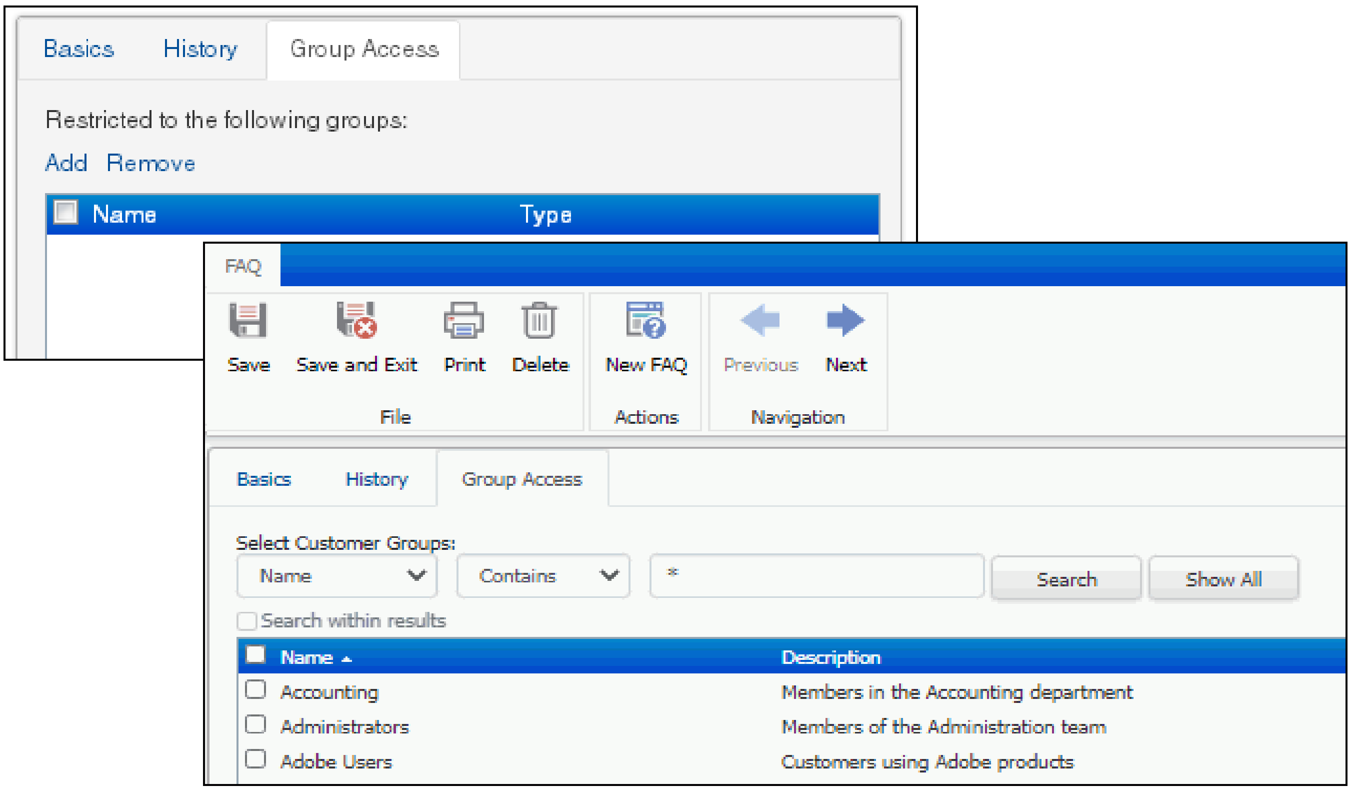
Viewing History

Use the History tab to view notations on all FAQ actions.



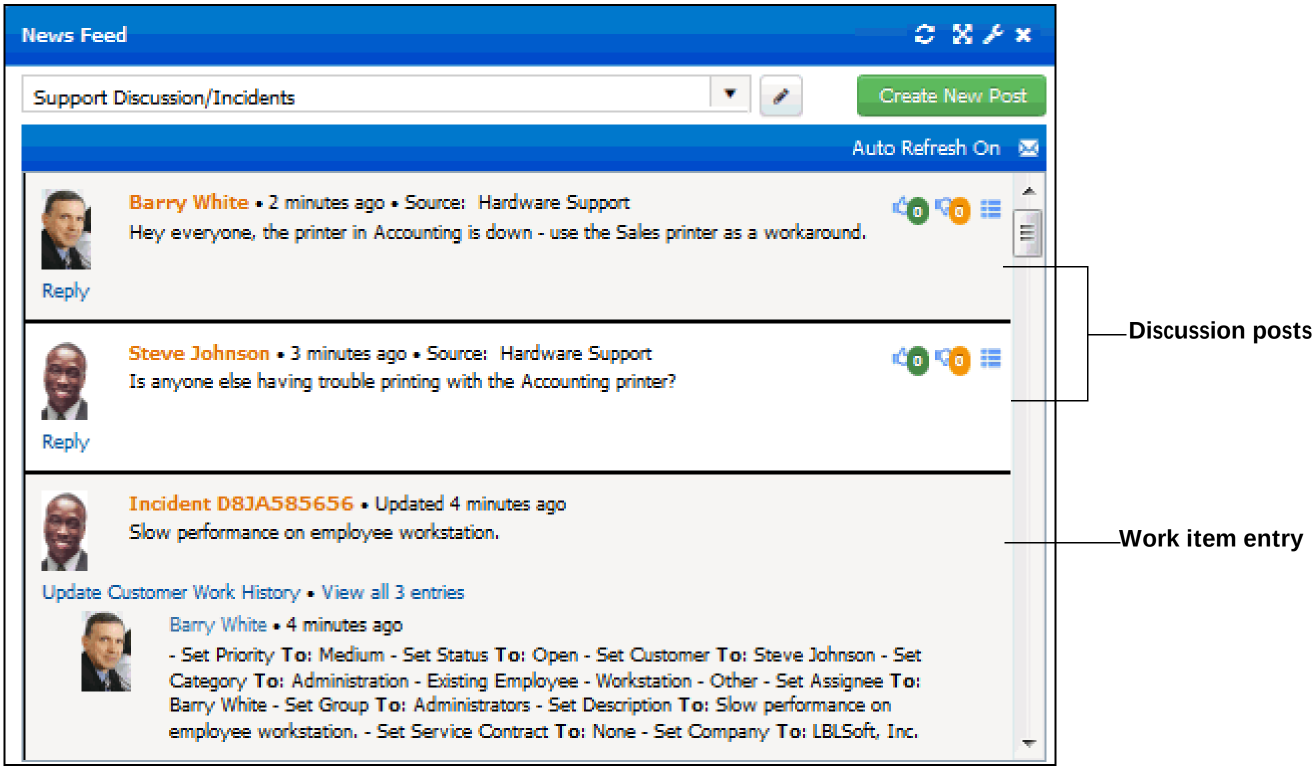
Restricting Access

Use the Group Access tab to restrict display of a FAQ to members of customer groups. Click the Add link to display the following dialog for selecting the groups. ***After you add one or more groups and save, the FAQ will display only to members of the selected groups.***

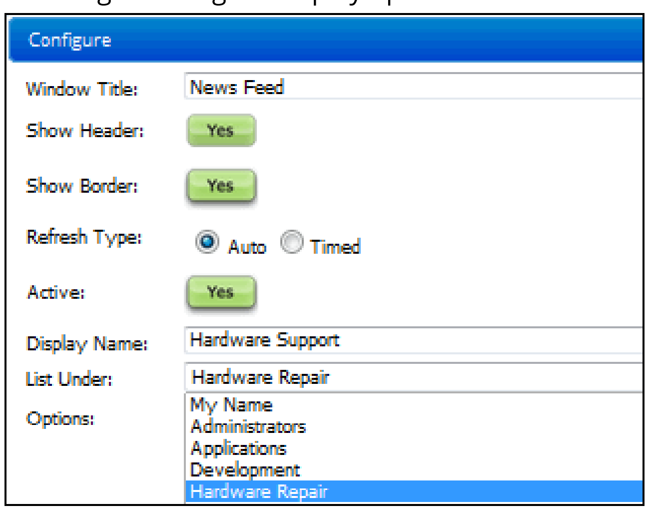


Configuring News Feeds

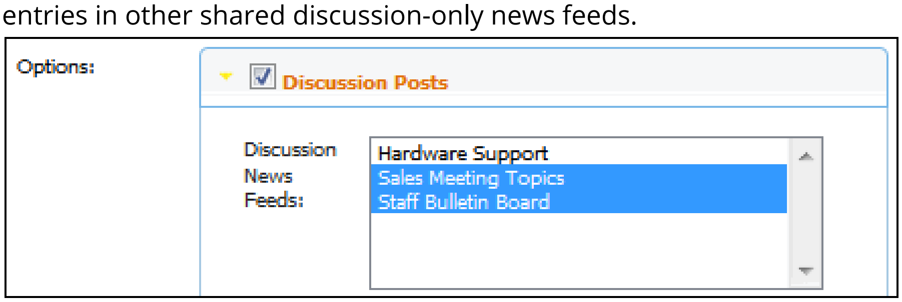
The News Feed component contains feeds that can contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. See the online help for more information on each option.



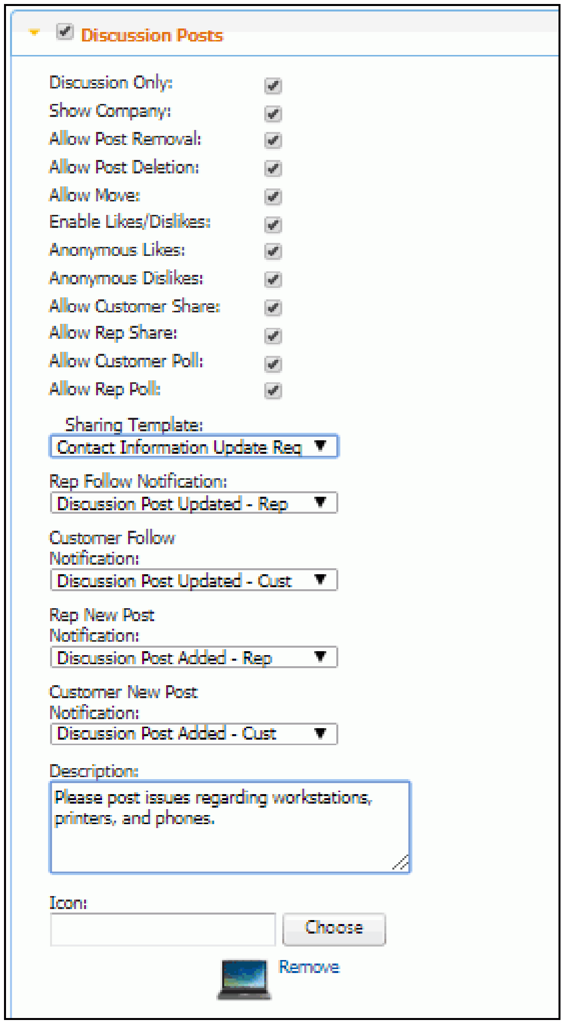
Select Create Feed in the News Feed component dropdown to create a news feed. The Configure dialog appears; use the fields in the top half of the dialog to configure display options.



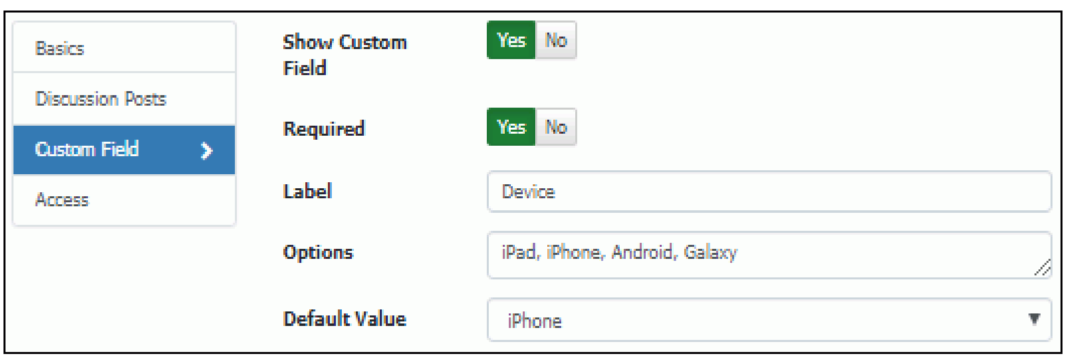
Enable the **Discussion Posts** section in the Configure dialog to include discussion posts in a news feed. If you **do not have** Discussion Feed Administrator access in your Support Representative Profile record, use the Discussion News Feeds field to include entries in other shared discussion-only news feeds.



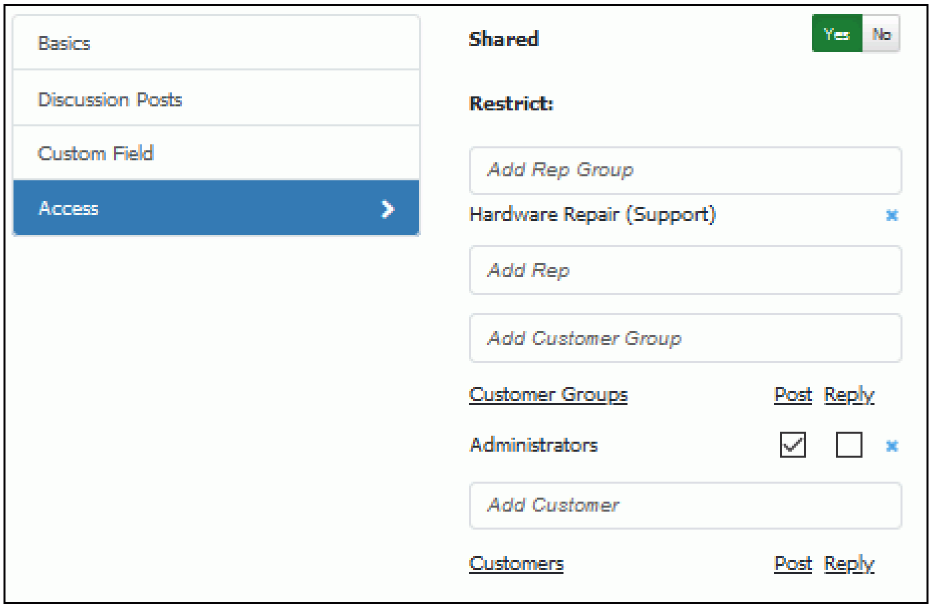
If you **have** Discussion Feed Administrator access in your Support Representative Profile record, the **Discussion Only** checkbox will appear to include only discussion posts in the feed.



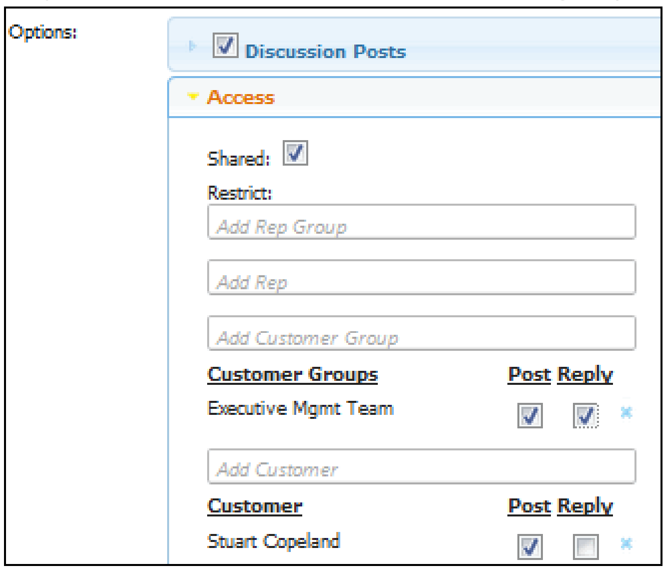
Use the **Custom Field** section to add a custom field to posts in a discussion-only news feed. You can make it required, enter options for selection (separate with a comma), and set a default value. Posts can be sorted by the custom field configured for a feed. Note that custom fields do not appear in replies.



