








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.

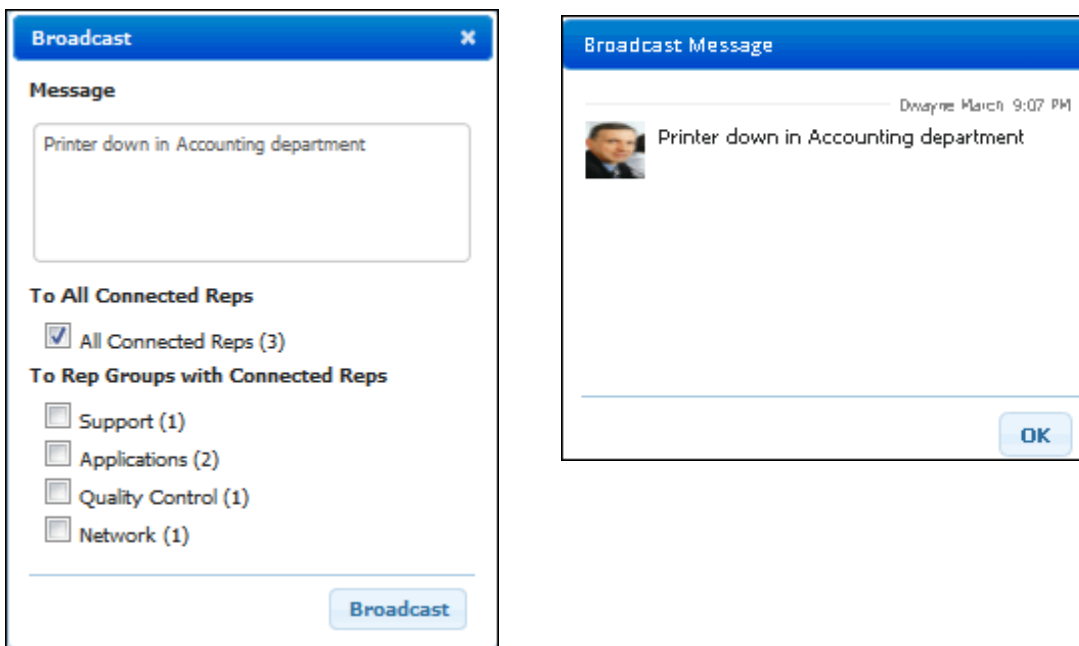
 iSupport’s **Mass Mailing Approvals** feature requires approvals on any correspondence sent from a customer view. The Mass Mailing component includes correspondence that is awaiting approval or has been rejected by an approver. See [“Configuring Mass Mailing/Approvals” on page 31](#) for more information.

 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](#).

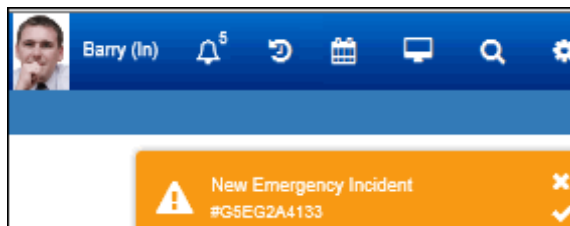
Sending a Broadcast Message

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.

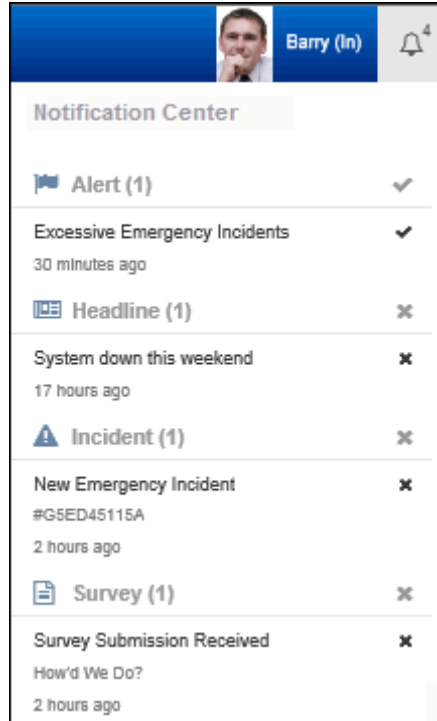


Creating Alerts and Desktop Notifications

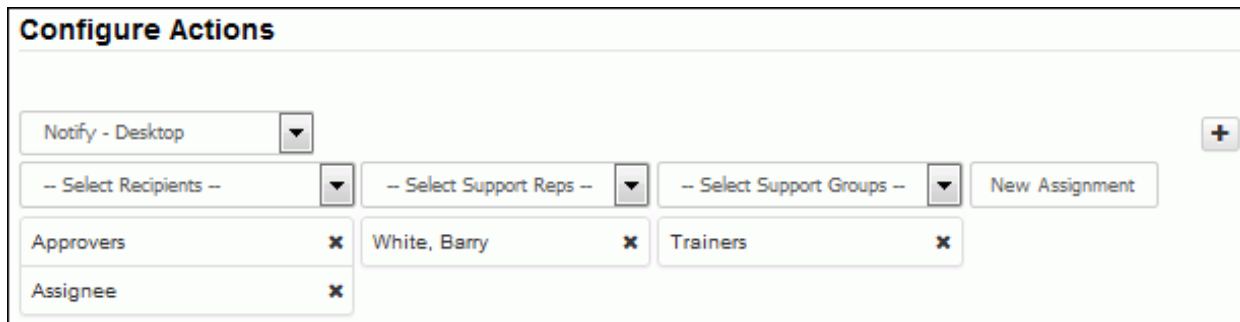
Use the **Notification Center**  icon to display a list of notifications configured via the Rules, Alert Designer, and Headline screens. Options on the Desktop Notification Center tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list 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:



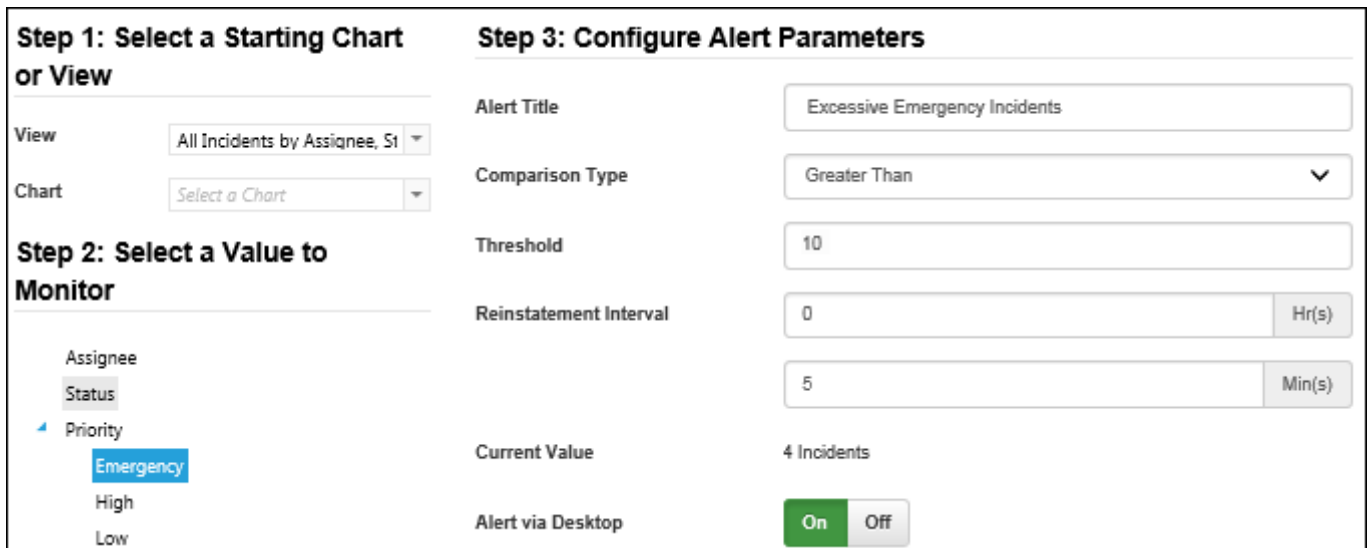
An example of the dropdown is shown below.



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

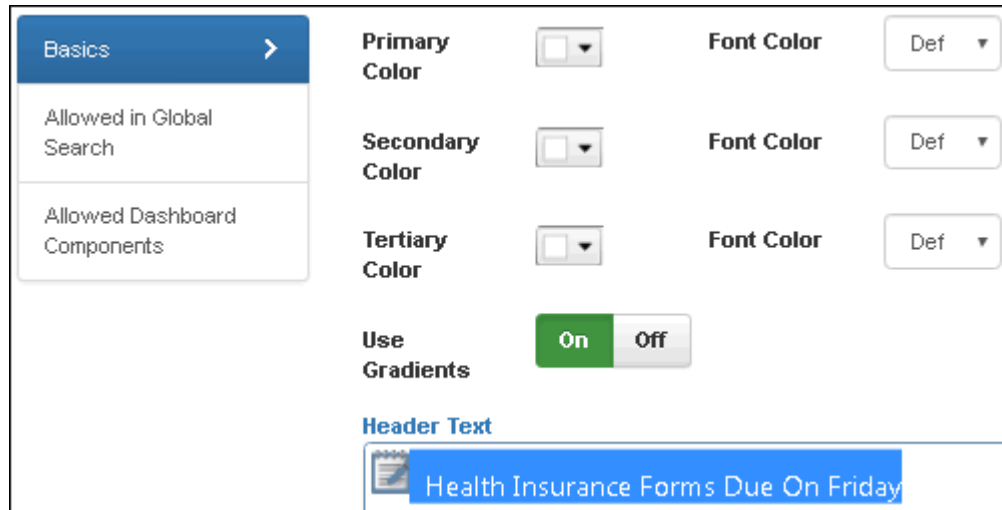


Alerts display when a view field reaches a certain threshold; select Yes in the Alert via Desktop field in the Alert configuration screen to enable it. Note that alerts are evaluated on the schedule of the Alert agent.



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.



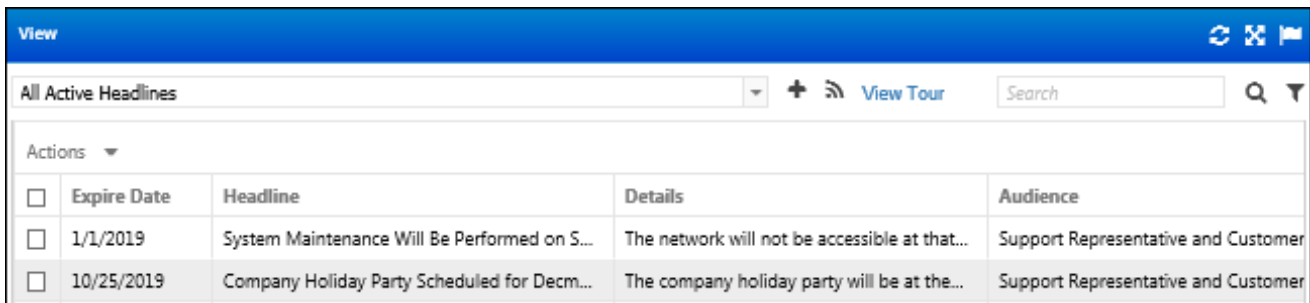
The screenshot shows the 'Basics' tab in the 'Options and Tools | Customize | Dashboard Settings' screen. It features three rows of 'Color' settings (Primary, Secondary, Tertiary) each with a color picker and a 'Font Color' dropdown set to 'Def'. Below these is a 'Use Gradients' toggle set to 'On'. The 'Header Text' section is highlighted in blue and contains a text input field with the text 'Health Insurance Forms Due On Friday'.

The text will appear as shown in the example below.



