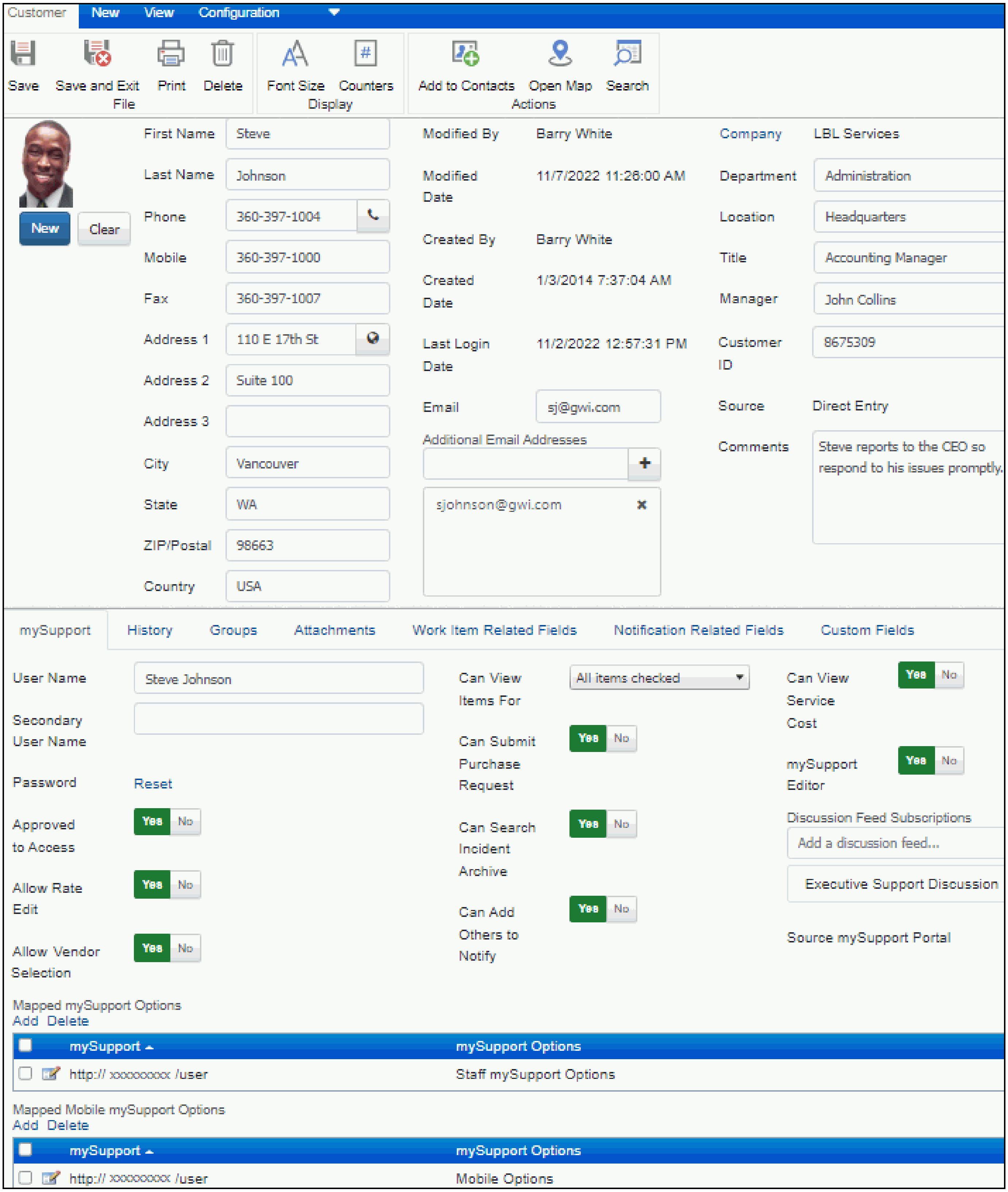
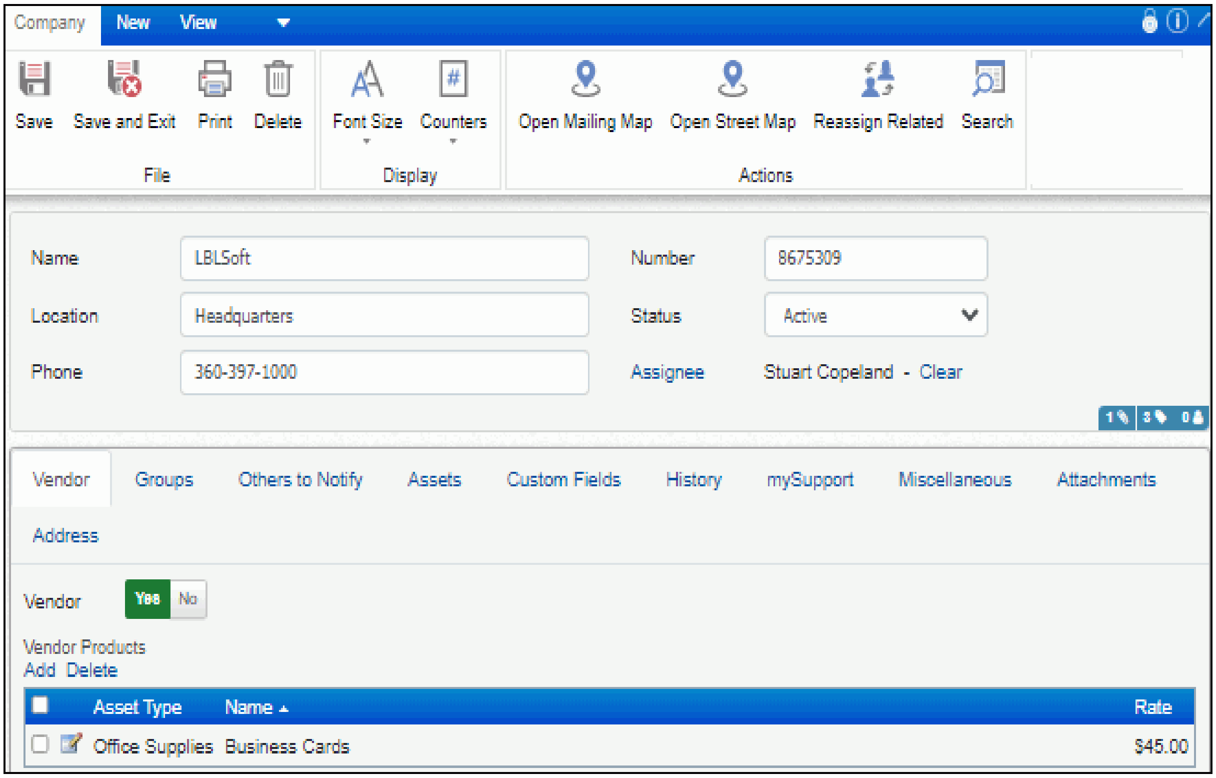
Configuring iSupport Customer and Company Functionality

iSupport uses Customer Profile records to track customer information for association with work items and other functionality. An example of the Customer Profile screen (accessed via the Desktop Create menu) is shown below.



Typically used for service desks, iSupport's Company functionality can help you to efficiently make mass assignments of customers in a company to groups, mySupport portals, assets, etc. Company profiles are also involved in Purchasing and Opportunity functionality (included in the Service Desk Edition). An example of the Company Profile screen (accessed via the Desktop Create menu) is shown below. After entering a company in this screen, it will be available for selection when a customer is added via the Customer Profile screen. If customer groups have been defined for a company, you can automatically add them to a customer profile when saving the record.



Configuration Overview

Creating Customer and Company Profile Records

- You can manually create Customer Profile records via the Customer Profile screen; access it via the Desktop Create menu and the Incident and Change screens. See the online help for more information.
- You can manually create Company Profile records via the Company Profile screen; access it via the Desktop Create menu and the Customer Profile screen. See the online help for more information.
- Customers can create Customer Profile records via the Registration option on a mySupport portal, or submission of an incident via email processing or a mySupport portal with an email address that does not exist in Customer Profiles. See the online help for more information.
- If your customer data is kept in an Active Directory, LDAP, Domino Directory, Microsoft CRM, or other relational database, you can use the Data Source Integration feature to import (one-way) and synchronize Customer Profile records. Associated assets, groups, and more can be pulled in. See "Integrating With Data Sources" on page 10. You can also import from a Microsoft Excel .xlsx file; see "Importing Customer Data From a CSV or Microsoft Excel File" on page 34 for more information.
- You can use the Company Match Settings screen to, during customer synchronization and import, enable a check to be performed for existing customers who have email domains that match the domain part of a new customer's email address.
- You can use Customer groups to target a selected set of customers for work item screen layouts, correspondence, surveys, reports, mySupport functionality, and more. See "Creating Customer Groups" on page 5 for more information.

You can designate members and associate a location for location-based routing, Incident and Change screen layouts, and mySupport portal options. You can also display the items that can be accessed by members of the group on mySupport portals.

Customizing iSupport Defaults

- iSupport includes default Customer Profile and Company screen layouts with a comprehensive set of fields for tracking customer and company data, but you can redesign it via the Layouts screen to include fields and tabs that are specific to your company. See "Configuring Screen Layouts" on page 50.
- If there are fields you need for the Customer and Company screens that are not included in iSupport by default, you can create custom fields. See "Configuring Custom Fields" on page 36.
- If multiple companies are involved, you can create a customizable structure of company relationship labels and assign multiple companies to customers. see "Creating Company Relationship Labels" on page 49. You can also assign a company status labels to classify types of company relationships; for example, "vendor" or "contractor". See "Creating Company Statuses" on page 44.

Sending Notifications

- You can use Incident rules to send Desktop and email notifications when specified conditions based on Incident record fields or events are met; for example, you can configure a rule to send a notification when an incident assignee has changed. See the online help for more information.
- You can use Customer rules perform actions when specified conditions based on Customer Profile record fields or events are met; for example, you could configure a rule to send a notification when a Customer Profile record is created via mySupport registration. See "Configuring Rules for Customer Profiles" on page 62.

  You can use or copy and modify iSupport's default notifications, or you can create new custom notifications. You can include data from Customer Profile records and designate any applicable recipients. You can also create an Others to Notify list for a customer or company for use in correspondence and notifications to keep those not directly involved in the process in the loop.
- You can send correspondence email from the Customer and Company screens. Correspondence can include data from Customer and Company records; correspondence templates can be utilized, and an Others to Notify list can be used for keeping those not directly involved in the loop. See the online help for more information.

Customizing mySupport Portals

- mySupport portals are the frameworks that enable customers to submit and view work items, search and follow knowledge, chat with support representatives, and view headlines, FAQs, self help guides, a Facebook activity feed, and a Twitter feed. Customers can also create discussion posts which can be viewed by support representatives on the Desktop. mySupport portal themes, options, and interfaces can be customized for specific customers, groups, or companies. iSupport includes a default mySupport portal that you can customize, or you can create more portals if applicable. See the online help for more information.
- You can configure Microsoft® Windows-based authentication to bypass the Login prompt on a mySupport portal. Portals on the same server with the same authentication method can use the same set of installed mySupport files; you'll need to add a new application with an alias in IIS for each one. See Adding an Application in IIS for Another mySupport Portal. If the second portal is on a different server or will use an authentication method that is different from the first portal, you'll need to install another set of mySupport files. If no authentication is configured to be required, a customer will need to enter an email address in order to submit an incident and use that email address to view incidents. You can individually prevent access to the mySupport portal in a customer's Customer Profile record.   If you are not using Microsoft® Windows-based authentication with iSupport, you can use the Customer Security screen to enable password security options and configure locks to prevent a customer who has exceeded a specified number of failed login attempts from logging in. See the online help for more information.

Managing Customer Profiles

- You can use the Action menu in the View component on the Desktop to perform actions such as opening and routing multiple Customer Profile records. See the online help for more information.

- You can use the Customer/Company Merge feature if you wish to consolidate multiple Customer or Company Profile records; for example, if multiple Customer Profile records have been created for the same person or multiple companies have merged. See "Merging Customer and Company Profiles" on page 45 for more information.
- You can use Customer rules to change field values, add or remove a mySupport portal URL and options, and initiate webhooks when specified conditions based on Customer Profile record fields or events are met. Customer rules are evaluated when a Customer Profile is saved or when a rule is executed on a one-time basis.See "Configuring Rules for Customer Profiles" on page 62.
- You can use webhooks to post Customer data to a web application via Customer rules. See "Configuring Webhooks" on page 84.
- You can assign service contracts to track and restrict incidents and changes for customers, companies, and/or assets. See the online help for more information.
- You can associate an approval cycle with a customer, company, or category, and designate a customer as an approver or approver delegate. See the online help for more information.
- You can configure roles/permissions for support reps and rep groups using Company and Customer functionality via the Support Representatives screen. See the online help for more information.

Using Other Work Item Functionality

- You can use Opportunity Management functionality to create Opportunity records and generate quotes using products and product groups that you create or utilize via Intuit® QuickBooks® integration. See the online help for more information.
- If you have the Service Edition, you can associate configuration items to utilize data in Customer Profile and Company records for views, reports, and correspondence. A CMDB contains configuration items (CIs) for the resources to be tracked and the relationships between those items. See the online help 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 76 for more information.

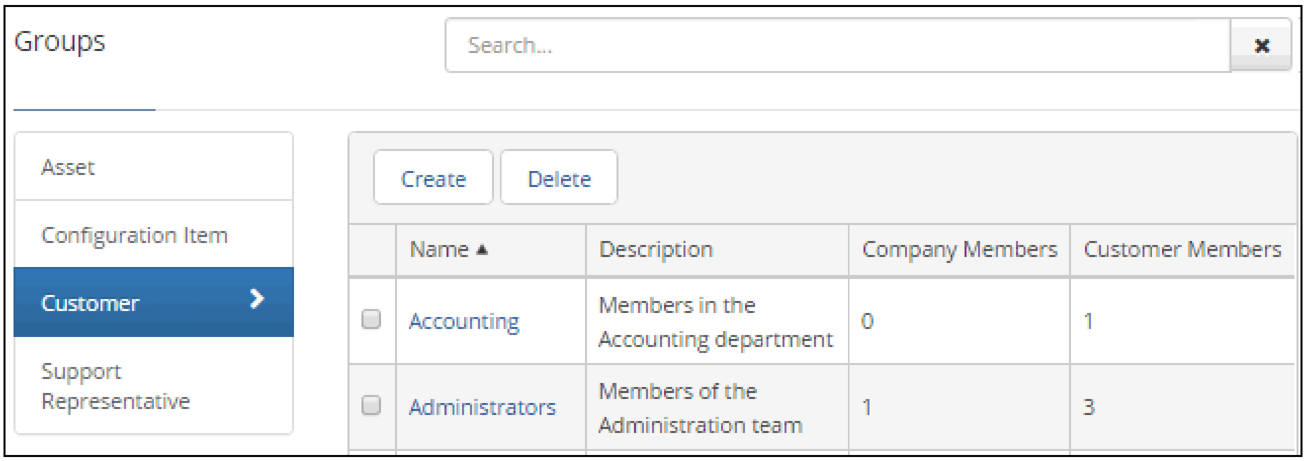
Creating Customer Groups

Customer groups enable correspondence to be sent and reports to be generated for a selected group of customers via the Desktop, as well as:

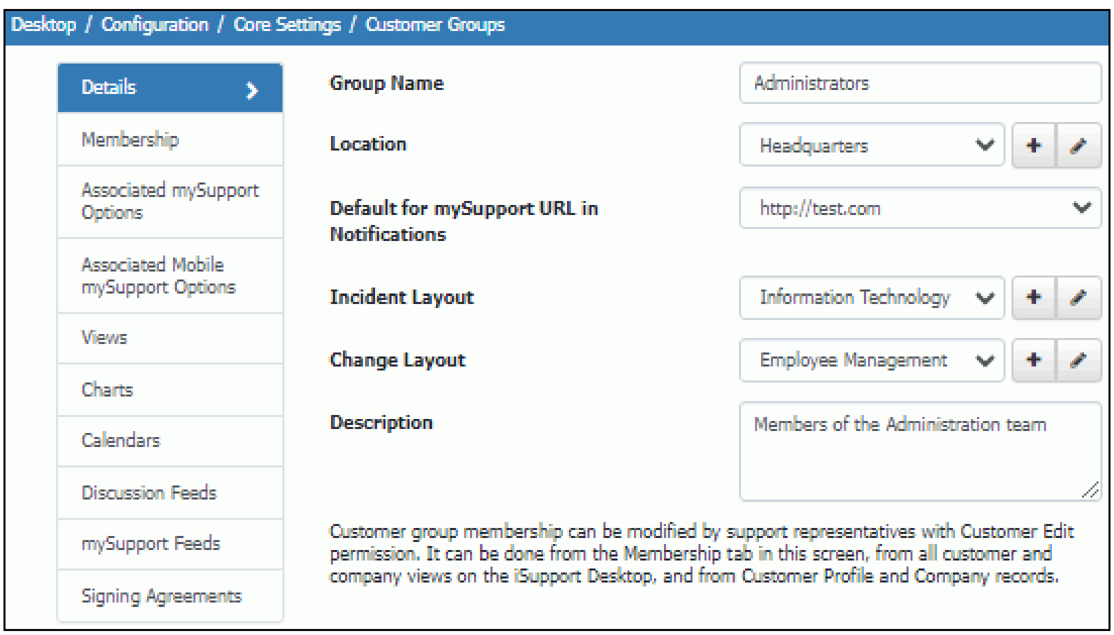
- Surveys to be sent for a selected group of customers via the Desktop.
- Customers to view incidents, changes, and assets via the mySupport portal for their associated groups.
- Restricted access to headlines, FAQs, knowledge entries, and categories on the mySupport portal.
- Associated support representative locations for location-based routing of incidents submitted via the mySupport portal and email.

When you create a customer group, you can quickly assign all of a company's current customers to the group. You can also assign customers to a group via the Customer Profile screen, Company screen, and Desktop.

Use the Customer tab in the Core Settings | Groups screen to create a customer group.



To create a customer group, select Customer Groups and click the Create link. The following screen appears:



Group Name - Enter the name of the customer group.

Location - Select the support representative location to associate with the customer group for location-based routing of incidents submitted via the mySupport portal. Use the Create New and View/Edit options to access the Locations screen; see the online help for more information.

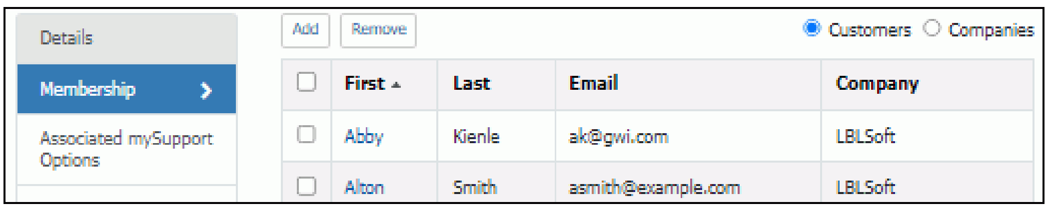
Default for mySupport URL in Notifications - Select the mySupport portal URL to include in work item notifications referencing a mySupport portal that are sent to customers in the group. This URL is determined as follows: using the order listed on the Notification Link Order of Precedence tab in the mySupport Portal screen, the system will check the URL in the Default for mySupport URL in Notifications field in the customer's profile, customer's primary company profile, and primary group profile. If a URL is specified in any of those fields, it will be used. If none exists in any of those fields, the mySupport portal definition with the Default for mySupport URL in Notifications checkbox selected will be used.

Incident Layout - Select the layout containing the fields and tabs that will display when a customer in the group is selected in the Incident screen. You can use the Create New and View/Edit options to access the Incident Layout screen. Layouts can also be associated with a category, support rep group, incident template, or hierarchy template; the Order of Precedence field in the Incident Layout screen determines which layout to use when more than one reference is applicable (for example, if the logged in rep's primary group has a layout as does the selected category). For categories, the layout found with the lowest level will be used; if a layout is not found at the lowest level the next level up will be checked, and so on up to the top level. If no layout is associated at the top level, the default layout specified in the Layouts screen will be used.

Description - Enter a description of the customer group.

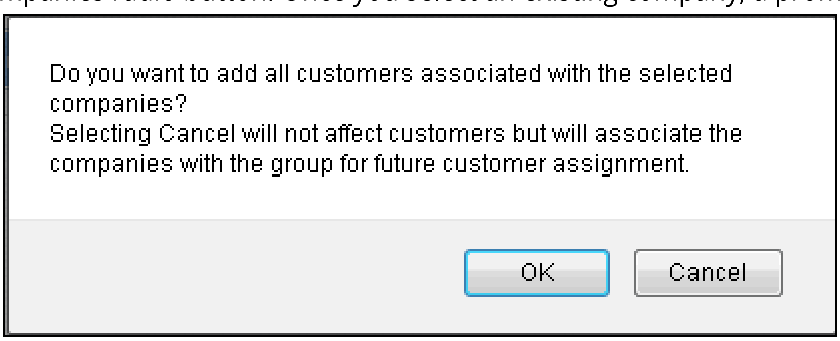
Adding Customers to Customer Groups

Use the Membership tab to assign selected customers to the group or to associate the group with a company for future customer assignment.



To add a customer to the group, click the Customers radio button and then click the Add link. Select an existing customer or create a new one.

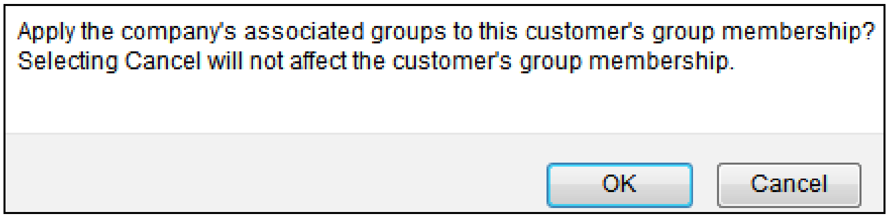
To add all current customers of a company to the group or associate the group with a company for future customer assignment, click the Companies radio button. Once you select an existing company, a prompt will appears:



If you select OK at this prompt, all of the company's current customers will become members of the group. The company will be associated with the group for future customer assignment.

If you select Cancel at this prompt, none of its current customers will be assigned to the group. However, the company will still be associated with the group for future customer assignment.

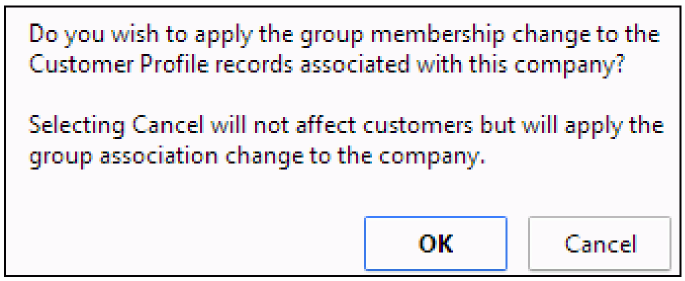
This future customer assignment can occur in the Customer Profile screen; when you add a customer for the company and save the record, the customer will become a member of the group after clicking OK at the prompt:



You can also manually add a customer to a group or remove a customer from a group using the arrows in the Groups section in the Customer Profile screen.