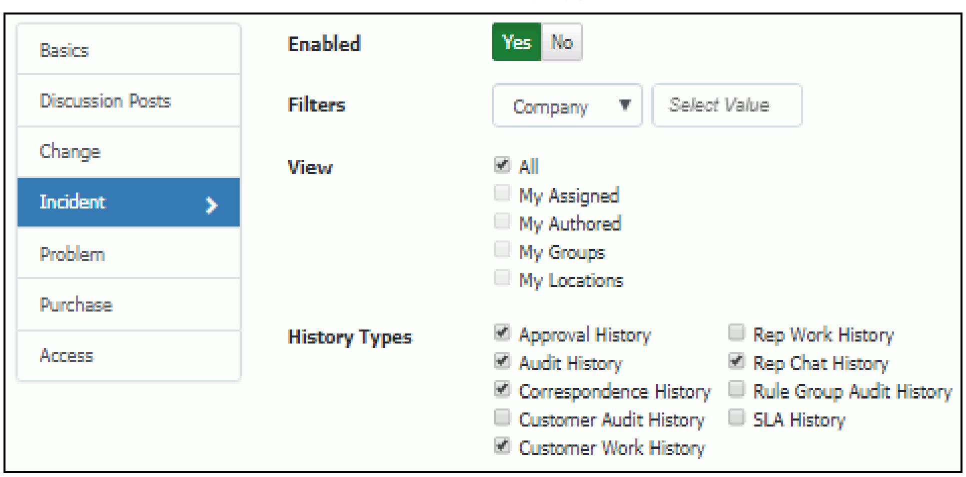
The **Access** section appears if you have Discussion Feed Administrator access in your Support Representative Profile record. Use the Shared checkbox to enable representatives and customers to view feed entries. (If this box is unchecked, only you will be able to view the feed entries.) You can restrict availability to selected support representative groups and individual support representatives (in addition to yourself).



If it is a discussion only news feed, you can also restrict access for customer groups and individual customers.



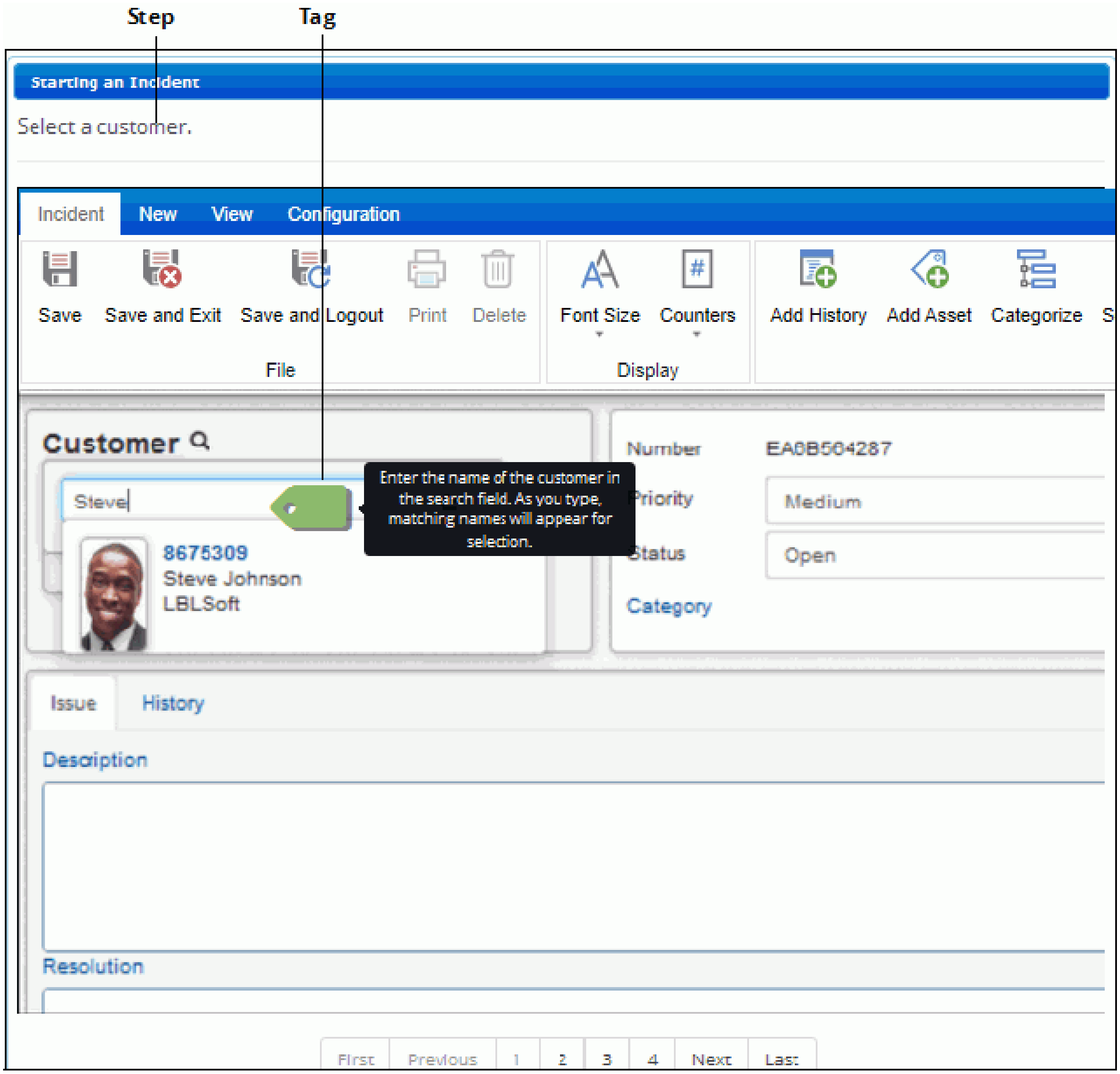
Use the work item-specific sections in the Configure dialog to restrict display of work items; you can display only work items for a specified incident field value, view, and history type.



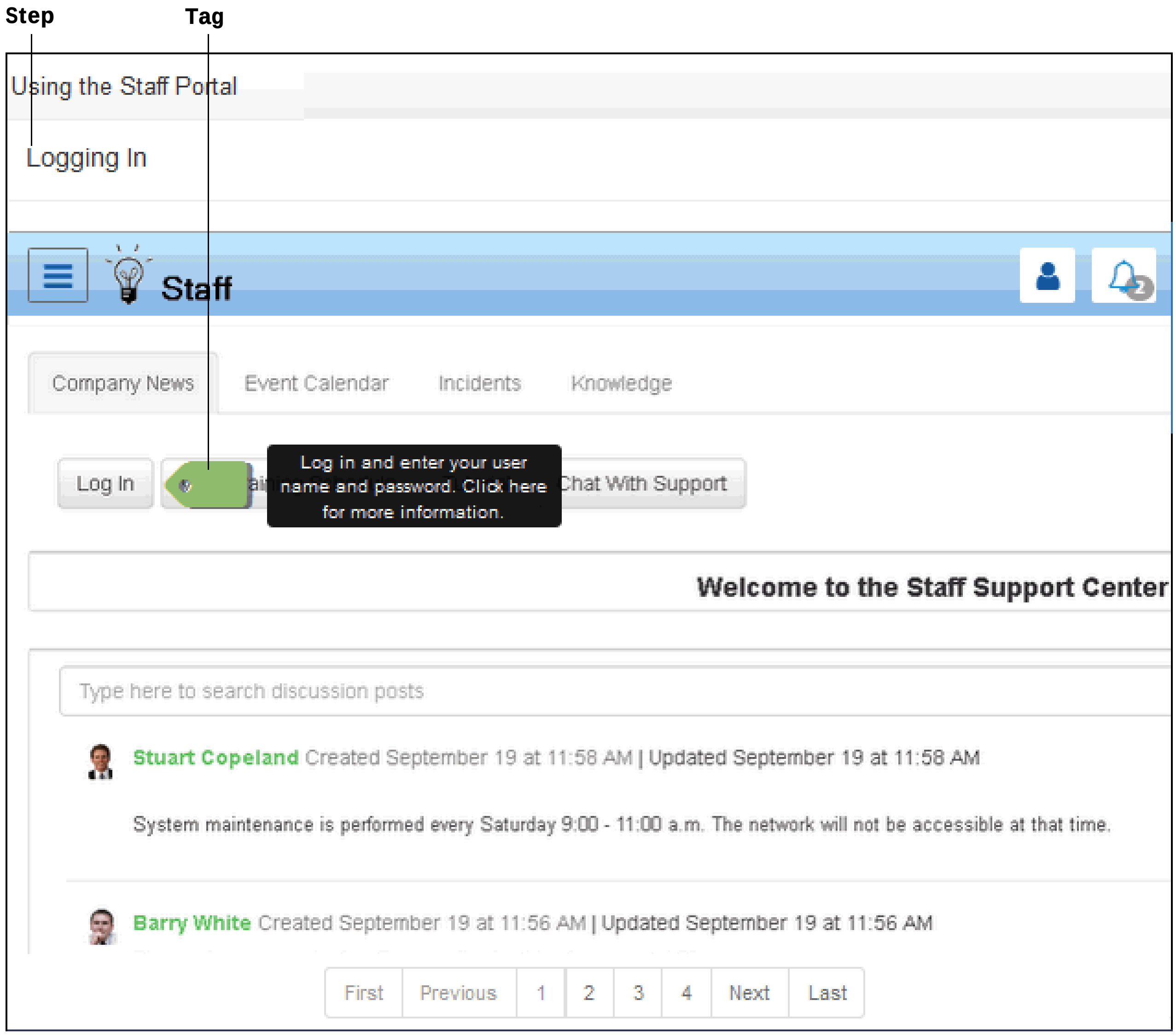
Configuring Tutorials

Go to Options and Tools | Customize | Tutorials to configure tutorials for providing information to support representatives and customers. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content.

On the Rep client:



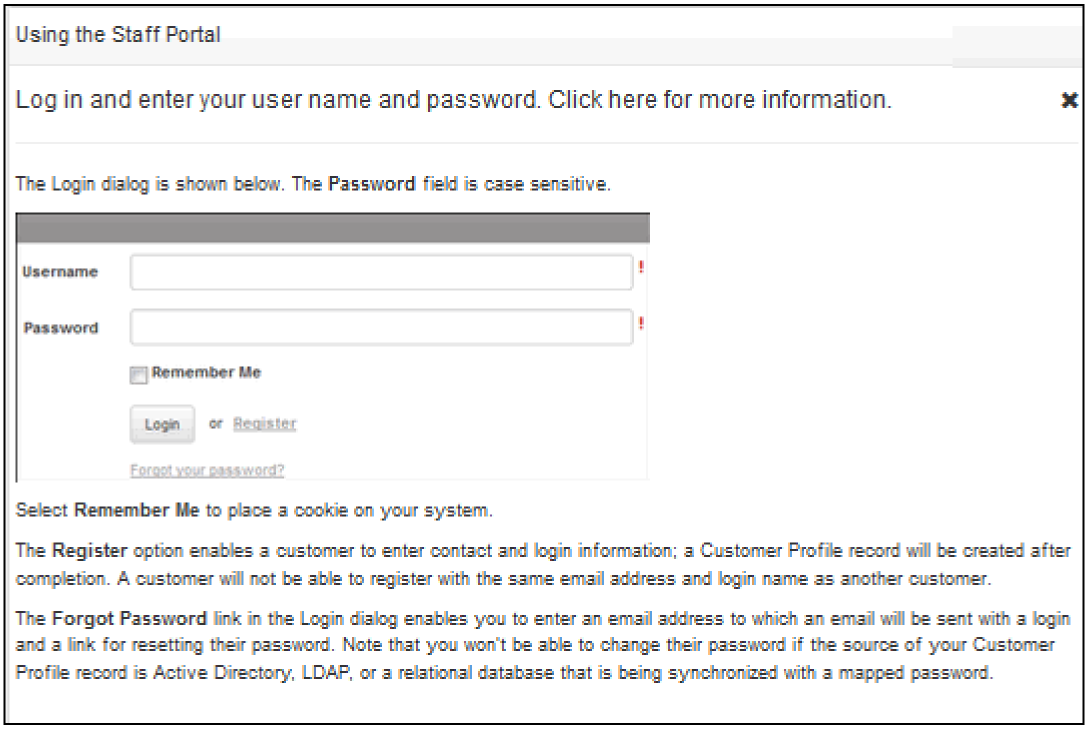
On a mySupport portal:



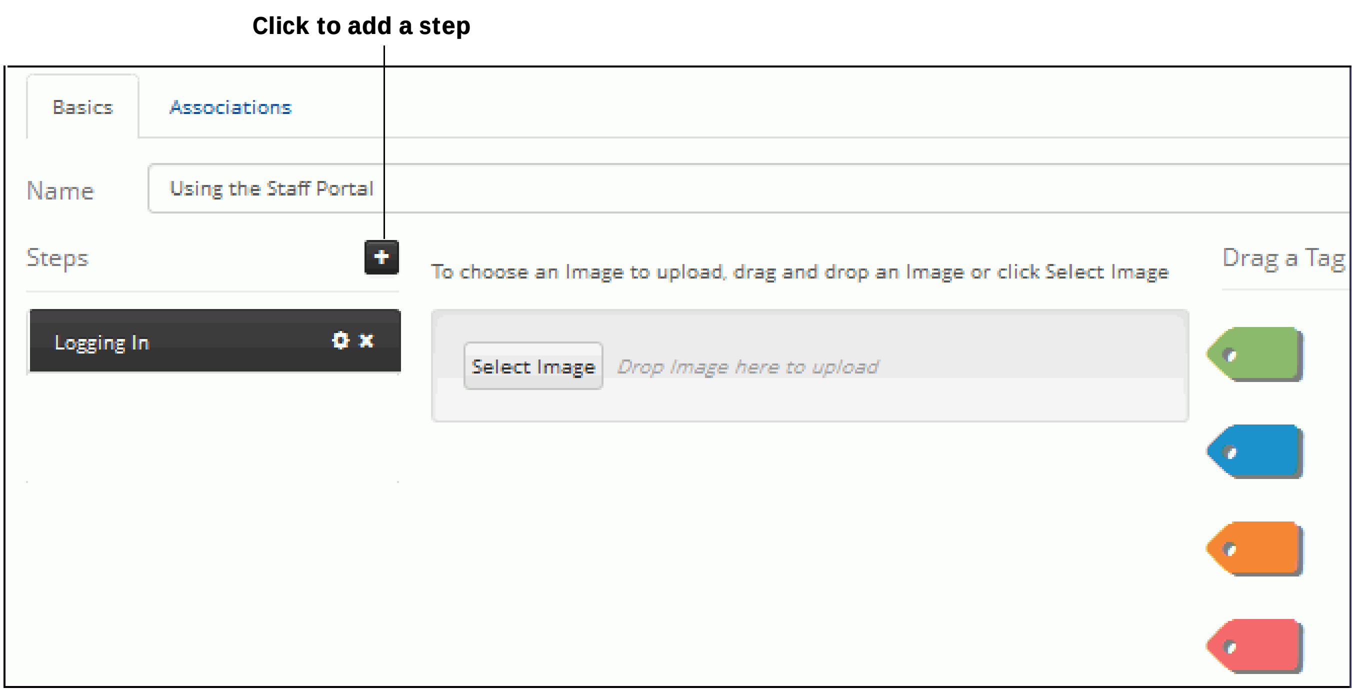
You can associate a tutorial with entry screen layouts, configuration screens, Rep Desktop dashboards, and mySupport dashboards. The tutorial will appear the first time a support representative accesses the screen associated with the layout or page. After that point, for screens with a large icon ribbon, a Tutorial icon will appear on the View ribbon if one is associated with the layout or page.

On mySupport, you can associate a tutorial with a dashboard, a mySupport work item submit or display layout, and a navigator link or a button that accesses a feature. For dashboards, the tutorial will appear the first time the authenticated user accesses the dashboard; after that point the Tutorial icon will appear in the upper right corner. You can also directly link a tutorial to a button or navigator link; this will display the tutorial every time the button or link is clicked.

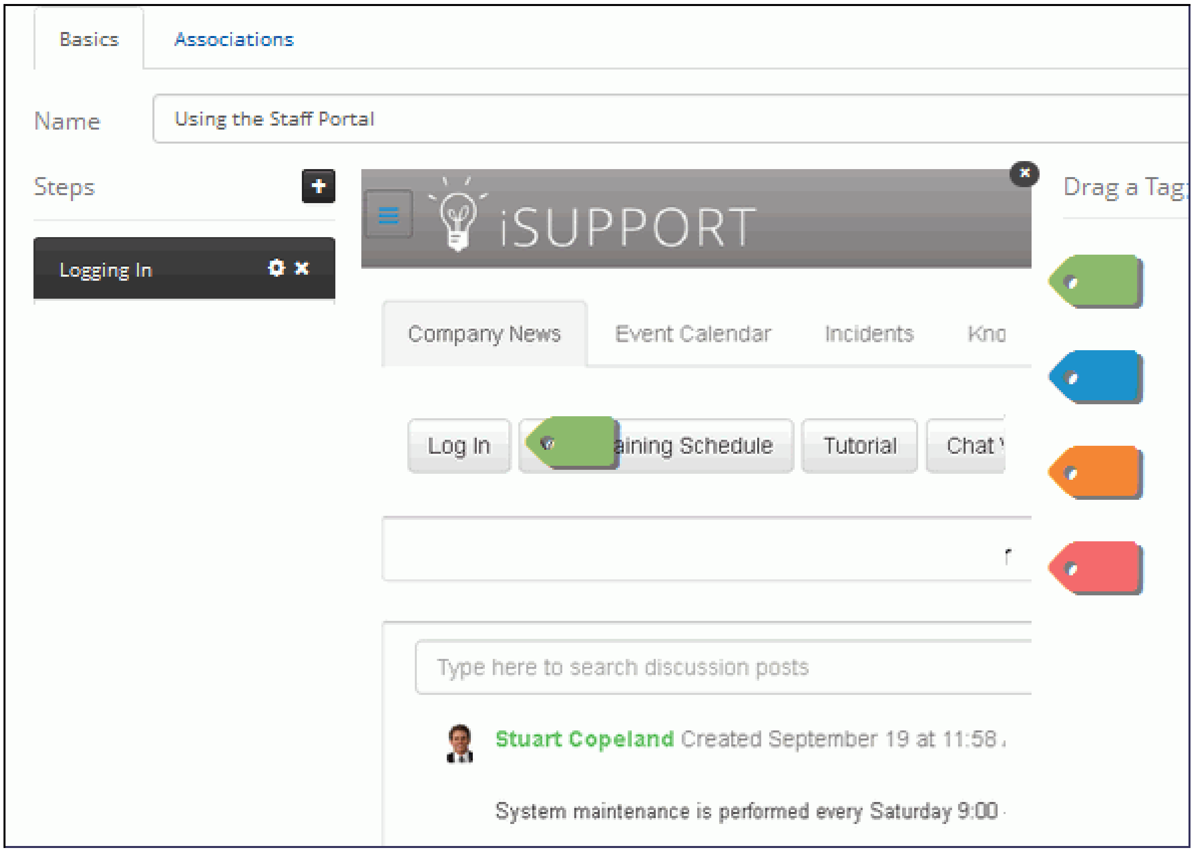
You can display images, videos, links, and formatted text in the screen that appears when a user clicks a tag.