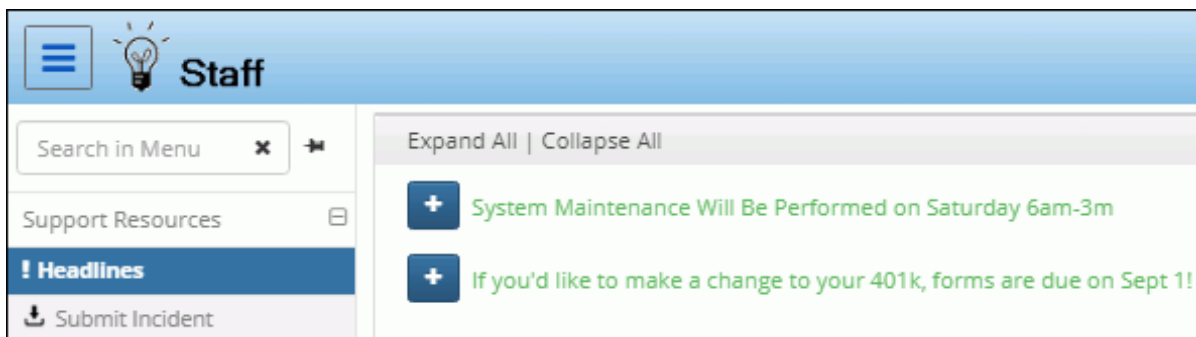
Creating Headlines

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



View				
All Active Headlines				
Actions				
<input type="checkbox"/>	Expire Date	Headline	Details	Audience
<input type="checkbox"/>	1/1/2019	System Maintenance Will Be Performed on S...	The network will not be accessible at that...	Support Representative and Customer
<input type="checkbox"/>	10/25/2019	Company Holiday Party Scheduled for Decm...	The company holiday party will be at the...	Support Representative and Customer

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.

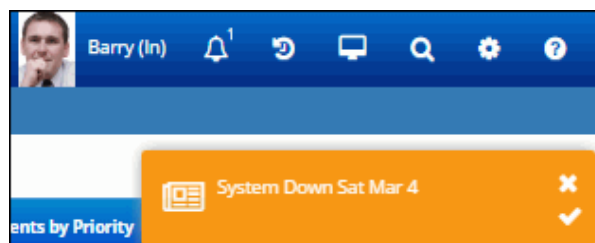
Expires - Select the day on which the headline should no longer display. (The headline will not display on this day.)

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

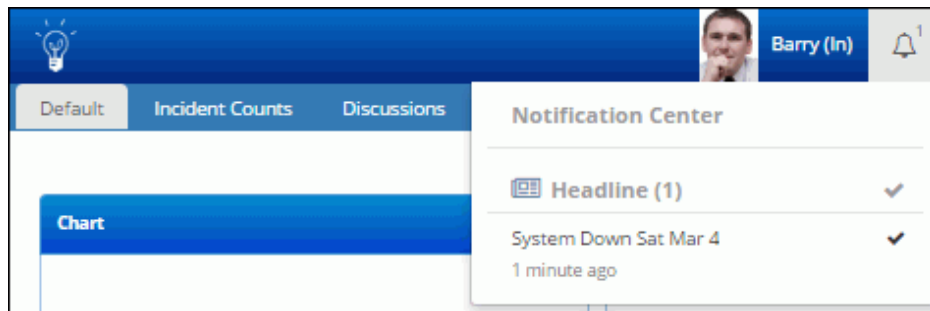
Available to Support Reps - Select Yes to enable display the headline in views and in the Notification Center, and in a popup on the Desktop.


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.



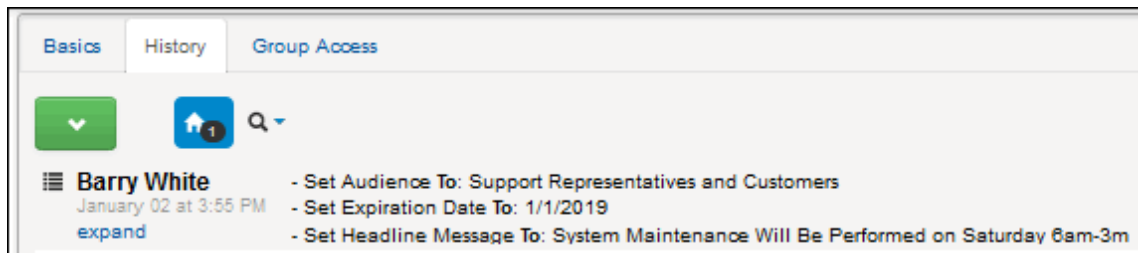
Desktop Notification Message - Select Yes to display the headline in the list of notifications accessed via the Desktop Notifications  icon.

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.**

The screenshot shows the 'Group Access' tab in the software interface. The main window has tabs for 'Basics', 'History', and 'Group Access'. Below the tabs, it says 'Restricted to the following groups:' and has an 'Add' button. A table below shows the selected groups:

Name	Type
Administrators	Administrators group created during application install.
Hardware Repair	Employees that have the skills to repair hardware

An inset dialog box is shown in the foreground, titled 'Group Access'. It has tabs for 'Basics', 'History', and 'Group Access'. Below the tabs, there are two radio buttons: 'Select Support Rep Groups' (selected) and 'Select Customer Groups'. Below the radio buttons is a table with columns 'Name' and 'Description':

Name	Description
Administrators	Administrators group created during application install.
Hardware Repair	Employees that have the skills to repair hardware

Associating Work Items


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

The screenshot shows the 'Associated Work Items' tab in the software interface. The main window has tabs for 'Basics', 'History', 'Group Access', and 'Associated Work Items'. Below the tabs, there are buttons for 'Disassociate' and 'Add Existing', and a 'Refresh' button. A table below shows the associated work items:

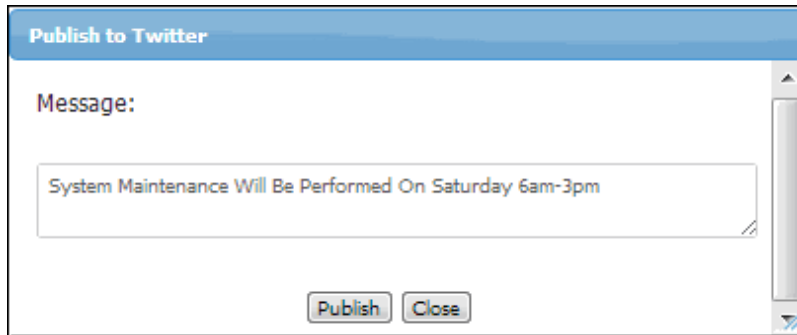
Number	Type	Customer	Assignee	Status	Priority	Date Opened
HBHC852439	Incident	Gale Locke	Barry White	Closed	Medium	11/17/2019 11:54:13 AM

* Denotes Source Work Item

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

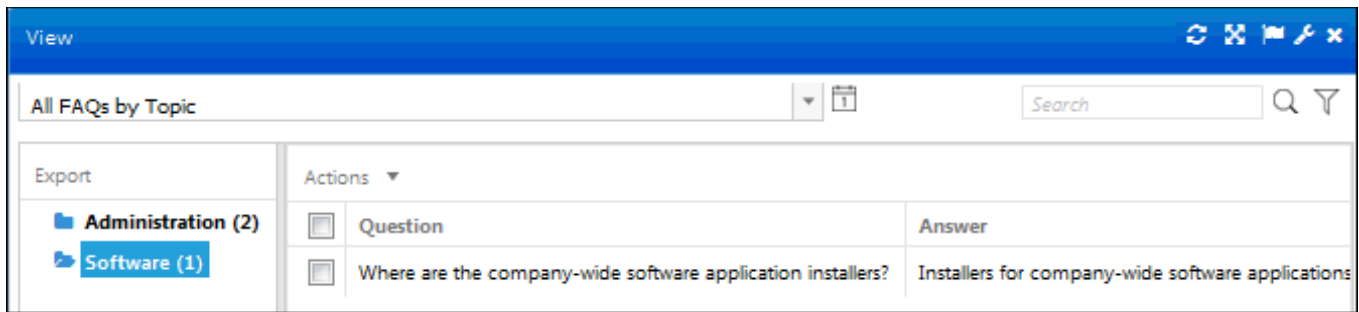
and details (for headlines) or the short description (for problems). If multiple Twitter applications have been created, you can select the account to which the headline or problem should be published.



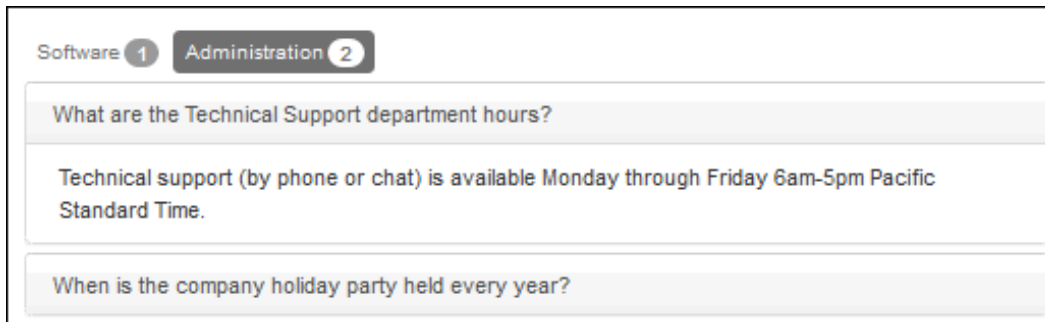
See [“Integrating with Social Media”](#) on page 21 for more information.

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.

The screenshot shows the 'Basics' tab of the FAQ entry screen. It includes a 'File' menu with 'Save' and 'Save and Close' options. The 'Topic' dropdown is set to 'Software', and the 'Position' dropdown is set to '2'. Under 'Available To', both 'Support Representatives' and 'Customers' are checked. The 'mySupport Portals' list shows 'mySupport - Administration' and 'mySupport - External'. The 'Question' field contains the text 'Where are the company-wide software application installers?' and the 'Answer' field contains 'Installers for company-wide software applications such as Microsoft Office and Adobe Reader are on the Admin server in the Installers directory.'

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.

Add Delete		Position	Topic
<input type="checkbox"/>		1	Administration
<input type="checkbox"/>		2	Software

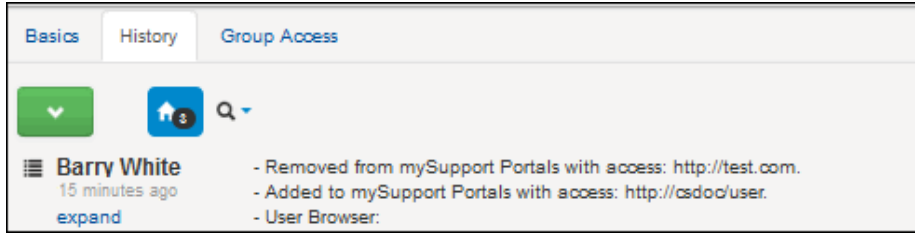
Available To - Select one or both of the following: Support Representatives to allow the frequently asked question to display to support representatives on the Desktop. Select Customers to allow the frequently asked question to display to customers on the mySupport portal.

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.