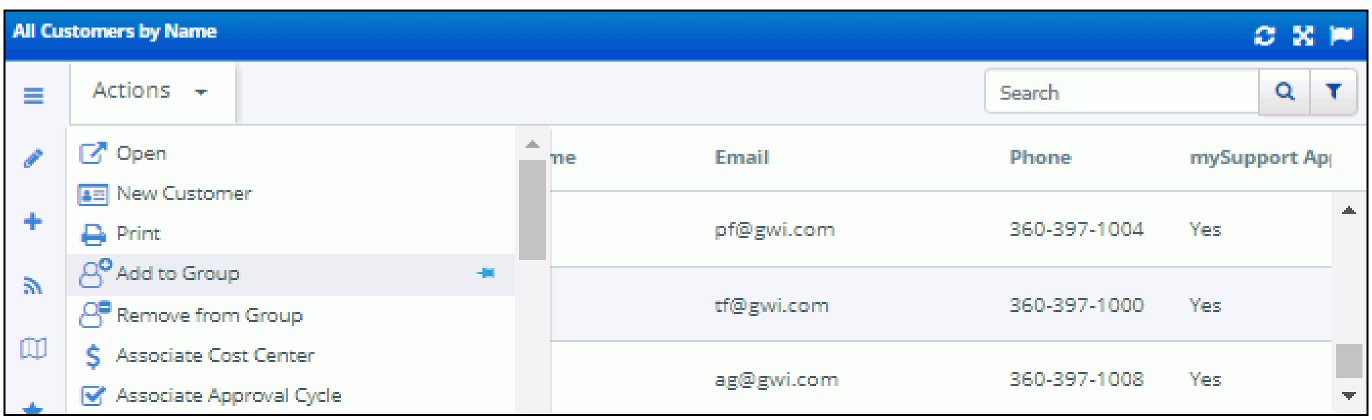
Assigning Customers via the Company Screen

In the Company screen, support representatives with Customer | Editor | Edit permission can use the Groups section to assign all of a company's current customers to a group. When you select a group and click the right arrow, a dialog appears regarding the assignment. If you select OK, all of the company's customers will become members of the selected group. If you select Cancel, the group will still be included in the Associated Groups field for future customer assignment.



Adding Customers to Groups via the Desktop

You can add selected customers to a group and remove selected customers from a group using the Add to Group and Remove From Group view actions in customer views on the Desktop.



Associating a mySupport Portal URL and Options

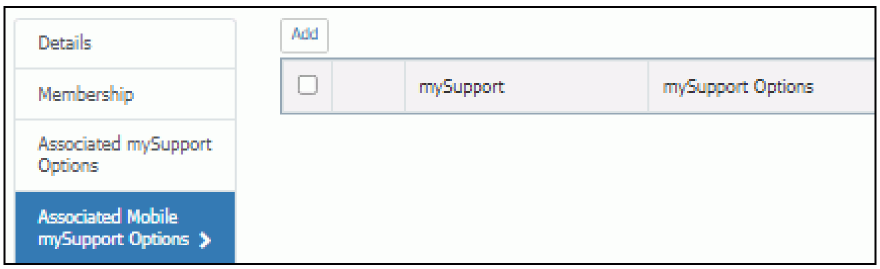
mySupport Options include configuration settings for the structure and content of the mySupport interface (except navigator detail). Options can be assigned to customers, companies, and groups; the order of precedence is determined by a setting in the mySupport Configuration screen. Any assigned options will be used; if none are assigned or if a customer does not log in, the mobile mySupport options specified as default in configuration will be used.

On the Associated mySupport Options tab, select the mySupport Portal URLs and mySupport Options to assign to members of the group.

Associating a Mobile mySupport Portal URL and Options

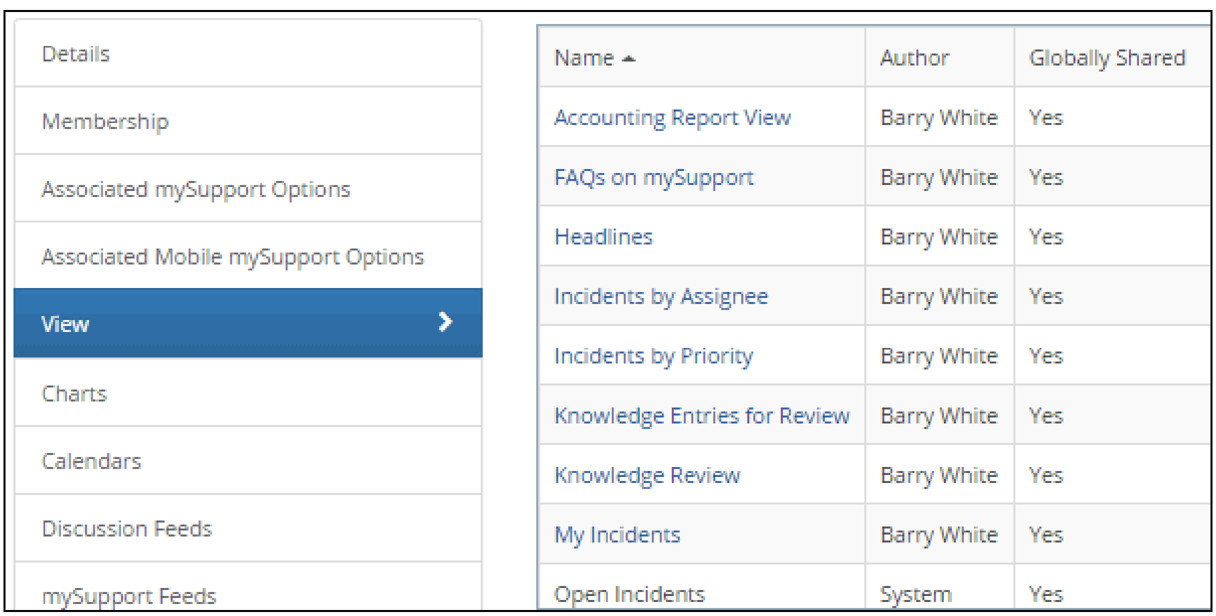
Mobile mySupport options include configuration settings for the structure and content of the mySupport interface, and mobile mySupport options can be assigned to customers, companies, and groups; the order of precedence is determined by a setting in configuration. Any assigned options will be used; if none are assigned or if a customer does not log in, the mobile mySupport options specified as default in configuration will be used.

On the Associated Mobile mySupport Options tab, select the mySupport URLs and mySupport Options to assign to members of the group.



Viewing Desktop Components Shared With the Group

Use the Views, Charts, Calendars, Discussion Feeds, and mySupport Feeds tabs to display lists of items that can be accessed by members of the group on mySupport portals.



Associating Signing Agreements

Use a signing agreement to display details in the Sign dialog in the Incident and Change work item screens. Signing agreements can be associated with customer and support representative groups, categories, and incident and change templates. If an incident or change involves more than one associated signing agreement (group, category, or template), all will be included in the Sign dialog in a dropdown for selection. (Note that “Blank” is also included for displaying no text above the signing line.)

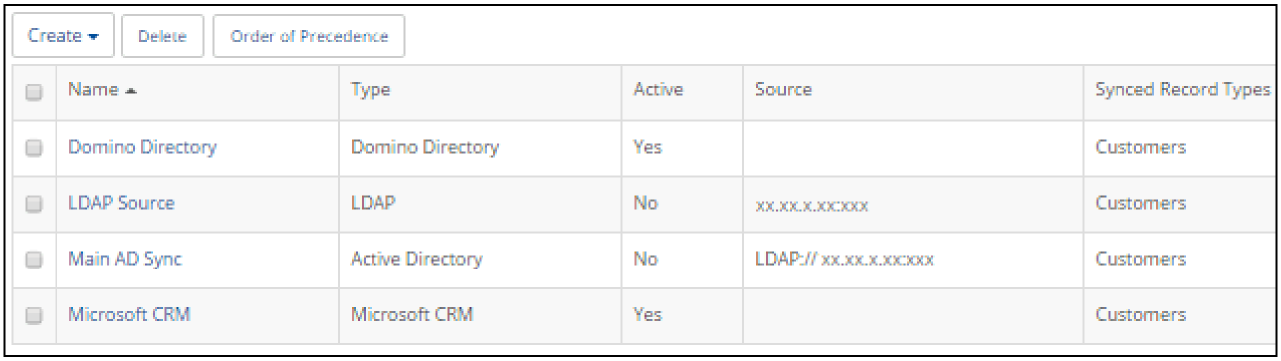
On the Signing Agreements tab, select the agreements to appear for selection in the dropdown when the incident or change involves the associated customer group. Use the plus sign icon to create an agreement via the Signing Agreements configuration screen.

Integrating With Data Sources

Use the Data Source Integration feature to utilize Active Directory, LDAP, Domino Directory, Microsoft CRM, or other relational databases as a source for iSupport's customer, asset, and support representative information. You can also import customer data from a Microsoft Excel .xlsx file; see page 34 for more information.

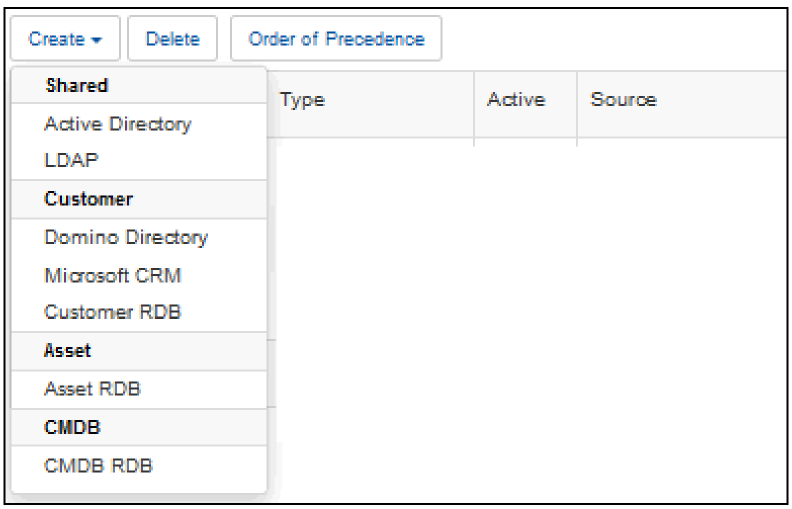
If utilizing multiple customer data sources, see "Specifying Precedence for Multiple SQL Data Sources" on page 33.

To get started, click the Create link in the Options and Tools | Integrate | Data Source Integration screen.



Name	Type	Active	Source	Synced Record Types
Domino Directory	Domino Directory	Yes		Customers
LDAP Source	LDAP	No	xx.xx.x.xx:xxx	Customers
Main AD Sync	Active Directory	No	LDAP:// xx.xx.x.xx:xxx	Customers
Microsoft CRM	Microsoft CRM	Yes		Customers

Select the data source type.



See the following for information on specific data source types:

- Active Directory: see the next section.
- LDAP: page 18
- Domino Directory: page 24
- Microsoft CRM: page 25
- Customer RDB: page 27
- Asset RDB: page 31

Integrating with Active Directory

The Active Directory Integration feature enables an agent that updates and synchronizes iSupport Customer Profile, Asset, and Support Representative Profile records with the information in one or more Active Directory sources.

You'll create a data source integration definition to specify the server and related settings, field mappings, and exclusions, and use sync definitions to specify the type of record you are synchronizing and the directory node and filters for the data to be synchronized. You can utilize both filtering and exclusions to specify the values that should not be synchronized; what you use will depend on how much you need to prevent from synchronizing for the level in the targeted source. You can also set default values based upon the AD/LDAP sync setting entry from which a record was created. Exclusions target everything under a node in a directory and apply to all sync definitions of the same record type within a data source integration definition. Filters use syntax that can target multiple nodes in a tree, and apply to a specified base directory node in a sync definition.

The following occurs when the agent runs:

- If there is an entry in Active Directory that does not exist in the iSupport Customer Profile table, the entry is created in iSupport. In order for an entry to be added from Active Directory, it must contain a first name, last name, and email address. If mySupport access is configured, the Approved to Access mySupport field will be enabled on the automatically-created Customer Profile record.
- The first name, last name, and email address in Active Directory are compared with those values in Customer Profiles. If all of those values in an Active Directory record match all of those values in a directly entered Customer Profile, the Customer Profile record is updated with the latest information from Active Directory; if one of those values does not match, a new record is created in Customer Profiles. Therefore, more than one Customer Profile record will result if both contain one of the same values (for example, email address) but one or both of the other fields differ. For example, if there is a directly entered Customer Profile named Jon Smith with an email address jsmith@example.com and Active Directory has the rep listed with the name Jonathan Smith and the same email address of jsmith@example.com, the result will be two Customer Profile records with the same email address.
- If an entry is deleted in the Active Directory, the record will be flagged for deletion and:
  - If work items or assets are **not** associated with that name, the entry will be deleted from Customer Profiles when the Database Maintenance agent runs.
  - If work items or assets are associated with the name, the entry will remain flagged for deletion in Customer Profiles until those incident records no longer exist.

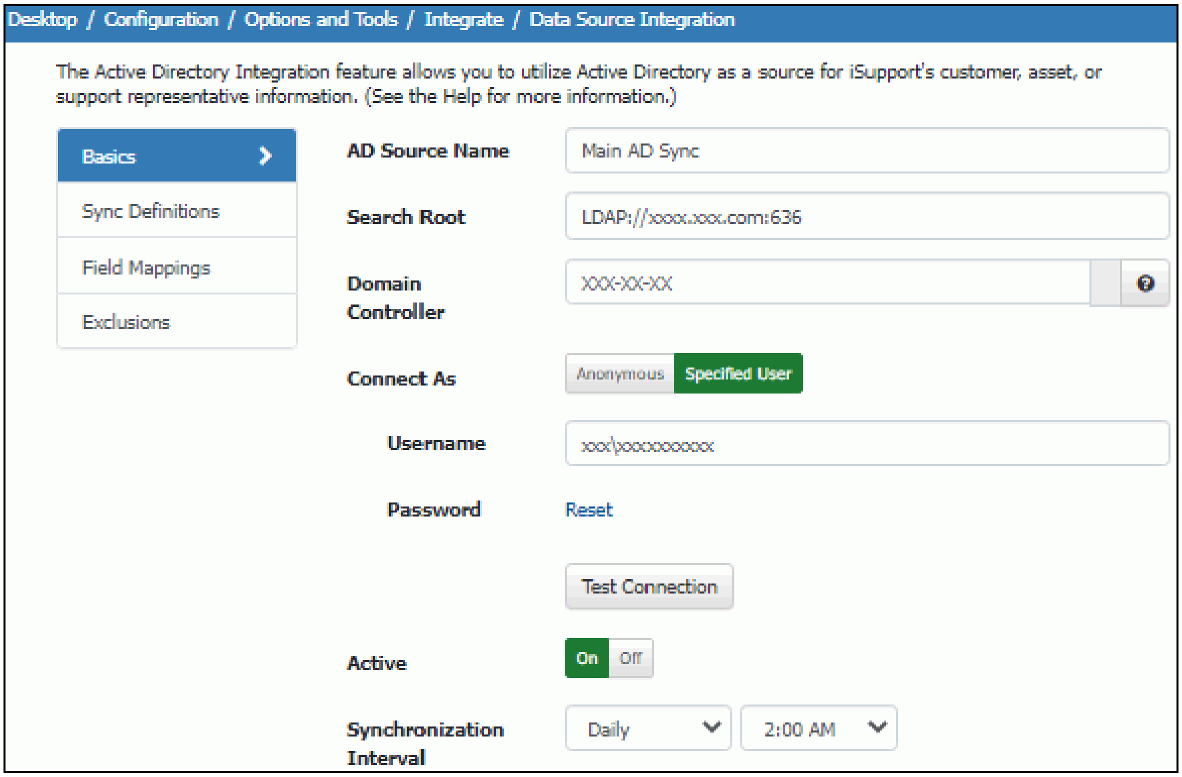
If a record in Active Directory has a value in the Manager field and an existing Customer Profile record contains that manager, the manager will be inserted in the Approver field in the Customer Profile record; otherwise, the Approver field will be blank.

Note: If a Customer Profile record has been synchronized with Active Directory, the synchronized fields (except for Secondary User Name) cannot be edited in the Customer Profiles screen. These fields can only be edited via Active Directory.

When the feature is enabled, the agent runs immediately and then as specified according to the configured interval. Note that the Active Directory Integration feature does not modify the contents in Active Directory in any way.

Basics

Use the Basics tab to specify the primary connection and authentication details for accessing the data source; these settings will apply to all of the sync definitions you create for that data source.



Note: Use of secure LDAP is required when authentication is used; port 636 must be used in the Search Root field to resolve the errors that happen during sync. When the Search Root does not contain :636, the Base DN dialog on the Sync Definitions and the Preview dialog on Field Mappings will error and will not synchronize the Customer Approver field. When the Search Root ends with :636, the Customer Approver field for existing customers will be updated to the current Manager in AD.

AD Source Name - Enter a name for the AD source definition. This name will appear in the Source field in the associated Customer Profile record.

Search Root - Enter the directory server machine name or IP address for querying user information in the Active Directory source; precede your entry with the following: LDAP://

Connect As - Select Anonymous to connect to the data source as an anonymous user or Specified User to enter a login for connecting to the data source.

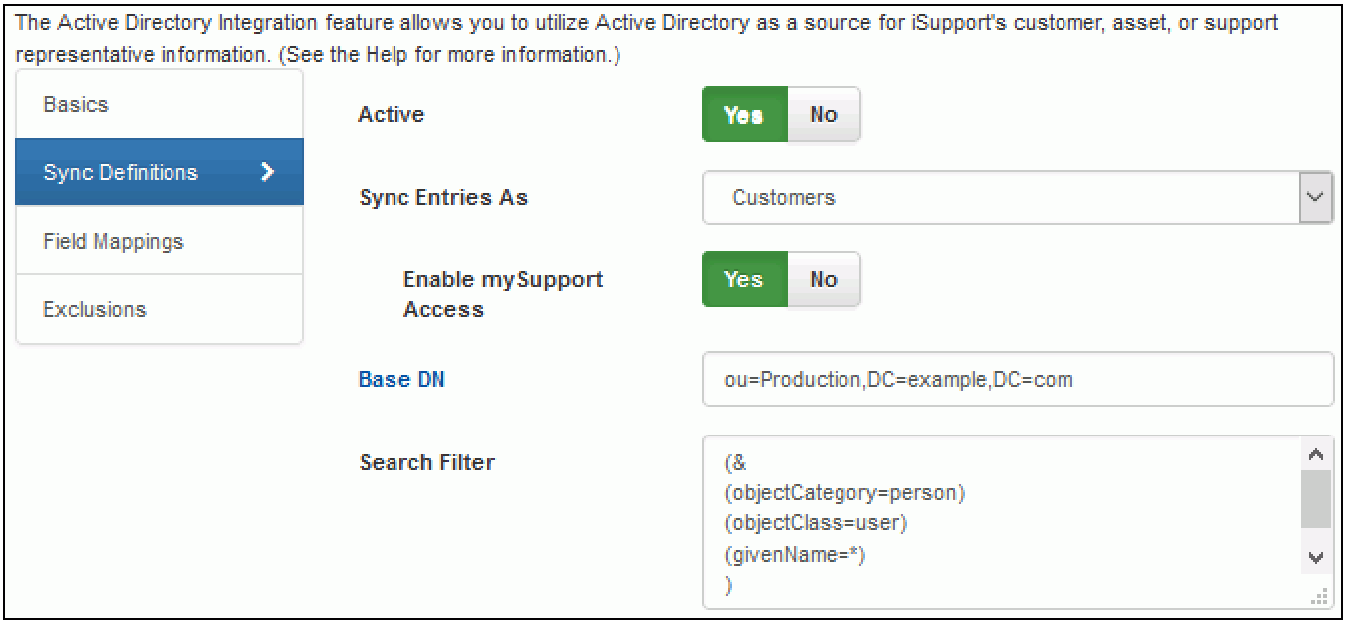
Username/Password - If anonymous Active Directory connections are not allowed in your environment, use these optional fields to enter a username and password for authentication when queries are performed. If anonymous connections are allowed, leave these fields blank.

Active - Select Yes to enable the Active Directory Integration agent that updates the records in iSupport with the information in Active Directory. The agent runs immediately and then continues to run as scheduled in the AD Synchronization Interval field.

AD Synchronization Interval - Select the amount of time in the interval for the synchronization to be performed.

Configuring a Sync Definition

Use the Sync Definition section to select the type of record that you are synchronizing, select the directory node that contains the data to be synchronized, and enter a search filter if applicable. Click the Create link to create a sync definition.

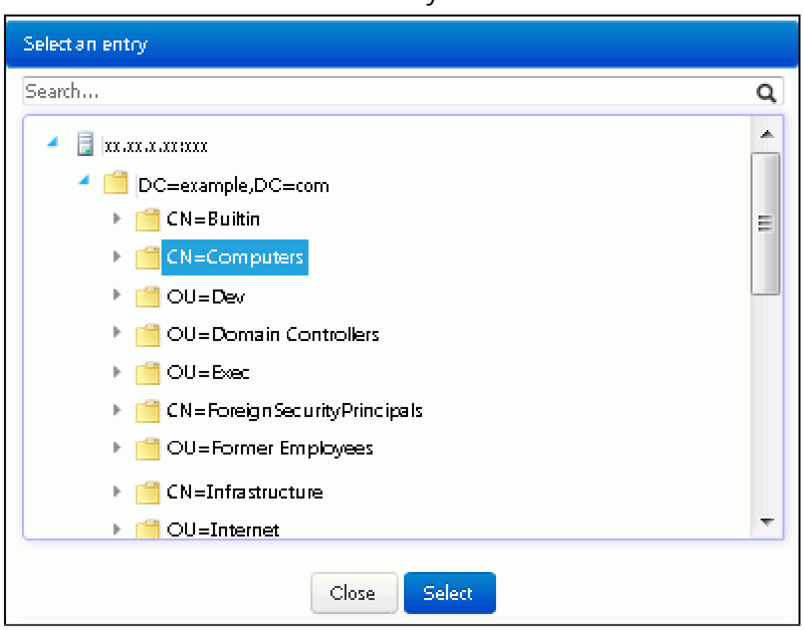


Active - Select Yes to enable the sync definition.

Sync Entries As - Select the type of record that you are synchronizing: Customer Profile. The **Enable mySupport Access** field will appear; select Yes to enable the Approved to Access mySupport field by default. If a login name and password exists in the Active Directory record, it will be included in the mySupport login fields for authentication to the mySupport portal. This is not a mapped or synchronized value; it can be edited in iSupport.

This feature utilizes LDAP (Light Weight Directory Access Protocol), which defines how information can be accessed in directories. Active Directory supports the LDAP search filter syntax as specified in RFC 1960. For information on LDAP and search filters, see http://social.technet.microsoft.com/wiki/contents/articles/5392.active-directory-ldap-syntax-filters.aspx#Examples.

Base DN - Click this button to select the node in the directory server that contains the data to be synchronized.



Search Filter - Enter the conditions that must be met for returning a specific set of information to iSupport. Note that a filter is only needed if the selected Base DN contains unwanted lower level nodes or if the data source's exclusions do not already remove the unwanted nodes.