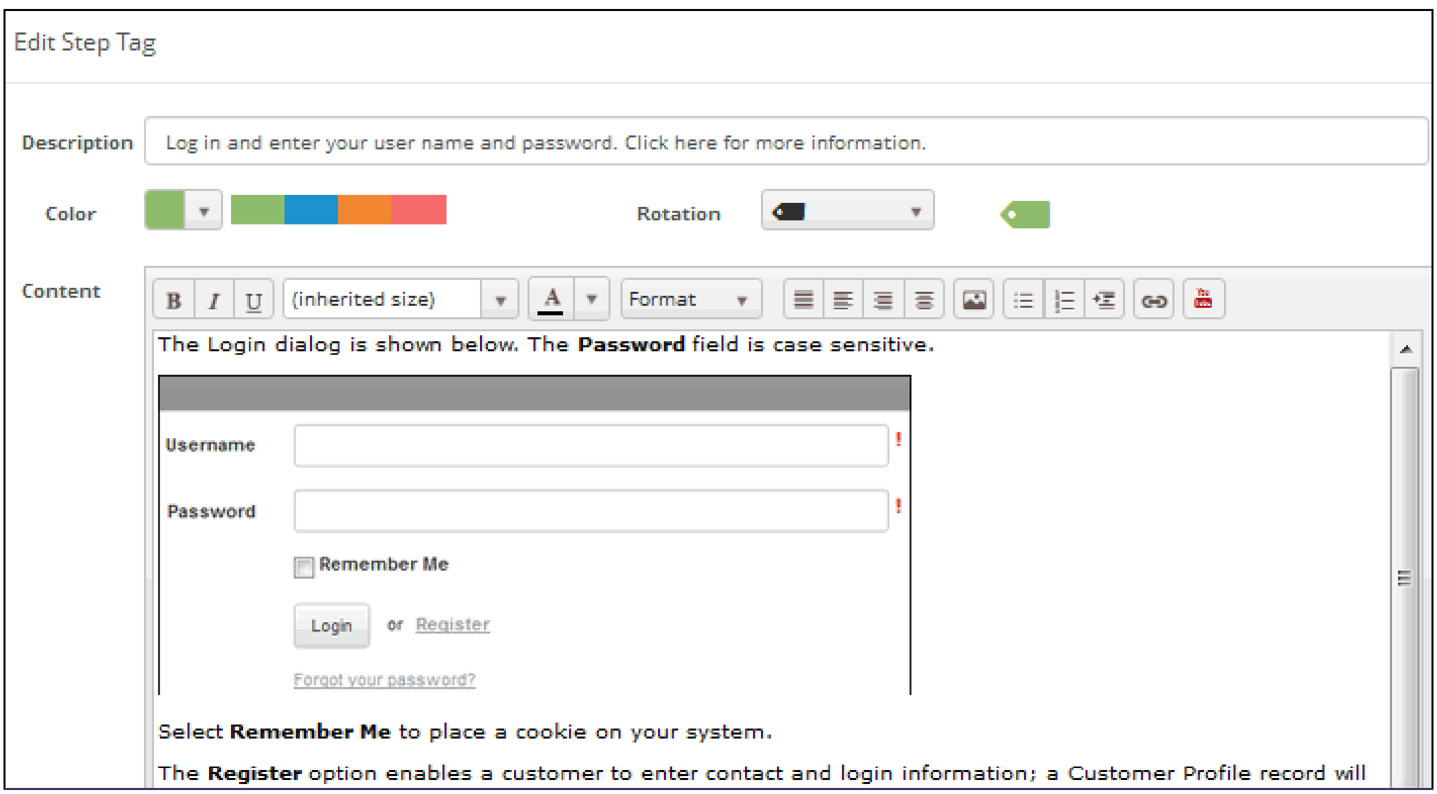
To configure a tutorial, go to Tutorials and click Create. Enter a name the tutorial; this name will appear as the heading. Then click the Add Step icon and enter the name of a step. You can use the Edit Step icon to change step text.



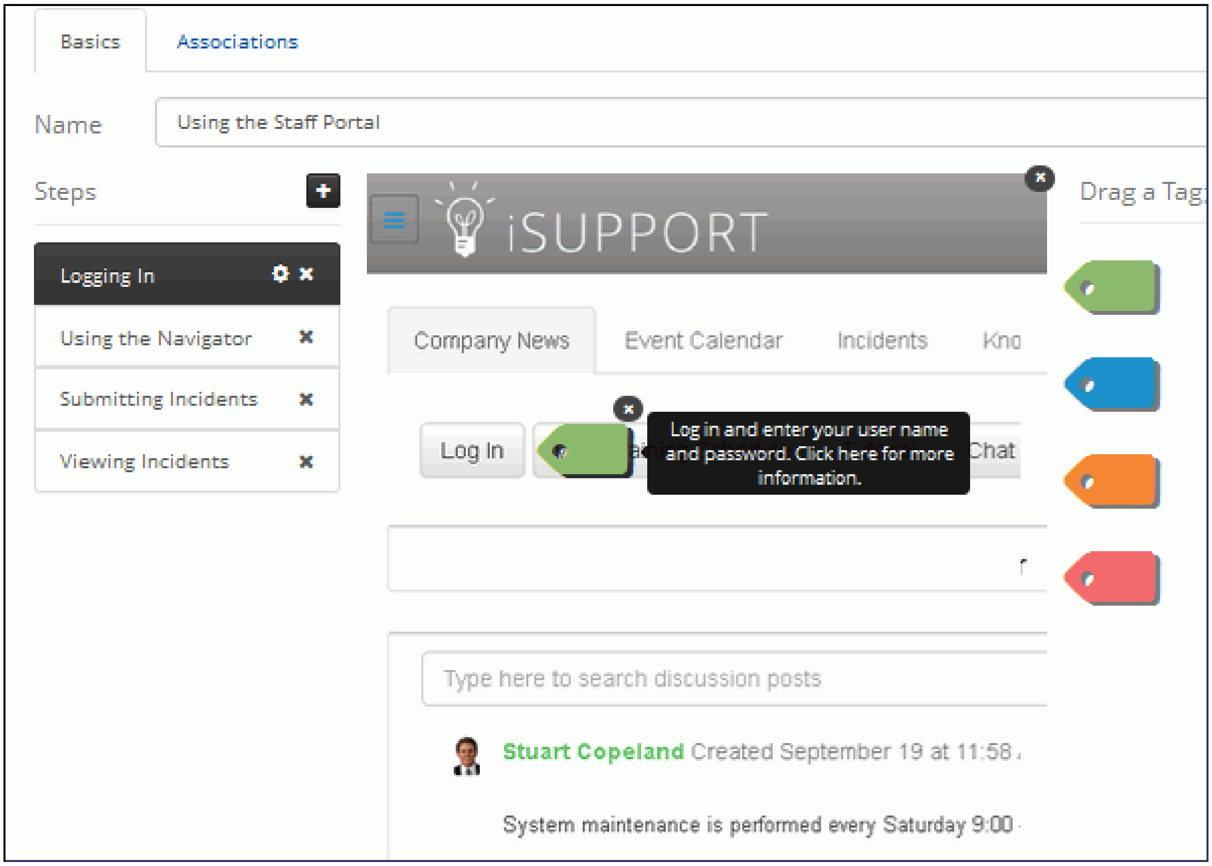
An image is required for each step; click Select Image or drag one into the gray area. To add a clickable tag, drag one from the list on the right onto the area in which you want to provide more information.



The Edit Step Tag screen appears; in the Description field, enter the text to appear next to the tag. Use the Color and Rotation fields to change the appearance of the tag if applicable, and then use the Content field to include the text, images, links, or YouTube videos to appear when the tag link text is clicked by the user.

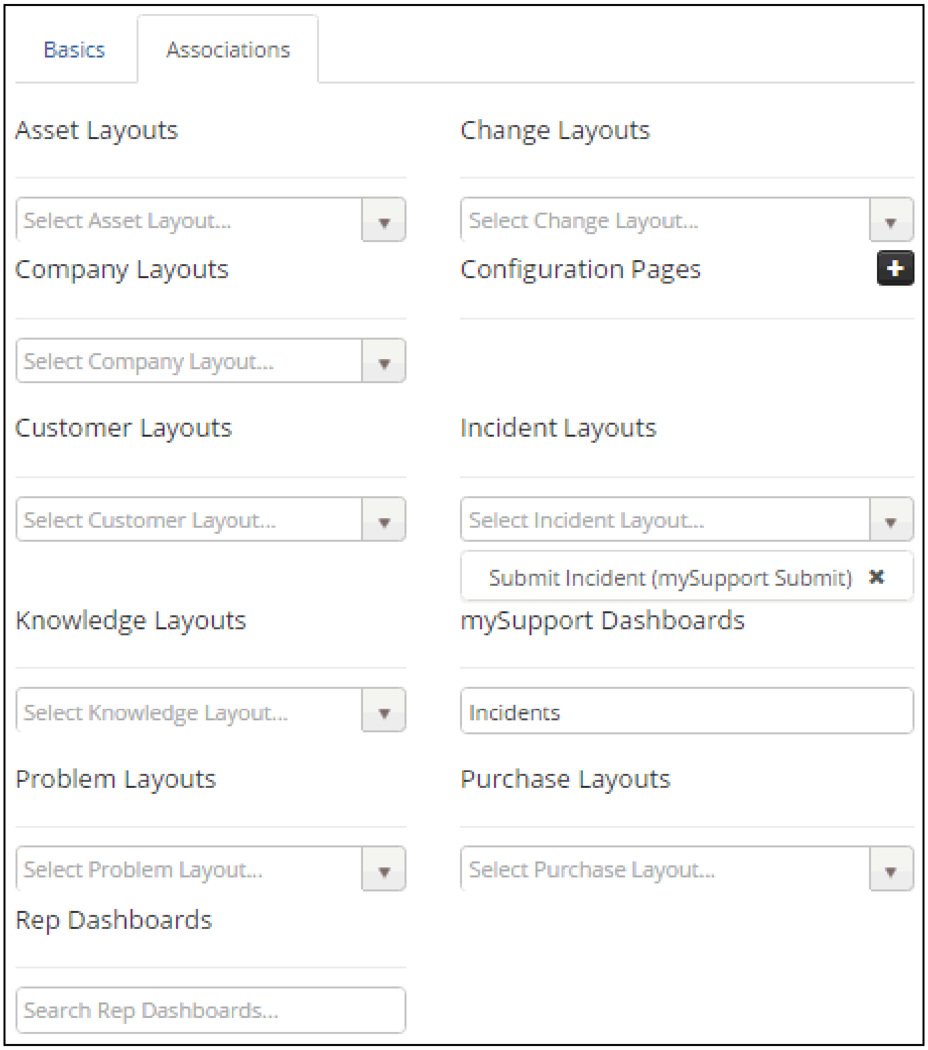


Add additional steps as necessary.



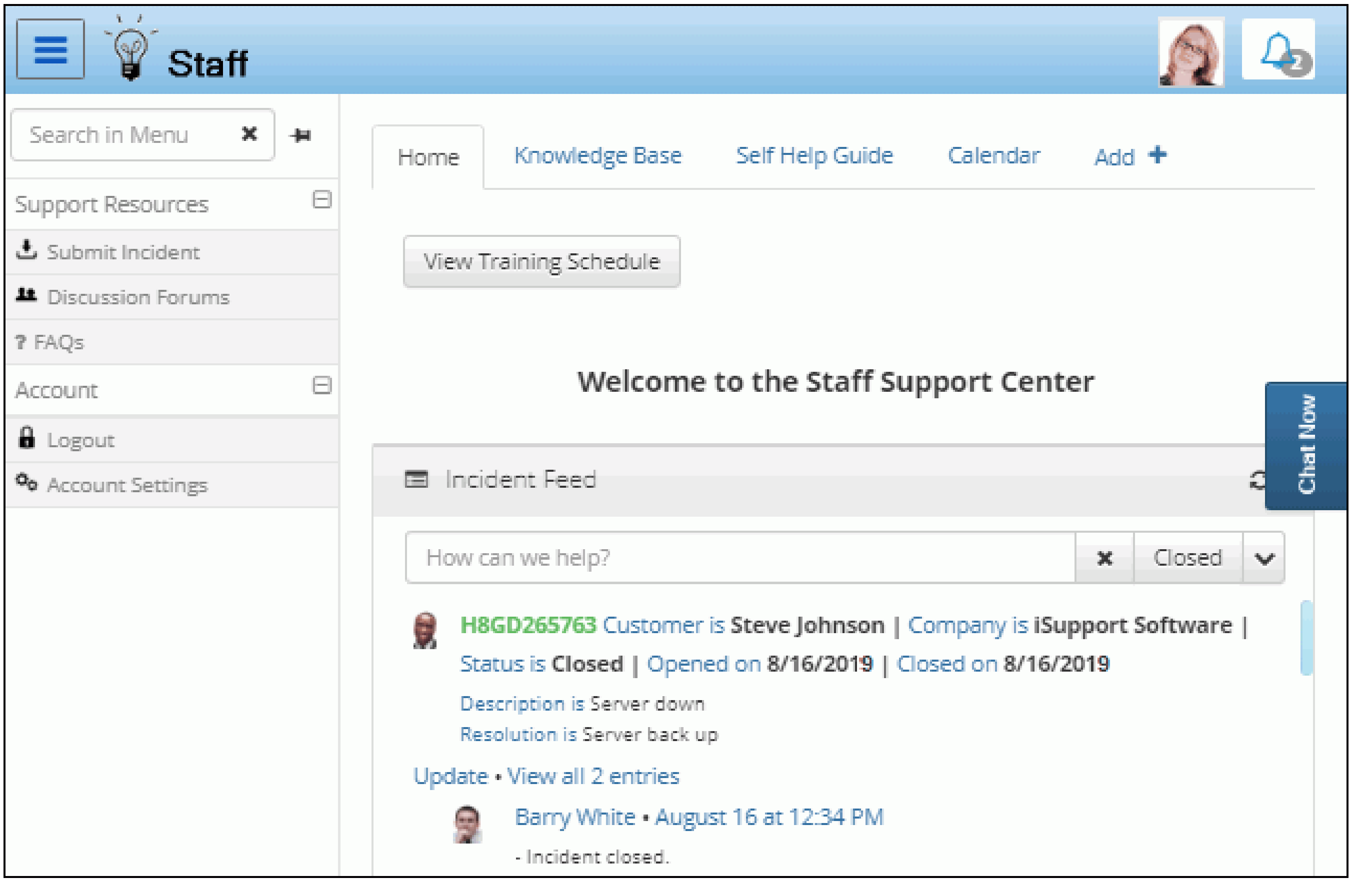
Associating Tutorials With Dashboards, Layouts, and Configuration Screens

Use the Associations tab in the Tutorials screen to link a tutorial to entry screen layouts, configuration screens, Rep Desktop dashboards, and mySupport dashboards.



mySupport Portal Informational Options

mySupport portals enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more.



You can utilize the following features for providing information to support representatives and customers; see the online help for information on each option.