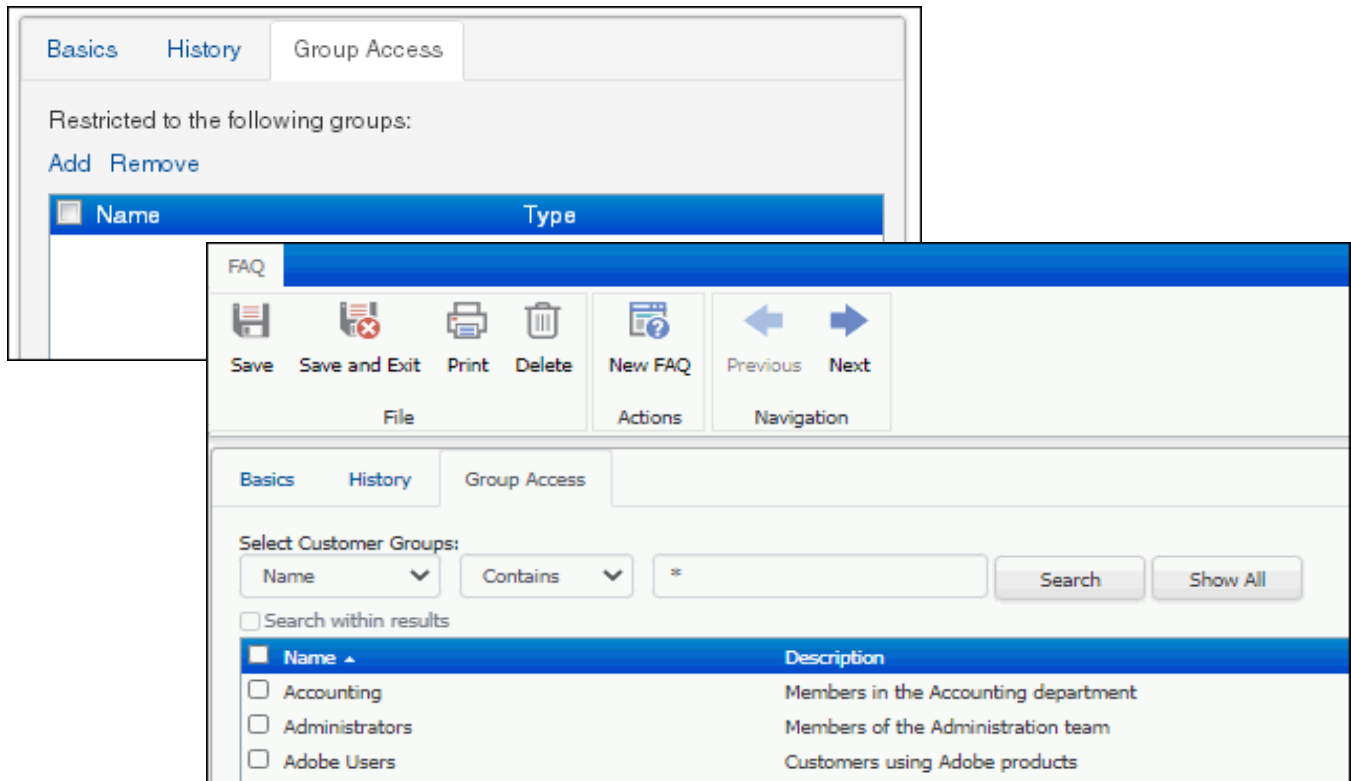
Viewing History

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




Restricting Access

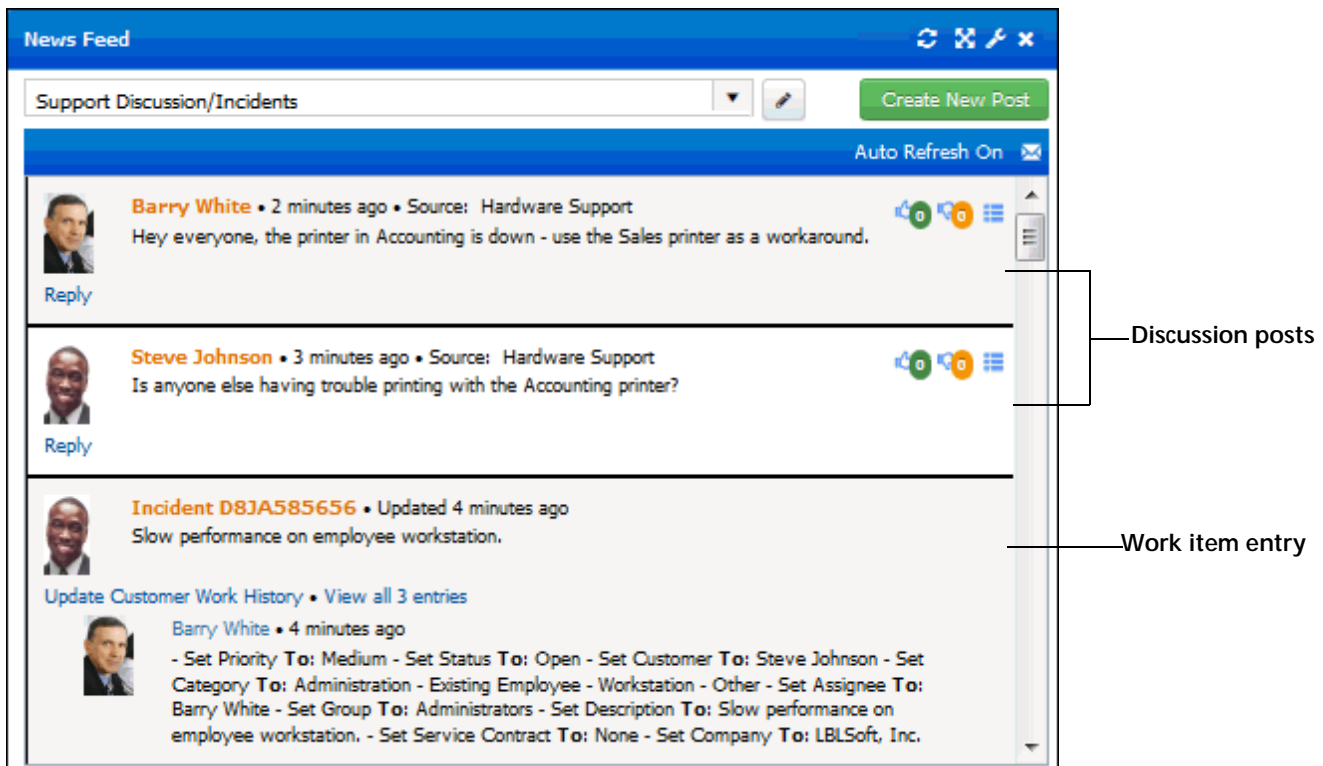
Use the Group Access tab to restrict display of a FAQ to members of customer groups. Click the Add link to display the following dialog for selecting the groups. **After you add one or more groups and save, the FAQ will display only to members of the selected groups.**



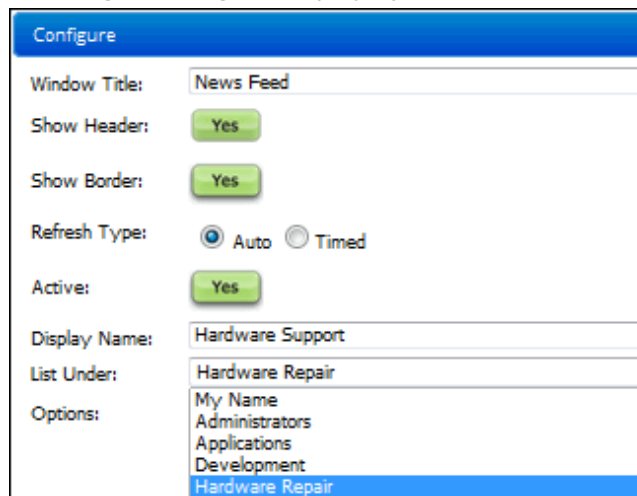
Configuring News Feeds

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

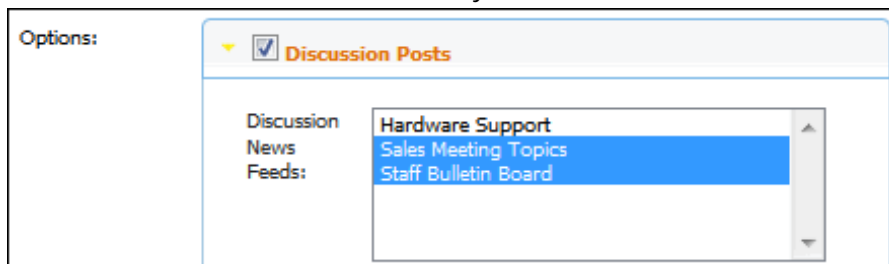
information on each option.



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).

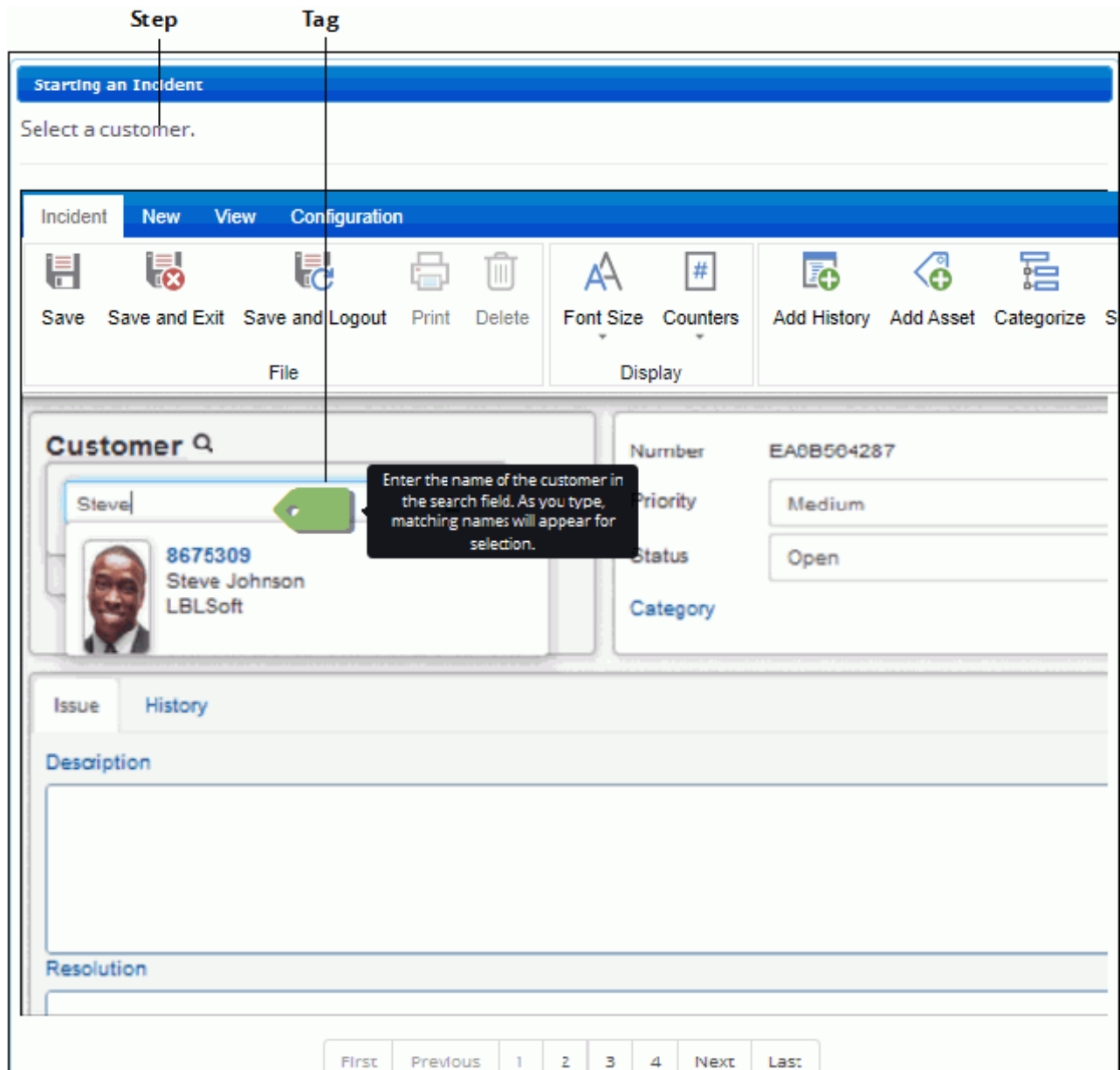
If it is a discussion only news feed, you can also restrict access for customer groups and individual customers.

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.

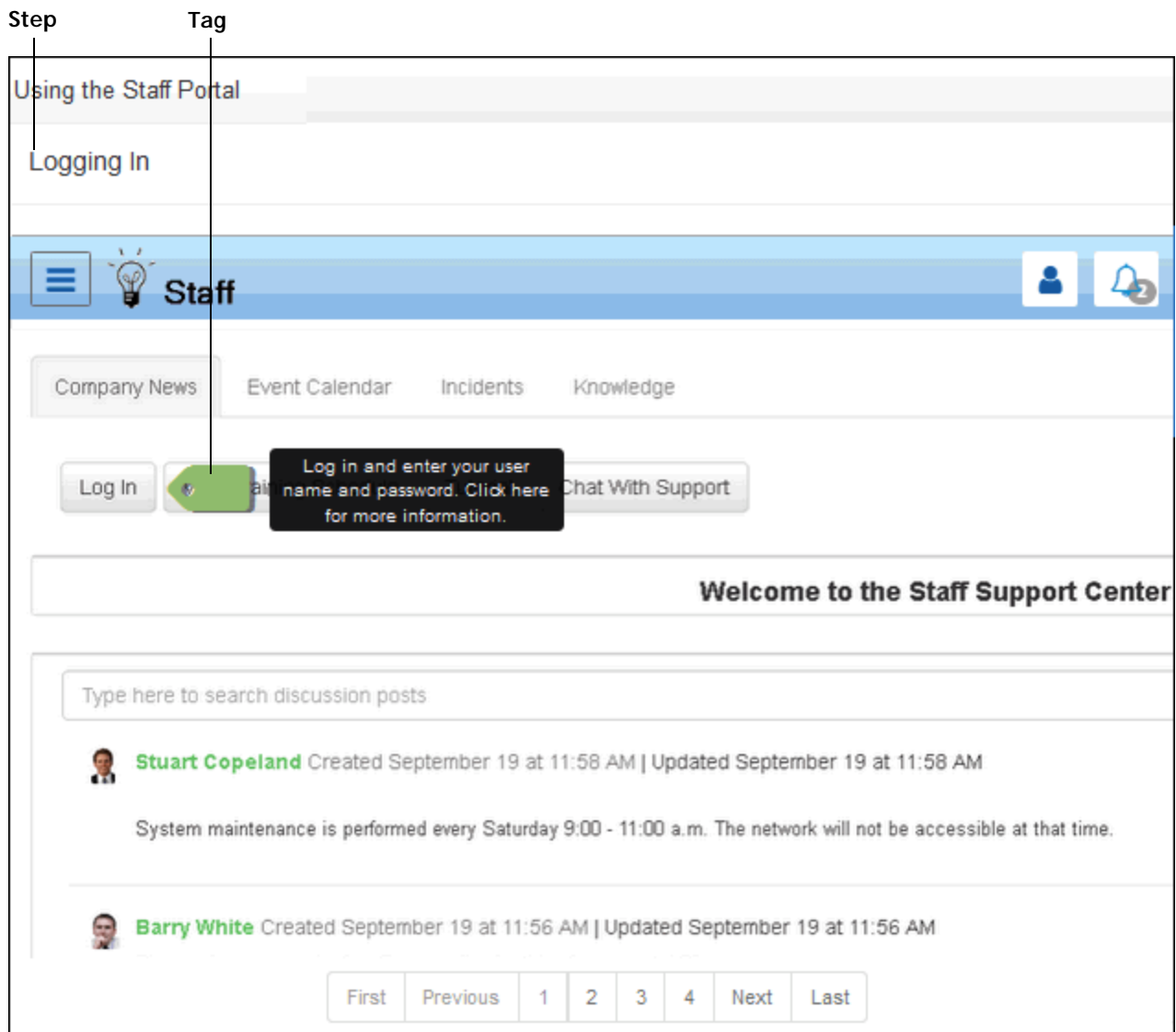
Configuring Tutorials


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:



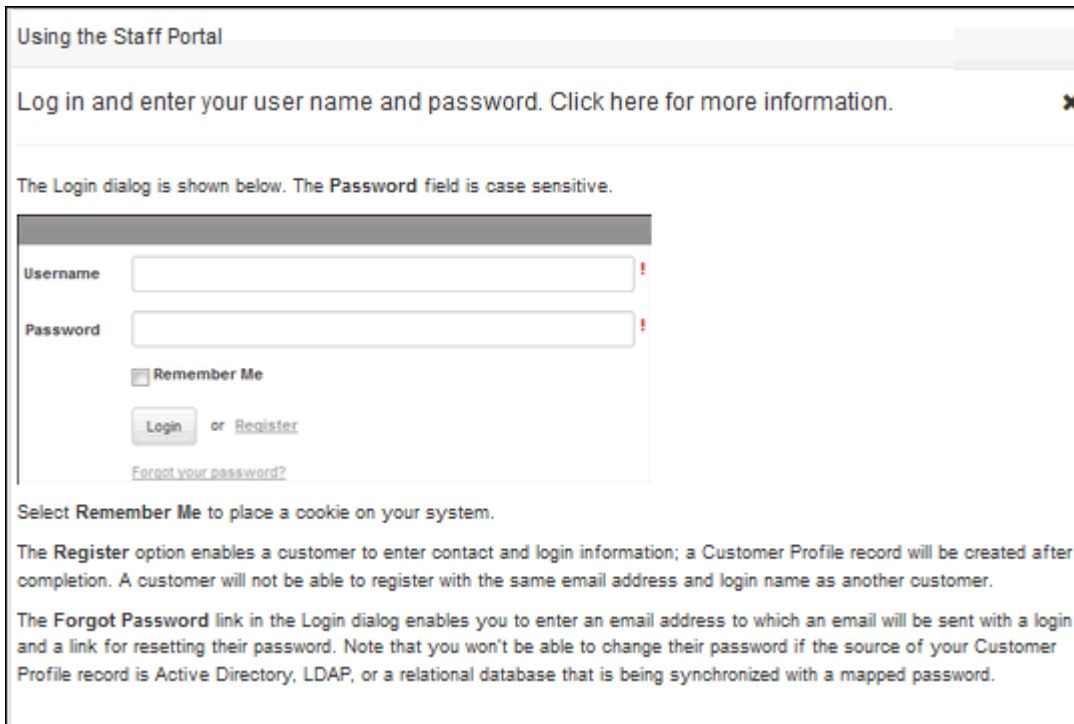
On a mySupport portal:





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.

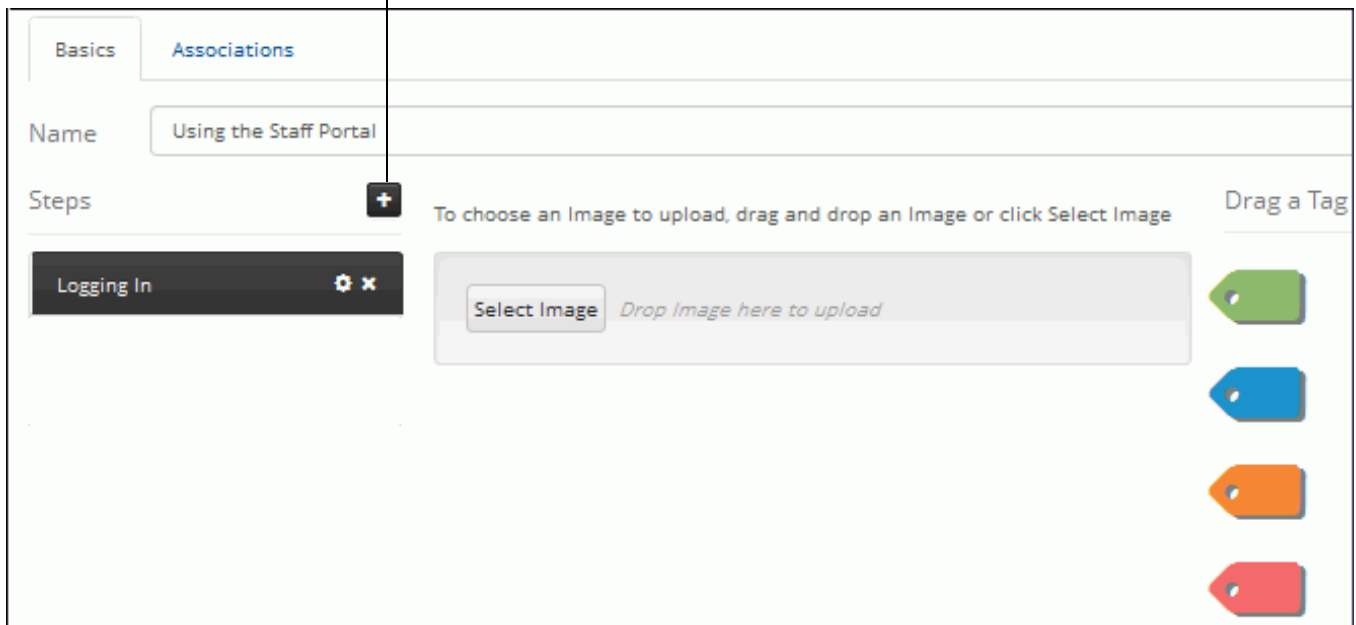
On mySupport, you can associate a tutorial with a dashboard, a mySupport work item submit or display layout, and a navigator link or a button that accesses a feature. For dashboards, the tutorial will appear the first time the authenticated user accesses the dashboard; after that point the Tutorial  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.

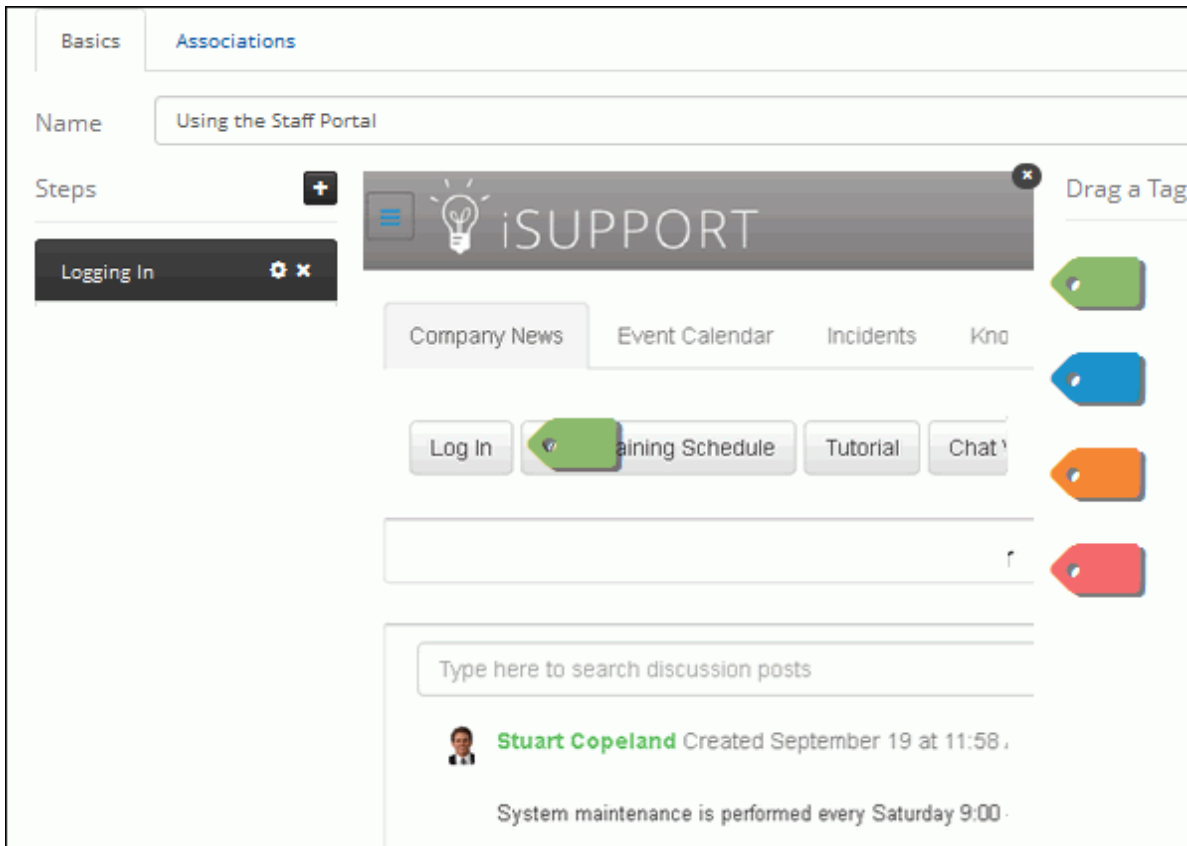


To configure a tutorial, go to Tutorials and click Create. Enter a name the tutorial; this name will appear as the heading. Then click the Add Step  icon and enter the name of a step. You can use the Edit Step  icon to change step text.