Examples

- All users that contain a first and last name:

  (&
  (objectCategory=Person)
  (objectClass=user)
  (givenName=*)
  (sn=*)

)

- All users that contain a first and last name excluding Tom Jones and SQL Account:

  (&

  (objectCategory=Person)
  (objectClass=user)
  (givenName=*)
  (sn=*)
  (!name =Tom Jones)
  (!name=SQL Account)

)

- All users and contacts that contain a first and last name:

  (&
  (objectCategory=Person)
  (givenName=*)
  (sn=*)

  (|

  (objectClass=user)
  (objectClass=contact)

)

)

- All users and contacts that contain a first and last name, excluding Tom Jones, Barry White, and SQL Account:

  (&
  (objectCategory=Person)
  (|

  (objectClass=user)
  (objectClass=contact)

)
  (givenName=*)
  (sn=*)
  (!name =Tom Jones)
  (!name=SQL Account)
  (!name =Barry White)

)

- All users with a valid Microsoft Windows user name (*domainname\username*):

  (&
  (objectCategory=Person)

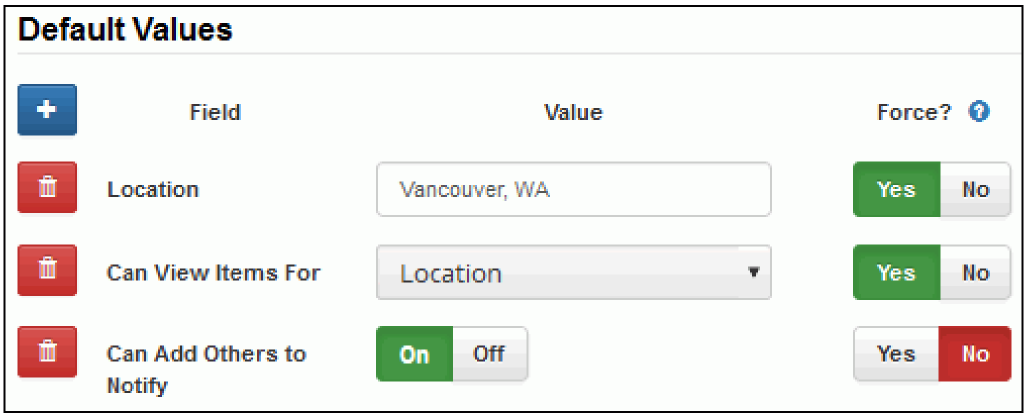
```
(objectClass=user)
(givenName=*)
(sn=*)
(userPrincipalName=*@*)
(samAccountName=*)

)
```

Setting Default Values

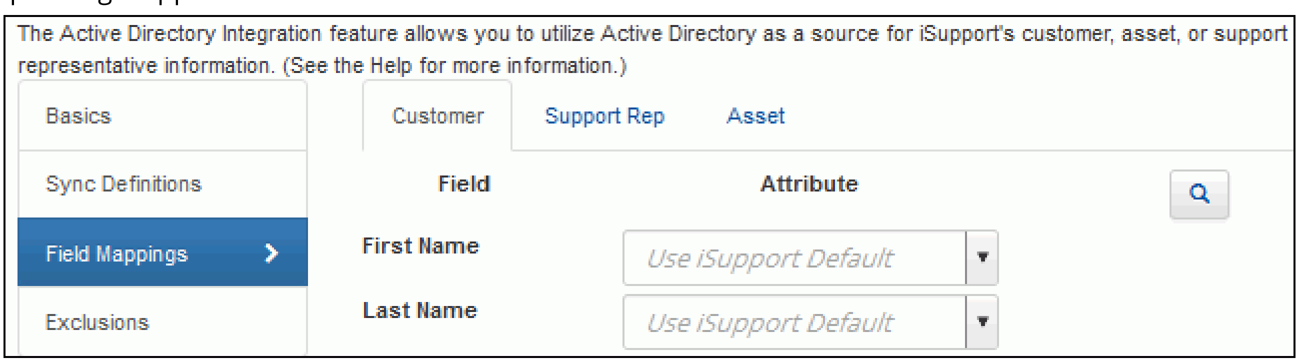
Use the Default Values section to set Customer Profile, Support Representative, and Asset field values based upon the AD sync setting entry from which a record was created. For example, if AD users are organized into a specific OU or group that indicates other user properties (such as location) and if the AD user profiles don't have the location attribute populated in the directory, you can simply add a default value for the location field to the sync setting entry that is linked to the OU or group.

In the Force column, select Yes if you wish to have the configured default value override the AD value in cases where the attribute was populated in the source user profile. If the Force field is set to No, the default value will only be applied if the AD attribute is either unmapped or has no value on the user profile.



Field Mappings

Use the subtabs to specify the attributes in your Active Directory source from which data will be pulled for corresponding iSupport fields.



Mapping options include:

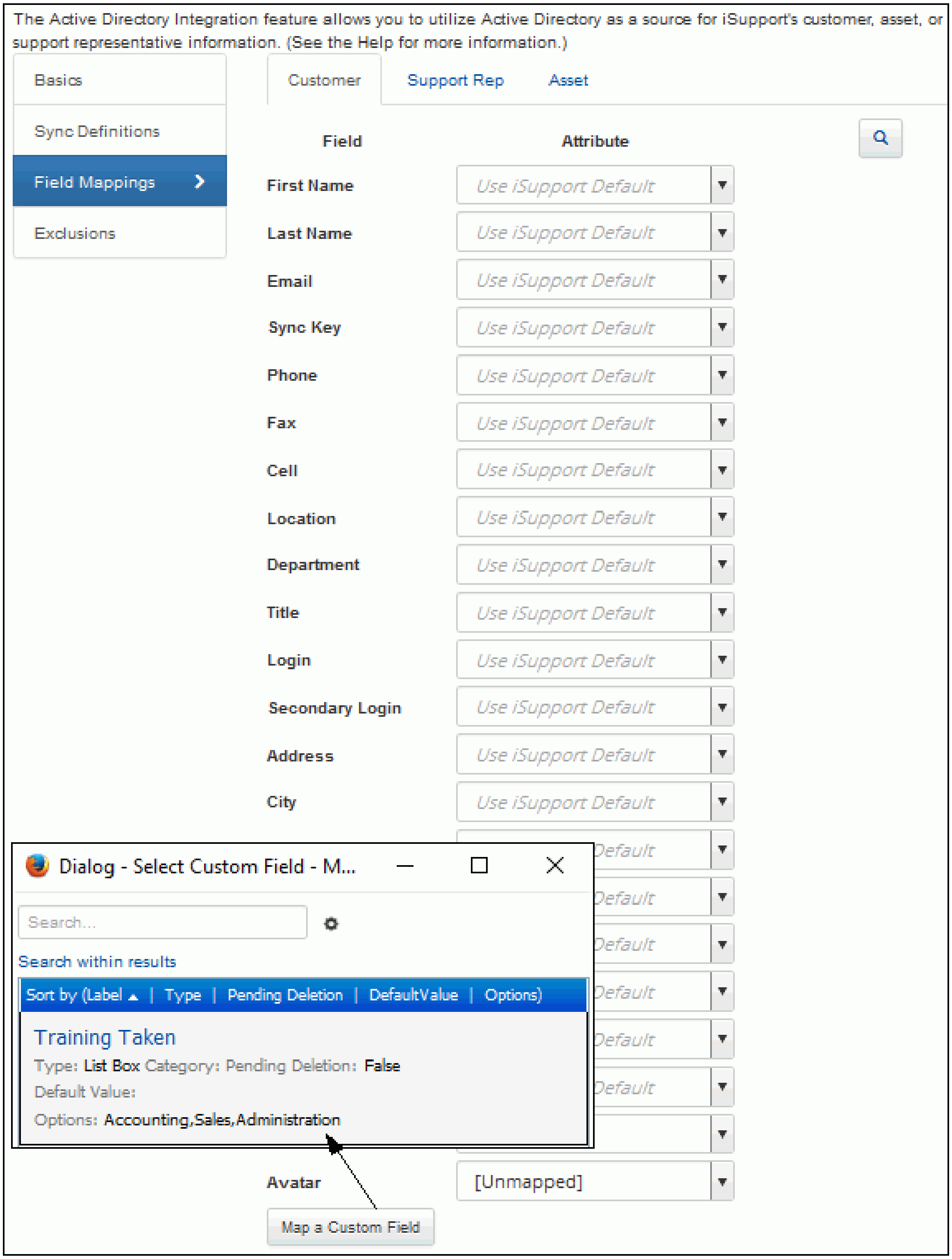
- Use iSupport Default which populates the default mapping; see the data map on page 23 for the attributes used by default by iSupport. Note that we recommend that you use iSupport's default for the Sync Key and Avatar field because the applicable schema property may vary depending on your version of Active Directory. If iSupport Default is selected for the Groups field, all groups associated with a customer will be created via the MemberOf attribute.
- An applicable schema property. Defaults appear in the dropdown; to add an attribute, enter its exact name and it will be retained in the list.

- [Unmapped] which will enable entry in the field. Note that the First Name, Last Name, Email, Sync Key, and Login fields cannot be left unmapped for customers.

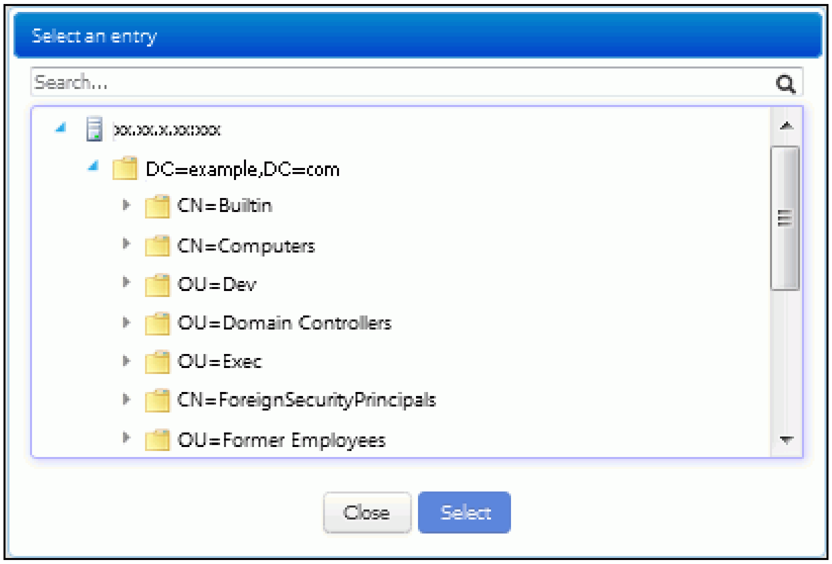
Use the Sync Key field to map to a value that is an unchanging unique identifier field in the source database.

To assign a primary group to multiple iSupport Customer Profile records, select a customer view on the Desktop and then select Add to Group.

Use the Map a Custom Field button to select a custom field to add to the list of fields to be mapped.



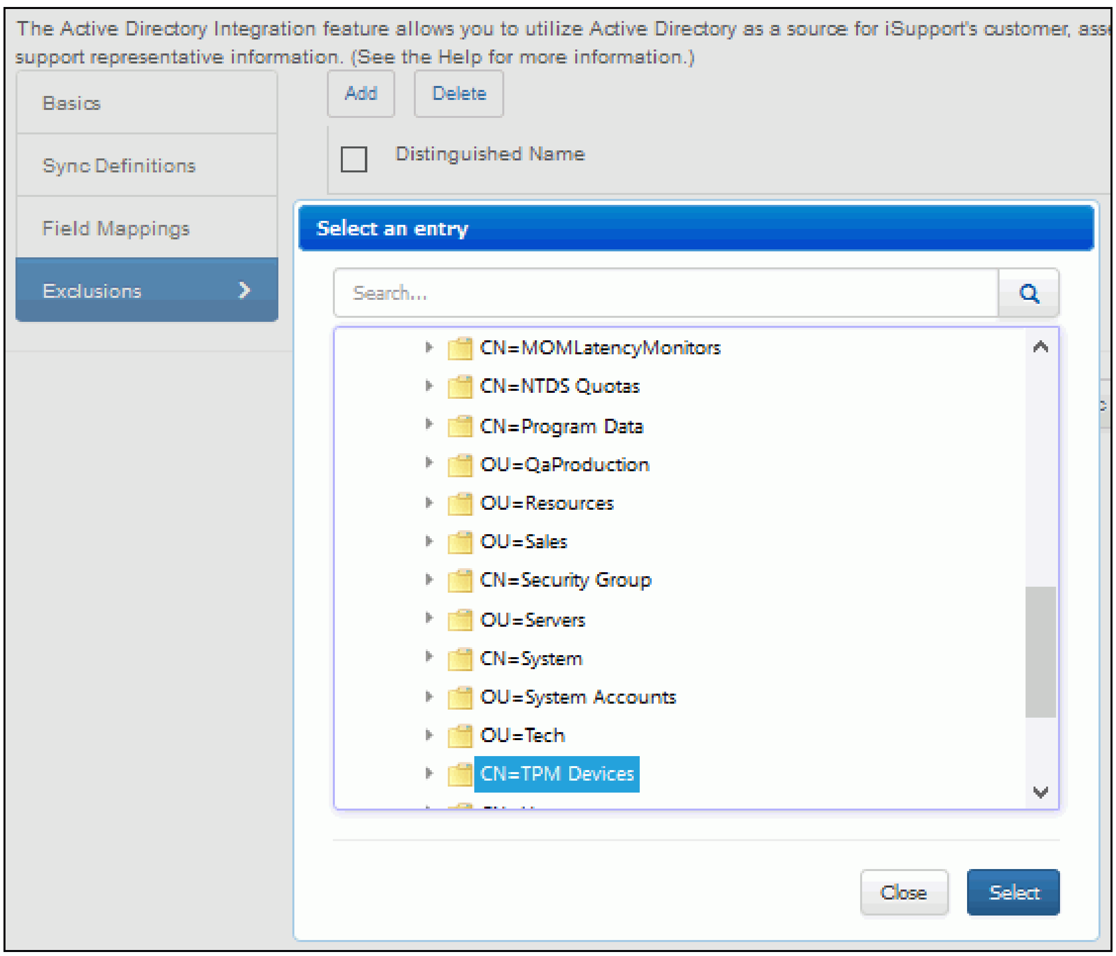
Use the Preview button to select a record to use for verifying your selections.



Values from the record will appear next to the fields.

Configuring Exclusions

Use the Exclusions tab to specify the nodes or directory objects that should not be synchronized; click the Add link to select the directory nodes or objects that should be excluded. All lower level nodes will also be excluded. Note that exclusions apply to all sync definitions of the same record type within a data source integration definition.



Integrating with LDAP

The LDAP Integration feature enables an agent that updates and synchronizes iSupport Customer Profile records with the information in one or more LDAP sources.

You'll create a data source integration definition to specify the server and related settings, field mappings, and exclusions, and use sync definitions to specify the type of record you are synchronizing and the directory node and filters for the data to be synchronized. You can utilize both filtering and exclusions to specify the values that should not be synchronized; what you use will depend on how much you need to prevent from synchronizing for the level in the targeted source. Exclusions target everything under a node in a directory and apply to all sync definitions of the same record type within a data source integration definition. Filters use syntax that can target multiple nodes in a tree, and apply to a specified base directory node in a sync definition.

The following occurs when the agent runs:

- If there is an entry in LDAP that does not exist in the Customer Profile iSupport table, the entry is created in iSupport. In order for an entry to be added from LDAP, it must contain a first name, last name, and email address. If mySupport access is configured, the Approved to Access mySupport field will be enabled on the automatically-created Customer Profile record.

  If a Windows login name exists in the LDAP record, it will be included in the mySupport User Name field for authentication to the mySupport portal. You'll need to disable LDAP integration in order to enter or change the password for accessing the mySupport portal. The password will not be changed by re-enabling LDAP integration.

- If an email address matches an email address in Customer Profiles and the record was directly entered via Customer Profiles, depending on the configured order of precedence, the Customer Profiles record is updated with the latest information from LDAP.
- If an entry is deleted in the LDAP, the record will be flagged for deletion and:
  - If work items or assets are **not** associated with that name, the entry will be deleted from Customer Profiles when the Database Maintenance agent runs.
  - If work items or assets are associated with the name, the entry will remain flagged for deletion in Customer Profiles until those incident records no longer exist.

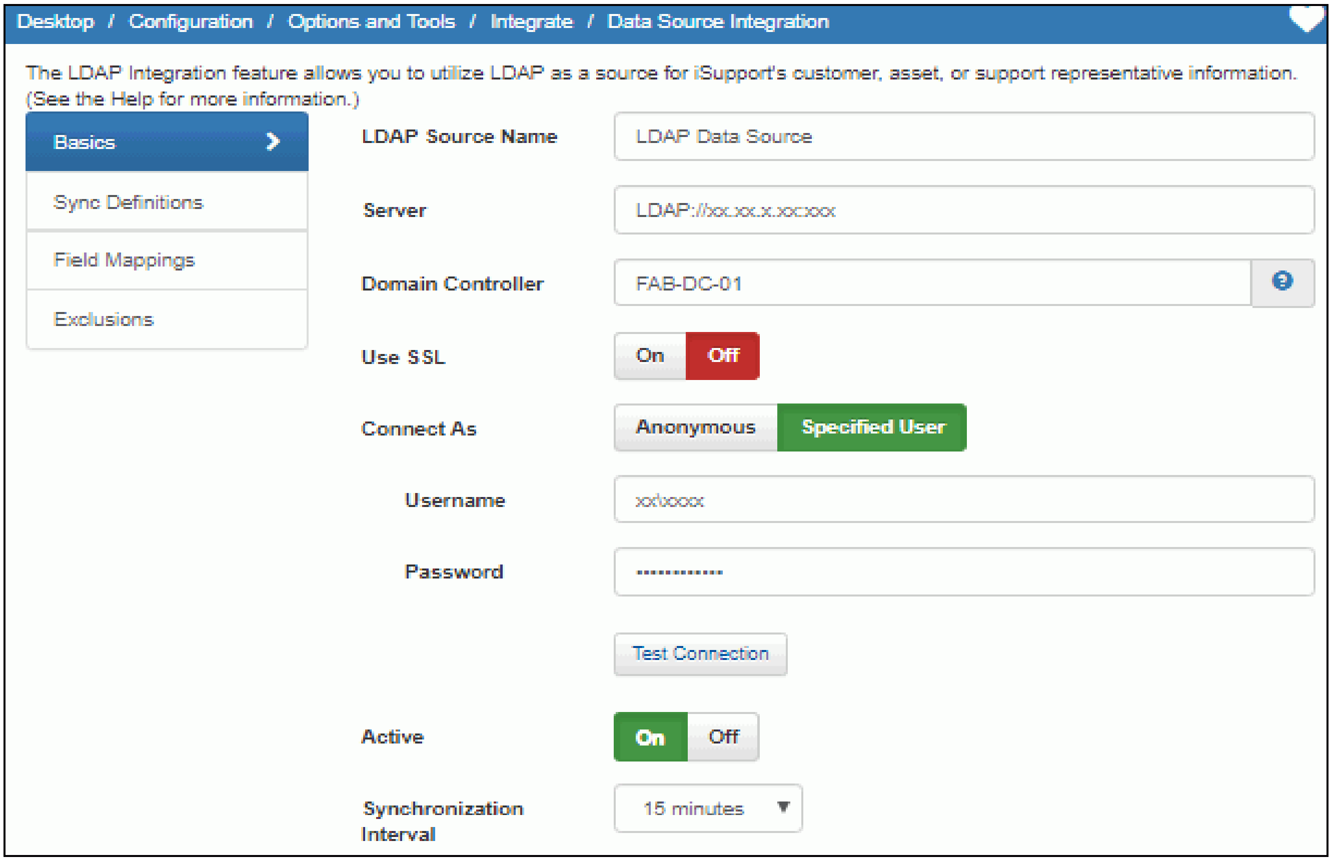
When the feature is enabled, the agent runs immediately and then as specified according to the selection in the LDAP Synchronization field. The LDAP Integration feature does not modify the contents in the LDAP source in any way.

Go to the following links for more information:

- http://www.rfc-archive.org/getrfc.php?rfc=3377 - Top level LDAPv3 Technical specs
- http://www.rfc-archive.org/getrfc.php?rfc=2254 - Search Filters (with examples)
- http://www.rfc-archive.org/getrfc.php?rfc=2255 - URL formats (examples for Search Root field)
- http://www.rfc-archive.org/getrfc.php?rfc=2256 - User Schema (standard available attributes, useful for mapping)

Configuring Basics

Use the Basics tab to specify the primary connection and authentication details for accessing the data source; these settings will apply to all of the sync definitions you create for that data source.



LDAP Source Name - Enter a name for the LDAP source definition. This name will appear in the Source field in the associated Customer Profile record.

Server - Enter the server on which the source entries are located.

Use SSL - SSL is an encryption method that overlays the connection between the cSupport server and the LDAP source server. Select Yes if SSL encryption is enabled on the LDAP source server. Use the Test Connection link to verify access.

Active - Select Yes to enable the agent that updates the applicable records in iSupport with the information in the LDAP source. The agent runs immediately and then continues to run as scheduled in the LDAP Synchronization Interval field.

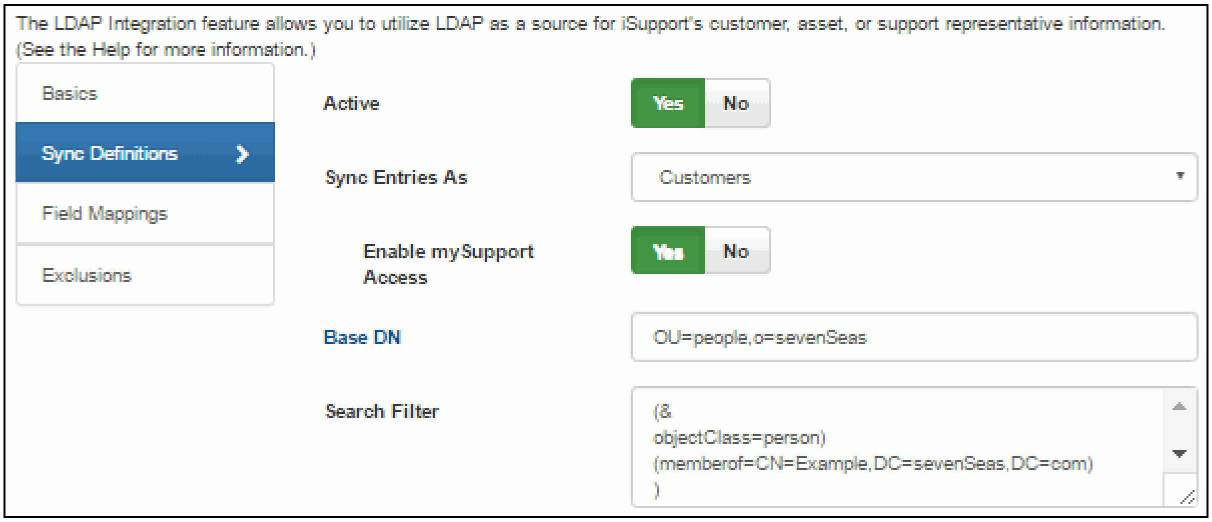
LDAP Synchronization Interval - Select the amount of time in the interval for the synchronization to be performed.

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

Use the fully qualified Distinguished Name for best results. If accessing a server hosting an Active Directory installation, it will work with several formats. For example, if the user name is lbladmin and it is in the lbl domain, you could enter lbladmin, lbl\lbladmin, lbladmin@lbl.soft.com. All of these entries would work, but you could also enter the full Distinguished Name for the lbladmin user account (cn=lbladmin,cn=users,dc=lbl,dc=soft,dc=com). Note that if you are connecting to a non-AD server like E-directory, the Username field must contain the fully qualified Distinguished Name.