- Use the **Embedded Content** component to display HTML content such as a web site or YouTube video.
- Use **event calendars** to schedule meetings and other events for display in mySupport and Desktop components. You can enable RSVPs and specify a maximum number of attendees, and support representatives can use event calendars on the Desktop.
- The **Help** option includes default text for the mySupport portal with general information on mySupport options; customize this information without purchase of a source code license via the Resource Editor.
- Use the **Link to PDF** feature to display a specified PDF in the PDF viewer associated with a customer's browser.
- Use the **Rich Text Area** component to enter formatted text, images, and links.
- You can create **self help guides** which contain decision tree style prompts to lead a user to a template, FAQ, knowledge, or help topic. Customers simply select items until the result appears. These guides can be accessed by clicking the link (labeled I Need Help by default) in the search bar; a navigator link to one self help guide or all self help guides can be used.
- Use **tutorials** to provide information to support representatives and customers. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content. You can associate a tutorial with a navigator link or a button, a dashboard, or mySupport work item submit or display layout.
- You can include **headlines** that are enabled for display to customers using a navigator link, which includes headlines in a list that can be expanded and collapsed, and a component which can include a search and sort bar as well as well as a customizable feed layout. Note that support representatives can publish headlines to Twitter

if Twitter integration is enabled. FAQs that are enabled for display to customers can be included on a portal via a navigator link or in a component.

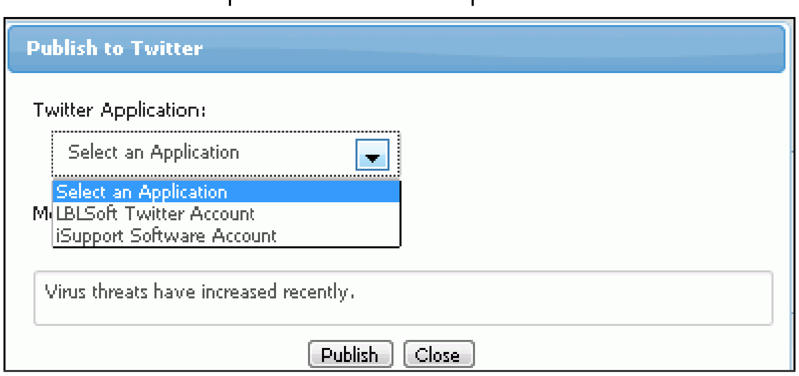
- **FAQs** that are enabled for display to customers can be included on a portal via a navigator link or in a component.
- From a navigator link, you can display a full-screen feed of **knowledge entries** with a search bar at the top. In the Knowledge Base component, you can display knowledge entries in sections for Most Popular, Newest, and Category. Knowledge entries can be designated with a status of Approved External - Requires Authentication or Approved External; knowledge entries appear on a mySupport portal according to assigned status. A mySupport portal designated as Public Knowledge Only will include only knowledge entries with an Approved External status.

  Customers can follow a knowledge entry, its author, and/or its category (if categories are enabled to display on a mySupport portal). Following a knowledge entry will cause updates to reload the entry in the Global News Feed, and following an author will cause any entries created by the author to appear in the Global News Feed. Following a category will cause any entries created with the same category to appear in the Global News Feed.
- Customers can create, view, reply to, and share **discussion posts** on shared discussion-only news feeds that are created by support representatives via the News Feed component on the Desktop.

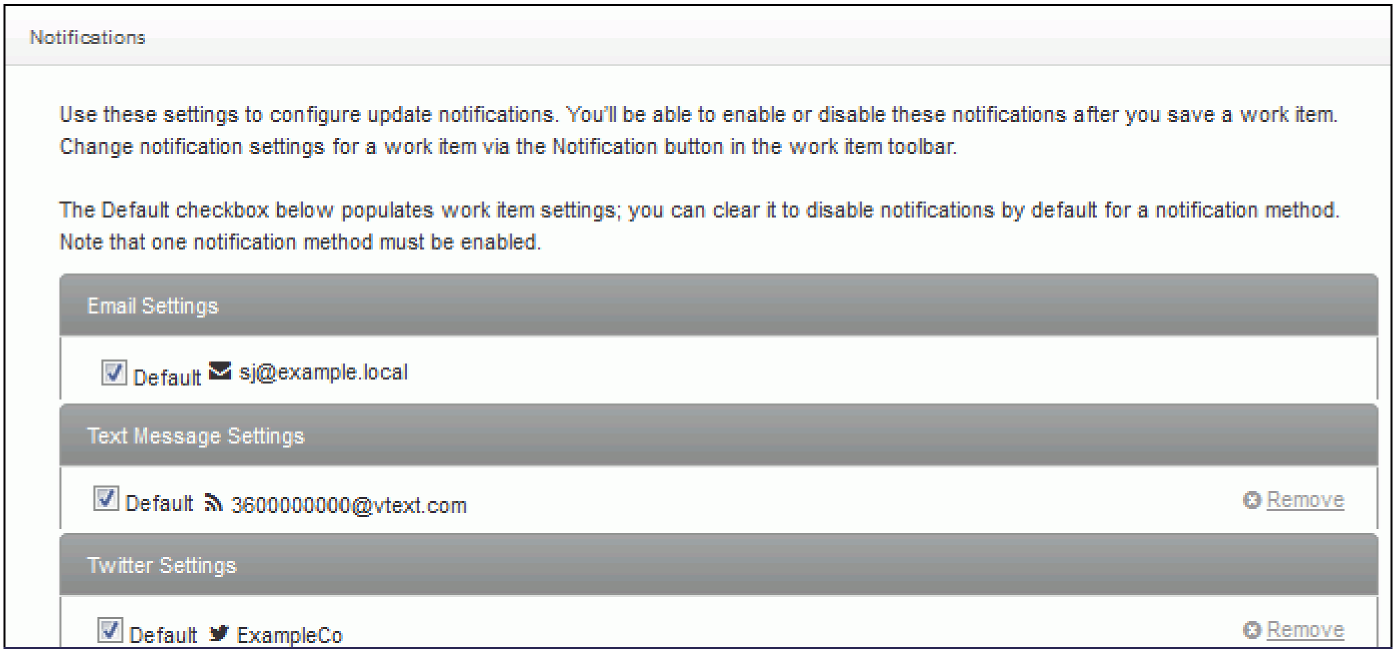
Integrating with Social Media

You can configure settings that work in conjunction with Twitter® notifications as well as the LinkedIn® and Facebook® linked account functionality on the mySupport portal. Follow the steps on the Options and Tools | Integrate | Social Media Integration screen and information in the online help.

- Customers can link to and authenticate to the mySupport portal via a **Facebook account**; use the Facebook Applications tab to configure an application for this functionality.
- Customers can link to and authenticate to the mySupport portal via a **LinkedIn account**; use the LinkedIn Applications tab to configure an application for this functionality.
- Configure a Twitter application to do the following.
  - The Twitter and Twitter Monitor components display a Twitter feed for a specified Twitter username on the Desktop.
  - The Twitter Monitor component searches Twitter and displays tweets that include a specified search term, or for a specified Twitter account, for the last 90 days. You can use the Reply link to reply to tweets directly from iSupport, or use the Create Incident link to create an incident and send a reply to the Twitter user (via a Twitter direct message) with their incident number included. The tweet will be included in the Description field in the incident, and if the Twitter username exists for a customer in Customer Profiles, the matching Customer Profile record will be used. If the Twitter username does not exist for a customer, a new Customer Profile record will be created in the format of <*Twitter username*>@twitter.com.
  - Support representatives can publish headlines and problems via Twitter. The Twitter icon will appear in the Headline and Problem screens if the support representative has the Publish to Twitter permission; when clicked, the Publish to Twitter dialog will appear with the contents of the message and details (for headlines) or the short description (for problems). If multiple Twitter applications have been created, the user can select the account to which the headline or problem should be published.



- Customers can use the Notifications section in Accounting Settings on the mySupport portal to enable a notification to be sent via email, SMS, and/or Twitter direct message whenever a rule results in any notification to the customer regarding work items (incidents, problems, changes, purchase requests).



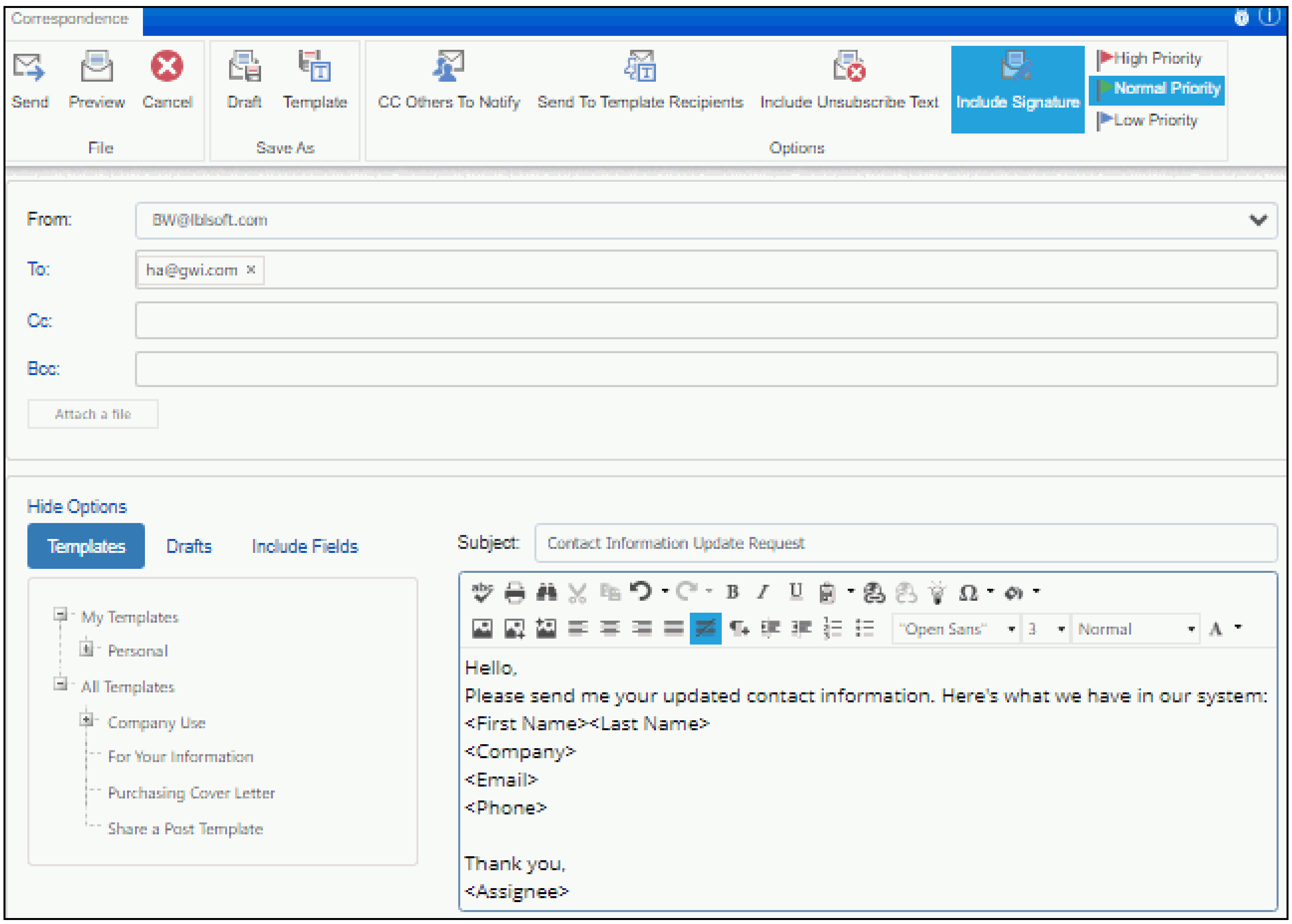
Using iSupport's Correspondence Functionality

Support representatives can access the Correspondence screen via the Desktop and work item screens to send correspondence and templates that can be configured to include defaults and field values when the email is sent. You can utilize Others to Notify lists of people that are not directly involved to be sent event notifications and other correspondence; see "Specifying Others to Notify" on page 25 for more information. Support representatives can create a contact list of customers that will display by default when type ahead is used in the address fields in the Correspondence screen; this list can be created Personal Contacts tab in Desktop Preferences, the Add to Contacts option on the toolbar in the Customer Profile screen, and the Add to Personal Contacts customer view action.

The Global Settings screen includes a Copy Attachments to Correspondence Replies field which enables automatic copying of any attachments associated with correspondence when the Reply or Reply all function is used.

Creating a Correspondence Document

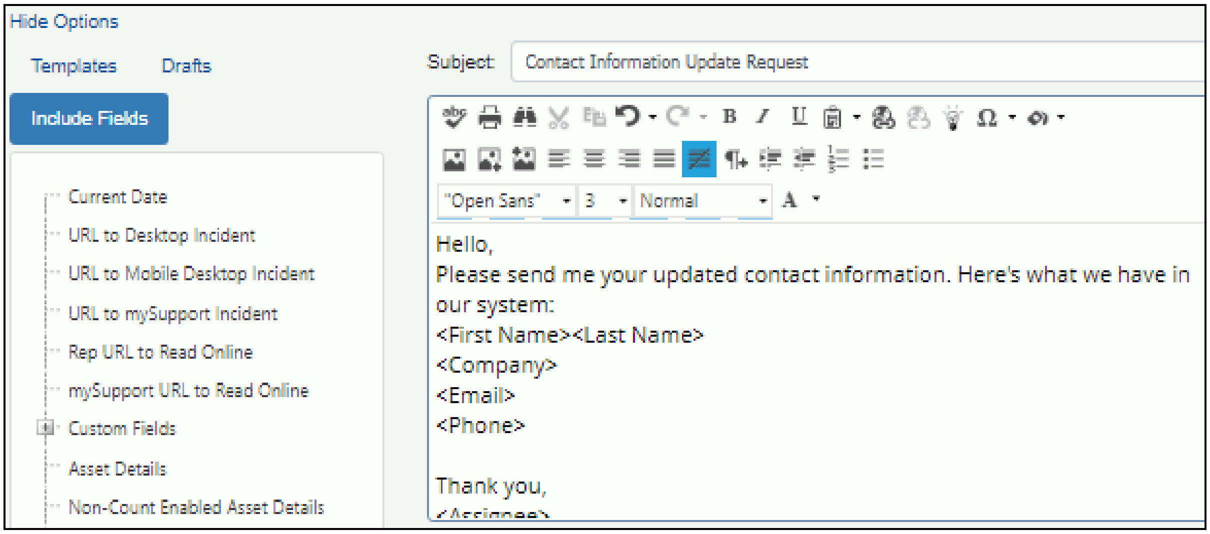
To create and send an email in iSupport, select Correspondence in an entry screen or Desktop view,



- In the From field, you can select from the Reply-To address set up during configuration or the email address set up in your Support Representative record. You can set the default for this field via the Default From Address field on the Correspondence tab in the Preferences screen accessed via the Desktop menu. If using a correspondence template, a different email address may be included.
- Use the CC:Others to Notify option to include a list of people that are not directly involved to be sent event notifications and other correspondence. See "Specifying Others to Notify" on page 25 for more information on the Others to Notify feature.
- The Show Options link displays predefined personal and shared correspondence templates on the left side of the screen; select the template and click the Apply button to populate all fields with the data in the template. Templates may be configured to contain only read-only (grayed out) fields, and some or all of the fields may be populated. Note that when you apply a template a second time, it will overwrite the data in all fields, including

attachments. You can select Save As | Template to save the current text in the Correspondence screen fields as a personal correspondence template.