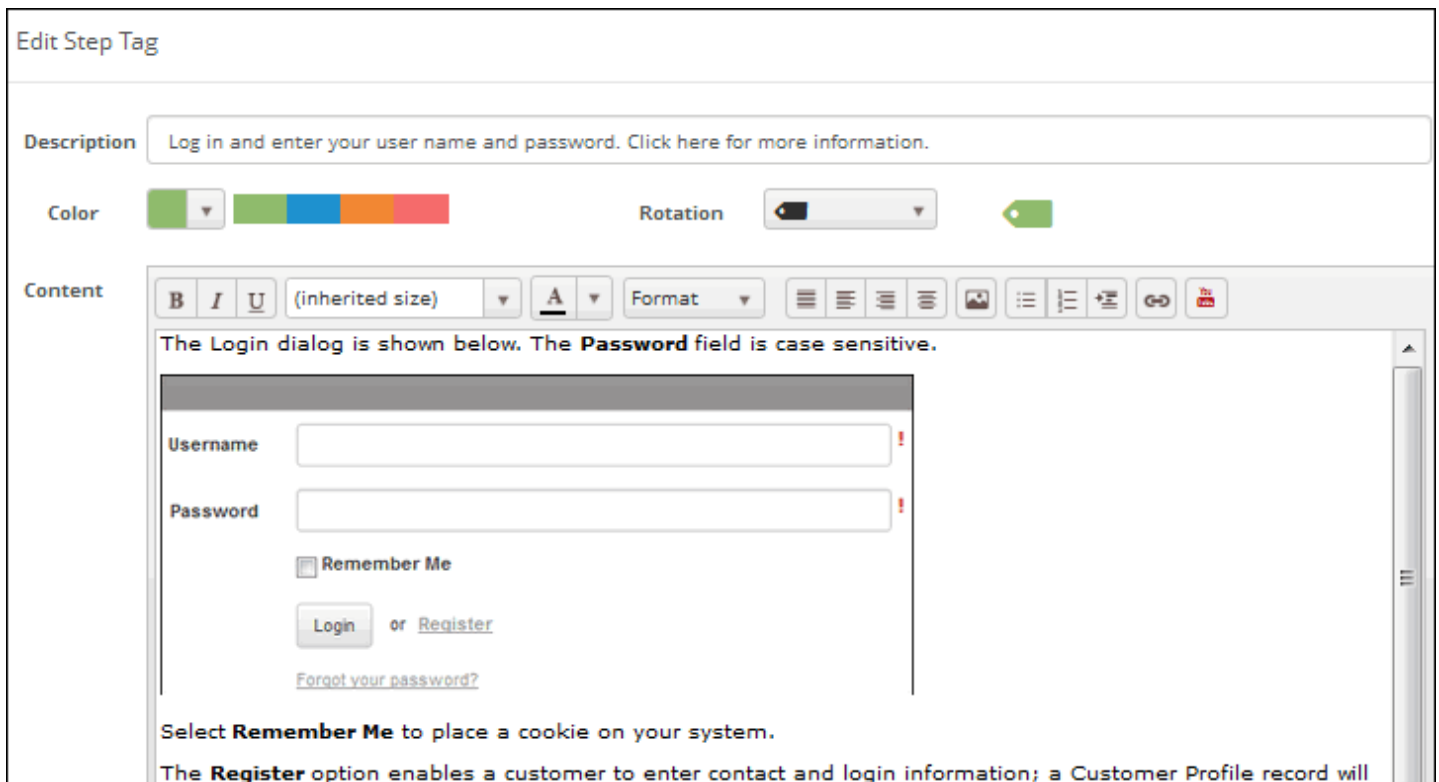
Click to add a step



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.

The screenshot shows the 'Associations' configuration page in iSupport software. At the top, there are tabs for 'Basics' and 'Associations'. Below the tabs, the 'Name' field is set to 'Using the Staff Portal'. A 'Steps' list on the left includes 'Logging In', 'Using the Navigator', 'Submitting Incidents', and 'Viewing Incidents'. The main preview area shows a user interface with a header 'iSUPPORT', navigation tabs for 'Company News', 'Event Calendar', 'Incidents', and 'Know', and a 'Log In' button. A tooltip points to the 'Log In' button with the text: 'Log in and enter your user name and password. Click here for more information.' To the right of the preview, there are four colored tags (green, blue, orange, red) and a 'Drag a Tag' label. Below the preview, there is a search bar with the text 'Type here to search discussion posts' and a post by 'Stuart Copeland' created on September 19 at 11:58, with the content 'System maintenance is performed every Saturday 9:00'.

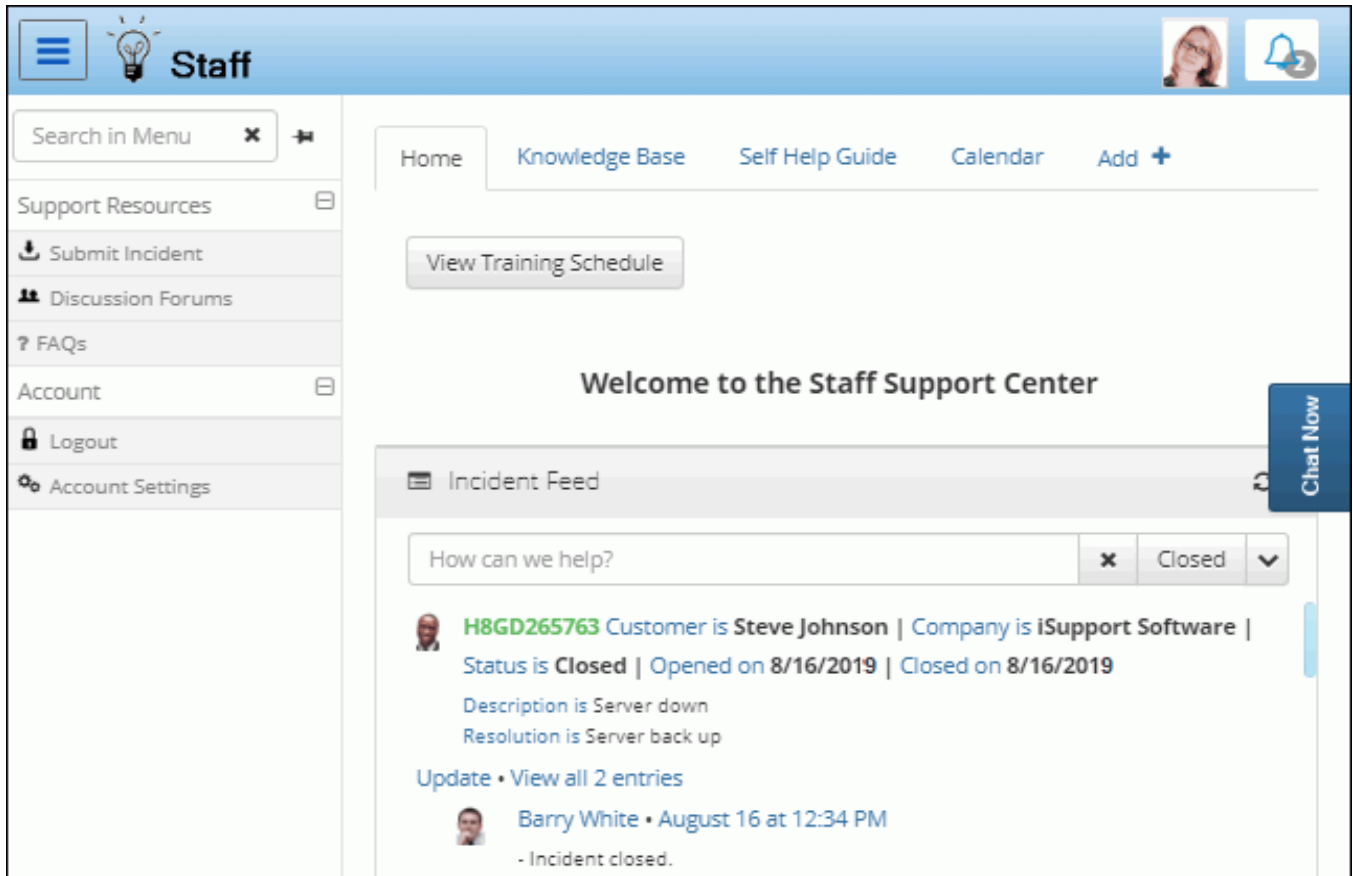
Associating Tutorials With Dashboards, Layouts, and Configuration Screens

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

The screenshot shows the 'Associations' tab in a software interface. It is divided into two columns of settings. The left column contains sections for 'Asset Layouts', 'Company Layouts', 'Customer Layouts', 'Knowledge Layouts', 'Problem Layouts', and 'Rep Dashboards'. Each of these sections has a dropdown menu with a downward arrow. The right column contains sections for 'Change Layouts', 'Configuration Pages', 'Incident Layouts', 'mySupport Dashboards', and 'Purchase Layouts'. 'Change Layouts' has a dropdown menu. 'Configuration Pages' has a plus sign icon. 'Incident Layouts' has a dropdown menu and a button labeled 'Submit Incident (mySupport Submit)'. 'mySupport Dashboards' has a text input field containing the word 'Incidents'. 'Purchase Layouts' has a dropdown menu. At the bottom left, there is a search input field labeled 'Search Rep Dashboards...'. At the top, there are two tabs: 'Basics' and 'Associations', with 'Associations' being the active tab.

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.

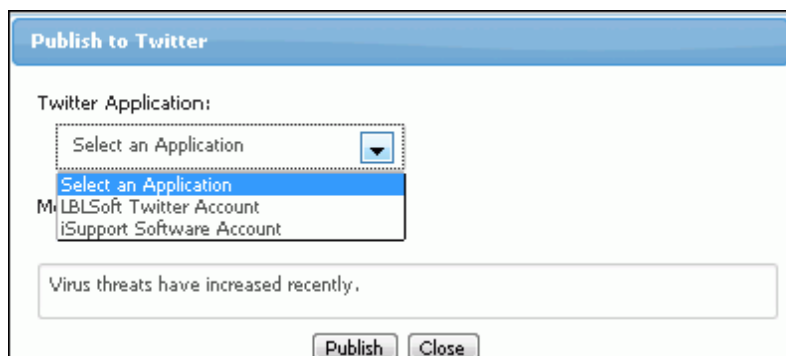
Customers can follow a knowledge entry, its author, and/or its category (if categories are enabled to display on a mySupport portal). Following a knowledge entry will cause updates to reload the entry in the Global News Feed, and following an author will cause any entries created by the author to appear 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).


Notifications

Use these settings to configure update notifications. You'll be able to enable or disable these notifications after you save a work item. Change notification settings for a work item via the Notification button in the work item toolbar.

The Default checkbox below populates work item settings; you can clear it to disable notifications by default for a notification method. Note that one notification method must be enabled.

Email Settings	
<input checked="" type="checkbox"/> Default  sj@example.local	

Text Message Settings	
<input checked="" type="checkbox"/> Default  3600000000@vtext.com	✖ Remove

Twitter Settings	
<input checked="" type="checkbox"/> Default  ExampleCo	✖ Remove

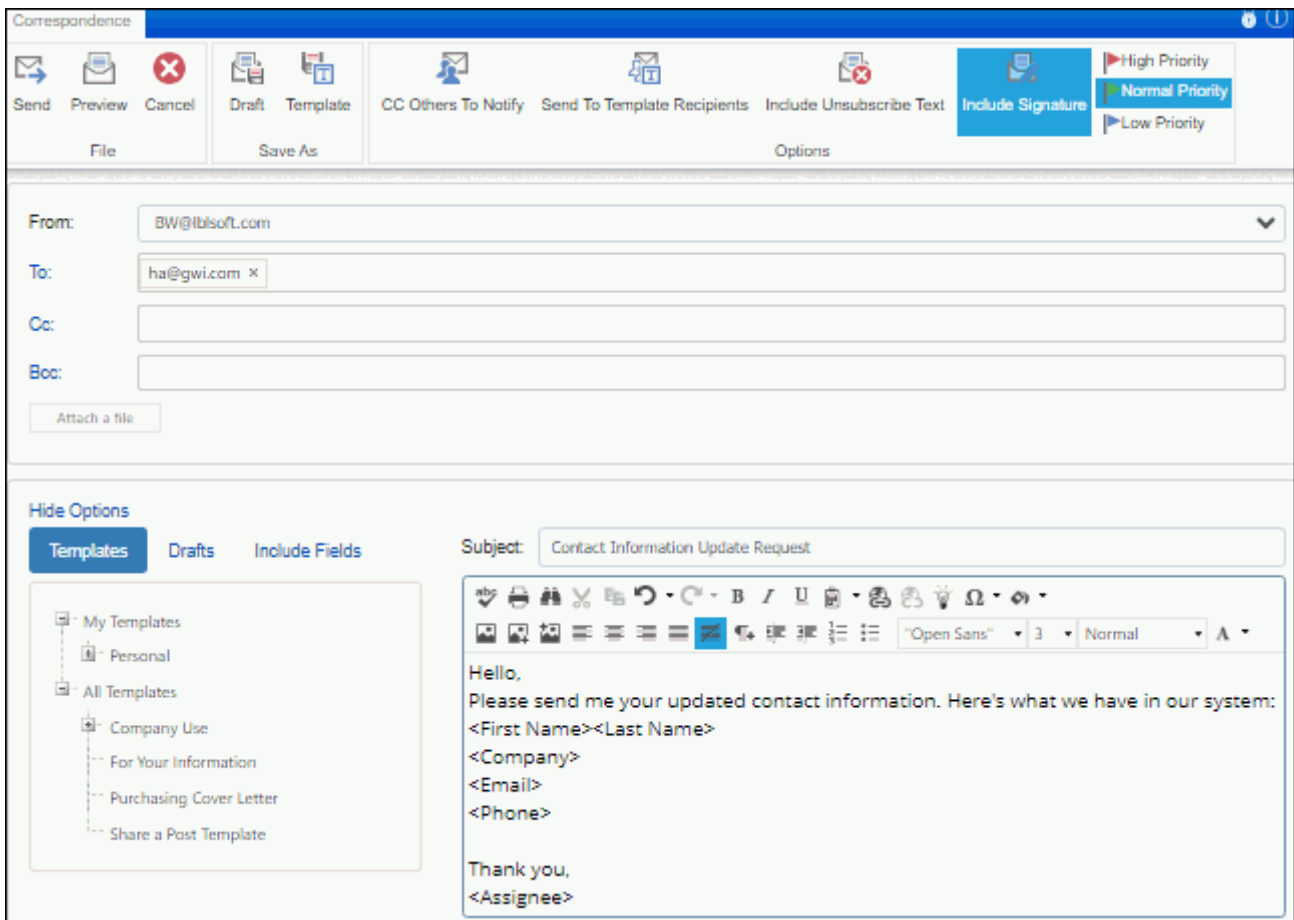
Using iSupport's Correspondence Functionality