Configuring a Sync Definition

Use the Sync Definition section to select the type of record that you are synchronizing, select the directory node that contains the data to be synchronized, and enter a search filter if applicable.



Active - Select Yes to enable the sync definition.

Sync Entries As - Select the type of record that you are synchronizing: Customer Profile. When synchronization occurs, the record will be created if there is an entry in the LDAP source that does not exist in iSupport. The **Enable mySupport Access** field will appear; select Yes to enable the Approved to Access mySupport field by default. If a login name and password exists in the LDAP source record, it will be included in the mySupport login fields for authentication to the mySupport portal. This is not a mapped or synchronized value; it can be edited in iSupport.

This feature utilizes LDAP (Light Weight Directory Access Protocol), which defines how information can be accessed in directories. Active Directory supports the LDAP search filter syntax as specified in RFC 1960. For information on LDAP and search filters, see http://social.technet.microsoft.com/wiki/contents/articles/5392.active-directory-ldap-syntax-filters.aspx#Examples.

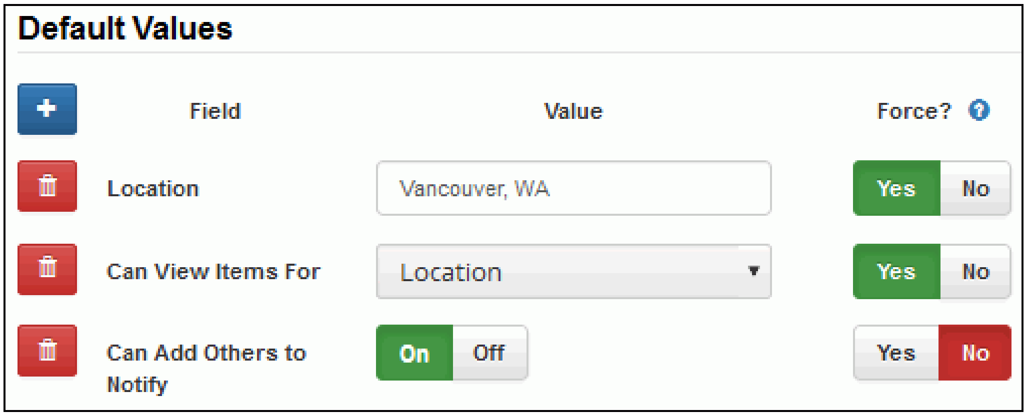
Base DN - Click this button to select the directory node that contains the data to be synchronized.

Search Filter - Enter the conditions that must be met for returning a specific set of information to iSupport. Note that a filter is only needed if the selected Base DN contains unwanted lower level nodes or if the data source's exclusions do not already remove the unwanted nodes.

Setting Default Values

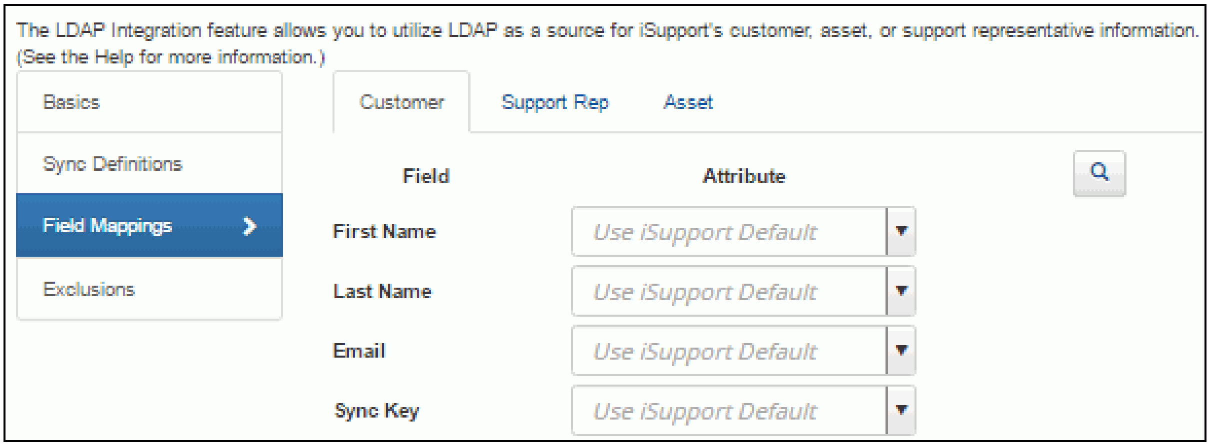
Use the Default Values section to set Customer Profile field values based upon the LDAP sync setting entry from which a record was created. For example, if LDAP users are organized into a specific OU or group that indicates other user properties (such as location) and if the LDAP user profiles don't have the location attribute populated in the directory, you can simply add a default value for the location field to the sync setting entry that is linked to the OU or group.

In the Force column, select Yes if you wish to have the configured default value override the LDAP value in cases where the attribute was populated in the source user profile. If the Force field is set to No, the default value will only be applied if the LDAP attribute is either unmapped or has no value on the user profile.



Field Mappings

Use the Customer subtab under the Field Mappings tab to specify the attributes in your LDAP source from which data will be pulled for corresponding iSupport fields.

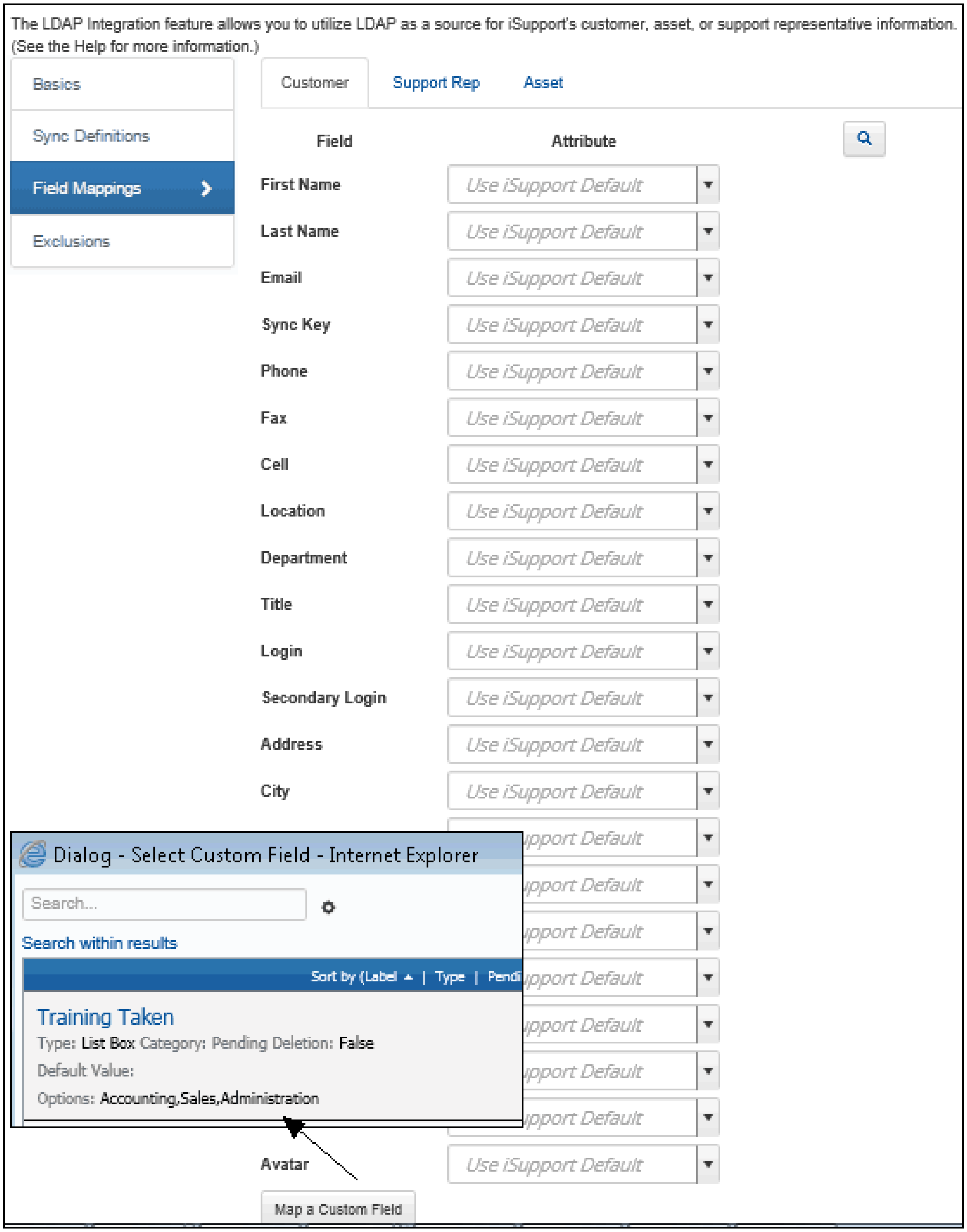


Mapping options include:

- Use iSupport Default which populates the default mapping; see the data map on page 23 for the attributes used by default by iSupport. Note that we recommend that you use iSupport's default for the Sync Key and Avatar fields because the applicable schema property may vary depending on your version of LDAP.
- An applicable schema property (selected via the dropdown)
- [Unmapped] which will enable entry in the field. Note that the First Name, Last Name, Email, Sync Key, and Login fields cannot be left unmapped.

Use the Sync Key field to map to a value that is an unchanging unique identifier field in the source database.

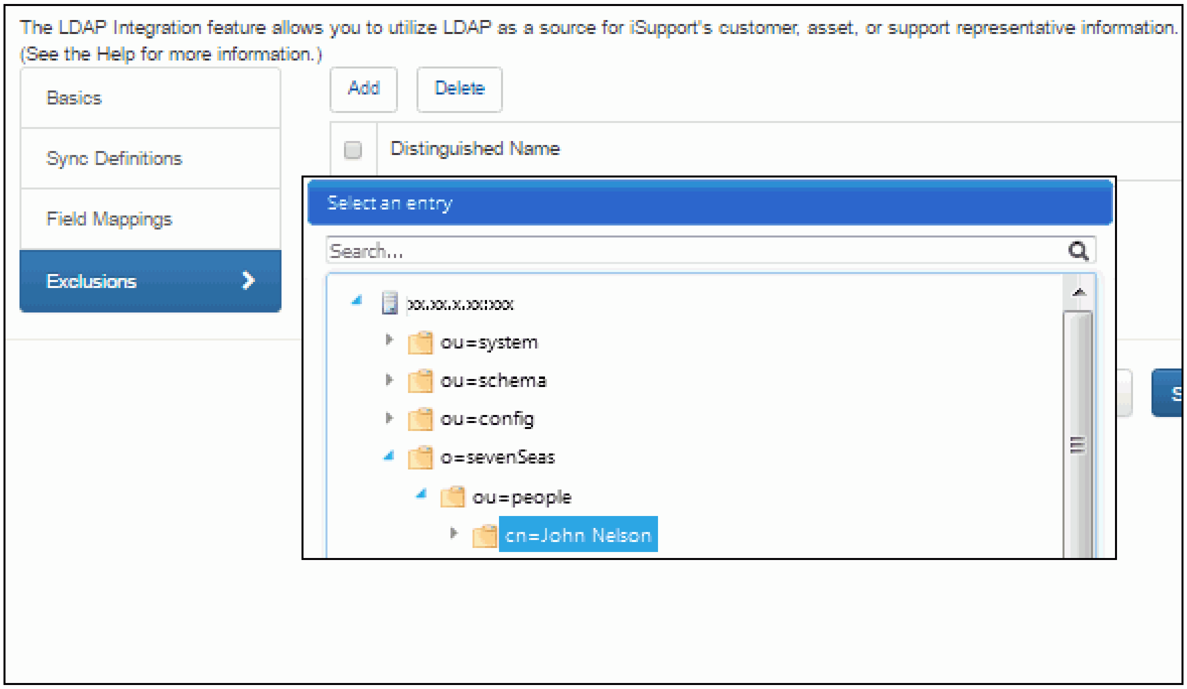
Use the Map a Custom Field button at the bottom of the screen to select a custom field to add to the list of fields to be mapped.



Use the Preview button to select a record to use for verifying your selections. Values from the record will appear next to the fields.

Configuring Exclusions

Use the Exclusions tab to specify the values that should not be synchronized; click the Add link to select the directory nodes or objects that should be excluded. All lower level nodes will also be excluded. Note that exclusions apply to all sync definitions within a data source integration definition.



Active Directory/LDAP Integration Data Map

The Active Directory and LDAP Integration features map according to the following schema:

Customers

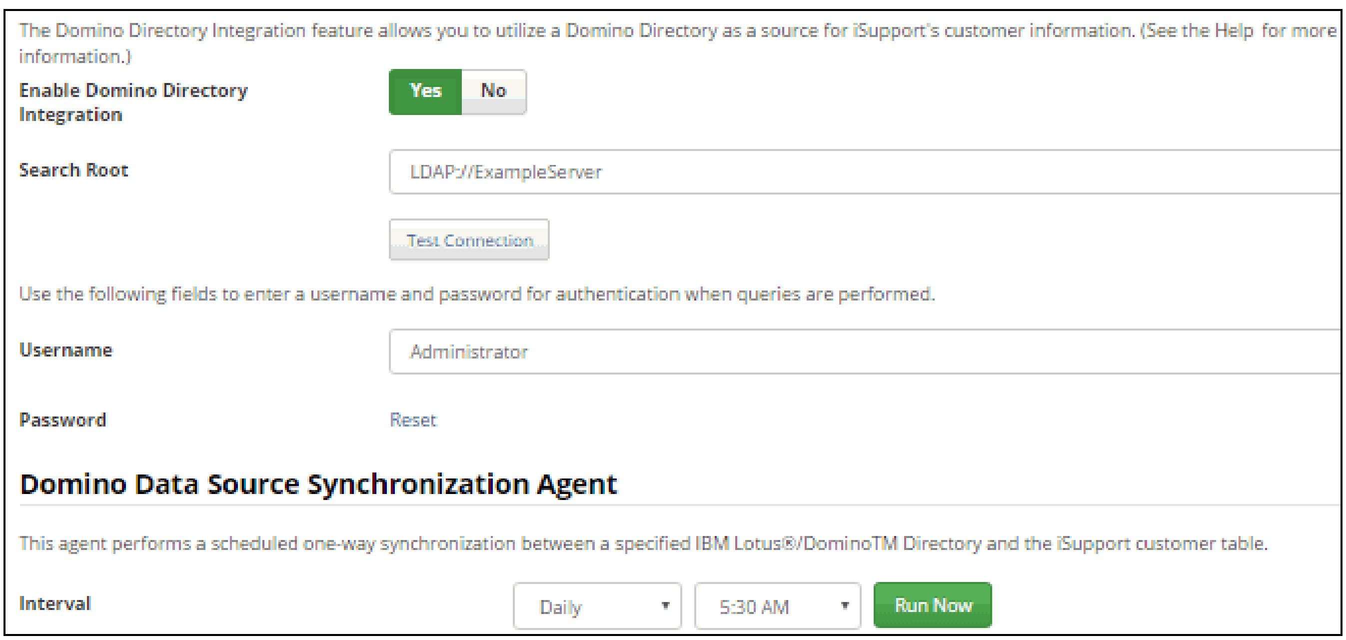
iSupport Customer Field	iSupport Default
First Name	givenName
Last Name	sn
Email	mail
Sync Key	objectGUID - if unavailable: entryUUID and uuid
Phone	telephoneNumber
Fax	facsimileTelephoneNumber
Cellular	mobile
Location	physicalDeliveryOfficeName
Department	department
Title	title
Login	userPrincipalName - if unavailable: samAccountName, UID, and then mail property
Secondary Login	The initial synchronization process will populate the Secondary User Name field if the iSupport Services user account is a domain level user account. It is approximated by retrieving the text between the @ symbol and the next period from the user's principal name and converting it to upper case (for example, LBLSOFT would be retrieved from john@lblsoft.com) and adding a backslash, and then retrieving the *username* portion from the samAccountName field of an AD user entry.

iSupport Customer Field	iSupport Default
Address	streetAddress (multiline value; first line used for Address1, any second line will be used for Address2, any third line will be used for Address3)
City	l
State	st
ZIP	postalCode
Country	co
Manager	manager
Company	company
Customer ID	*(unmapped)*
Group	MemberOf
Avatar	jpegPhoto - if unavailable: thumbnailPhoto

Integrating with Domino Directory

The Domino Directory Integration feature enables you to perform a scheduled one-way synchronization between a specified IBM Lotus®/Domino™ Directory (previously termed "NAB") and the iSupport customer table. (Note: The customer's login information cannot be populated.) You'll specify the server on which the Directory is located and Notes ID and password for accessing the server. The synchronization will occur according to the schedule defined for the Domino Synchronization agent.

To configure this feature, click the Create link and select Domino Directory. Complete the fields, schedule the Domino Synchronization agent, and click the Save button. If utilizing multiple customer data sources, use the Order of Precedence link in the Data Source Integration list screen to select the order of precedence if there are matching records.



Enable Domino Directory Integration - Select Yes to enable the Domino Directory Integration feature for updating the iSupport Customers table with the information in a Domino Directory. Note: the synchronization will not occur until you schedule the Domino Synchronization agent.

Search Root - Enter the search root URL for accessing the server on which the Domino Directory is located. This field is used for connection purposes only; the Domino LDAP task returns values for all Domino Directories identified on the server through Directory Assistance. Use the Test Connection link to test the query.

Username/Password - Enter the username and password for authentication when queries are performed.

Use the Test Connection link to verify access.

Domino Directory Synchronization Agent Interval - The Domino Synchronization feature performs a scheduled one-way synchronization between a specified IBM Lotus®/Domino™ Directory (previously termed "NAB") and the iSupport customer table. Select the amount of time in the interval for the synchronization to be performed or select Daily to run the agent every day at a specified start time.

Note: The Domino Directory Integration feature requires that the LDAP task is running on the Domino Directory server.

Data Map

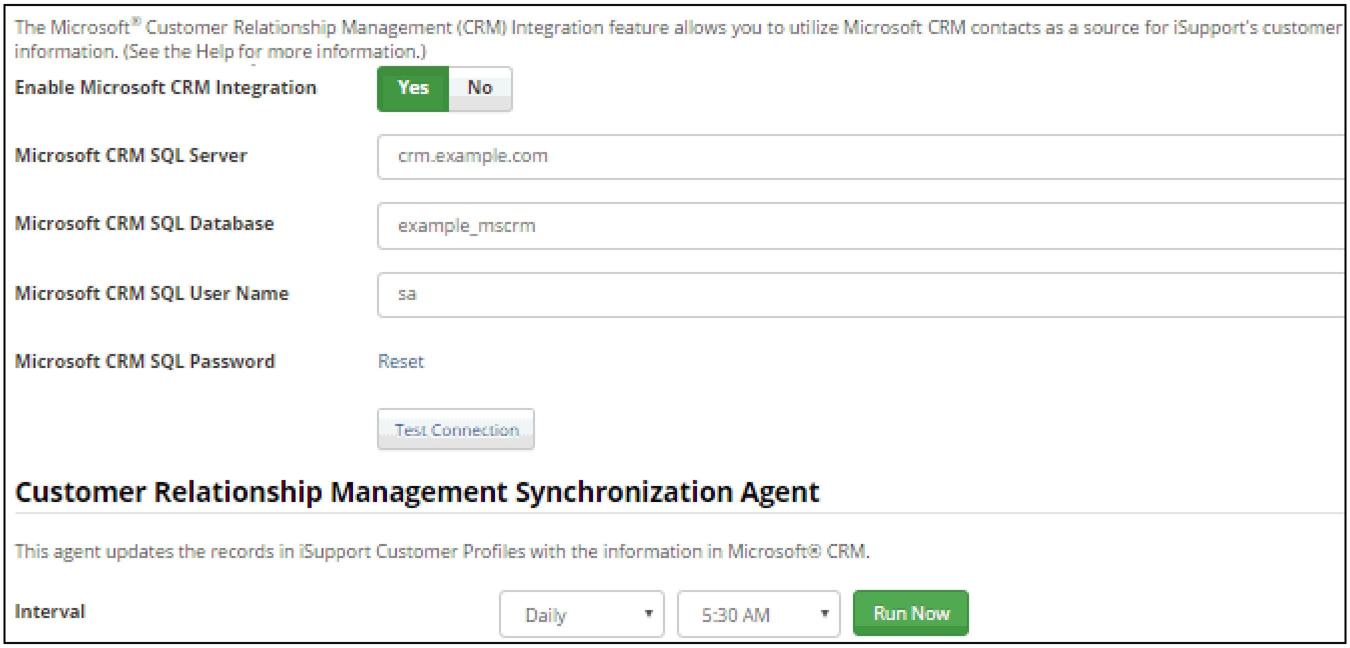
The Domino Directory Integration feature maps according to the following schema:

iSupport Customer Field	LDAP Name	Notes Name
First Name	givenName	FirstName
Last Name	sn	LastName
Phone	telephoneNumber	OfficePhoneNumber
Fax	facsimileTelephoneNumber	OfficeFAXPhoneNumber
Cellular	mobile	CellPhoneNumber
Email	mail	InternetAddress
Company	CompanyName	CompanyName
Location	Location	Location
Department	Department	Department
Title	title	JobTitle
Manager	manager	manager
Address1	OfficeStreetAddress	OfficeStreetAddress
City	l	OfficeCity
State	st	OfficeState
ZIP	postalCode	OfficeZip
Country	c	OfficeCountry

Integrating with Microsoft® CRM

The Microsoft® Business Solutions Customer Relationship Management (CRM) Integration feature enables an agent that updates the records in iSupport Customer Profiles with the information in Microsoft® CRM. To configure this feature, click the Create link and select Microsoft CRM. Complete the fields, schedule the Customer Relationship Management Synchronization agent, and click the Save button. If utilizing multiple customer data sources, use the

Order of Precedence link in the Data Source Integration list screen to select the order of precedence if there are matching records.



- If there is an entry in Microsoft® CRM that does not exist in iSupport Customer Profiles, the entry is created in Customer Profiles. In order for an entry to be added from Microsoft® CRM, it must contain a first name, last name, and email address.
- If an email address matches an email address in Customer Profiles and the record was directly entered via Customer Profiles, the Customer Profiles record is updated with the latest information from Microsoft® CRM. If a Customer Profile entry has already been synchronized with Microsoft® CRM, the Customer Profile is updated with the latest information.
- If an entry is deleted in the Microsoft® CRM:
  - If incidents are **not** associated with that name, the entry will be deleted from Customer Profiles when the CRM Synchronization agent runs.
  - If incidents are associated with the name, the entry will remain flagged for deletion in Customer Profiles until those incident records no longer exist.

Note: If a Customer Profile record has been synchronized with Microsoft® CRM, the synchronized fields cannot be edited in the Customer Profiles screen. These fields can only be edited via Microsoft® CRM.

When the feature is enabled, the agent runs immediately and then on an interval basis according to the specified schedule. The Microsoft® CRM Integration feature does not modify the contents in Microsoft® CRM in any way.

Enable Microsoft CRM Integration - Select Yes to enable the Microsoft® CRM Integration agent that updates the records in iSupport Customer Profiles with the information in Microsoft® CRM. The agent runs immediately and then continues to run as scheduled.