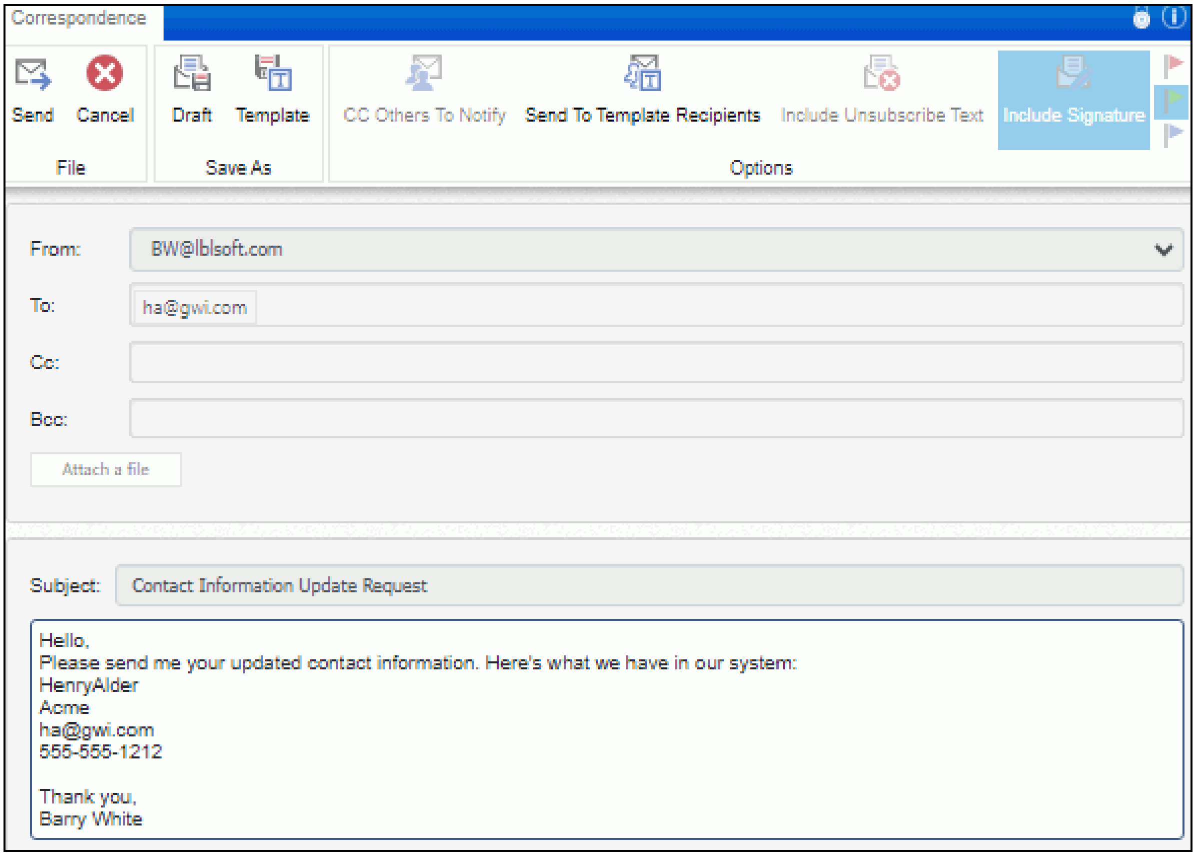
- The Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).
- Additional recipients may be included in the CC field when you preview a correspondence if the CC:Others to Notify feature is enabled for a selected template.
- Use the Include Fields button in the Options panel to display fields from the current record; these fields will be replaced with corresponding data from the originating screen when the email is sent. (If data does not exist for a value, nothing will be inserted when the email is sent. The field area will be blank.) You can drag applicable fields to the message body.



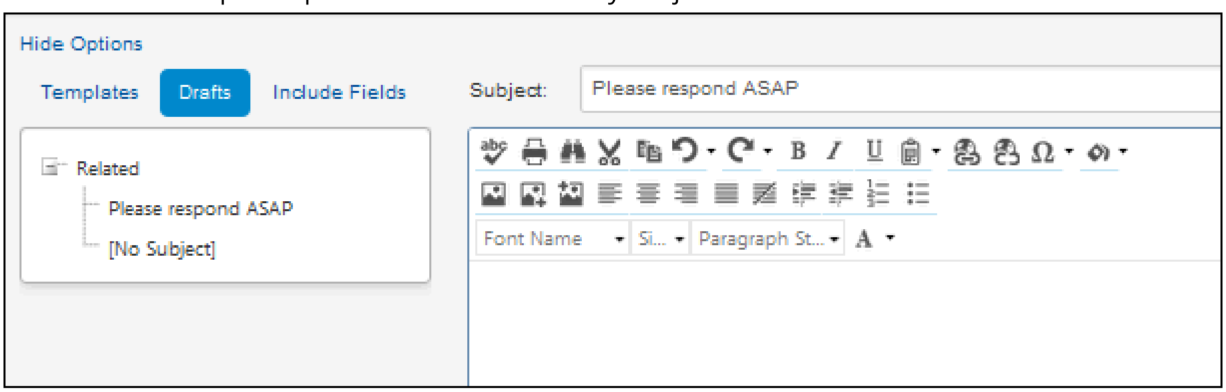
You can append **:label:*string*** to the <URL to x> include fields so the link displays as linked text rather than the full URL. The <Rep URL to Read Online> and <mySupport URL to Read Online> include fields will include a link for viewing the email on the web (typically for customers who aren't able to see an email properly rendered with linked images via their mail client).

- If configured, text and links will be added to the bottom of the correspondence for customers to use to unsubscribe from future email sent from the Desktop, Customer Profile, and Opportunity screens and the customer's profile will contain their status: Unsubscribed, Do Not Include Unsubscribe Text, and Include Unsubscribe Text. If you have the Change Unsubscribed Status permission, the prompt “Customer has unsubscribed from correspondence. Click Continue to proceed.” will appear when a correspondence is initiated for a customer with an Unsubscribed status, and the Include Unsubscribe Text option will be included in the Correspondence screen for overriding the Do Not Include Unsubscribe Text status.

- Select Preview to view the email using values from the record in which the correspondence originated.



- You can select Save As | Draft to save a draft of the current text in the Correspondence screen fields in the Drafts section of the Options panel. Drafts are listed by subject line text.



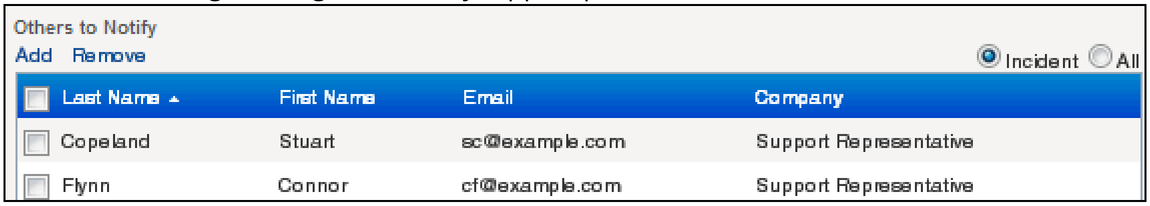
When finished completing fields in the Correspondence dialog, select Send. Note that the correspondence may be subject to approval before sending if the Mass Mailing Approval feature is enabled.

After the email is sent and the originating record is saved, notations are included in the History field. You can use the Correspondence option on a work item View menu to display correspondence associated with a record.

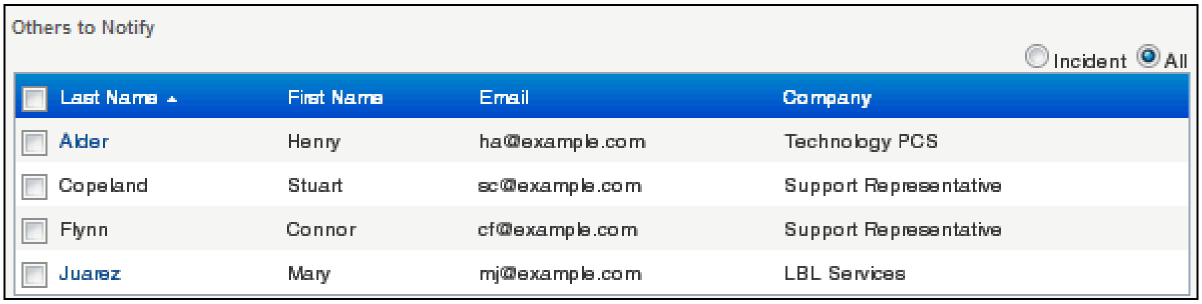
Specifying Others to Notify

If enabled in configuration, you can use the Others to Notify feature to set up a list of people that are not directly involved to be sent event notifications and other correspondence. Those on Others to Notify lists can be designated in configuration to be notification recipients for events such as initial save, a Work History entry is added, and route.

In iSupport, an Others to Notify list can be set up for an individual customer, all customers in a company, a category set, or an individual incident, problem, change, or configuration item. If configured, a customer can add to an Others to Notify list when submitting a change via the mySupport portal.



A record-specific list is only a subset; the comprehensive Others to Notify list for a record also includes any Others to Notify lists for the selected customer profile, categorization, and company. You can display the comprehensive Others to Notify list (those associated with the selected customer, customer's company, and category) using the All radio button. You cannot change entries in the comprehensive Others to Notify list via the Incident, Problem, and Change screens.



Others to Notify lists are used with incidents, problems, and changes in the following ways:

- When event (such as save, close, email-submitted incident creation, route, or Customer Work History save) notifications are set up in the Configuration module, Others to Notify lists can be included in the To field or in the CC field. The comprehensive Others to Notify list will be used for these system-generated notifications as well as for any correspondence sent via the Desktop or an entry screen.
- When you create a correspondence, you can choose to copy (CC) those in the Others to Notify list. The correspondence will be sent to the comprehensive Others to Notify list. See the next section for more information.
- When you create a correspondence document from the Customer Profile screen or select a customer on the Desktop, you can choose to copy (CC) those in the selected customer's Others to Notify list. Note that the correspondence will also be sent to the Others to Notify list of the company assigned to the customer.
- When you send correspondence for selected incidents via the Desktop, you can choose to copy (CC) those in the Others to Notify list. The correspondence will be sent to the comprehensive Others to Notify list.

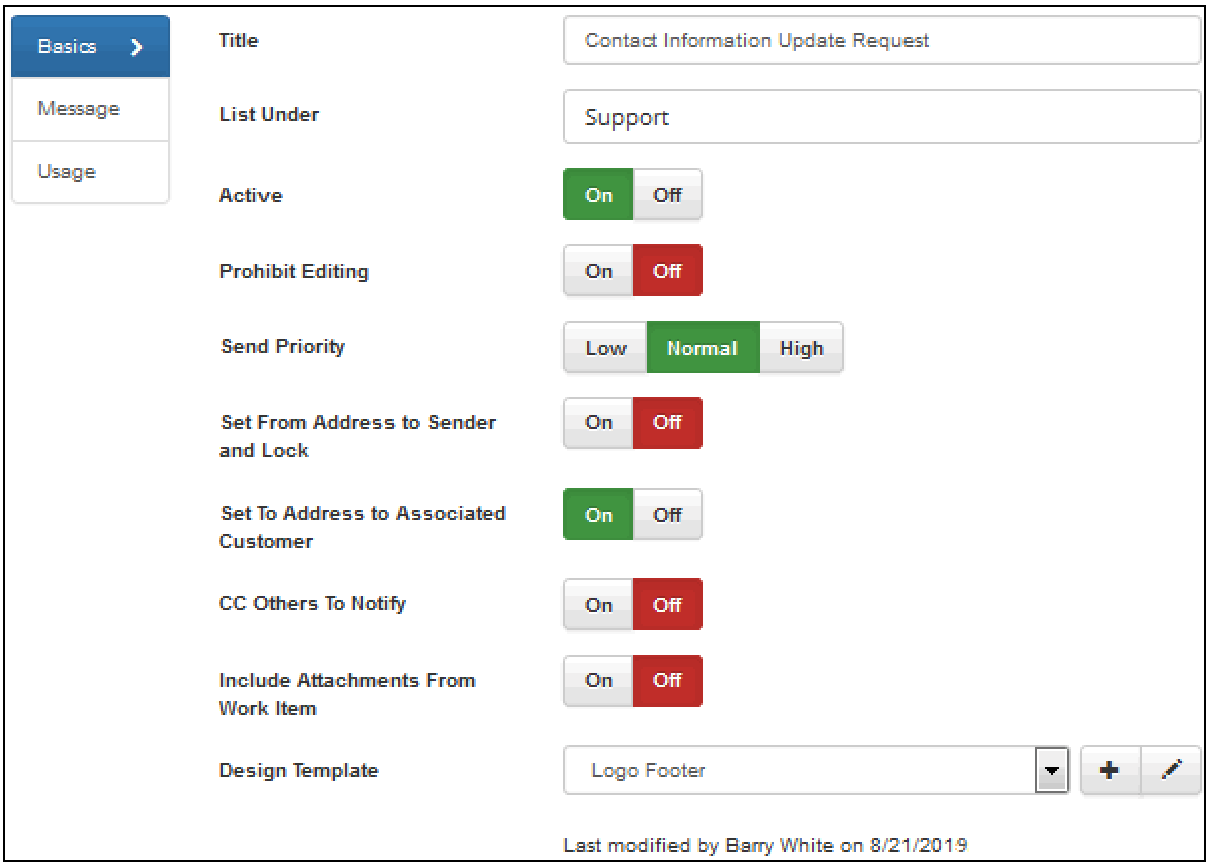
Configuring Correspondence Templates

Use the Correspondence tab on the Options and Tools | Templates screen to set up correspondence templates for use in iSupport entry screens and on the Desktop. You can include all aspects of an email, including attachments. When creating a correspondence document in iSupport, you can select a predefined template or create a new document. After the email is sent and the record is saved, notations are included in the History field. You can view sent correspondence via Correspondence views on the Desktop, and you can display and open correspondence via the View menu in iSupport entry screens. When using a multiselect view to send a correspondence, if there is a value specified in the To field on a template, a Preview dialog will appear with a Send to Template Recipients menu option. Select this option to send the correspondence to the email addresses in the To field on the template.

If permissions for personal correspondence templates are enabled in the Support Representative Profile screen, use the Personal Correspondence Template tab in Preferences to create a correspondence template that will appear only to you in the list of correspondence templates available in iSupport.

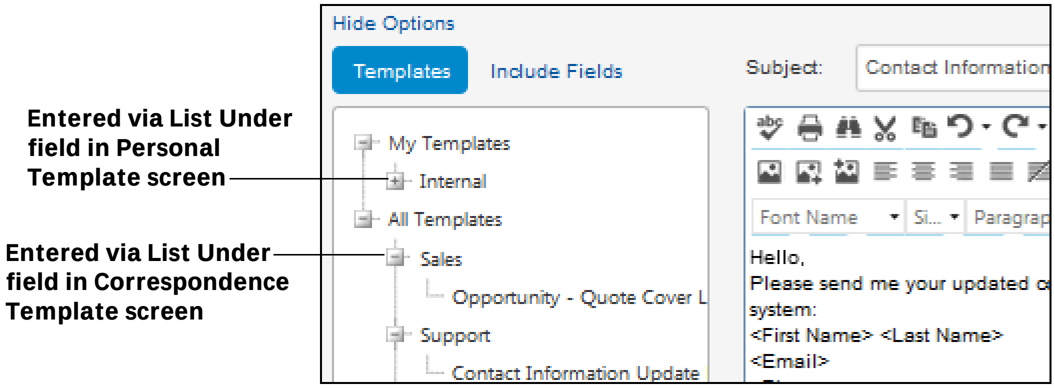
Setting Basic Options

Set miscellaneous options on the Basics tab.



Title - Enter a name for the correspondence template. If the Active checkbox is selected in this screen, this template title will display for selection in the correspondence template selection dialog.

List Under - Enter the name under which the template should appear in the list for selection in the Correspondence screen as shown below; this list includes both personal and shared templates.



Active - Select On to include the template in the correspondence template selection dialog in the Use With (Incident/ Customer Profile/Problem/Change/Purchase Request) screens.

Prohibit Editing - Select On to, when the template is selected, prevent all fields on the email from being edited.

Send Priority - Select the priority delivery level for the email created from the template.

Set From Address to Sender and Lock - Select On to populate the From field with the address of the support representative sending correspondence via the template and prevent any changes to the From field.

Set To Address to Associated Customer - Select this checkbox to append the customer from the incident to the list in the To field.

CC Others to Notify - This field appears if the Others to Notify option is enabled in the Feature Basics screen. It will not appear if only Service Contracts or Discussion Posts are enabled in the Use With field. Select this checkbox to include the CC: Others to Notify field when a correspondence is created from the template.

If originating from a customer profile or for customers selected on the Desktop, this will copy the correspondence to those on the customer's Others to Notify list as well as the Others to Notify list of the company assigned to the customer.

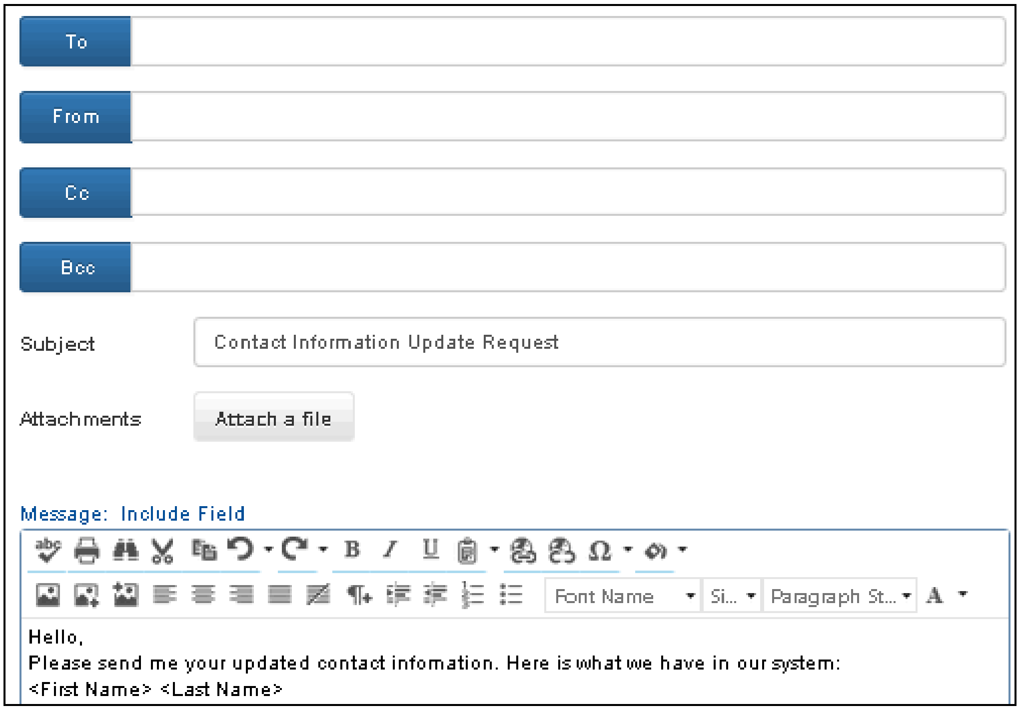
If originating from an incident, problem, purchase request, and/or change selected on the Desktop, this will copy the correspondence to those on the Others to Notify lists for the incident, the selected customer profile, the customer's company, and selected categorization.