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

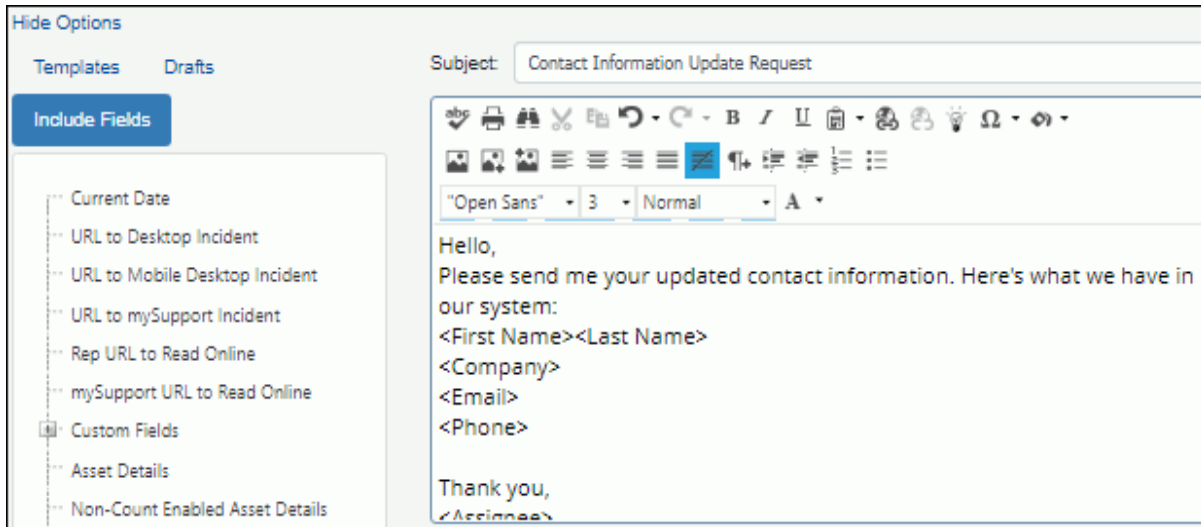
To create and send an email in iSupport, select  Correspondence in an entry screen or Desktop view,



- 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.

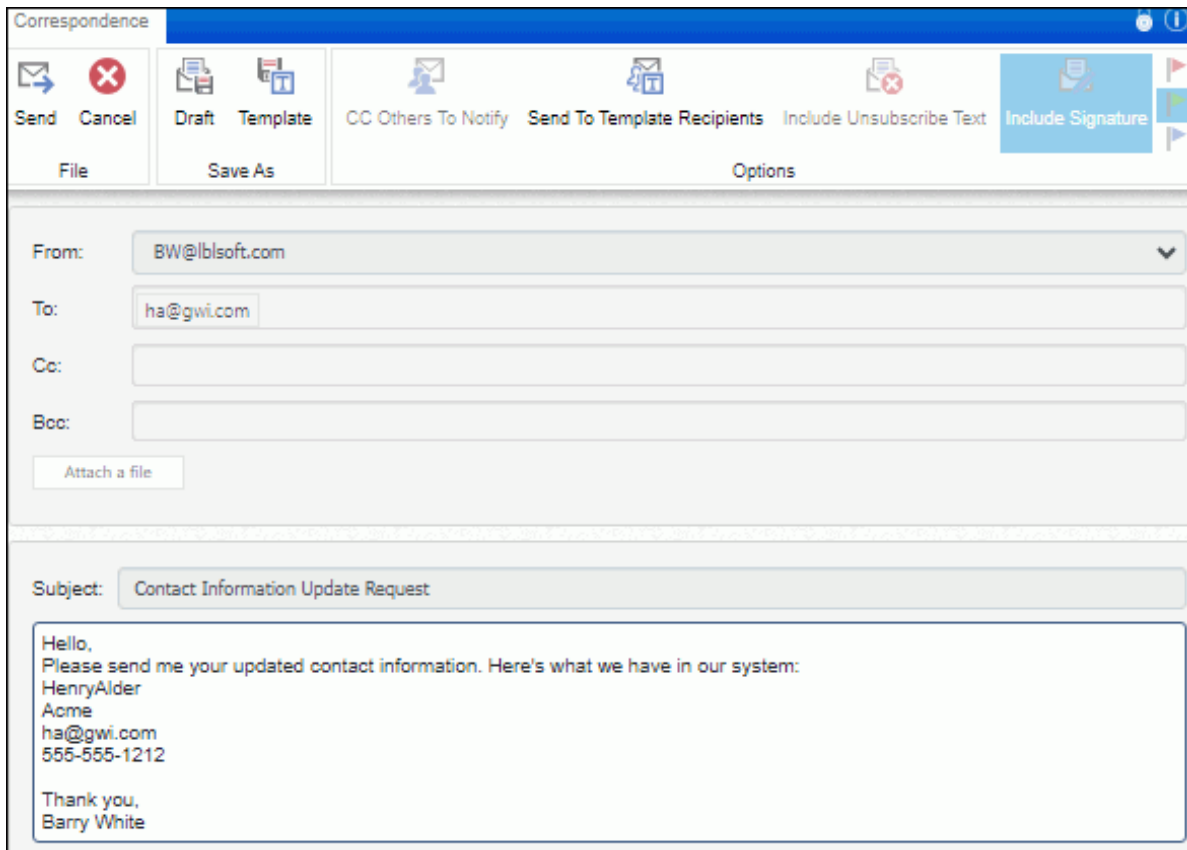
- The Body field may contain a signature block if set up in the Preferences screen (accessed via the Desktop).
- Additional recipients may be included in the CC field when you preview a correspondence if the CC:Others to Notify feature is enabled for a selected template.
- Use the Include Fields button 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.




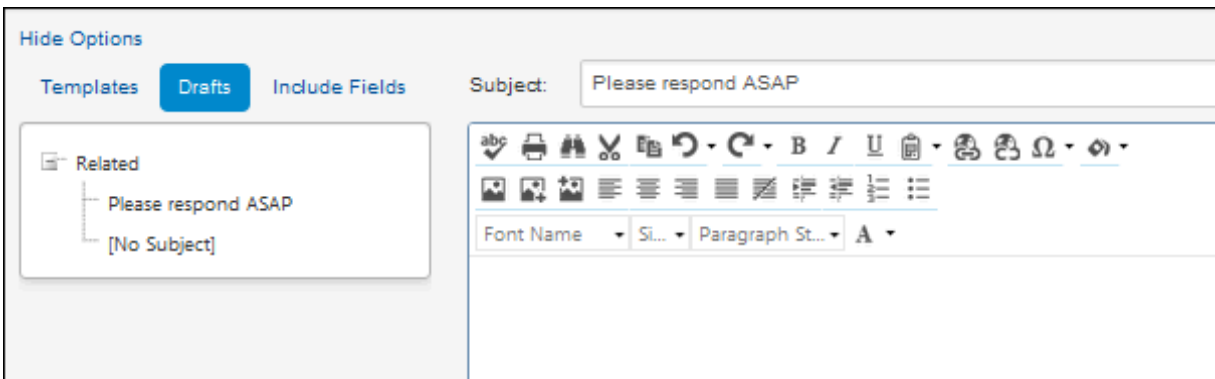
You can append **:label:string** to the <URL to x> include fields so the link displays as linked text rather than the full URL. The <Rep URL to Read Online> and <mySupport URL to Read Online> include fields will include a link for viewing the email on the web (typically for customers who aren't able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

Others to Notify			
Add Remove		<input checked="" type="radio"/> Incident <input type="radio"/> All	
<input type="checkbox"/> Last Name ▲	First Name	Email	Company
<input type="checkbox"/> Copeland	Stuart	sc@example.com	Support Representative
<input type="checkbox"/> Flynn	Connor	cf@example.com	Support Representative

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			
		<input type="radio"/> Incident <input checked="" type="radio"/> All	
<input type="checkbox"/> Last Name ▲	First Name	Email	Company
<input type="checkbox"/> Alder	Henry	ha@example.com	Technology PCS
<input type="checkbox"/> Copeland	Stuart	sc@example.com	Support Representative
<input type="checkbox"/> Flynn	Connor	cf@example.com	Support Representative
<input type="checkbox"/> Juarez	Mary	mj@example.com	LBL Services

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

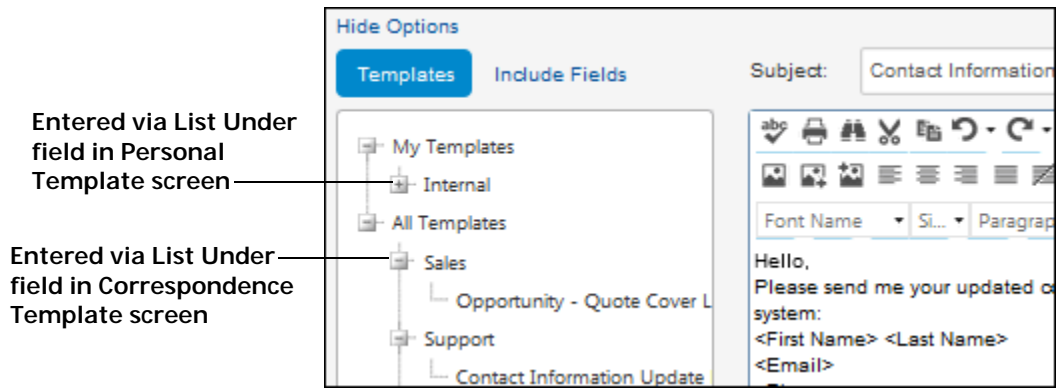
Set miscellaneous options on the Basics tab.

Basics >	Title	Contact Information Update Request
Message	List Under	Support
Usage	Active	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off
	Prohibit Editing	<input type="checkbox"/> On <input checked="" type="checkbox"/> Off
	Send Priority	<input type="checkbox"/> Low <input checked="" type="checkbox"/> Normal <input type="checkbox"/> High
	Set From Address to Sender and Lock	<input type="checkbox"/> On <input checked="" type="checkbox"/> Off
	Set To Address to Associated Customer	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off
	CC Others To Notify	<input type="checkbox"/> On <input checked="" type="checkbox"/> Off
	Include Attachments From Work Item	<input type="checkbox"/> On <input checked="" type="checkbox"/> Off
	Design Template	Logo Footer <input type="button" value="v"/> <input type="button" value="+"/> <input type="button" value="pencil"/>

Last modified by Barry White on 8/21/2019

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.

The screenshot shows an email configuration interface. At the top, there are four fields for 'To', 'From', 'Cc', and 'Bcc', each with a blue header. Below these is a 'Subject' field containing the text 'Contact Information Update Request'. Underneath is an 'Attachments' section with a button labeled 'Attach a file'. A section titled 'Message: Include Field' contains a rich text editor toolbar with various icons for text formatting and alignment. Below the toolbar, the message body text is displayed: 'Hello, Please send me your updated contact information. Here is what we have in our system: <First Name> <Last Name>'.

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.

The screenshot shows a dialog box titled 'Select Field to Include'. It contains a list of fields that can be selected for inclusion in the email body. The fields are: Current Date, Rep URL to Read Online, mySupport URL to Read Online, Incident, URL to Desktop Incident, URL to Mobile Desktop Incident, URL to mySupport Incident, Asset Details, Custom Fields List, Custom Fields List, Age Group, Server OS, Site Visit Required, Department Code, and Date. The list is scrollable and has a search bar at the top.

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.

The screenshot shows the 'Usage' configuration tab. On the left, there is a navigation menu with 'Basics', 'Message', and 'Usage' (highlighted with a blue bar and a right-pointing arrow). The main content area is divided into three sections: 1. 'Override Do Not Include Unsubscribe Text' with a toggle switch set to 'On'. 2. 'Use with Features' with a list of checkboxes: Incidents, Problems, Customers, Configuration Items, Discussion Posts, Changes, Purchases, Service Contracts, and Opportunities. 3. 'Use with Categories' with an 'Edit' button and a text input field containing 'Applications>Adobe>Reader'. At the bottom, there is a 'Preview with' dropdown menu currently set to 'Incident'.