Microsoft CRM SQL Server - Enter the location of the Microsoft® SQL server that contains the Microsoft® CRM application.

Microsoft CRM SQL Database - Enter the name of the database containing the Microsoft® CRM contacts.

Microsoft CRM SQL Username/Microsoft CRM SQL Password - Enter the username and password for logging into the Microsoft CRM SQL database. This login must have Read permission for performing queries.

Customer Relationship Management Synchronization Agent Interval - The Microsoft® CRM Integration feature enables the CRM Synchronization agent that updates the records in iSupport Customer Profiles with the information in Microsoft® CRM. Select the amount of time in the interval for the synchronization to be performed or select Daily to run the agent every day at a specified start time.

Use the Test Connection link to verify access.

Data Map

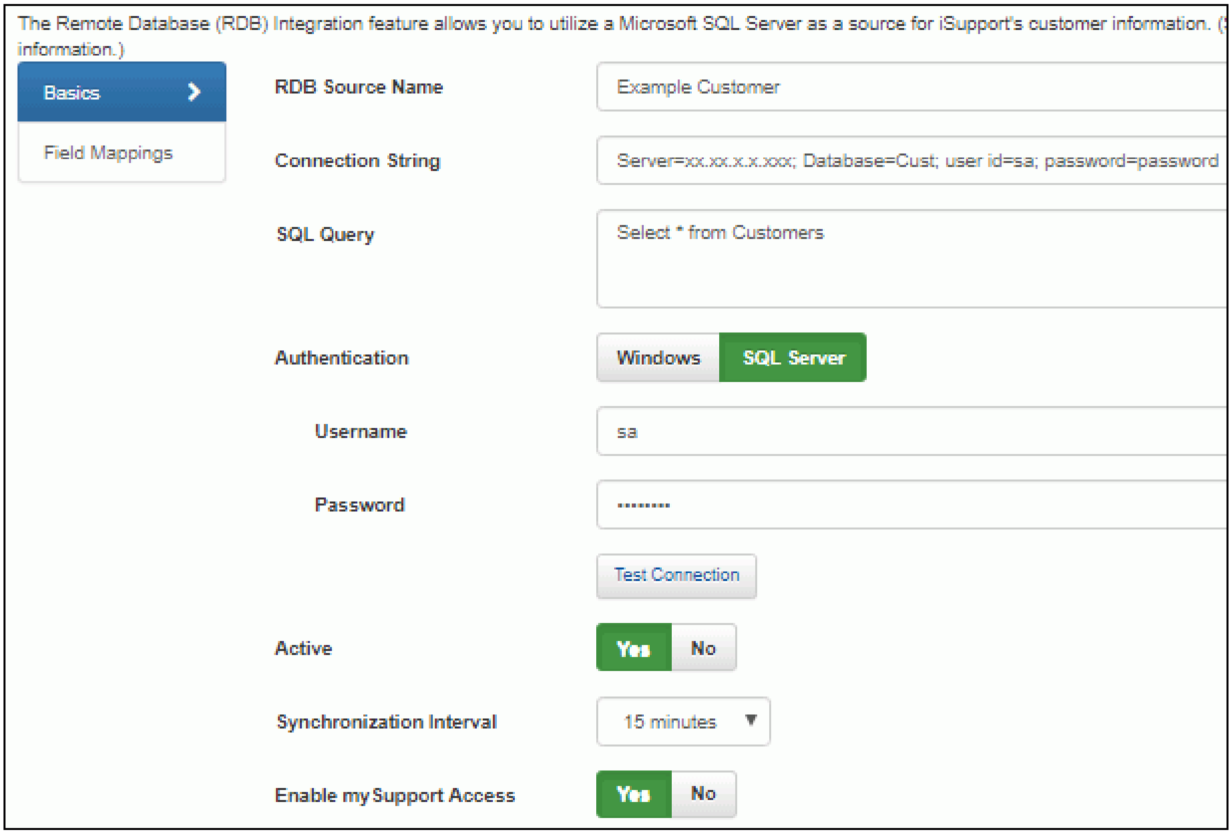
The Microsoft® Business Solutions Customer Relationship Management (CRM) Integration feature maps according to the following schema:

iSupport Customer Field	CRM Database Table	Field Value
Cellular	Contact Base	MobilePhone
Company	Contact Base	AccountId
Dept	Contact Base	Department
Email	Contact Base	EmailAddress1
Fax	Contact Base	Fax
FName	Contact Base	FirstName
LName	Contact Base	LastName
Manager	Contact Base	ManagerName
Phone	Contact Base	Telephone1
Sync_Key	Contact Base	ContactId
Title	Contact Base	JobTitle
Address1	CustomerAddressBase	Line1
Address2	CustomerAddressBase	Line2
Address3	CustomerAddressBase	Line3
City	CustomerAddressBase	City
Country	CustomerAddressBase	Country
Location	CustomerAddressBase	Name
State	CustomerAddressBase	StateOrProvince
ZIP	CustomerAddressBase	PostalCode

Importing From a Remote Customer SQL Database and Synchronizing

Select Customer RDB on the Data Source Integration Create menu to perform a scheduled one-way synchronization between a specified Microsoft SQL Server database and the iSupport Customers table. You'll specify the data source connection string, SQL (Structured Query Language) query, and column mapping. This feature can be used with any Microsoft SQL Server database that contains customer data. If utilizing multiple customer data sources, use the

Order of Precedence link in the Data Source Integration list screen to select the order of precedence if there are matching records.



Enable mySupport Access for Auto-Created Customer Records - Select Yes to grant mySupport access for all Customer Profile records created by the integration.

RDB Source Name - Enter a name for the RDB source definition. This name will appear in the Source field in the associated Customer Profile record.

Connection String - Enter the connection string for accessing the Microsoft SQL Server database.

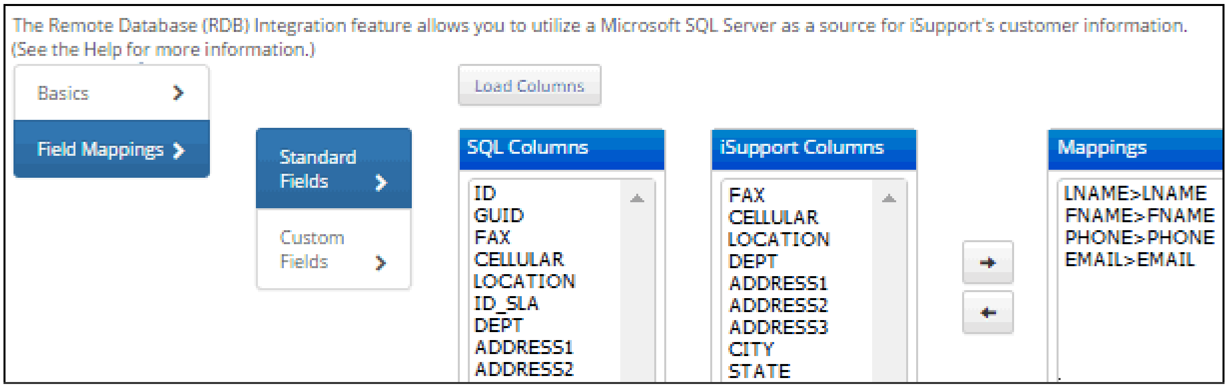
SQL Query - Enter the SQL query string for accessing the customer-specific SQL columns in the Microsoft SQL Server database. This field is limited to 255 characters (including white space). Click the Refresh Columns button to populate the SQL Columns field.

Note: For security purposes, it is recommended that you create a read-only user account for accessing the Microsoft SQL Server database with permission to access only the customer data information. For added security, you can push the customer data into a second database created specifically for access by iSupport.

Authentication/Username/Password - Select the type of authentication to be used to access the source SQL Server database: Windows authentication or SQL Server authentication. If using SQL Server authentication, enter the user name and password for accessing the server. If using Windows Authentication, the database must have both of the iSupport user IDs listed, with the db_owner and public roles.

Use the Test Connection link to test the query.

When you make an entry in the SQL Query field and click the Load Columns button on the Field Mappings tab, the SQL Columns field will be populated with the corresponding columns in the Microsoft SQL Server database. The iSupport Columns field contains the columns in the iSupport Customers table.



Do the following:

- To map a field, select a field under SQL Columns and the corresponding field under iSupport Columns. Then click the button. The associated fields display under Mappings. In order to save the record, you must create a map for the first name, last name, and email address. Use the Custom Fields tab to map LDAP attributes to fields set up on the Customer tab in the Custom Fields Configuration screen.
- To remove an entry from the Mapping field, select the entry and click the button.

You can use the SYNC_KEY field under iSupport Columns to map to a value that is an unchanging unique identifier field in the source database.

Data Map

The Remote Database Integration feature maps according to the following schema:

iSupport Customer Field	Supported Remote Database Fields
First Name	FName
Last Name	LName
Phone	Phone
Fax	FAX
Cellular	Cellular
Email	Email
Login	Login
Password	Password (Note: this password must be cleartext, and it will be encrypted when stored by iSupport.)
Company	Company
Location	Location
Department	Dept
Title	Title
Manager	Manager
Address1	Address1
Address2	Address2
Address3	Address3
City	City

iSupport Customer Field	Supported Remote Database Fields
State	State
ZIP	Zip
Country	Country
Customer ID	Customer_Number

Enabling and Scheduling the Synchronization

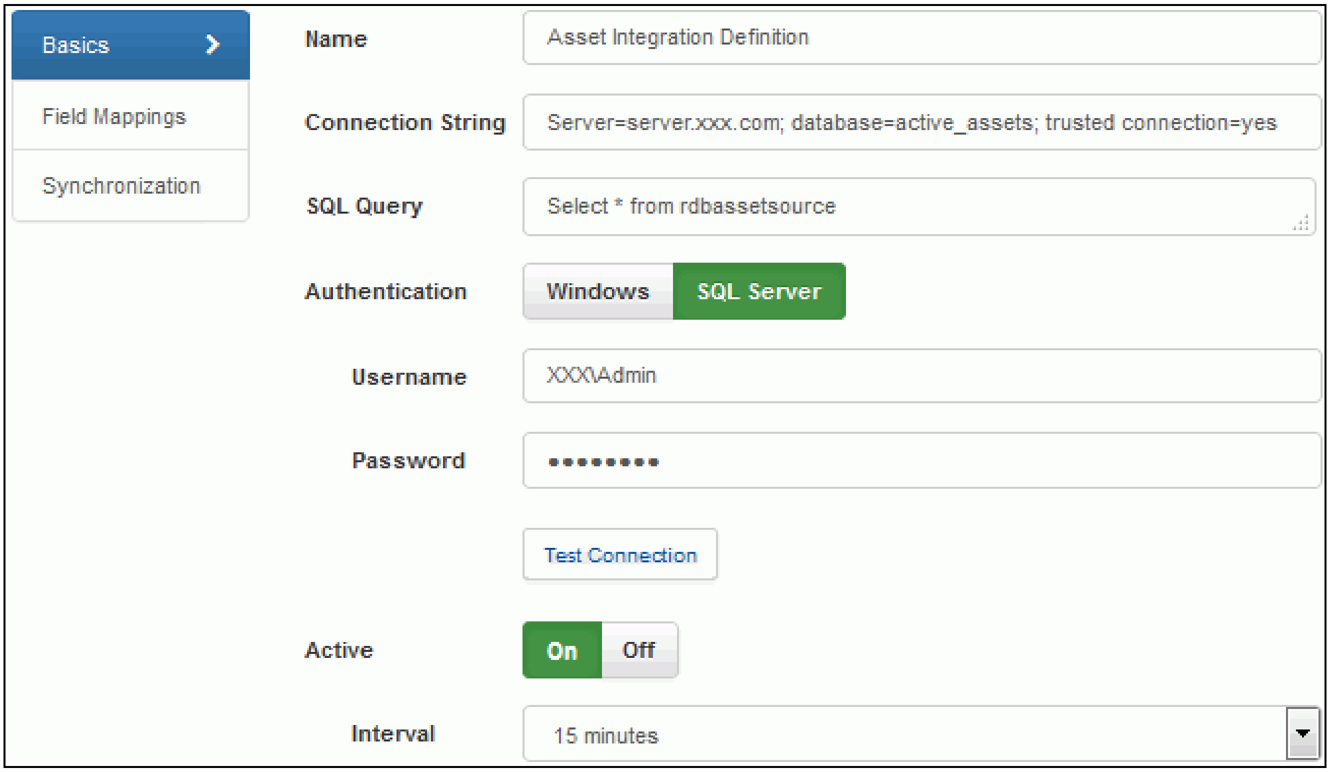
Use the RDB Synchronization Interval field to select the amount of time in the interval for the synchronization to be performed or select Daily to run the agent every day at a specified start time. Select Yes in the Active field to enable the RDB Synchronization agent that updates the records in iSupport Customer Profiles with the information in the database.

Enable mySupport Access - Select Yes to populate Yes in the Approved to Access field in each customer's profile. This enables the customer to log in to view incidents or change their password on the mySupport portal.

Importing From a Remote Asset Database and Synchronizing

Select Asset RDB on the Data Source Integration Create menu to import asset data from one or more Microsoft SQL Server source databases into iSupport's Asset database, and synchronize with those source databases on an interval basis. You'll enter a connection string and SQL query, and then click the Test button to display columns in the source database on the Field Mappings tab for specific field mapping options. You can schedule synchronization to occur on an interval basis. If a matching field exists in the source database, the record will be updated in iSupport's Asset database.

Use the Basics tab to specify the connection string, SQL query, authentication information, and synchronization interval.



Microsoft SQL Server Source Name - Enter a name for the SQL Server source definition. This name will appear in the list of integration definitions and in the Source field in the associated Asset record.

Connection String - Enter the connection string for accessing the source database.

SQL Query - Enter the SQL query string for accessing the asset-specific SQL columns in the source database. Click the Test Query button to populate the SQL Columns field on the Field Mappings tab.

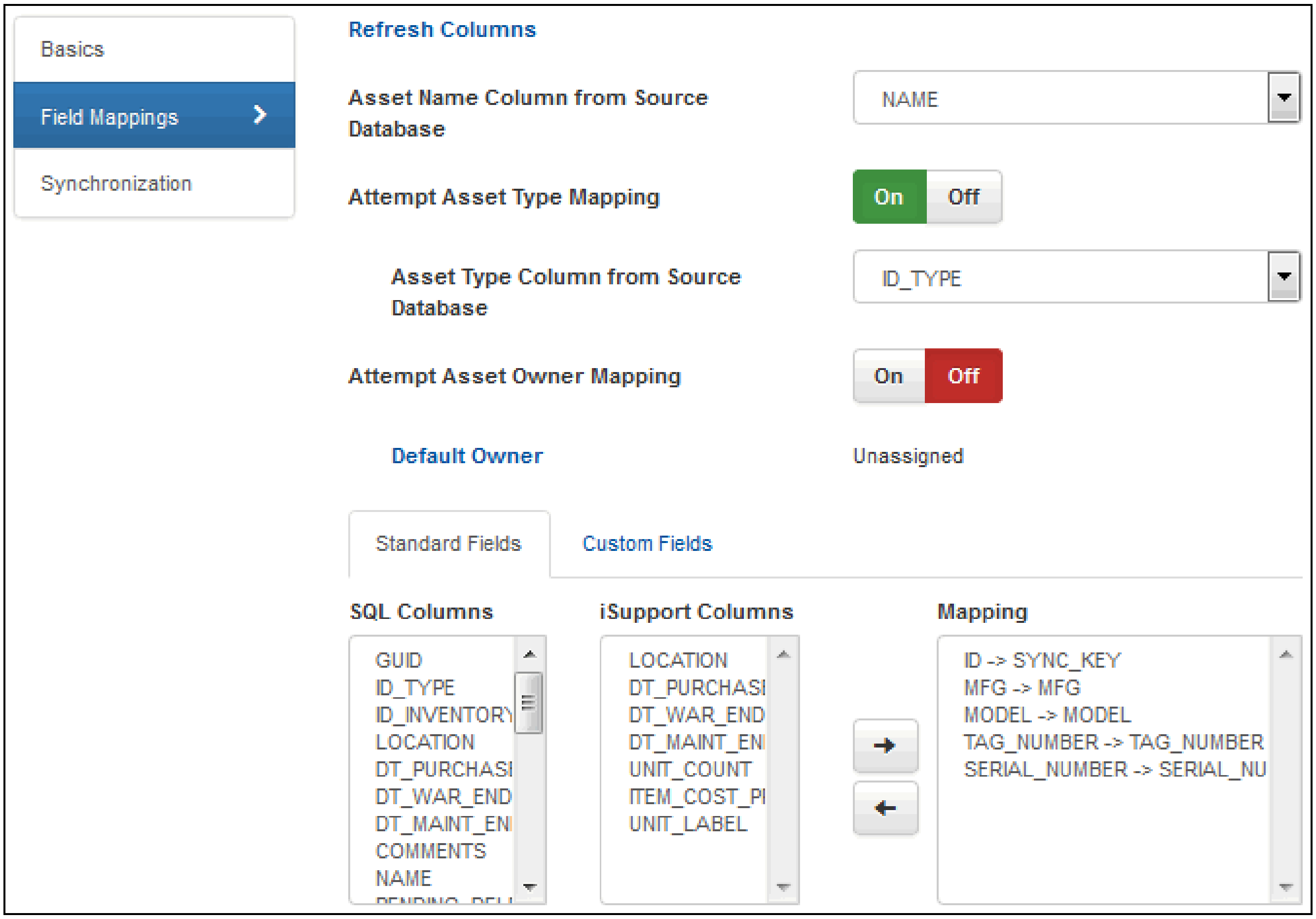
Authentication/Username/Password - Select the type of authentication to be used to access the source SQL Server database: Windows Authentication or SQL Server Authentication. If using SQL Server authentication, enter the user name and password for accessing the server. If using Windows Authentication, the database must have both of the iSupport user IDs listed, with the db_owner and public roles.

Active - Select Yes to enable the Asset Synchronization agent that updates the records in the iSupport Asset database with the information in the SQL source database.

Asset Synchronization Interval - Select the number of minutes in the interval for the synchronization to be performed.

Specifying Field Mappings

When the query connection is successful, use the Field Mappings tab to specify options for mapping the fields in the source database to the fields in the iSupport Asset database.



Asset Name Column from Source Database - Select the asset name column in the SQL database that contains the data to be synchronized.

Attempt Asset Type Mapping - Select:

- On to specify the asset type column in the source database for mapping to the iSupport asset type column. If a value in the source does not match the corresponding value a predefined type, a new type will be assigned.
- Off to assign the predefined iSupport asset type in the Default Asset Type field to all synchronized records.

Asset Type Column from Source Database - If On was selected in the Attempt Asset Type Mapping field, select the column to be used for mapping the asset type in the source database.

Default Asset Type - If Off was selected in the Attempt Asset Type Mapping field, select the predefined iSupport asset type to assign to all synchronized asset records.

Attempt Asset Owner Mapping - Select:

- On to specify the names of the asset owner First Name, Last Name, and Email columns in the source database and search for a matching asset owner in iSupport Customer Profiles.

  If a value in the source database does not match, a new Customer Profile record will be created if Yes is selected in the Create New Customer Profile if Mapping Fails field. If No is selected in that field, the customer in the Default Owner field will be assigned.
- Off to assign the customer in the Default Owner field as the asset owner of all synchronized records.

Owner First Name Column from Source Database - If On was selected in the Attempt Asset Owner Mapping field, select the owner first name column in the source database to be used in the search for a matching asset owner in iSupport Customer Profiles.

Owner Last Name Column from Source Database - If On was selected in the Attempt Asset Owner Mapping field, select the owner last name column in the source database to be used in the search for a matching asset owner in iSupport Customer Profiles.

Owner Email Column from Source Database - If On was selected in the Attempt Asset Owner Mapping field, select the owner email column in the source database to be used in the search for a matching asset owner in iSupport Customer Profiles.

Create New Customer Profile if Mapping Fails - Select:

- On to create a new Customer Profile record if a value in the source database does not match.
- Off to assign the customer in the Default Owner field as the asset owner of all imported records.

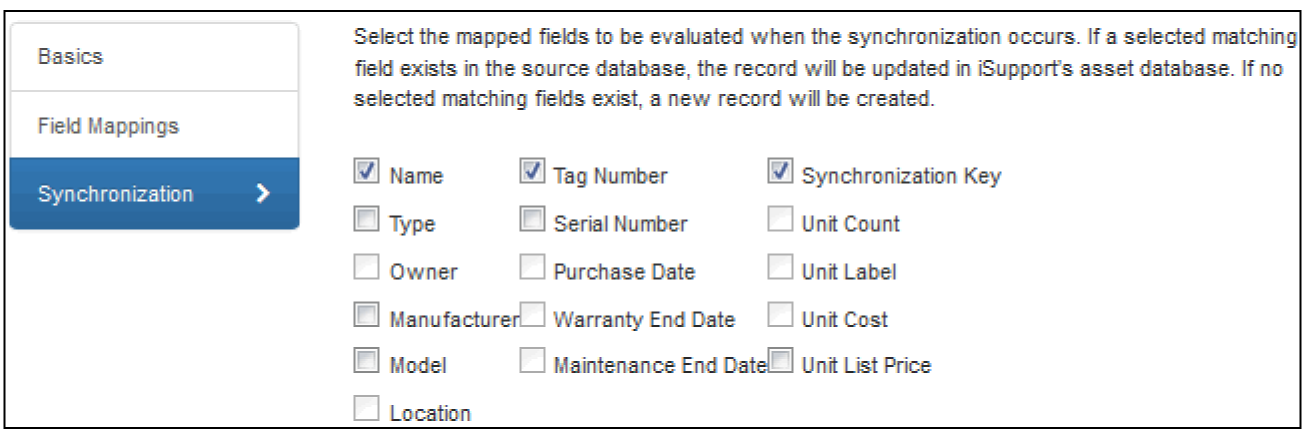
Default Owner - If no owner mapping was attempted or Off was selected in the Create New Customer Profile if Mapping Fails field, select the customer to assign as the asset owner for all imported records.

When you make an entry in the Connection String and SQL Query fields on the Basics tab and click the Test Query button or Refresh Columns link, the SQL Columns section will be populated with the names of the columns in the source database. The iSupport Columns field contains the columns in the iSupport's Asset database. To map a field, select a field in the SQL Columns field and the corresponding field in the iSupport Columns field. Then click the button. The associated fields display under Mapping. To remove an entry from the Mapping section, select the entry and click the button.

Use the Custom Fields tab to map fields in the source database to the custom fields set up for both asset types and the Asset entry screen. Then click Save to save your selections. The synchronization will occur when the Sync button is clicked and/or on the interval set in the Asset Synchronization Interval field on the Basics tab.