Include Attachments From Work Item - Select On to associate any attachments from the referenced work item with the correspondence document when it is sent.

Design Template - If desired, select the design template with the elements (text and images) to appear around the body of the correspondence template and support representative signature (if applicable). You can click the Create New + and View/Edit icons to access the Design Template screen; see "Configuring Design Templates" on page 23.

Configuring Message Options

Use the Message tab to enter the To, From, CC, BCC, and content of the message to populate the email created from the template.



To - Select or enter the address to which correspondence using this template should be sent. Note: When using a multiselect view from the Desktop to send a correspondence, if there is a value specified in the To field on a template, a Preview dialog will appear with the Send to Template Recipients menu option.

From - Select or enter the address to be included in the Reply To field when an email is created from the template.

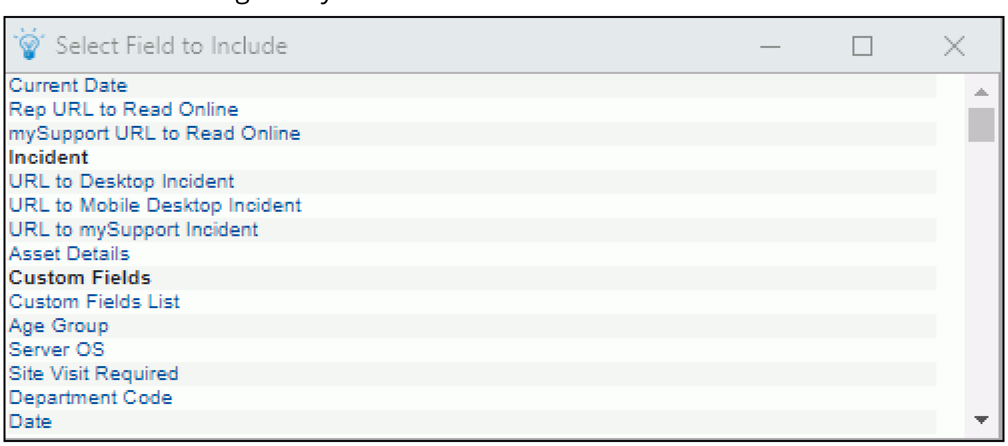
CC - Select or enter the address to be included in the CC field when an email is created from the template.

BCC - Select or enter the address to be included in the BCC field when an email is created from the template.

Subject - Enter the text to be included in the Subject field when an email is created from the template.

Attachments - Attach any files to be attached when an email is created from the template.

Use the **Include Field** link to add field values from the current record to the Body field. When the correspondence template is selected, the selected field data will be inserted into the email. The following dialog will appear for selecting values; the fields that appear will correspond with the modules selected in the Use With field. The field will be included in brackets in the message body.



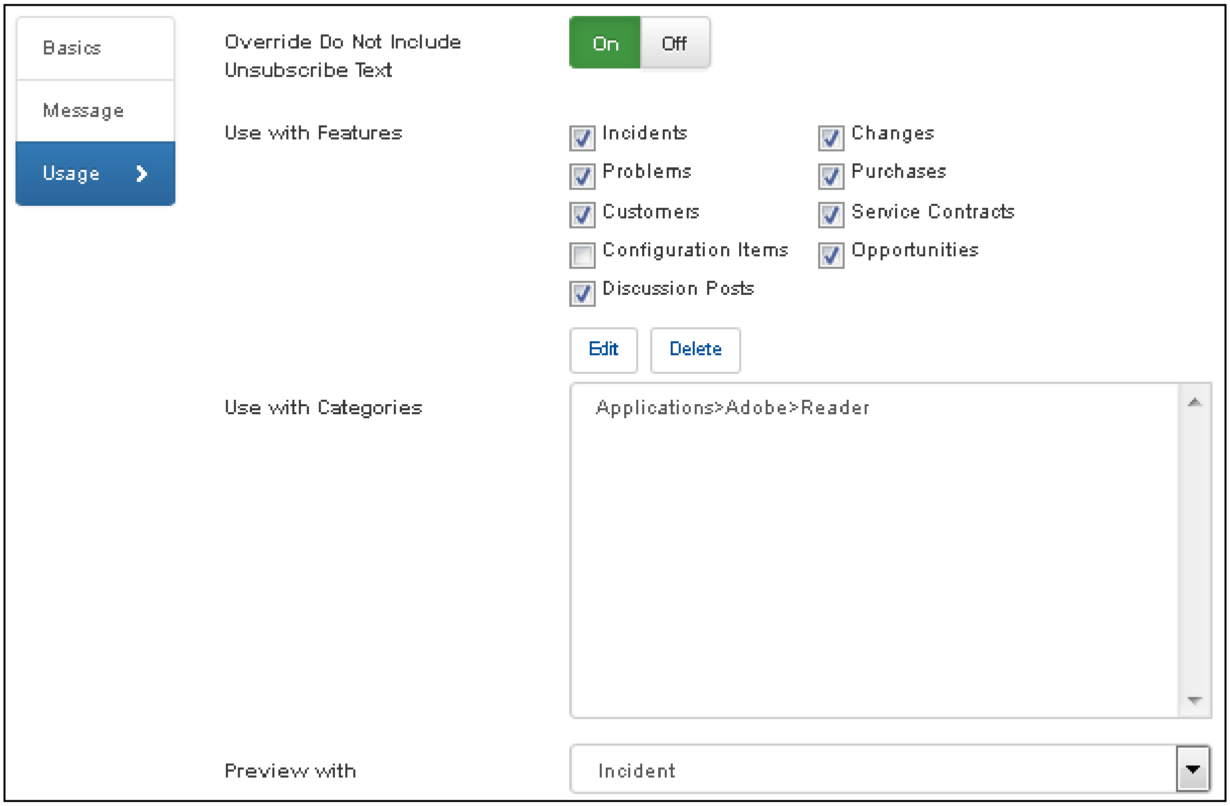
Use the *<Rep URL to Read Online>* and *<mySupport URL to Read Online>* include tags to include a URL for viewing a correspondence online (in case a message with linked images cannot be properly rendered with a mail client). You can customize the display text for the generated link by adding the following after the field, before the end bracket:

:label:*text to replace the link*

Example: <Rep URL to Read Online:label:Click here to read online>

Setting Usage Options

Use the Usage tab to set unsubscribe, availability, and preview options.



Override Do Not Include Unsubscribe Text - This field appears if Unsubscribe Settings are configured which will append unsubscribe links and text to outbound email correspondence, enabling customers to unsubscribe and prevent email from being sent by support representatives via the Desktop, Customer Profile, and Opportunity screens. After a customer has unsubscribed, the status in the Unsubscribe Status field in the Customer Profile screen will change to Unsubscribed; other options for the Unsubscribe Status field include Do Not Include Unsubscribe Text to enable correspondence to be sent without the configured links, and Include Unsubscribe Text to enable correspondence to be sent with the unsubscribe links. Select On in this field to override the Do No Include Unsubscribe Text option if it is enabled in the Unsubscribe Status field in a recipient's Customer Profile record, and enable an email to be sent.

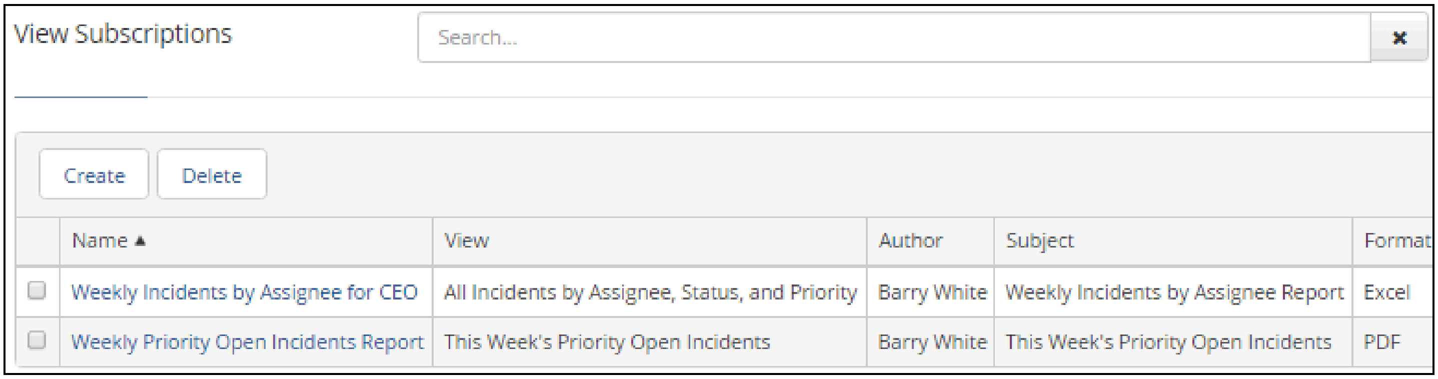
Use With Features - Select the screens in which the template should be available: Incidents, Problems, Changes, Purchases, Customers, Service Contracts, Discussion Posts, and/or Configuration Items.

Use With Categories - Select Edit to associate the template with a categorization; the template will only appear in the list of available correspondence templates when the categorization is selected for a record, or when a correspondence is sent from a view on the Desktop.

Preview With - Use the Preview With field to view the template using values from a selected record. When using a multiselect view to send a correspondence, if there is a value specified in the To field on a template, previewing correspondence will include the value in an Also Send To field. **Note:** If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

Viewing and Creating View Subscriptions

The View Subscription feature enables you to send an email with an attached file of exported view data to configured recipients on a schedule; support representatives can also configure view subscriptions via the Subscription icon in the View component on the Desktop. The email will be sent via the View Subscription agent, which runs on a five minute interval. Use the Email | View Subscriptions feature to create, modify, and delete view subscriptions.

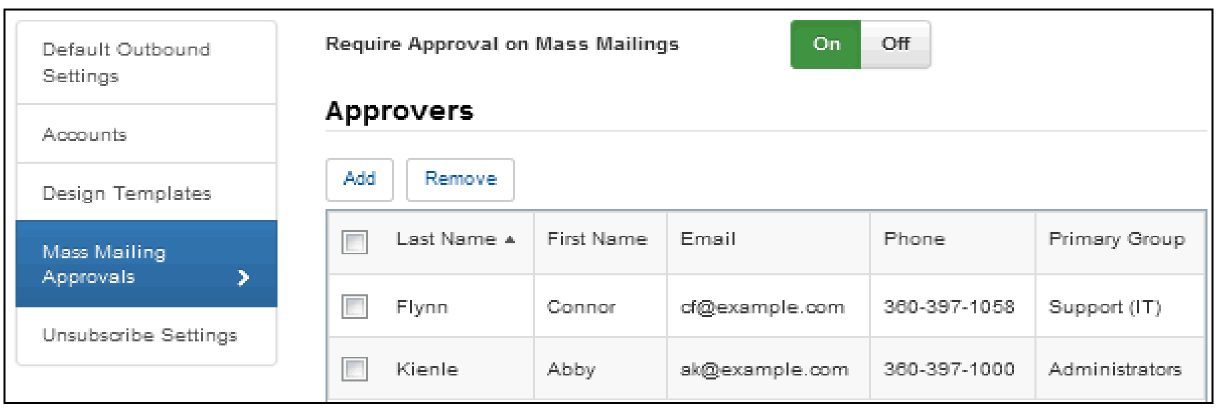


Configuring Mass Mailing/Approvals

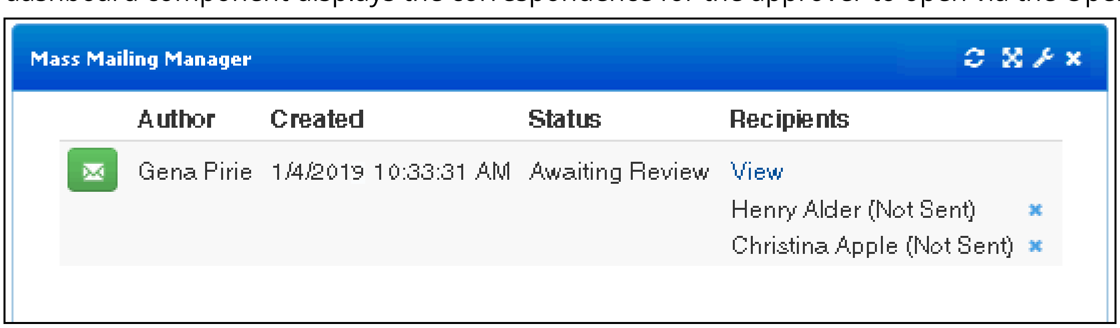
iSupport's Mass Mailing Approvals feature requires approvals on any correspondence sent from a customer view. The Mass Mailing component includes correspondence that is awaiting approval or has been rejected by an approver.

To configure this feature:

- Enable required approvals and designate approvers via the Mass Mailings screen.

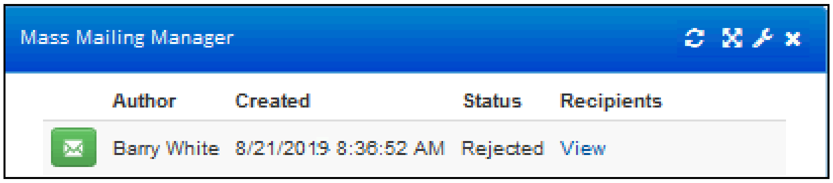


- Use the Dashboard Settings screen to make the component available for the author and approver to add to a dashboard.
- When the author creates a correspondence from a customer view and clicks the Send button, the Mass Mailing Manager dashboard component displays the correspondence for the approver to open via the Open icon.



Approvers can use the Reject button in the Correspondence screen to prevent the correspondence from being sent, or the Send button to send the correspondence.

The correspondence will display to the author in the Mass Mailing Manager.



Configuring Calendar and Meeting Integrations

You can configure integration with Google Calendar, Google Meet, Microsoft Outlook, Microsoft 365 Teams and Planner, and Zoom to display an option in the Incident, Problem, Change, and Customer Profile screens for initiating a meeting.

Note: iSupport utilizes or integrates with a number of third party applications and resources; changes in these external applications and resources may have a negative impact on functionality in iSupport. Depending on the nature and degree of the change, iSupport will, at its discretion, revise the current version of iSupport or make a corrective change in a future release of iSupport.