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 Not 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.

View Subscriptions		Search...			
<div style="display: flex; justify-content: space-between;"> Create Delete </div>					
	Name ▲	View	Author	Subject	Format
<input type="checkbox"/>	Weekly Incidents by Assignee for CEO	All Incidents by Assignee, Status, and Priority	Barry White	Weekly Incidents by Assignee Report	Excel
<input type="checkbox"/>	Weekly Priority Open Incidents Report	This Week's Priority Open Incidents	Barry White	This Week's Priority Open Incidents	PDF

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.


- Default Outbound Settings
- Accounts
- Design Templates
- Mass Mailing Approvals >
- Unsubscribe Settings

Require Approval on Mass Mailings
 On Off

Approvers

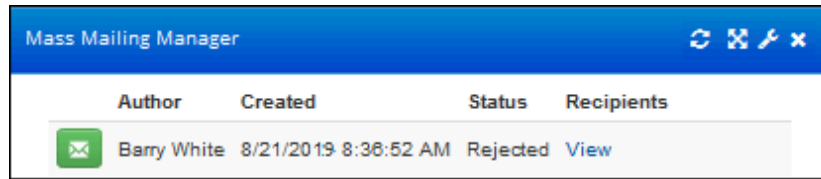
<input type="checkbox"/>	Last Name ▲	First Name	Email	Phone	Primary Group
<input type="checkbox"/>	Flynn	Connor	cf@example.com	360-397-1058	Support (IT)
<input type="checkbox"/>	Kienle	Abby	ak@example.com	360-397-1000	Administrators

- 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.


Mass Mailing Manager				
	Author	Created	Status	Recipients
	Gena Pirie	1/4/2019 10:33:31 AM	Awaiting Review	View Henry Alder (Not Sent) ✕ Christina Apple (Not Sent) ✕

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.



The screenshot shows a window titled "Mass Mailing Manager" with a blue header bar containing refresh, close, and edit icons. Below the header is a table with the following columns: Author, Created, Status, and Recipients. A single row of data is visible, with a green envelope icon to the left of the author's name.


Author	Created	Status	Recipients
 Barry White	8/21/2019 8:36:52 AM	Rejected	View

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

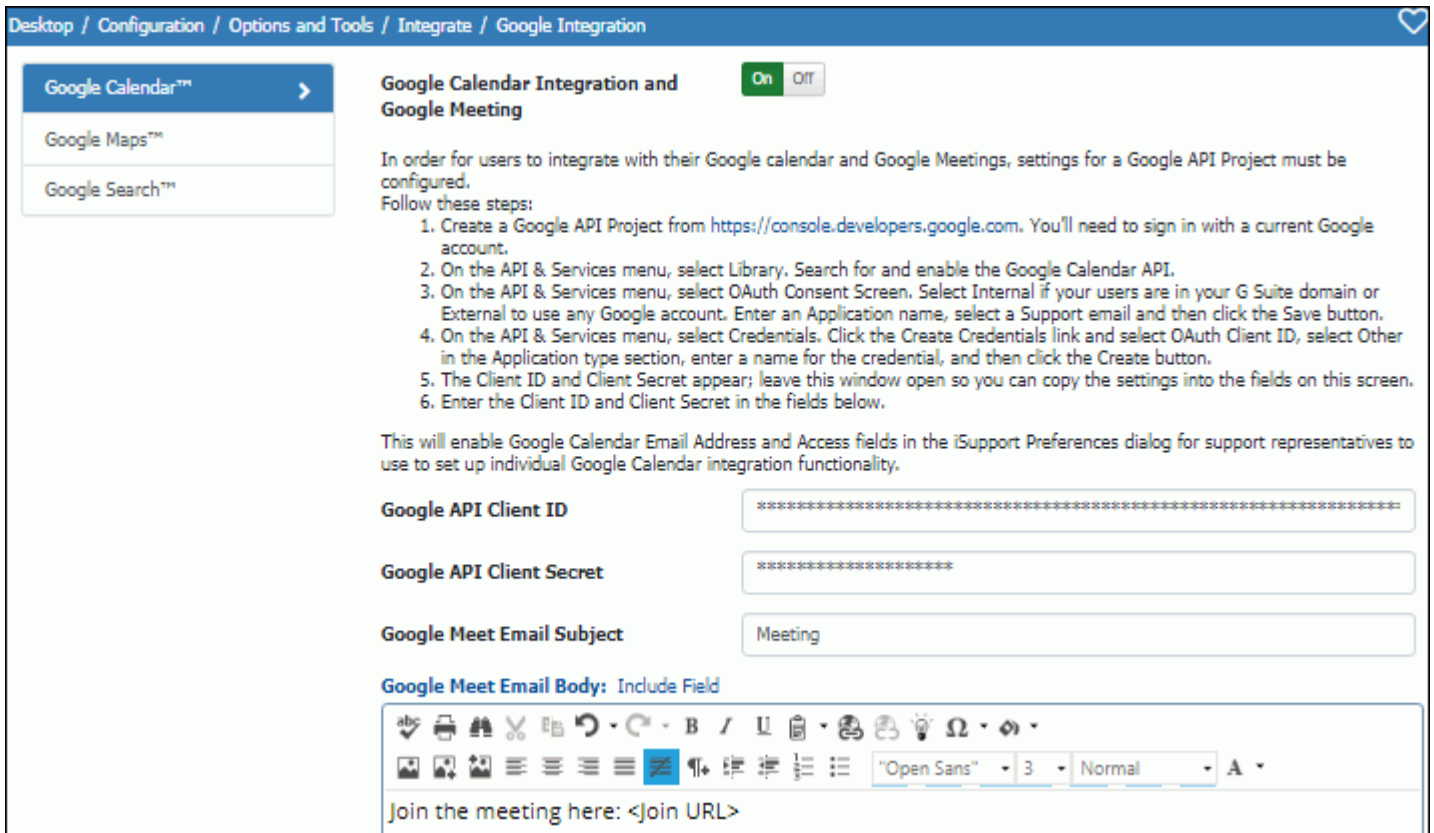
Set up Google Calendar integration in the Options and Tools | Integration | Google Integration screen to enable users to access their Google Calendar for the Calendar option on the Desktop and mySupport portals, a New Meeting option in iSupport entry screens for scheduling a Google Calendar meeting,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

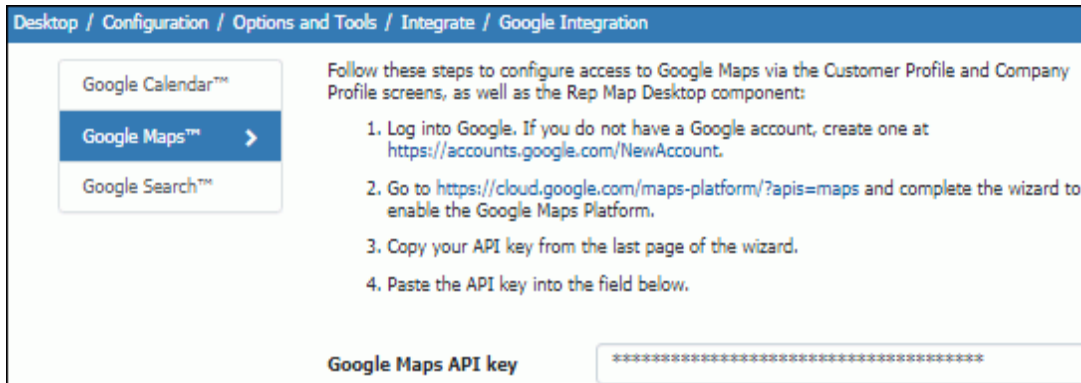


Note: Support representatives will need to use the Google Calendar Email Address and Google Calendar Access fields on the Details screen in the Preferences dialog to enable access to their calendar(s) and set the work day hours during which they are available to be scheduled via iSupport. (The dates/times 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.

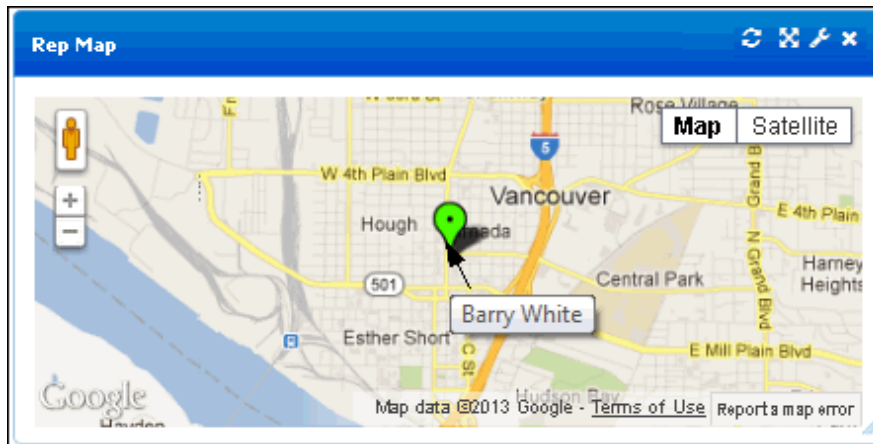
Google Meet meetings can be included in work item screens; add the Google Meetings field to a work item screen layout via the Layouts configuration screen.

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.





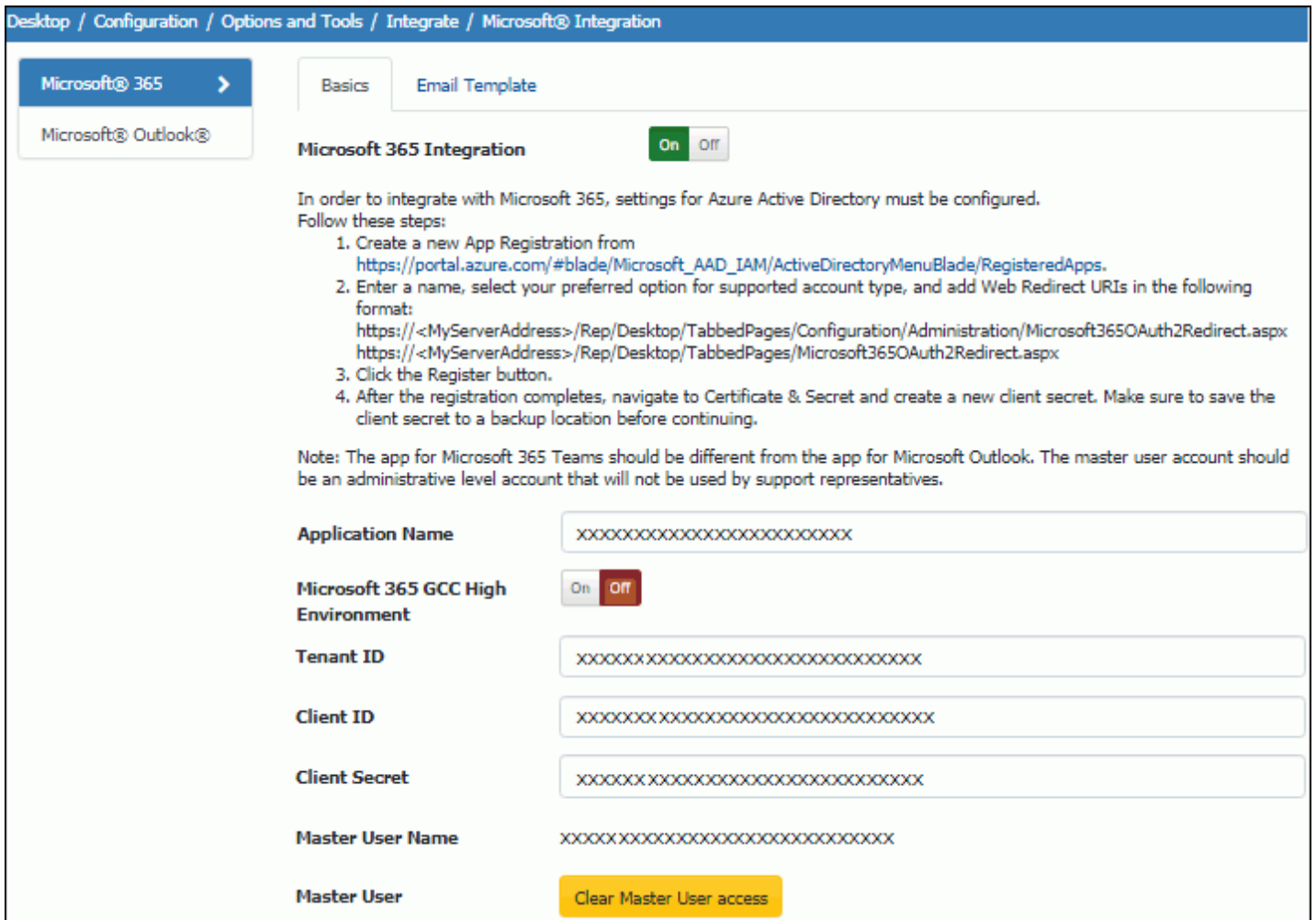
Maps will appear as shown in the example below.