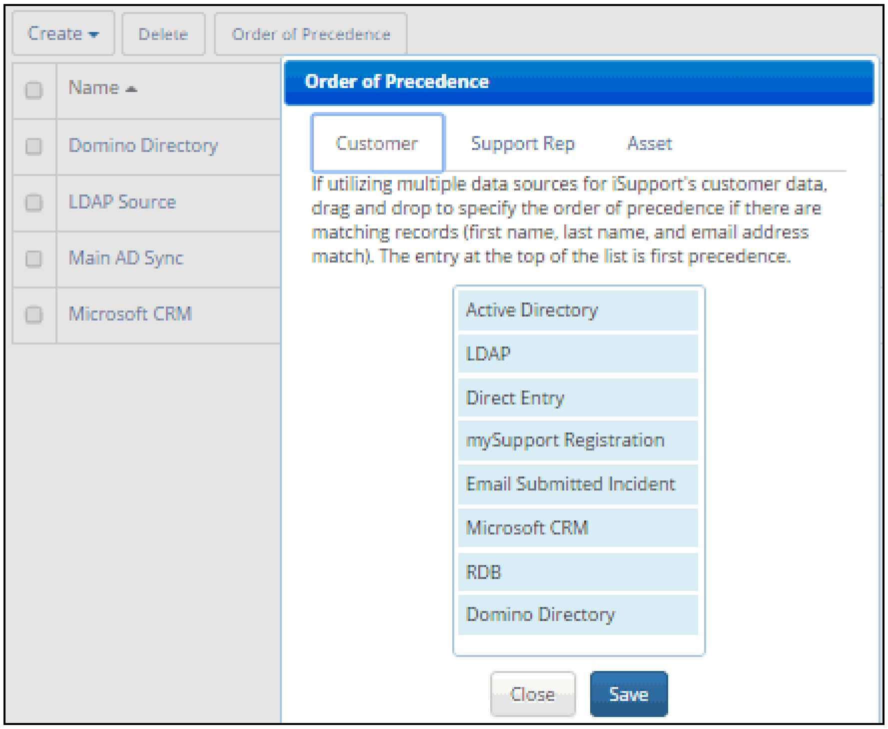
Selecting Fields for Asset Synchronization

Use the Synchronization tab to synchronize iSupport's Asset database with fields in a Microsoft SQL Server source database; you'll select the mapped fields to be evaluated when the synchronization occurs. If a matching field exists in the source database, the record will be updated in iSupport's Asset database.



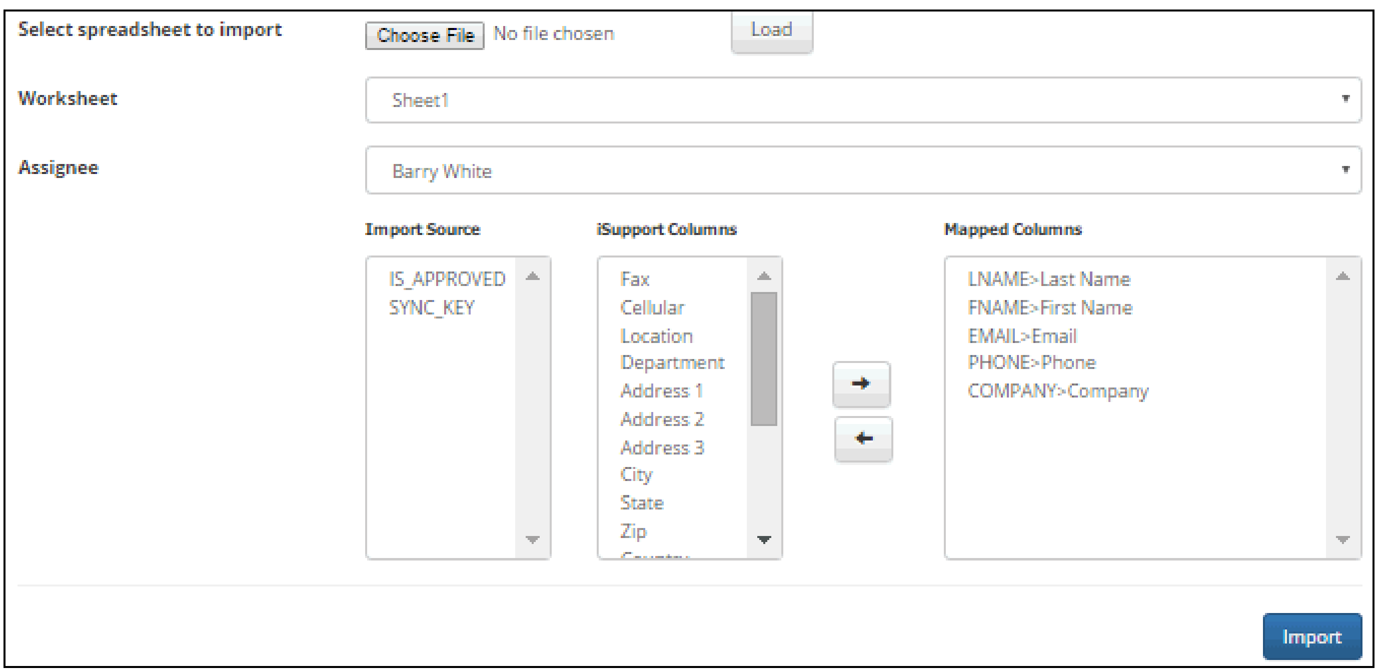
Specifying Precedence for Multiple SQL Data Sources

If you are using multiple sources for populating iSupport's customer, support representative, and asset data, use the order of precedence link to specify the order of precedence if there are matching records. (For customers and support representatives: a match on first name, last name, and email address; for assets, a match on name.) All of the possible data sources are listed; the top position has the highest precedence. If you are not using one of these data sources, move it down in the list.



Importing Customer Data From a CSV or Microsoft Excel File

Use the Customer Import feature to import customer data from a comma separated value (.csv) or Microsoft Excel .xlsx file. Note that the Microsoft Access Object Library 12.0 must be installed for this feature.



Click the Choose File button to select a Microsoft Excel file containing the customer information. Click the Load button to populate the Import Source column with the columns in the spreadsheet. The worksheets in the file appear in the Worksheet field; select the worksheet containing the data to import.

The Assignee field appears if you have the Service Desk Edition and Opportunity functionality is enabled; select the support representative to populate the Assignee field for use with Opportunity functionality.

Map the columns in the Import Source list to the columns in iSupport.

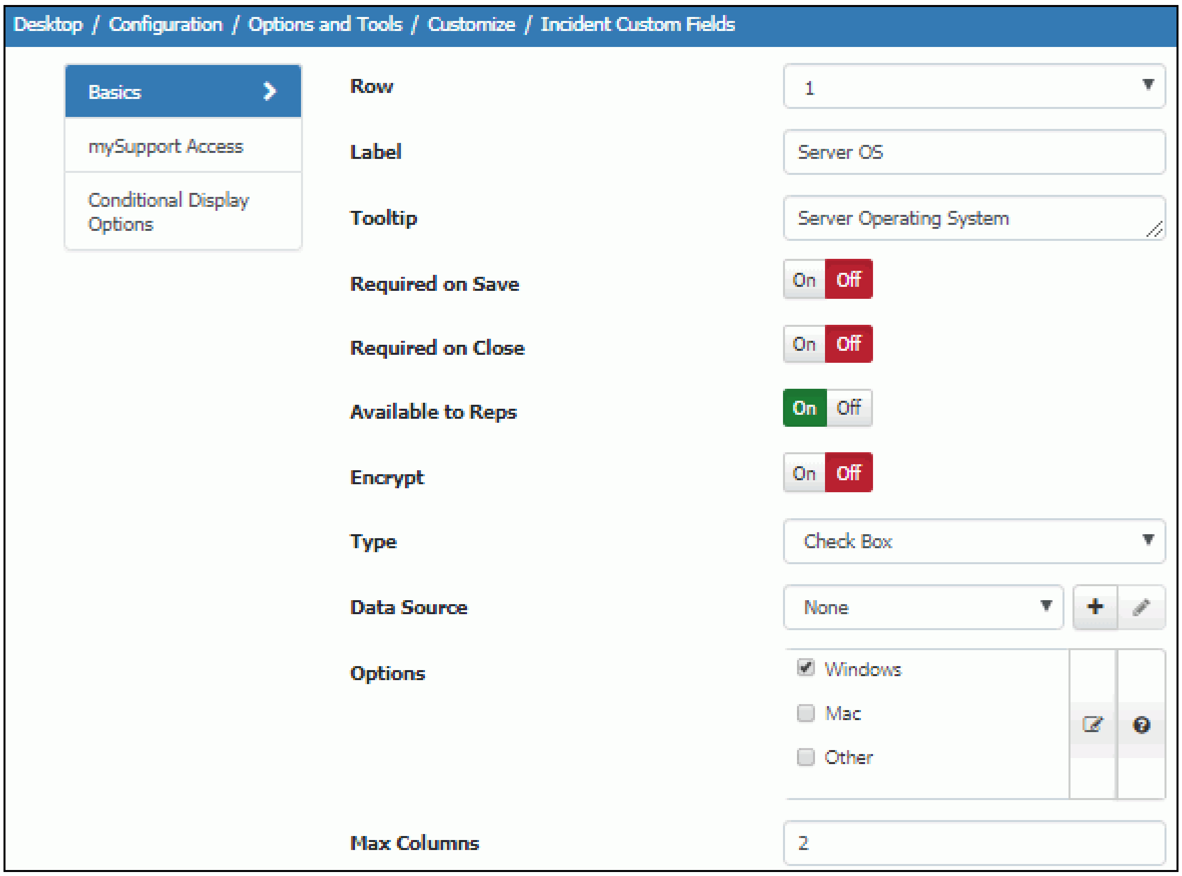
- To map a column, select a column in the Import Source list and in the corresponding column in the iSupport Columns list. Then click the right arrow ➔ button. The associated fields display under Mapped Columns.
- To remove an entry from the Mapped Columns list, select the entry and click the left arrow ⬅ button.

When finished, click the Import button to execute the import.

Configuring Custom Fields

To define fields for entering information specific to your company, go to Options and Tools | Customize | Custom Fields. An unlimited number of text, keyword, hyperlink, date, selection, and date/time fields can be defined. You can do the following with custom fields:

- Require custom fields to be completed before a work item is saved and/or closed
- Configure display based on defined conditions, and pull from a data source
- Map to a SQL data source and populate and synchronize options for list-type custom fields
- Use rules to set a custom field value
- Configure custom fields to appear when an associated asset type, CMDB type, cost center, or category is selected; you can control display of these additionally defined fields in screen layouts. Note that all custom fields that have met any conditional display conditions will be created upon mySupport work item submission regardless of whether they are included on a mySupport submission layout.



Row - Enter the row number for the position of the field. Row one will be the first field, row two will be located under the first field, and so on.

Label - Enter the label for the custom field.

Tooltip - Enter the text to display when a user hovers over the field with the cursor.

Required on Save - Select On to require the field to be completed before the record can be saved. Note: If an inbound email rule uses an auto-close incident template and a required custom field does not have a default value, the required custom field will not have a value in the closed incident.

Required on Close - Select On to require the field to be completed before a Closed status can be selected in a work item.

Available to Reps - Select Off to prevent support representatives from editing the field. (However, rules can change field values.)

Encrypt - If your business has a specific mandate regarding column level encryption and you are already using 'database at rest' encryption, send a request to iSupport's Technical Support department for a feature unlock code.

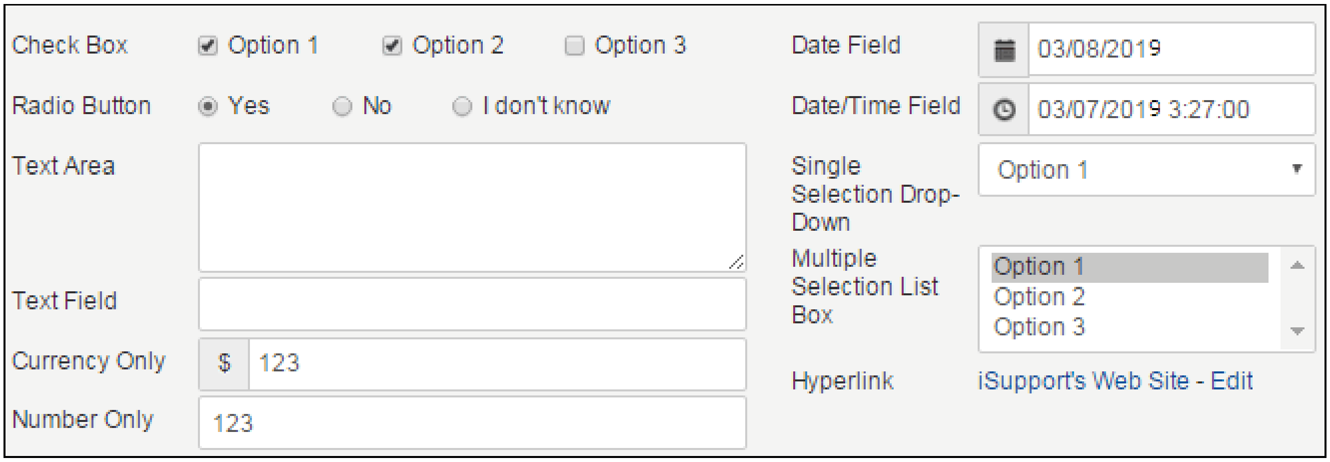
Type - Select the format of the field. Note that for list-type fields (Checkbox, Multiple Selection List Box, Radio Button, Single Selection Drop-Down, and Type Ahead) you can map to a SQL data source and populate and synchronize options for a field; see "Pulling From a Data Source" on page 41 for more information.

- A **Check Box** field enables multiple selections; use the Max Columns field to enter the number of check boxes to appear before a scroll bar is used.
- A **Currency** field displays a dollar sign next to the field and allows entry of the numbers 0 through 9, a decimal point, and two values after the decimal point. The dollar sign symbol that precedes a currency custom field is controlled by the server's default language, but you can override it via a setting in the web.config file (located in the directories in which the Desktop, mySupport portal, and Survey functionality are installed). The following tag in the web.config file defines globalization settings: <globalization requestEncoding="utf-8" responseEncoding="utf-8"/>

  You can add a culture/language name setting to this tag to override the currency symbol; in the example below, *culture="en-GB"* was added to change the dollar sign symbol to the English (United Kingdom) pound symbol. <globalization requestEncoding="utf-8" responseEncoding="utf-8" culture="en-GB"/>

  Note that the settings in the web.config file should be updated only as directed (via this guide or iSupport Technical Support); failure to do so may result in data loss or corruption. See http://msdn2.microsoft.com/en-us/library/system.globalization.cultureinfo.aspx for more information on defined culture settings.
- A **Date** field enables entry or selection of a date in MM/DD/YY format; a **Date Time** field enables entry or selection of a date (MM/DD/YY) and time. To disable manual entry in Date and Date Time fields and require the user to select from the calendar popup, select Yes in the Disable Manual Entry of Date Time Custom Fields field on the Advanced tab in the Custom Fields list screen.
- A **Hyperlink** field enables you to specify default text and a URL to appear in the field; the user can change those entries. You can also leave the field blank and allow the user to enter the default text and URL.
- A **Label Only** field does not display a value option; you can use it as a section header to group custom fields.
- A **Multiple Selection List Box** field enables the user to select multiple entries in a list. Use the Max Rows field to enter the number of selections to appear before a scroll bar is used.
- A **Number Only** field enables entry of the numbers 0 through 9 and a decimal point.
- A **Radio Button** field enables only one selection; use the Max Columns field to enter the number of radio buttons to appear before a scroll bar is used.
- A **Single Selection Drop-Down** field enables selection of one item in a list.
- A **Text Area** field enables text characters to be entered in a resizable field.
- A **Text** field enables text to be entered in a one-line field.
- A **Type Ahead** field initiates a search of matching options after a few characters are typed. This custom field type is only used for fields that are linked with a data source.

Examples are shown below.



Options - This field displays when creating a radio button, checkbox, multiple selection list box, or single selection drop-down. Enter or paste items into this field; separate each value with a comma or return and select Commit Items when finished. Select items to specify defaults and drag items to change the order. Options can be populated by and synchronized with a SQL data source; see "Pulling From a Data Source" on page 41 for more information.

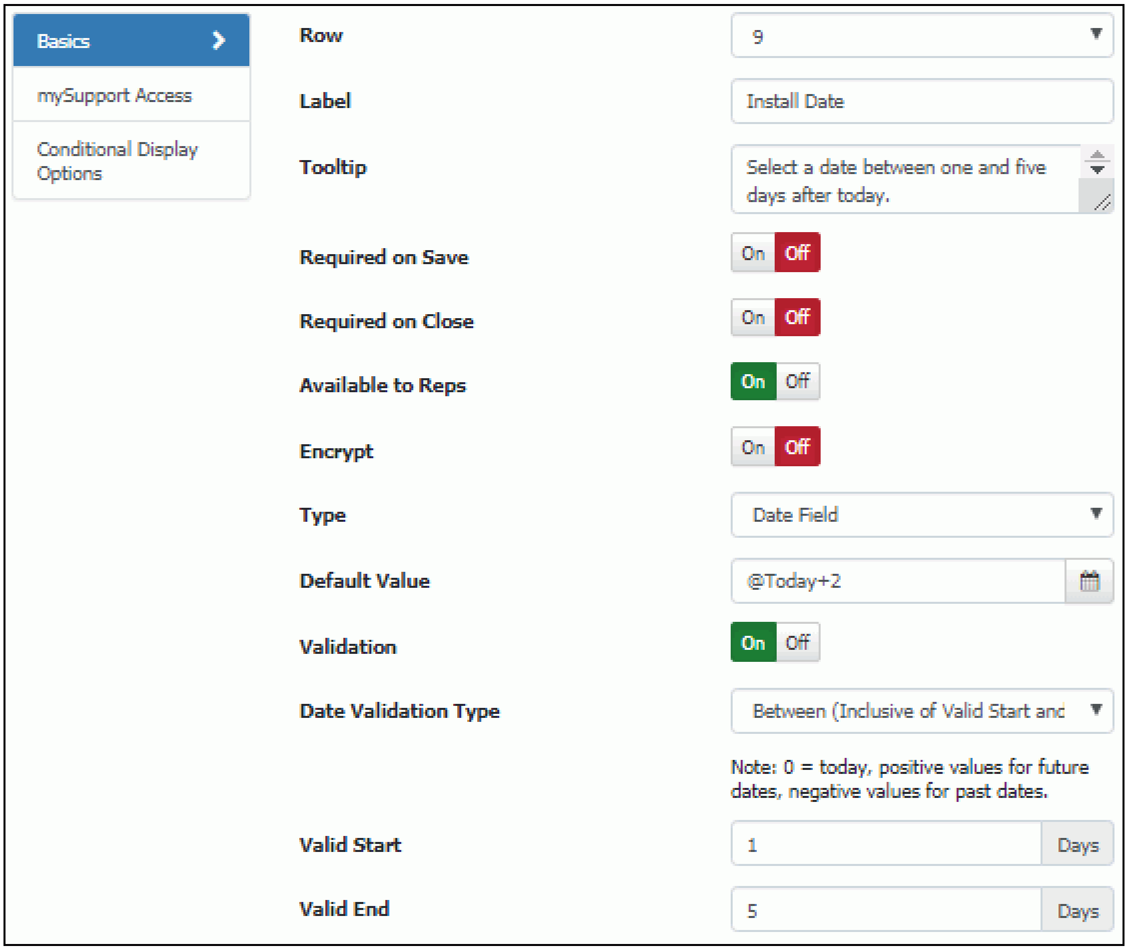
Default Value - Enter a value to appear as an option in the custom field by default.

- To display the current date, enter **@today**
- To display the date a specified number of days after the current date, enter **@today+n** (where *n* is the number of days to add after today's date)
- To display the date a specified number of days before the current date, enter **@today-n** (where *n* is the number of days to subtract from today's date)

Max Columns/Max Rows - For Check Box and Radio Button type fields, enter the maximum number of columns to display (the fields will wrap to multiple rows); for a Multiple Selection List Box type field, enter the maximum number of rows to display (causing a scroll bar to appear).

To delete a custom field, select the row number and then select the Delete link. To delete multiple custom fields, select the fields and select the Delete link. To edit a custom field, select the label link.

Validation - This field appears for Date, Date/Time, Currency, Text Area, and Text custom fields. Select On to enable date, date/time, currency, text area, and text custom fields to be validated upon entry (for example, the calendar picker will only make available valid dates for selection). Enter the parameters that the field will be validated against; the parameters will vary depending on the type of field.



- **Date:** The calendar picker will only make available valid dates for selection by the user. Use the Date Validation Type field to specify the basis for validation and then enter the number of days before or after the current date on which to make available dates. Use zero as the current date, positive values for future dates, and negative values for past dates.

  Select **Start** in the Date Validation Type field to ensure that the available dates for selection will be on or after the specified number of days from the current date. Examples:

  - If you enter -2 in the Valid Start field, the dates available for selection will start two days before the current date.
  - If you enter 0 in the Valid Start field, the dates available for selection will start on the current date.
  - If you enter 1 in the Valid Start field, the dates available for selection will start one day after the current date.

  Select **End** in the Date Validation Type field to ensure that the available dates for selection will be on or before the specified number of days from the current date. Examples:

  - If you enter -2 in the Valid End field, the dates available for selection will end two days before the current date.
  - If you enter 0 in the Valid End field, the dates available for selection will end on the current date.
  - If you enter 1 in the Valid End field, the dates available for selection will end one day after the current date.

  Select **Between** (Inclusive of Valid Start and Valid End) to ensure that the available dates for selection will be a range: starting on or after a specified number of days from the current date, and ending on or before a specified number of days from the current date. (Your entry in the Valid Start field must be less than or equal to the number of days in the Valid End field.) Examples:

  - If you enter -2 in the Valid Start field and 2 in the Valid End field, the dates available for selection will start two days before the current date and end two days after the current date.

- If you enter 1 in the Valid Start field and 3 in the Valid End field, the dates available for selection will start one day after the current date and end three days after the current date.

- **Date Time:** The information above applies to this field; use the Validation Start Time and Validation End Time fields to select available times on the available days for selection.
- **Currency:** Enter a minimum amount in the Min Amount field, a maximum amount in the Max Amount field, or a minimum and maximum in both fields to specify a range. (Your entry in the Min Amount field must be less than or equal to the number in the Max Amount field.)
- **Number Only:** Enter a minimum amount in the Min Amount field and a maximum amount in the Max Amount field; the number the user enters must between the two numbers. (Your entry in the Min Amount field must be less than or equal to the number in the Max Amount field.)
- **Text Area/Text:** Enter a minimum number of characters in the Min Length field or a maximum number of characters in the Max Length field. Enter numbers in both fields to specify a range. (Your entry in the Min Length field must be less than or equal to the number in the Max Length field.)

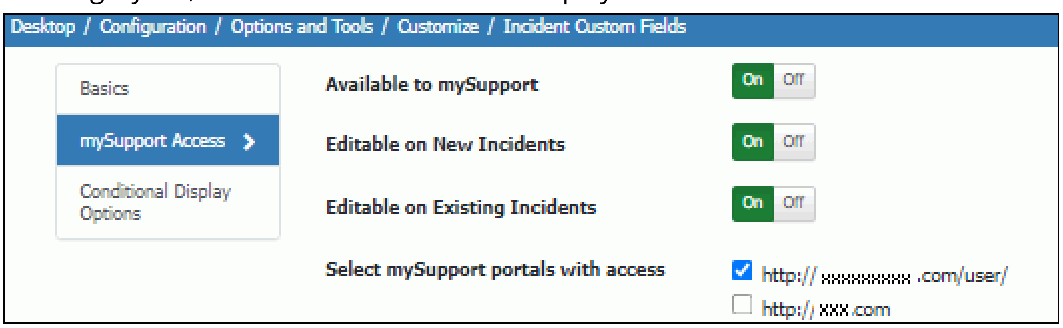
mySupport Access Options

Available to mySupport - Select On to enable the field to appear on a mySupport portal.