Google Calendar/Meet

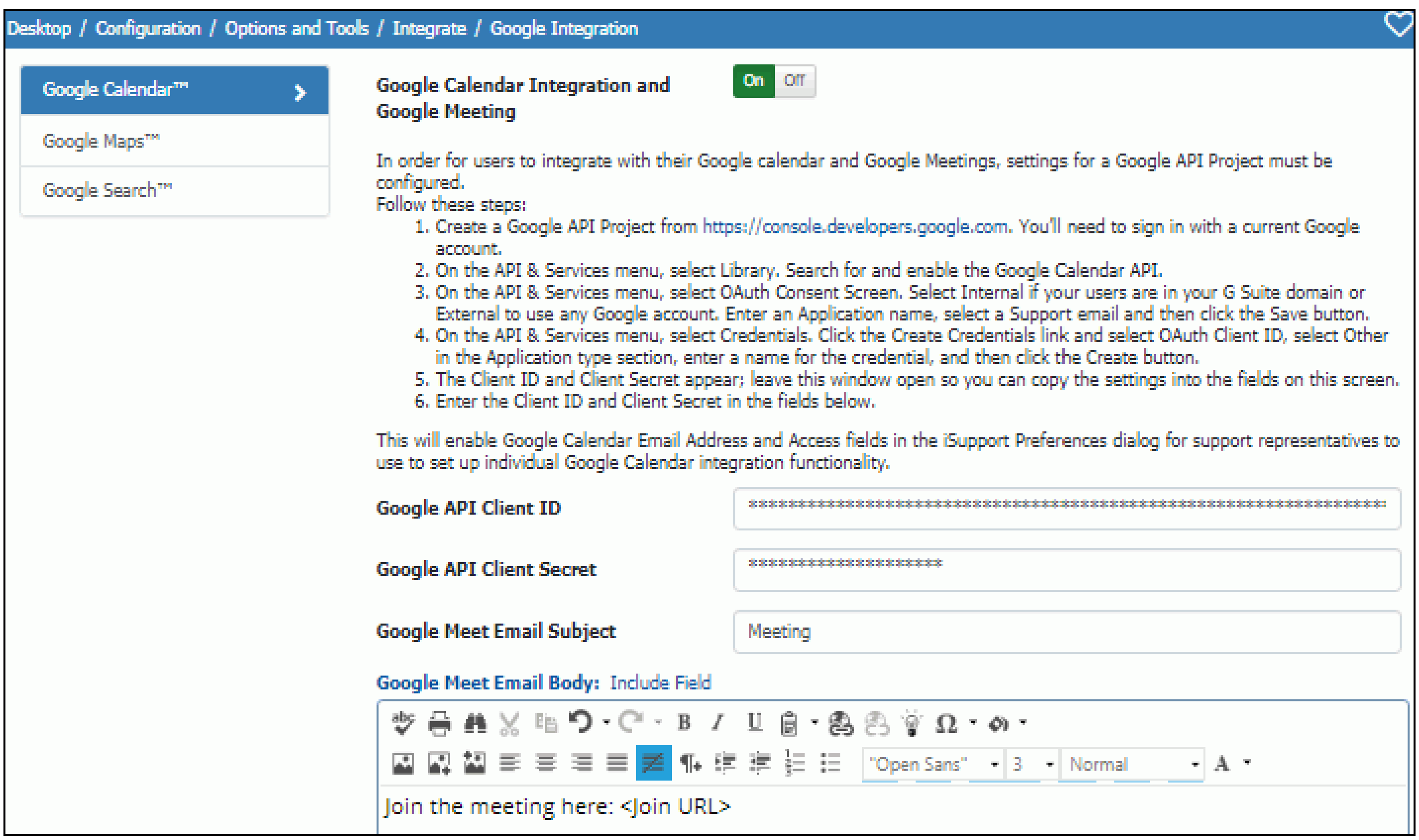
Set up Google Calendar integration in the Options and Tools | Integration | Google Integration screen to enable users to access their Google Calendar for the Calendar option on the Desktop and mySupport portals, a New Meeting option in iSupport entry screens for scheduling a Google Calendar meeting, and a Google Meet option to appear in work item screens for starting a meeting.

With Google Calendar, support representatives can view the schedules of meeting attendees, create a meeting to be added to their calendar, and configure a notification to be sent to the meeting attendees.

When the Google Meet option is selected, the Generate Join URL dialog will appear for you to enter the topic, share the Join URL, and email a link to the meeting. The Share Join URL option will display a dialog with the URL and an option to start the meeting; the Email Link option will display the Correspondence dialog.

The timeframe (work hours) during which support representatives are available to be scheduled via iSupport can be set via the Desktop or Support Representative Profile screen. On the Desktop, a support representative can view their calendar via the Calendar component and work item-specific calendars can be viewed from action menu. Administrators can view support representative calendars via the Support Representative Profile screen.

On the Google Calendar tab, follow the steps on the screen and copy the Google API Client ID and Secret into the applicable fields. Enter the subject body of the email to be sent for the scheduled meeting; use the Include Field link to add field values regarding the meeting.

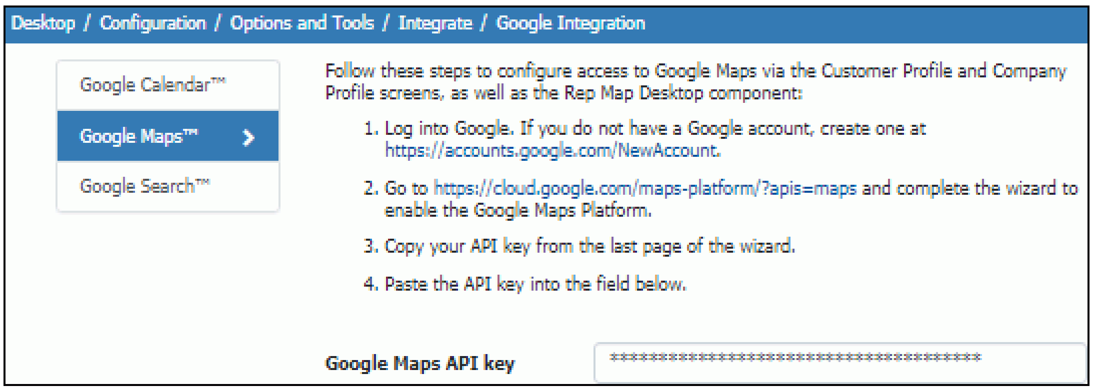


Note: Support representatives will need to use the Google Calendar Email Address and Google Calendar Access fields on the Details screen in the Preferences dialog to enable access to their calendar(s) and set the work day hours during which they are available to be scheduled via iSupport. (The dates/times outside of work day hours are designated as "Unavailable" in the calendars displayed via iSupport.) After clicking the Grant Access link, a Google dialog will appear for the support representative to allow iSupport access to their calendar and a code will be provided. The Grant Access to Your Google Calendar dialog will appear in the Preferences screen with an Auth Code field for pasting the code. After clicking Continue, “Access Granted” will appear in the Google Calendar Access field.

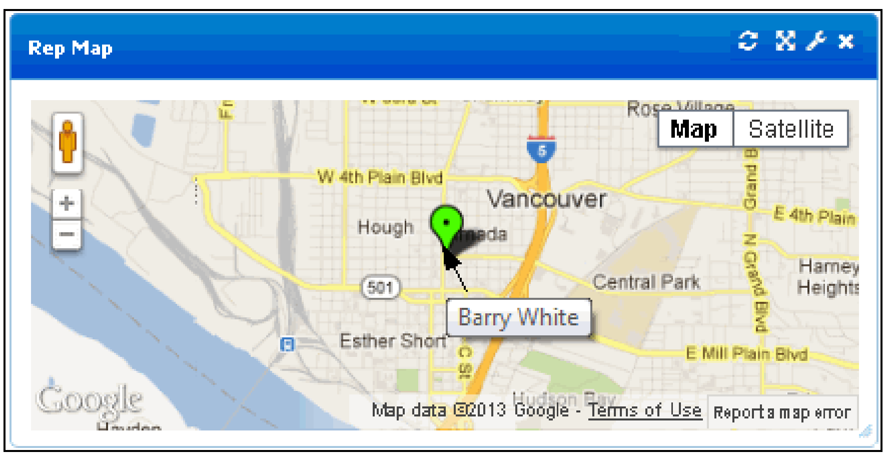
Google Meet meetings can be included in work item screens; add the Google Meetings field to a work item screen layout via the Layouts configuration screen.

Google Maps

Use the Google Maps tab in the Options and Tools | Integration | Google Integration screen to enable access to Google Maps via the Customer Profile and Company Profile screens, as well as the Rep Map Desktop component. Follow the steps on the screen and enter the Google Maps API key.

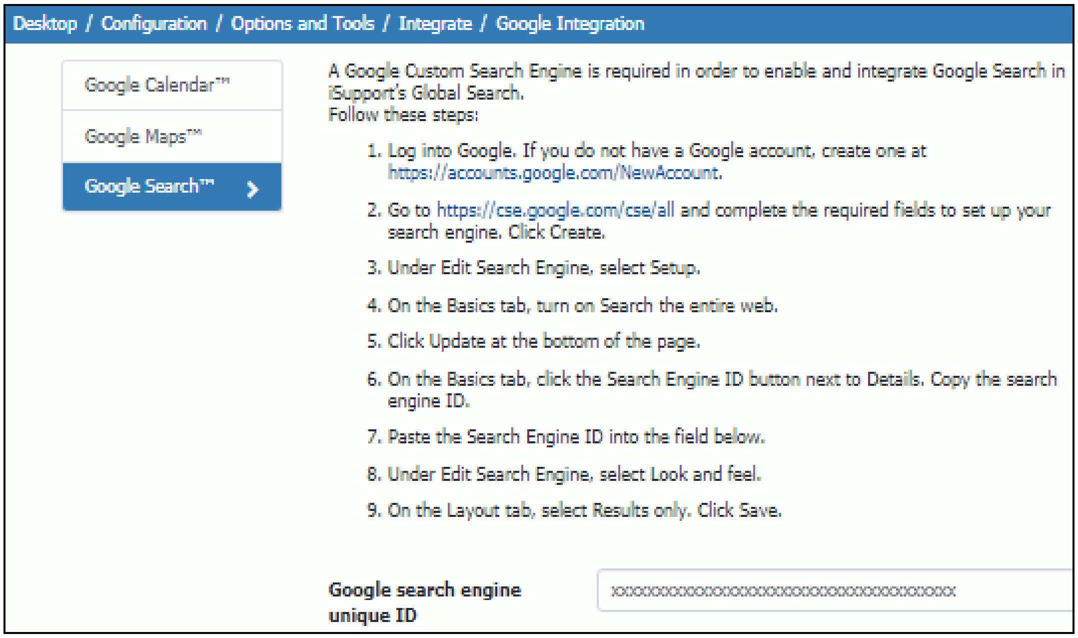


Maps will appear as shown in the example below.

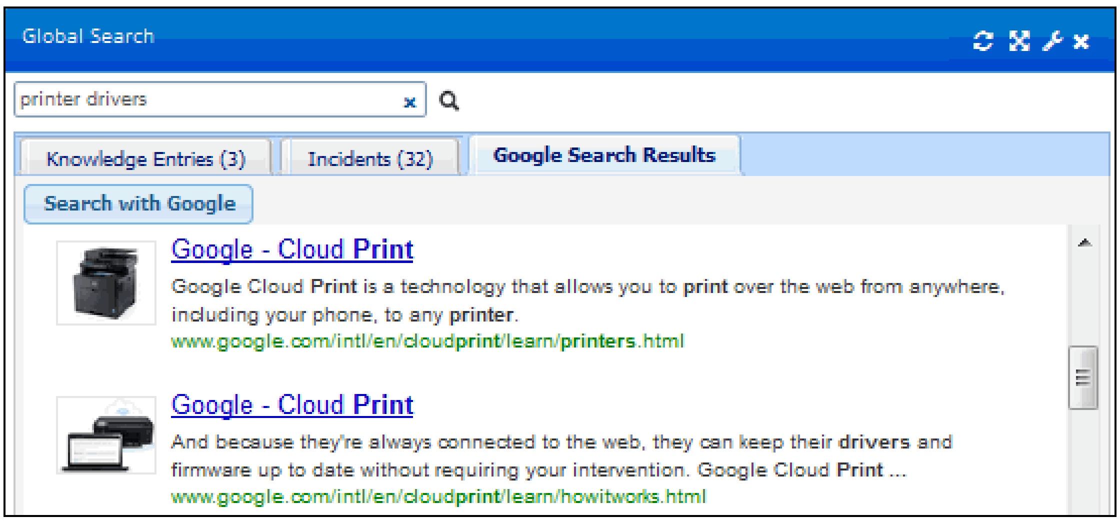


Google Search

Use the Google Search tab in the Options and Tools | Integration | Google Integration screen to enable access to Google Search throughout the application. Follow the steps on the screen to create a Google Custom Search Engine, copy the unique ID from the Google Custom Search Engine screen, and enter it in the Google Search Engine Unique ID field.



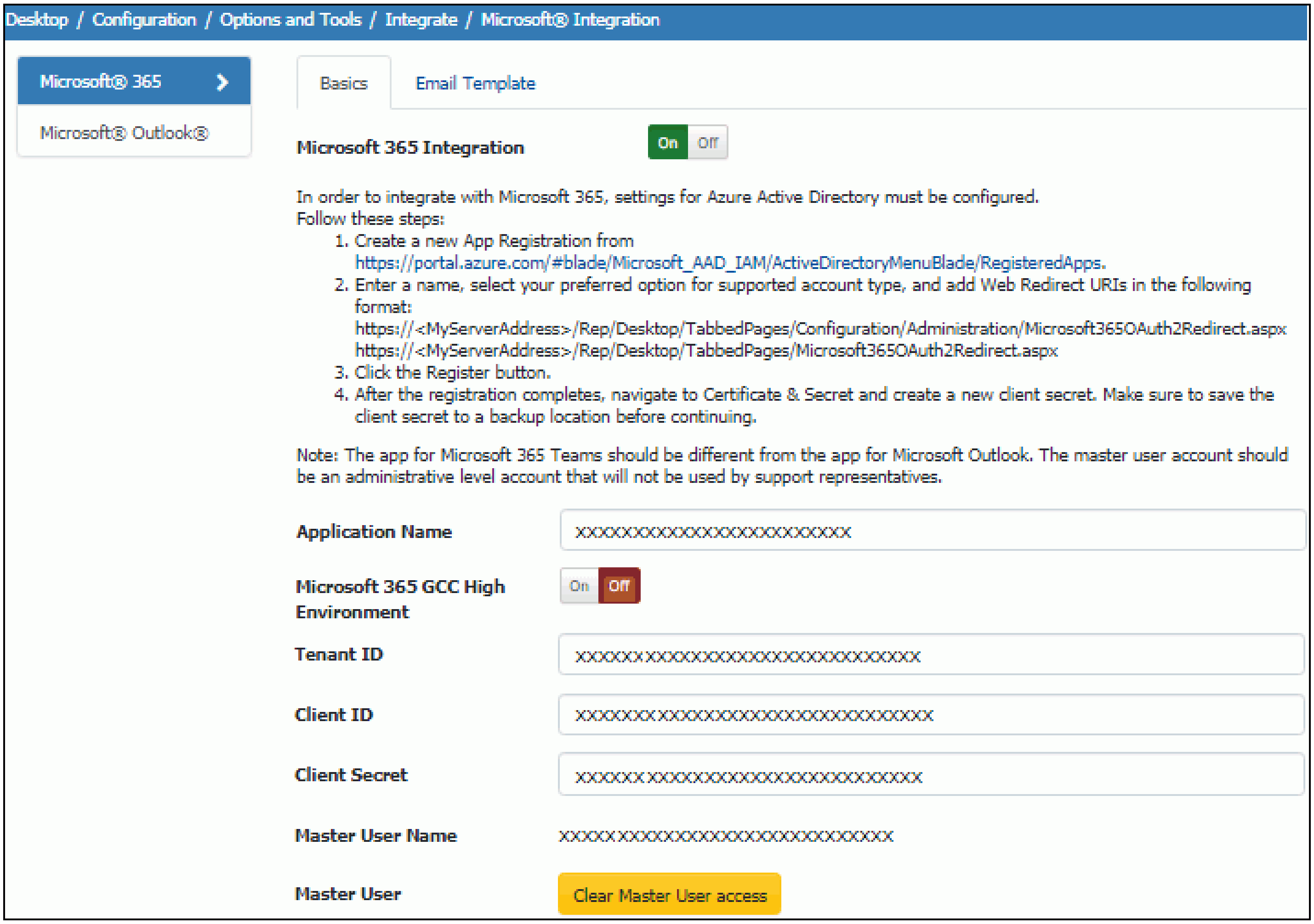
The Google Search tab will appear in the Global Search component as shown in this example.



Microsoft 365 Integration

Use the Microsoft 365 tab in the Options and Tools | Integration | Microsoft Integration screen to enable the Microsoft Teams Planner component on the iSupport Desktop for viewing and accessing scheduled and unscheduled

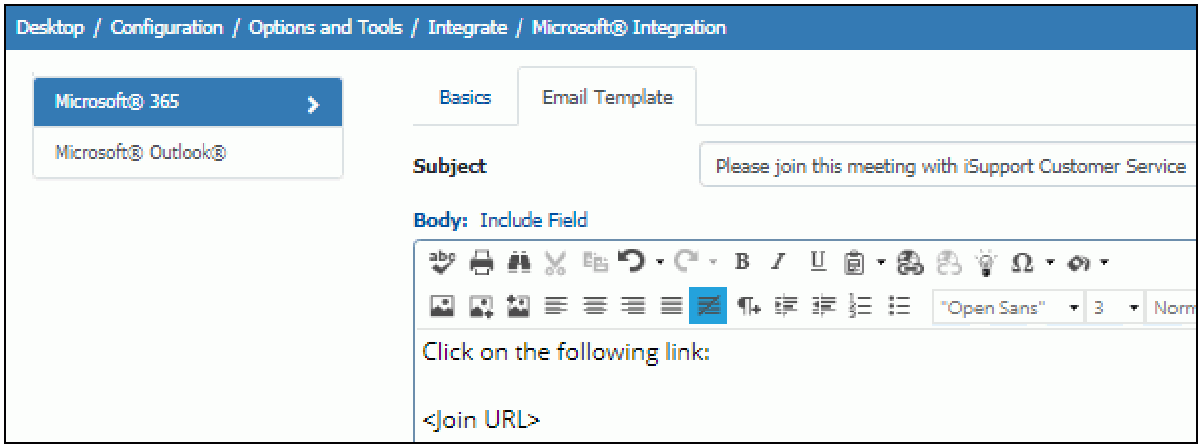
Microsoft Teams tasks, and enabling Microsoft Teams Meeting and Planner Task option to appear in work item screens for creating meetings and tasks with prefilled references to the iSupport work item number.