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,

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.

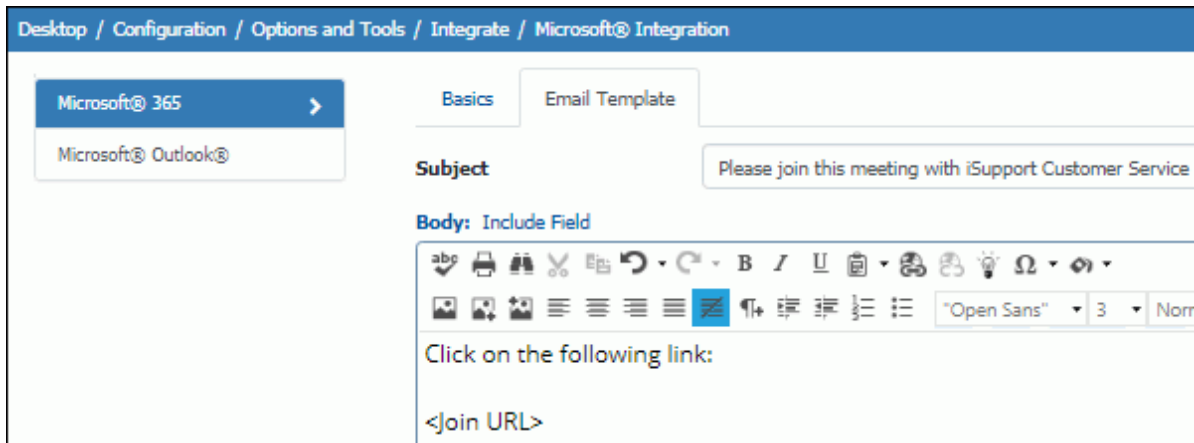


The screenshot shows the 'Microsoft 365 Integration' configuration page. At the top, there is a breadcrumb trail: 'Desktop / Configuration / Options and Tools / Integrate / Microsoft® Integration'. Below this, there are two tabs: 'Basics' and 'Email Template'. The 'Microsoft 365 Integration' toggle is currently set to 'On'. Below the toggle, there is a note: 'In order to integrate with Microsoft 365, settings for Azure Active Directory must be configured. Follow these steps:'. The steps are: 1. Create a new App Registration from https://portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/RegisteredApps. 2. Enter a name, select your preferred option for supported account type, and add Web Redirect URIs in the following format: <https://<MyServerAddress>/Rep/Desktop/TabbedPages/Configuration/Administration/Microsoft365OAuth2Redirect.aspx> and <https://<MyServerAddress>/Rep/Desktop/TabbedPages/Microsoft365OAuth2Redirect.aspx>. 3. Click the Register button. 4. After the registration completes, navigate to Certificate & Secret and create a new client secret. Make sure to save the client secret to a backup location before continuing. Below the steps, there is a note: 'Note: 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.' The form contains several fields: 'Application Name' (text input with placeholder 'XXXXXXXXXXXXXXXXXXXXXXXXXXXX'), 'Microsoft 365 GCC High Environment' (toggle set to 'Off'), 'Tenant ID' (text input with placeholder 'XXXXXXXXXXXXXXXXXXXXXXXXXXXX'), 'Client ID' (text input with placeholder 'XXXXXXXXXXXXXXXXXXXXXXXXXXXX'), 'Client Secret' (text input with placeholder 'XXXXXXXXXXXXXXXXXXXXXXXXXXXX'), 'Master User Name' (text input with placeholder 'XXXXXXXXXXXXXXXXXXXXXXXXXXXX'), and 'Master User' (button labeled 'Clear Master User access').

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.

Desktop / Configuration / Options and Tools / Integrate / Microsoft® Integration

Microsoft® 365
Microsoft® Outlook®

Microsoft Outlook Calendar Integration On Off
Note that this feature utilizes basic (legacy) authentication; OAuth support will be added in a future release.

Microsoft Exchange Server

Use SSL Yes No

Microsoft Exchange Domain (Optional)

Click the Validate Connection button to enter a user's Microsoft Outlook login and email address for testing the Microsoft Outlook server connection. This login will be used only for validating the connection.

Microsoft Active Directory® Server

Use SSL Yes No

Microsoft Active Directory Search Root

If anonymous Microsoft Active Directory connections are not allowed your environment, use these optional fields to enter a username and password for authentication when queries are performed. If anonymous connections are allowed, leave the Username and Password fields blank.

Microsoft Active Directory User Name

Microsoft Active Directory Password

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://`

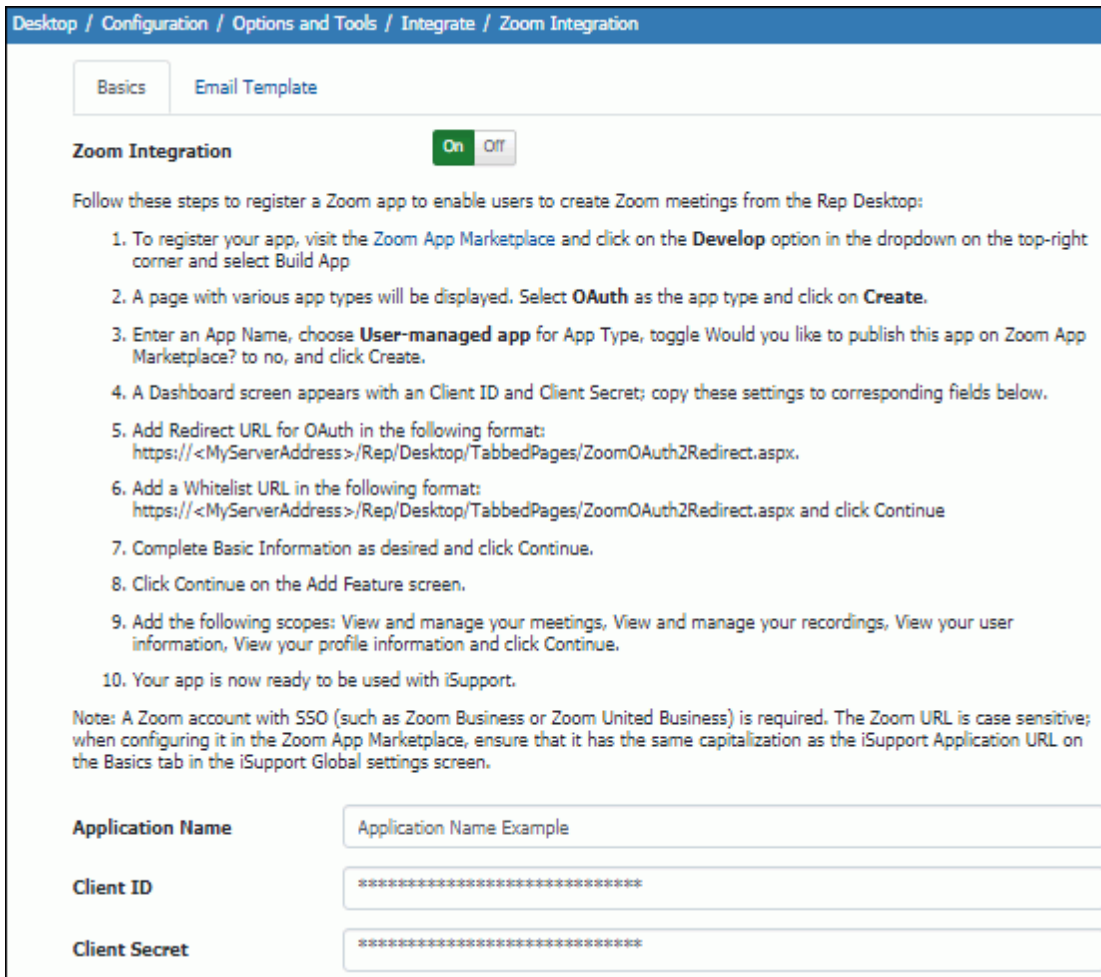
Microsoft Active Directory User Name/Microsoft Active Directory Password - If anonymous Active Directory® connections are not allowed in your environment, use these optional fields to enter a login for authentication when queries are performed. The username should be in the following format: `DOMAINNAME\username`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



Desktop / Configuration / Options and Tools / Integrate / Zoom Integration

Basics Email Template

Zoom Integration On Off

Follow these steps to register a Zoom app to enable users to create Zoom meetings from the Rep Desktop:

1. To register your app, visit the [Zoom App Marketplace](#) and click on the **Develop** option in the dropdown on the top-right corner and select **Build App**
2. A page with various app types will be displayed. Select **OAuth** as the app type and click on **Create**.
3. Enter an App Name, choose **User-managed app** for App Type, toggle **Would you like to publish this app on Zoom App Marketplace?** to no, and click **Create**.
4. A Dashboard screen appears with an Client ID and Client Secret; copy these settings to corresponding fields below.
5. Add Redirect URL for OAuth in the following format:
`https://<MyServerAddress>/Rep/Desktop/TabbedPages/ZoomOAuth2Redirect.aspx`.
6. Add a Whitelist URL in the following format:
`https://<MyServerAddress>/Rep/Desktop/TabbedPages/ZoomOAuth2Redirect.aspx` and click **Continue**
7. Complete **Basic Information** as desired and click **Continue**.
8. Click **Continue** on the **Add Feature** screen.
9. Add the following scopes: **View and manage your meetings**, **View and manage your recordings**, **View your user information**, **View your profile information** and click **Continue**.
10. Your app is now ready to be used with iSupport.

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.

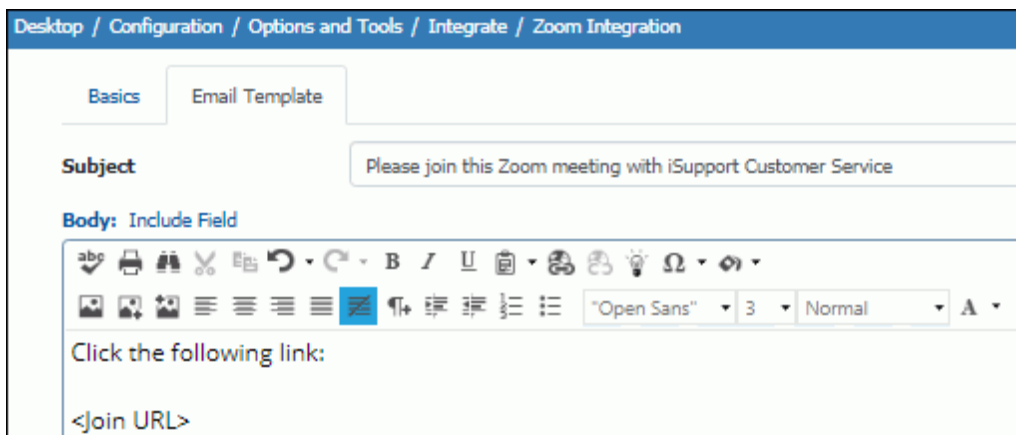
Application Name

Client ID

Client Secret

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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.



The screenshot shows a web interface for configuring Zoom integration. The breadcrumb trail at the top reads: Desktop / Configuration / Options and Tools / Integrate / Zoom Integration. There are two tabs: 'Basics' and 'Email Template', with 'Email Template' being the active tab. Below the tabs, there is a 'Subject' field containing the text 'Please join this Zoom meeting with iSupport Customer Service'. Underneath is a 'Body' section with a sub-label 'Include Field'. A rich text editor toolbar is visible, featuring icons for undo, redo, bold, italic, underline, link, unlink, list, and text color. The font is set to 'Open Sans', size 3, and style 'Normal'. The body text reads 'Click the following link:' followed by a placeholder '<Join URL>'. The toolbar includes icons for undo, redo, bold, italic, underline, link, unlink, list, and text color. The font is set to 'Open Sans', size 3, and style 'Normal'.

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.