Editable On New Incidents - This field appears if Hyperlink is selected in the Type field on the Basics tab. Select On to enable the Edit link for Hyperlink-type custom fields on mySupport. Note: On is the default value; when off, the default text and URL are validated and the Edit link is hidden in mySupport.

Editable On Existing Incidents/Changes - Select On to enable the custom field to be edited by customers with the mySupport Custom Fields Editor permission. Note that you can use the Allow Edit field in the Configure Field dialog for custom fields on mySupport display layouts to disable/enable an individual Customer Profile custom field to be edited by customers with the mySupport Custom Fields Editor permission.

Select mySupport Portals with Access - If the mySupport Access field is enabled, select the predefined mySupport portal interfaces on which the custom field can appear. Note: If custom fields are associated with more than one level of a selected category set, the fields for all levels will display.

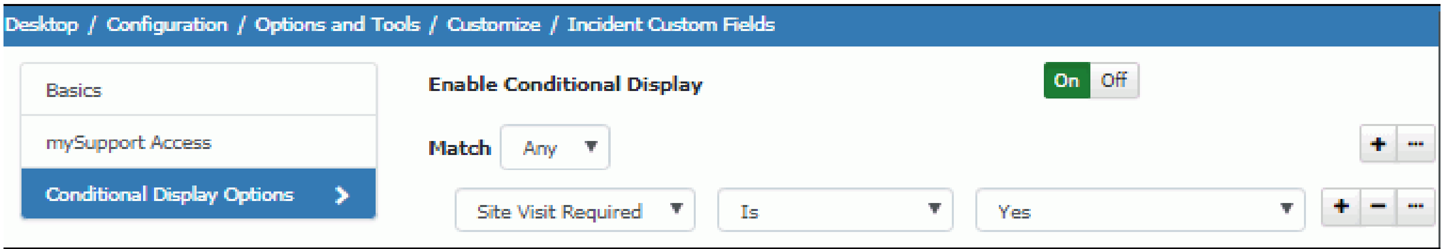


Setting Advanced Options

Disable Manual Entry of Date Time Custom Fields - Select Yes to require that users only select from the calendar popup for Date and Date Time custom fields.

Conditional Display Options

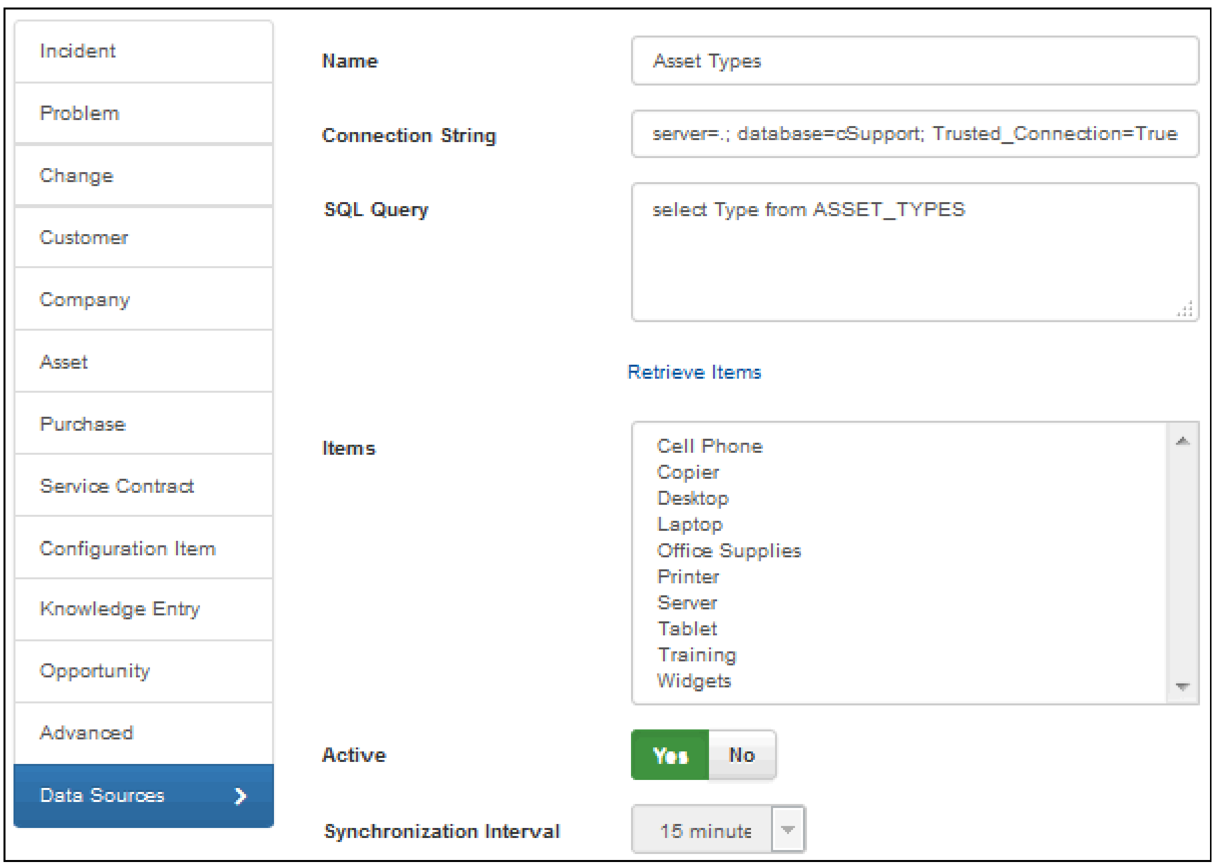
Enable Conditional Display - Select On to enable the Conditional Display Options fields for configuring conditions on which to base display of the custom field.



Use the Match *<All/Any>* field to specify whether you want **every** *<field>* is *<value>* search condition to be met, or **any** configured condition to be met. Use the Add Condition and Remove Condition options to display and remove a *<field>* is *<value>* search condition. Select the Add Condition option if you wish to include another condition. You can use the Add Condition Group option to put a set of search conditions to be evaluated together in a group.

Pulling From a Data Source

You can map to a SQL data source and populate and synchronize options for list-type custom fields. Use the Data Sources tab in the Custom Fields screen to create a custom field data source definition, enter a connection string and SQL query, and specify the synchronization interval.



Name - Enter a name for the SQL Server source definition. This name will appear in the list that can be selected in the Data Source field in the Custom Field Definition dialog (if a list-type format is selected in the Type field).

Connection String - Enter the connection string for accessing the source database.

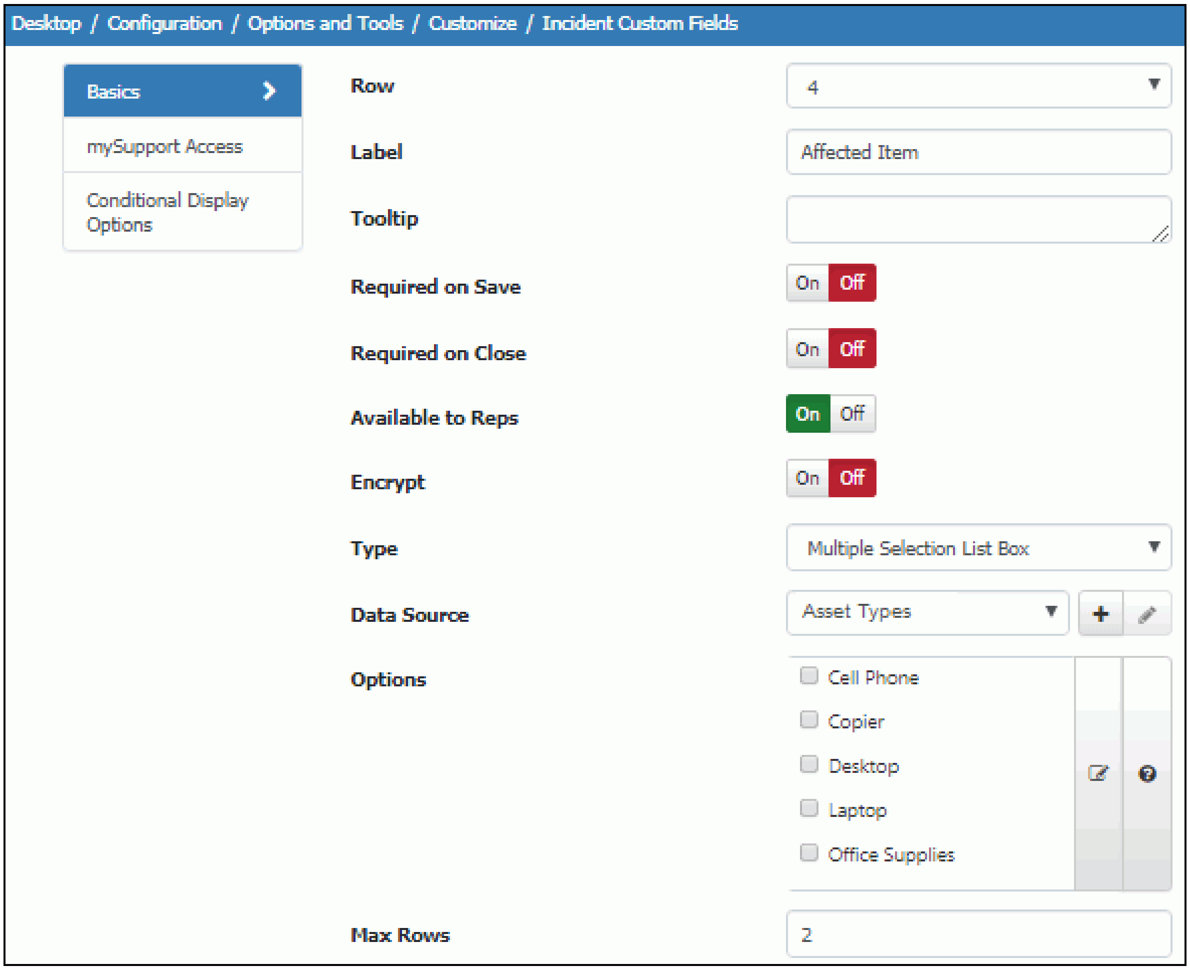
SQL Query - Enter the SQL query string for accessing the field options in the SQL database. Select the Retrieve Items button to populate the Items field using this string.

Active - Select Yes to enable synchronization and update the Options list for a custom field with the information in the SQL source database.

Synchronization Interval - Select the number of minutes in the interval for the synchronization to be performed.

Using the Data Source for a Custom Field

After saving, the custom field data source definition will be available for selection in the Custom Field Definition dialog. The Options field will be populated and will not be editable after synchronization.



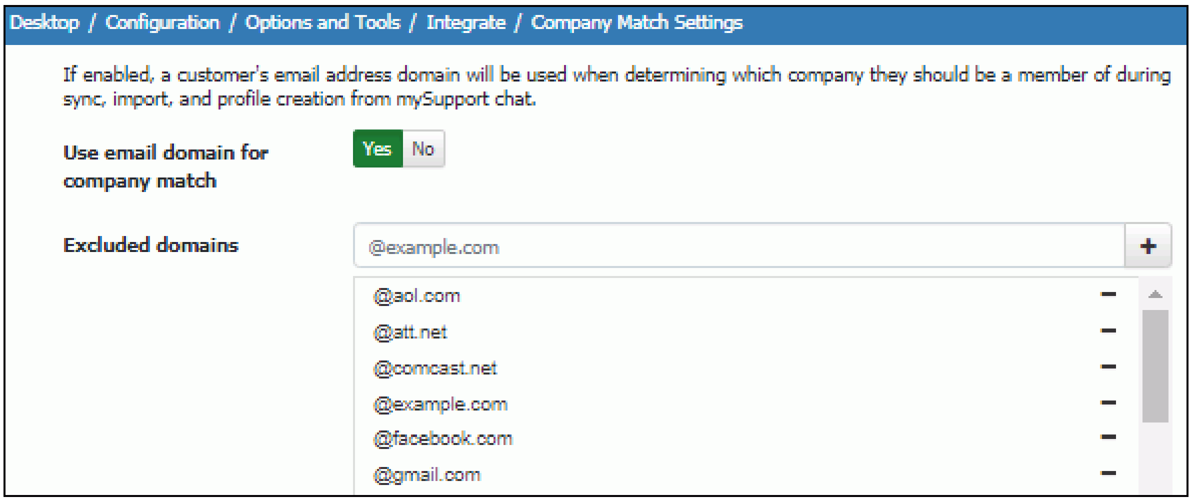
Configuring Company Match Settings

Use the Options and Tools | Integrate | Company Match Settings screen to, during customer synchronization and import, enable a check to be performed for existing customers who have email domains that match the domain part of a new customer's email address.

If matches are found, the primary company associated with the customers with matching email domains will be associated with the new customers being created. If multiple customer matches are found with the email domain and they have different associated primary companies, the matching customers will be sorted based on last contacted date and the primary company associated with the most recently contacted customer will be applied.

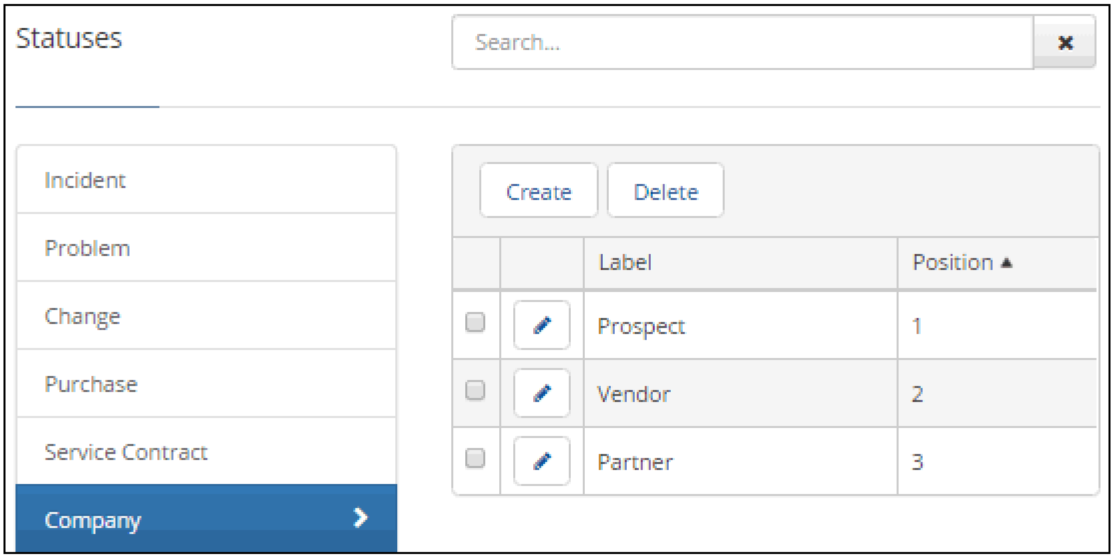
The Excluded Domains field is automatically populated with a list of known email domains that are personal in nature; you can add or remove domains from this prepopulated list. To reset to defaults you can disable, save, and then enable the email check.

If a company already existed and had an existing customer with a matching email domain, the company name in that existing record will not change and it will be associated with all the new customers. It will retain its name and the alternate company name(s) associated with the new customers in the original data source will be ignored.



Creating Company Statuses

Use the Company tab in the Options and Tools | Customize | Statuses screen to enter status labels that describe the company. These statuses are for reference purposes only.



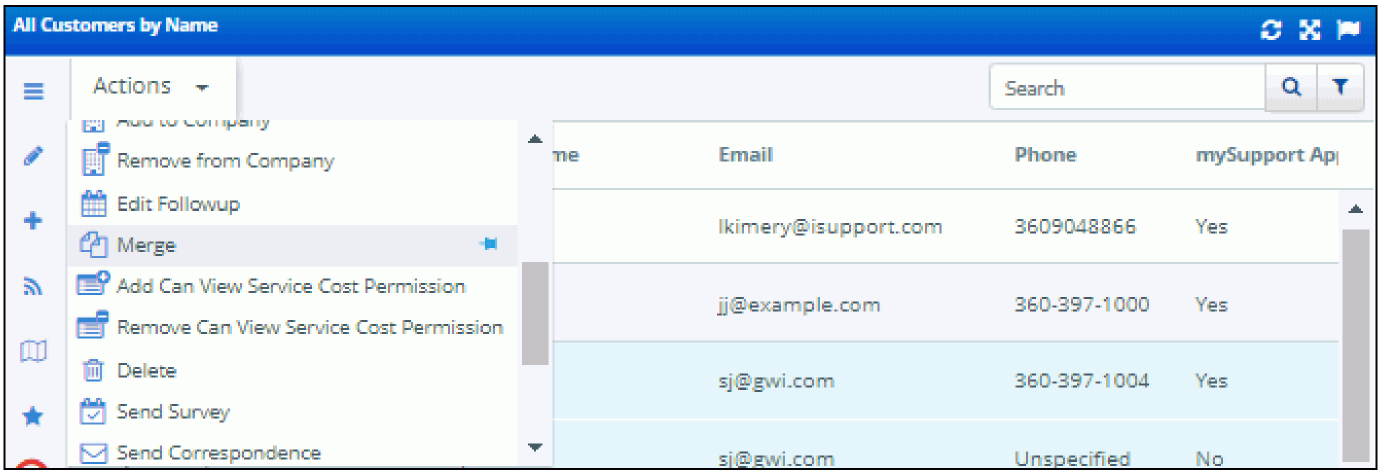
Merging Customer and Company Profiles

Use the Customer/Company Merge feature if you wish to consolidate multiple Customer or Company Profile records; for example, if multiple Customer Profile records have been created for the same person or multiple companies have merged. From a customer or company view, you'll select a master containing some or all of the data you wish to use as well as other profiles that you wish to consolidate. (Note that selected profiles other than the master will be deleted after the merge.)

See "Merging Company Profiles" on page 47 for information on merging Company Profile records.

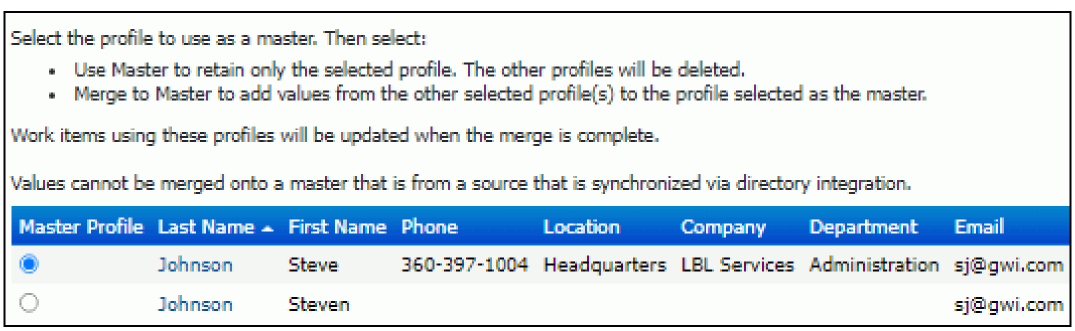
Merging Customer Profile Records

To merge multiple Customer Profile records, select the records in a view and select Merge on the view component Actions menu (this option will appear in customer and company views on the Desktop if you have the Customers | Merge permission).

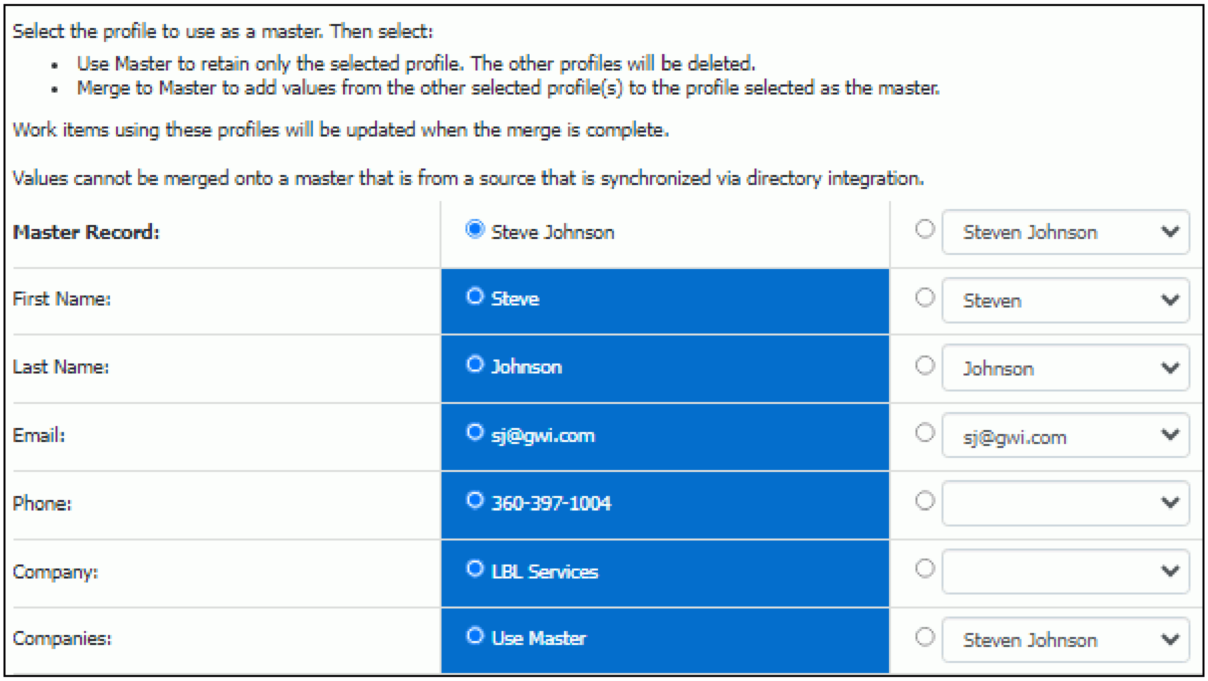


The Merge dialog appears as shown below. Select the profile you wish to use for iSupport functionality in the Master Profile column and then select one of the following options:

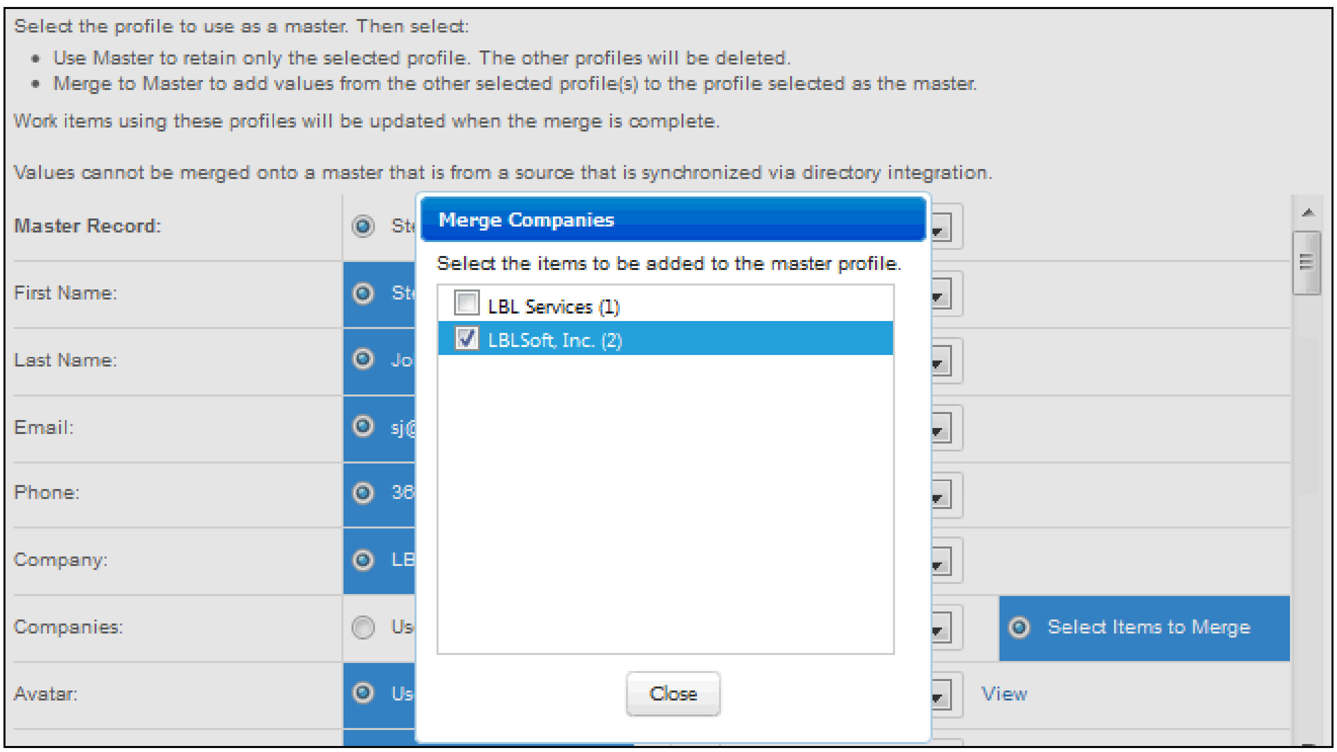
- Take Master to use only the selected profile. The other selected profiles will be deleted.
- Merge to Master to add data from the other selected profile(s) to the profile selected as the master.