Follow the steps on the screen and complete the fields. Note that this requires administrator level access in Microsoft. The app for Microsoft 365 Teams should be different from the app for Microsoft Outlook. The master user account should be an administrative level account that will not be used by support representatives. Enable the Microsoft GCC High Environment setting if your Microsoft account was created under the .US domain in a Government Community Cloud High environment.

If you wish to allow support representatives to enable access to Teams and a group calendar in the Preferences screen without Microsoft administrator level access, ensure that you select the Consent On Behalf of Your Organization checkbox while requesting permissions in this screen. The Master User account is used for Team channel posts via rules and Outlook calendar groups available for display on dashboards.

Use the Email Template tab in the Microsoft 365 Integration screen to enter defaults for the subject and body of the email to be sent with a link to the meeting.



Note: Support representatives will need to use the Microsoft 365 Access field on the Details screen in the Preferences dialog to enable access to their calendar(s).

To add list fields of Microsoft Teams meetings and Planner tasks in work item screens, add the Microsoft Teams Meetings and Microsoft Planner Tasks fields to a work item screen layout via the Layouts configuration screen.

You can utilize the MS Teams Channel recipient with the Notify - Email action in work item rules.

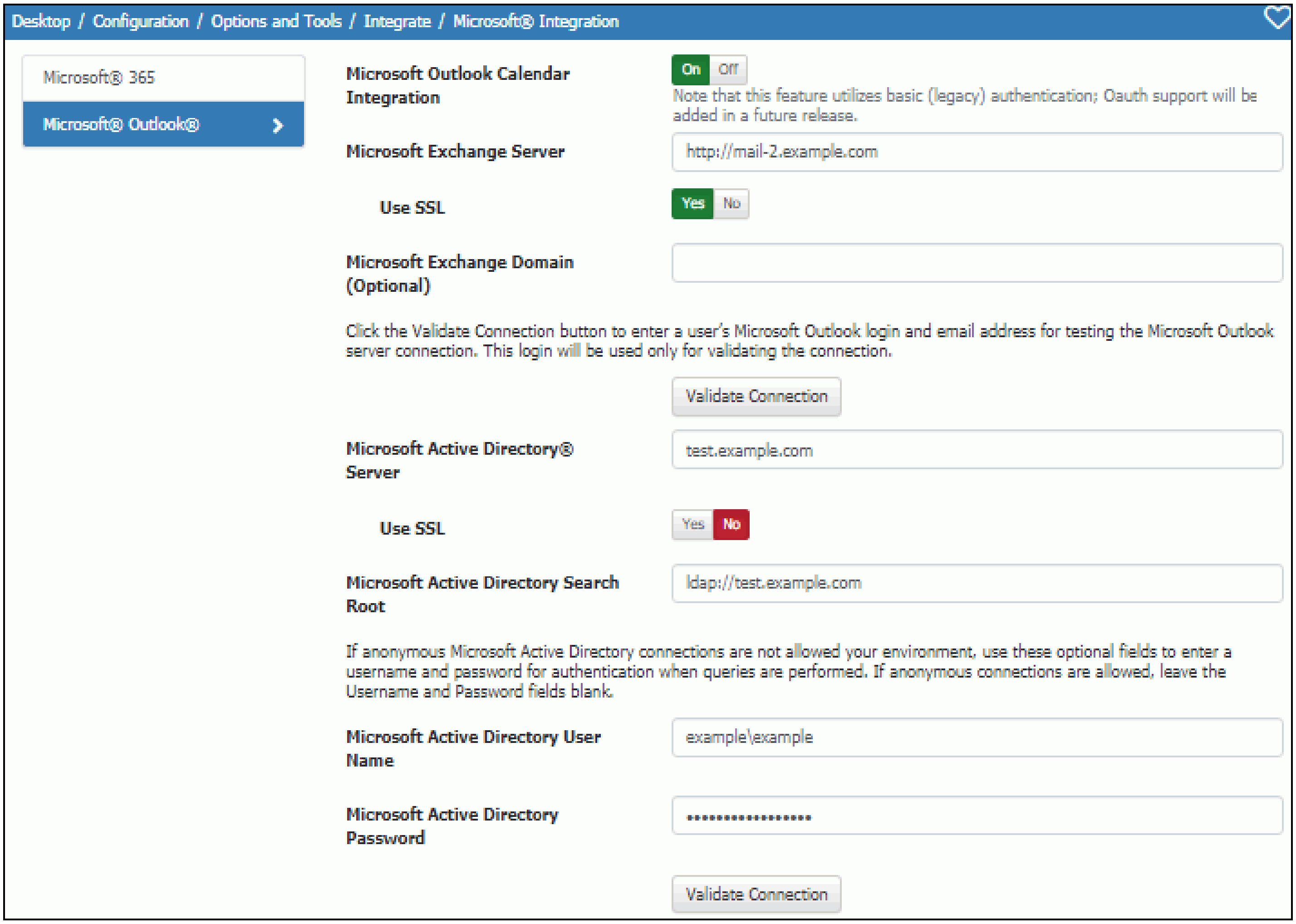
Microsoft Outlook Calendar Integration

Use the Microsoft Outlook tab in the Options and Tools | Integrations | Microsoft Integration screen to enable:

A New Meeting option to appear in iSupport entry screens after a record is saved for scheduling a Microsoft® Office Outlook® calendar meeting.

A support representative to view their calendar via the Desktop Calendar component and work item-specific calendars via the Action menu. Administrators can view support representative calendars via the Support

Representative Profile screen. Support representatives can view the schedules of meeting attendees, create a meeting to be added to their calendar, and configure a notification to be sent to the meeting attendees.



Microsoft Outlook Calendar Integration - Select On to enable the Microsoft Outlook Calendar Integration feature.

Microsoft Exchange Server - Enter the web address of the installation location of the Microsoft Exchange Server. If using SSL, the format must be: https://<*server*>

Use SSL - SSL is an encryption method that overlays the connection between the iSupport server and the Microsoft Active Directory server. Select Yes if SSL encryption is enabled on the Microsoft Active Directory server.

Microsoft Exchange Domain (Optional) - Enter the domain for accessing the Microsoft Exchange server. An entry in this field may be needed for a successful test connection.

A valid connection to the Microsoft Outlook server is required; click the Validate Connection button to enter a Microsoft Outlook login and email address to test the connection. Note that this information will be used only for validating the connection.

Microsoft Active Directory Server - Enter the installation location of the Microsoft Active Directory Server.

Use SSL - SSL is an encryption method that overlays the connection between the iSupport server and the Microsoft Active Directory server. Select Yes if SSL encryption is enabled on the Microsoft Active Directory server.

Microsoft Active Directory Search Root - Enter the complete search root URL for querying user information in Active Directory® entries. The search root can point to anywhere in the Active Directory® hierarchy, but the entry must be preceded by: ldap://

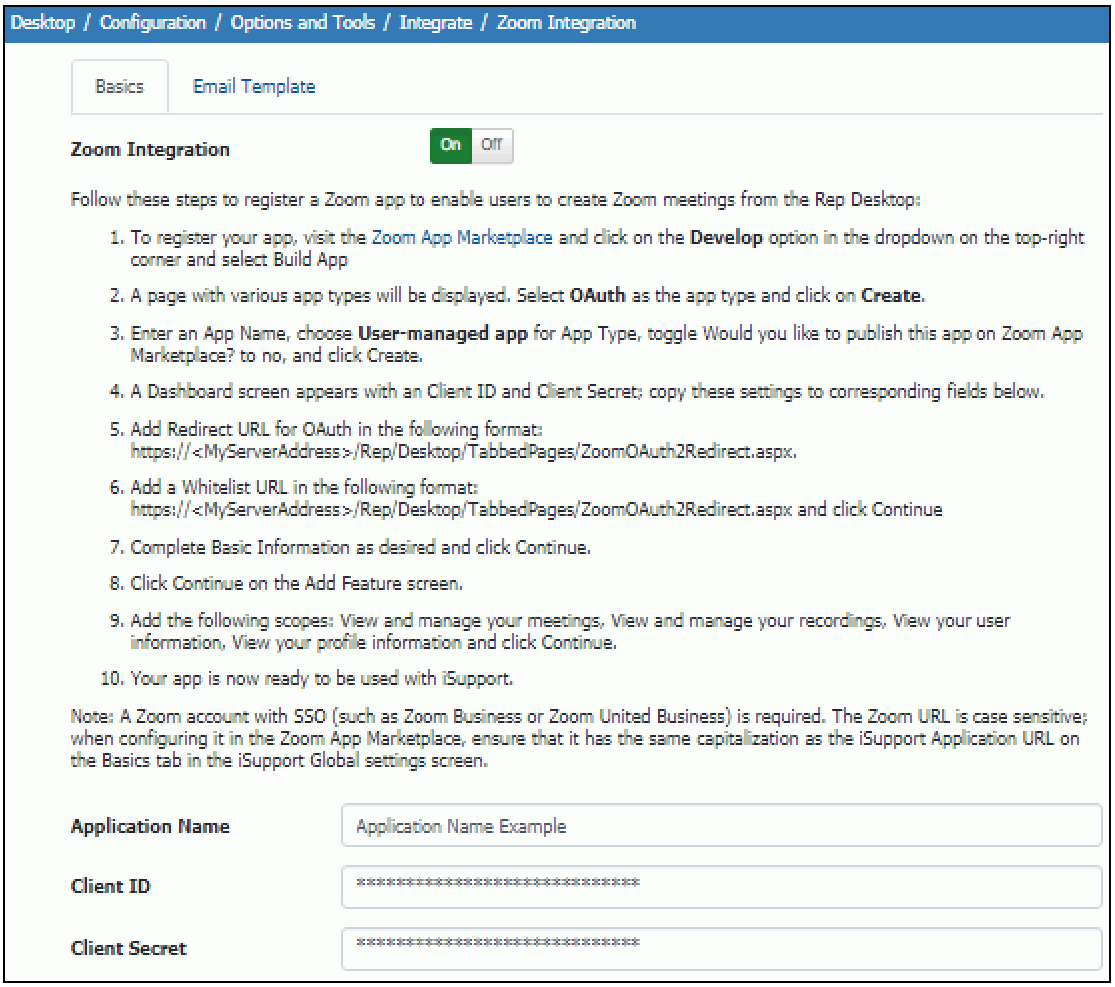
Microsoft Active Directory User Name/Microsoft Active Directory Password - If anonymous Active Directory® connections are not allowed in your environment, use these optional fields to enter a login for authentication when queries are performed. The username should be in the following format: DOMAINNAME\usernameIf anonymous connections are allowed, leave these fields blank.

Note: Support representatives will need to use the Microsoft Exchange User Name and Microsoft Exchange Password fields on the Details tab in the Preferences dialog and set the work day hours during which they are available to be scheduled via iSupport. The timeframe (work hours) during which support representatives are available to be scheduled via iSupport can be set via the Desktop or Support Representative Profile screen. (The dates/times outside of work day hours are designated as "Unavailable" in the calendars displayed via iSupport.)

Zoom Integration

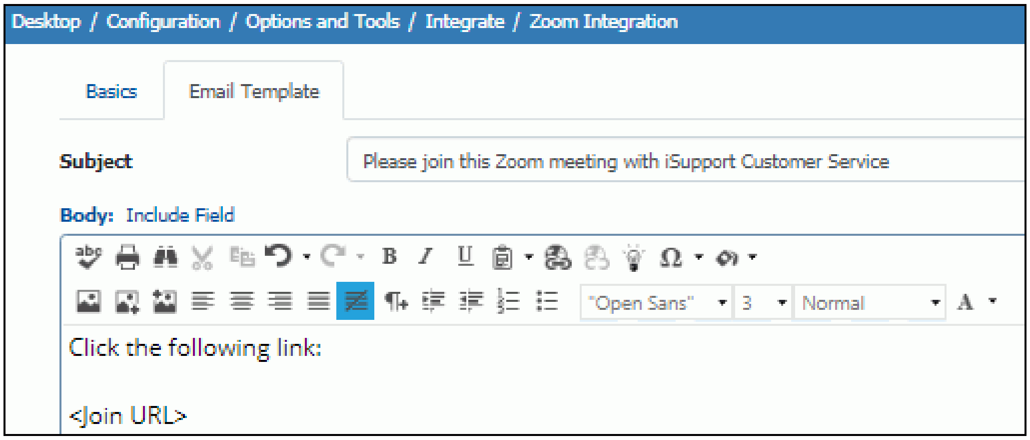
Use the Options and Tools | Integrations | Zoom Integration configuration screen to enable a Zoom Meeting option to appear in the Incident, Change, Problem, and Customer screens for scheduling an on-demand Zoom meeting. When the option is selected, a Generate Join URL dialog will appear for you to enter the topic and options for sharing the Join URL, and emailing a link to the meeting. The Share Join URL option will display a dialog with the URL and an option to start the meeting; the Email Link option will display the Correspondence dialog.

Follow the steps on the screen, enter an application name, and then enter the Client ID and Client Secret in the applicable fields.



Note: A Zoom account with SSO (such as Zoom Business or Zoom United Business) is required. The Zoom URL is case sensitive; when configuring it in the Zoom App Marketplace, ensure that it has the same capitalization as the iSupport Application URL on the Basics tab in the iSupport Global settings screen.

Use the Email Template tab in the Zoom Integration screen to enter the subject and body of the email to be sent with a link to the meeting.



Zoom meetings can be included in work item screens; add the Zoom Meetings field to a work item screen layout via the Layouts configuration screen.

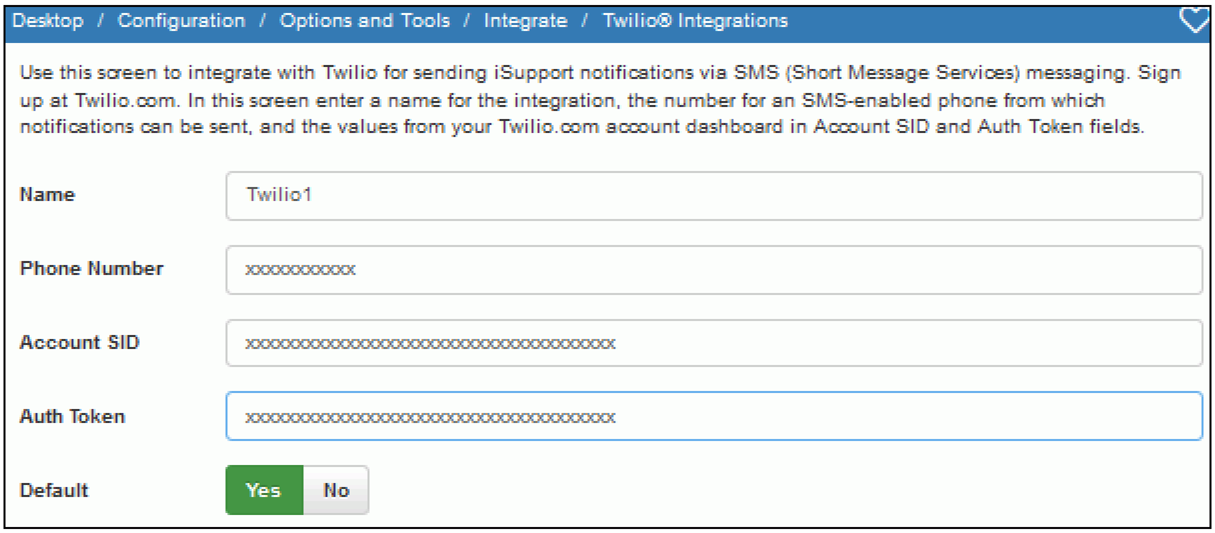
Configuring Twilio Integrations

iSupport integrates with Twilio for sending iSupport notifications and authentication codes to support representatives and customers via SMS (Short Message Services) messaging. Rules with the Notify - SMS action will send the contents of the SMS Text field in the specified notification; if that field is blank or if it is a default notification, the text in the Subject field will be used.

If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, to the address in the Email field. If sending to a customer, the message will be sent to the following in their Customer Profile record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the SMS email from mySupport (email to text); if that is unavailable, the address in the Email field.

Rules can change the Twilio integration (phone number to which an iSupport SMS notification is sent) used for a work item.

After signing up at Twilio.com, use the Options and Tools | Integrate | Twilio Integrations screen to set up a number from which iSupport SMS notifications can be sent.



Name - Enter a name for the Twilio integration.

Phone Number - Enter the number for an SMS-enabled mobile phone from which iSupport SMS notifications can be sent.

Account SID - Enter the value for the Account SID from your Twilio.com account dashboard.

Auth Token - Enter the value for the Auth Token from your Twilio.com account dashboard.

Default - Select Yes to use this Twilio integration phone number for all work items that have not been assigned a Twilio integration phone number via a rule.

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