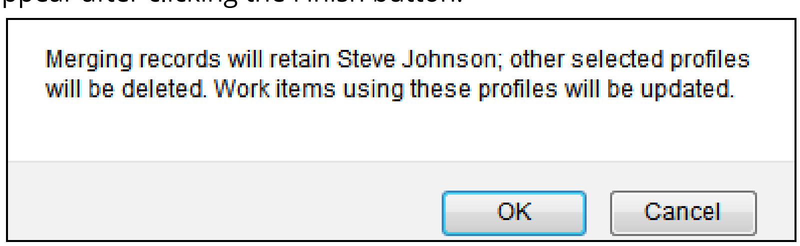
If you selected Merge to Master, the fields in each selected profile appear for selecting the data to be retained in the master profile.



If a profile contains multiple items for an entity, click the Select Items to Merge link to select the items to be added to the master.



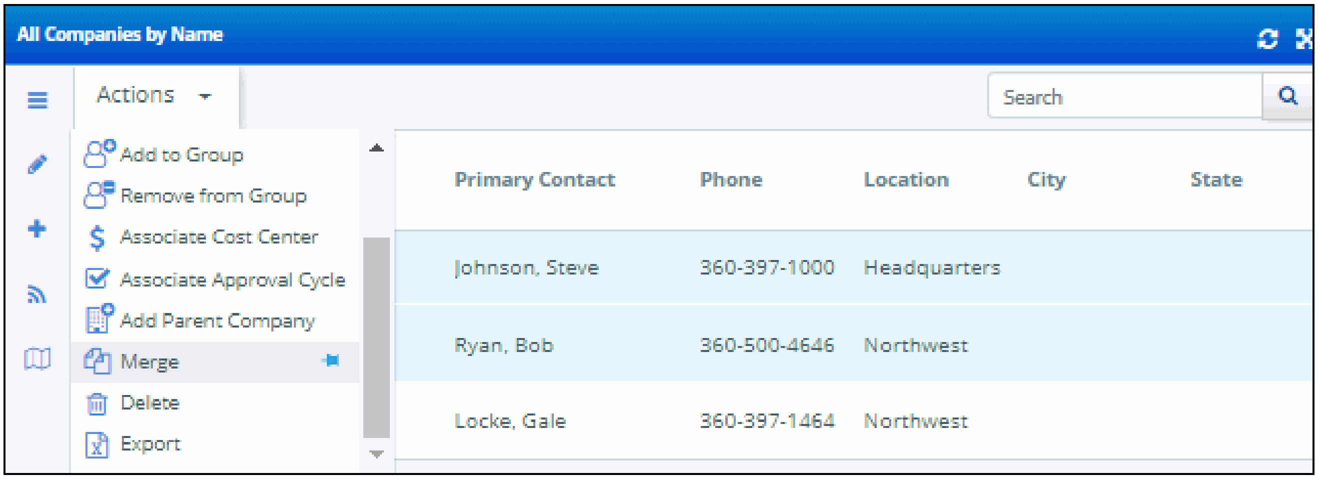
The following dialog will appear after clicking the Finish button:



After clicking OK, the master will be created and all records (incidents, problems, changes, etc.) that were associated with the other selected profile(s) will be associated with the master profile. The other selected profiles will be deleted.

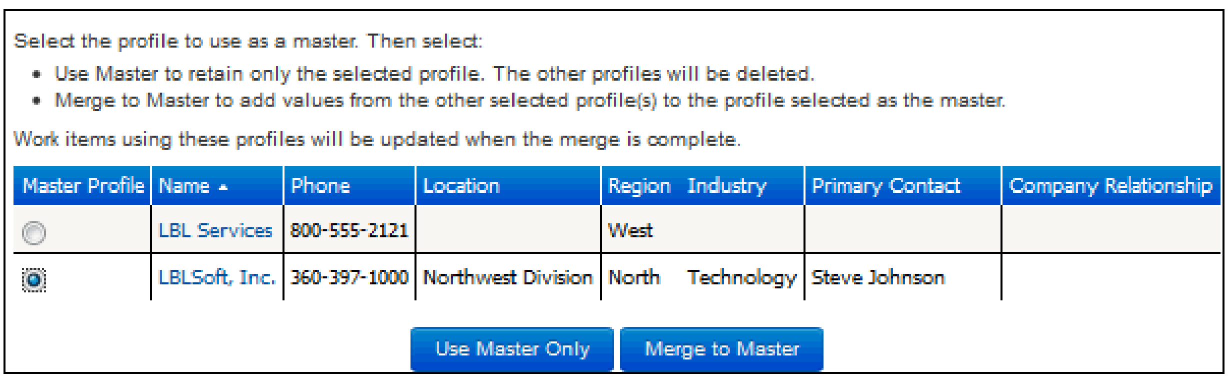
Merging Company Profiles

To merge multiple Company records, select the records in a view and select Merge on the view component Actions menu (this option will appear in customer and company views on the Desktop if you have the Customers | Merge permission).

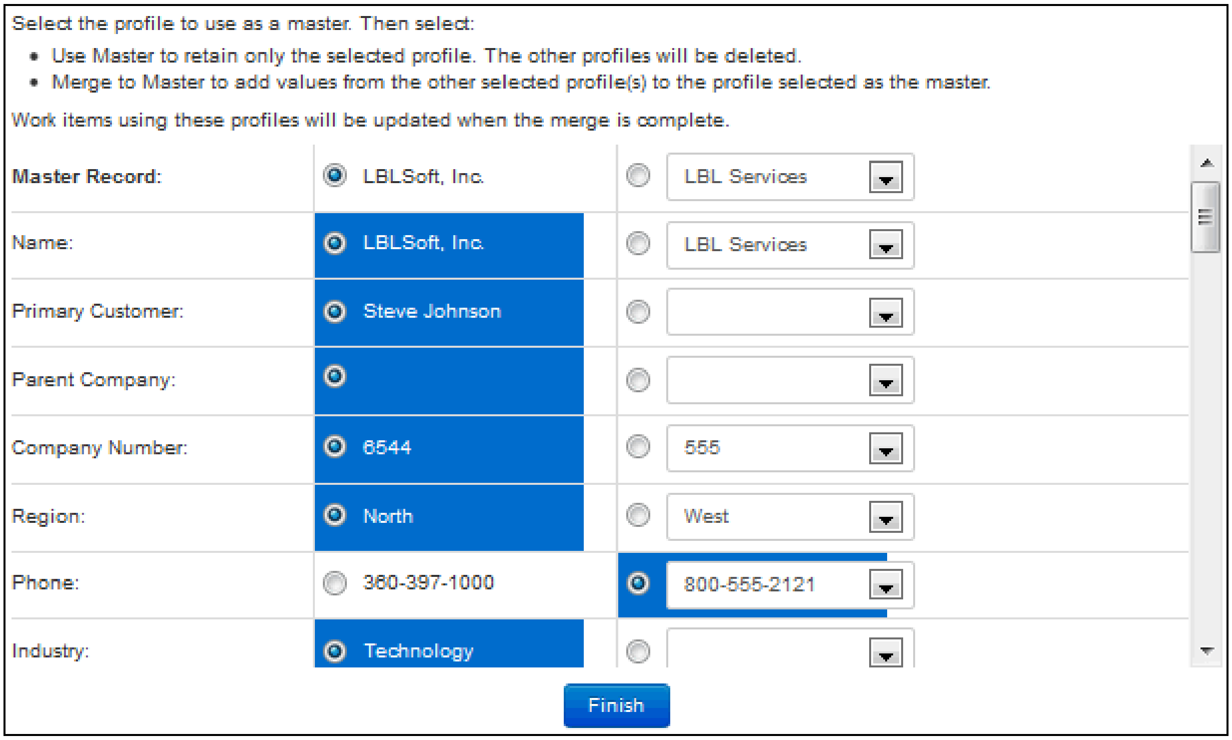


The Merge dialog appears as shown below. Select the profile you wish to use for iSupport functionality in the Master Profile column and then select one of the following options:

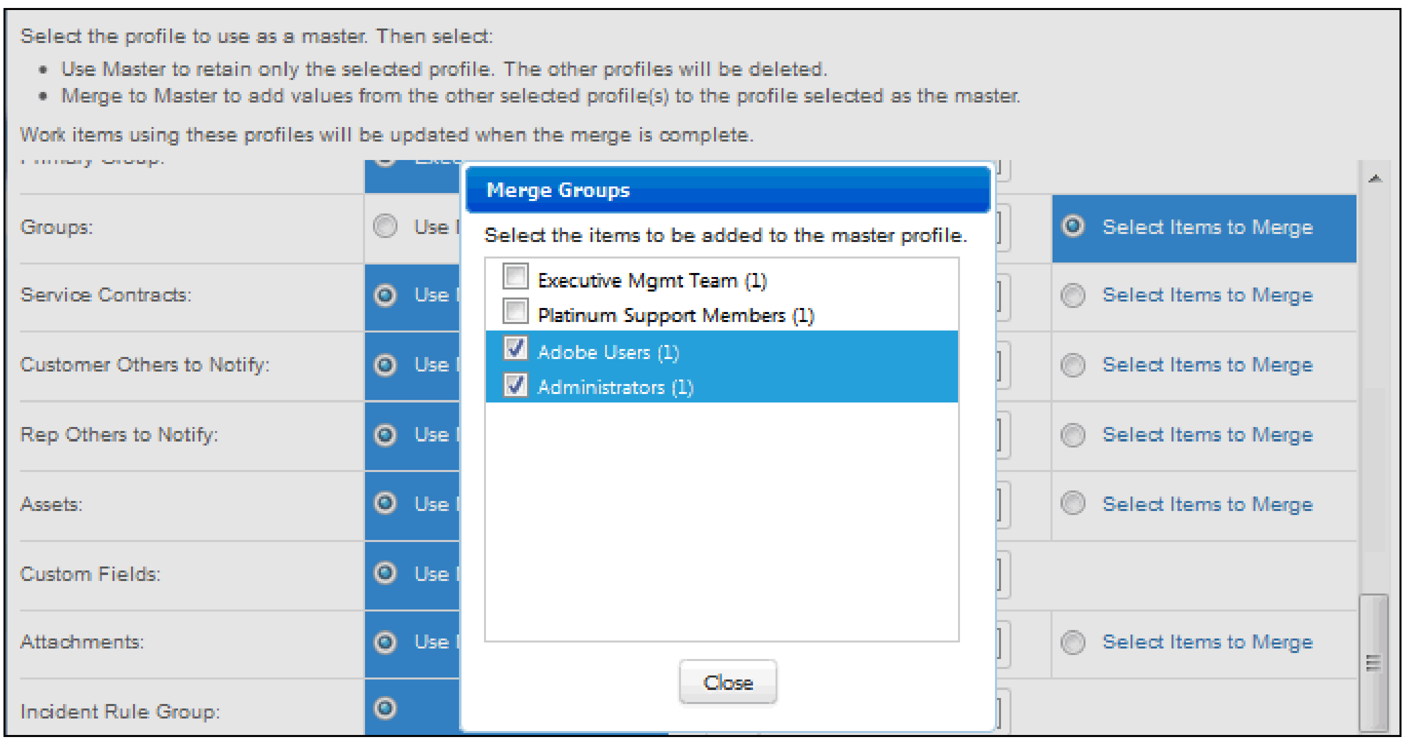
- Take Master to use only the selected profile. The other selected profiles will be deleted.
- Merge to Master to add data from the other selected profile(s) to the profile selected as the master.



If you selected Merge to Master, a dialog appears for selecting the data to be retained in the master profile.



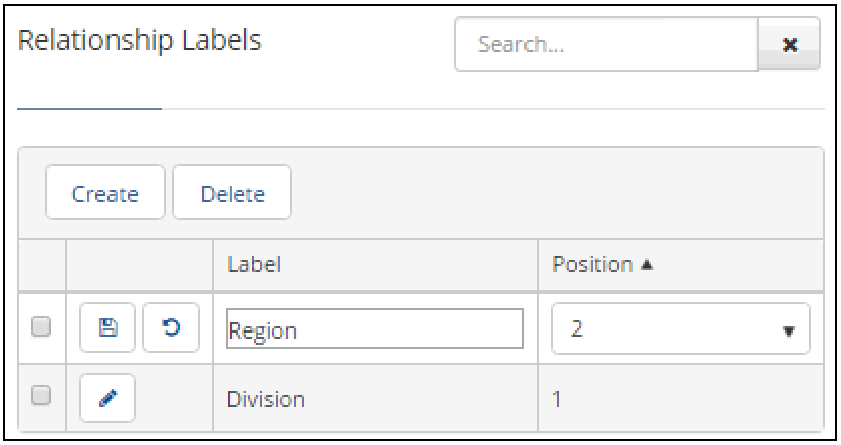
If a profile contains multiple items (such as groups) for an entity, click the Merge link to select the items to be added to the master.



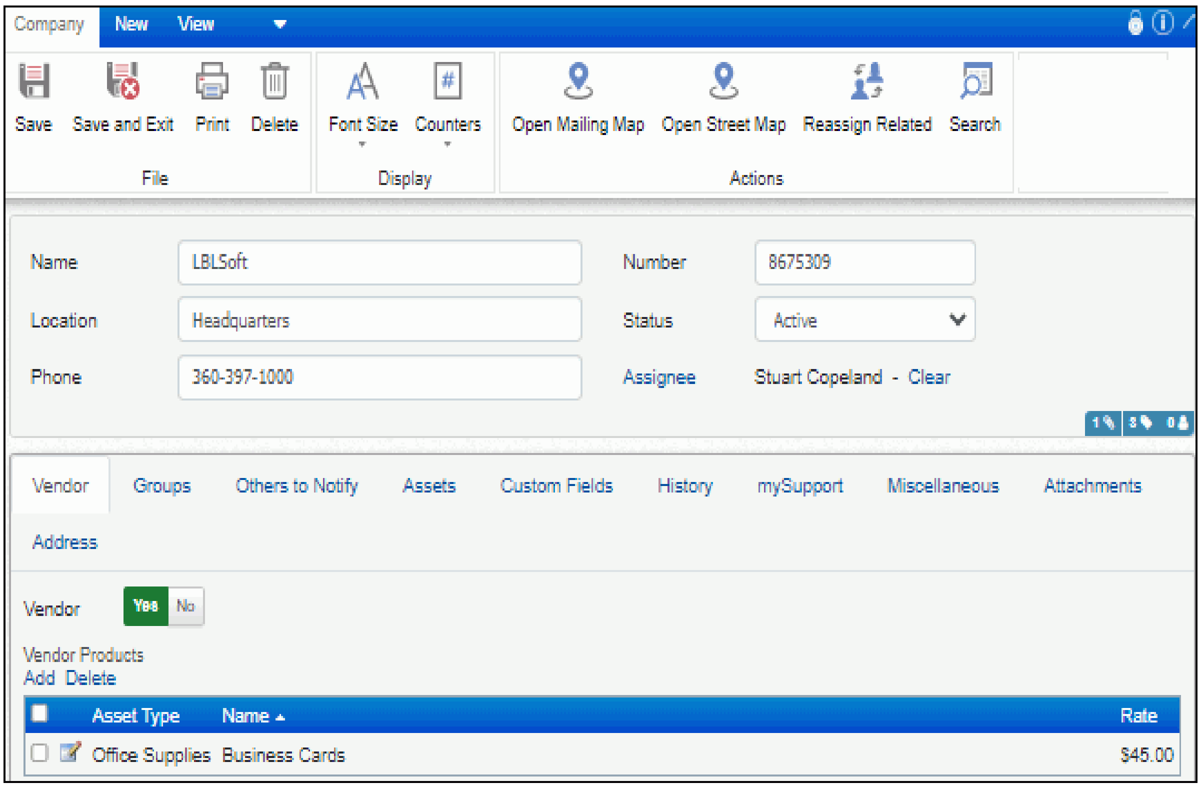
The master will be created after clicking the Finish button in the Merge Companies dialog, and all records (incidents, problems, changes, etc.) will be associated with the master profile. The other selected profiles will be deleted.

Creating Company Relationship Labels

Use the Related Companies feature to create a customizable structure of companies and assign multiple companies to customers. After enabling the Related Companies feature in the Feature Basics screen, use the Company Relationship Labels screen to define relationship labels.



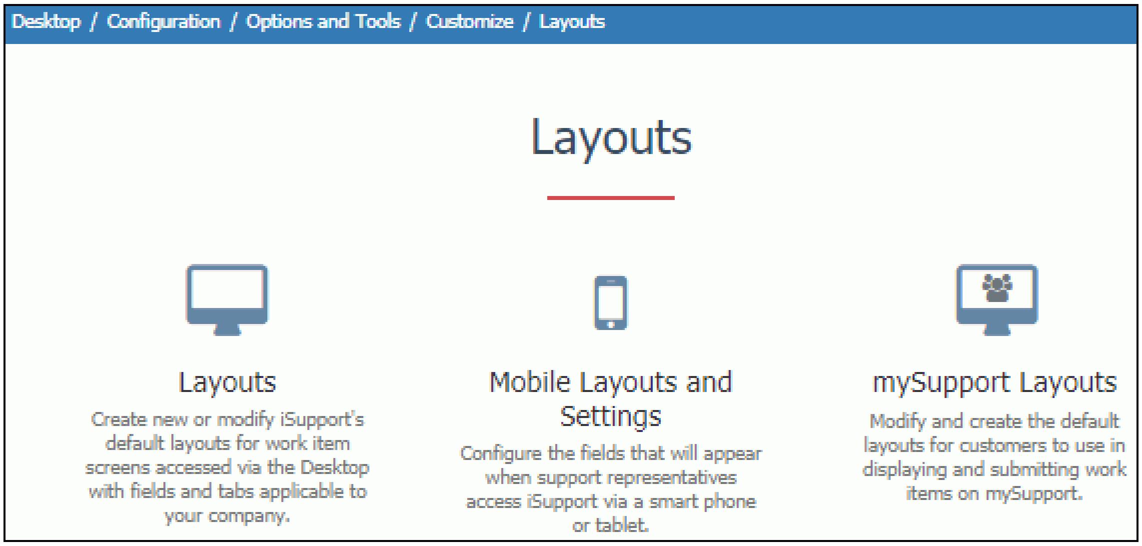
You'll use these relationships in the Company screen by clicking the Parent Company link to select a new or existing company, and then selecting a defined relationship to the current company in the Company Relationship Label field.



The structure appears when you click the View | Company Structure link in the Company screen.

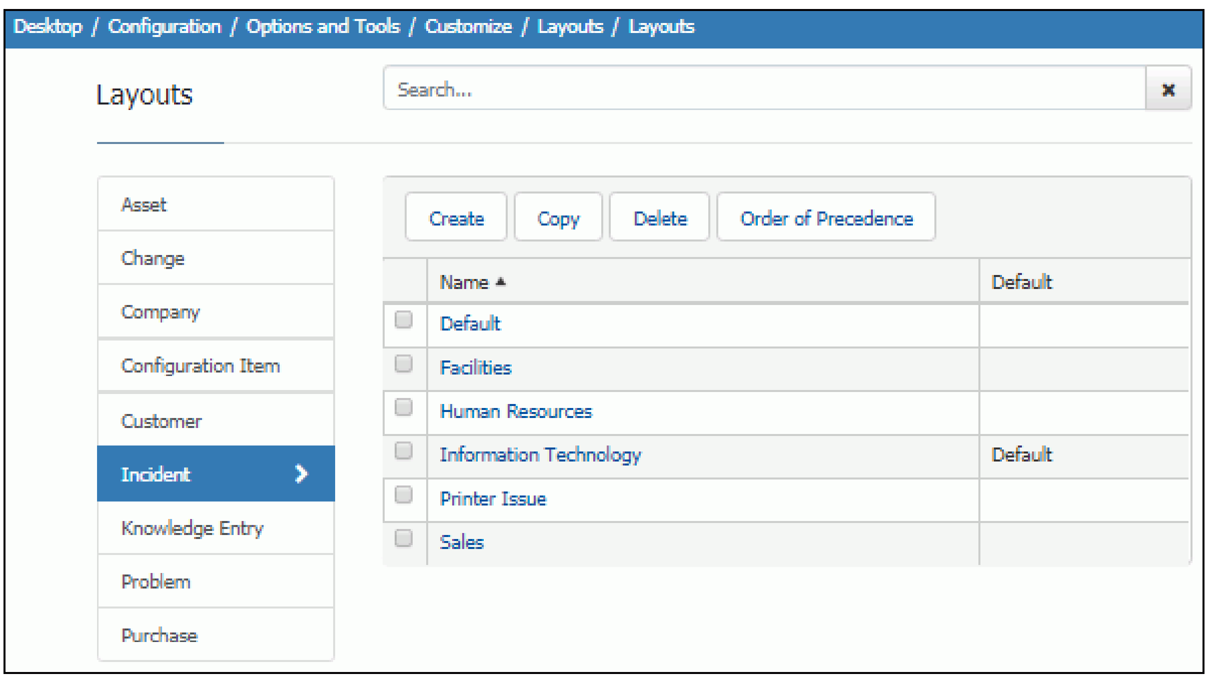
Configuring Screen Layouts

iSupport includes default layouts for the entry screens used by support representatives, the display and submit screens used by customers on the mySupport portal, and for the mobile HTML5 interface. Use the Layouts screens to modify these layouts and/or create new ones with fields and tabs that are specific to your company.



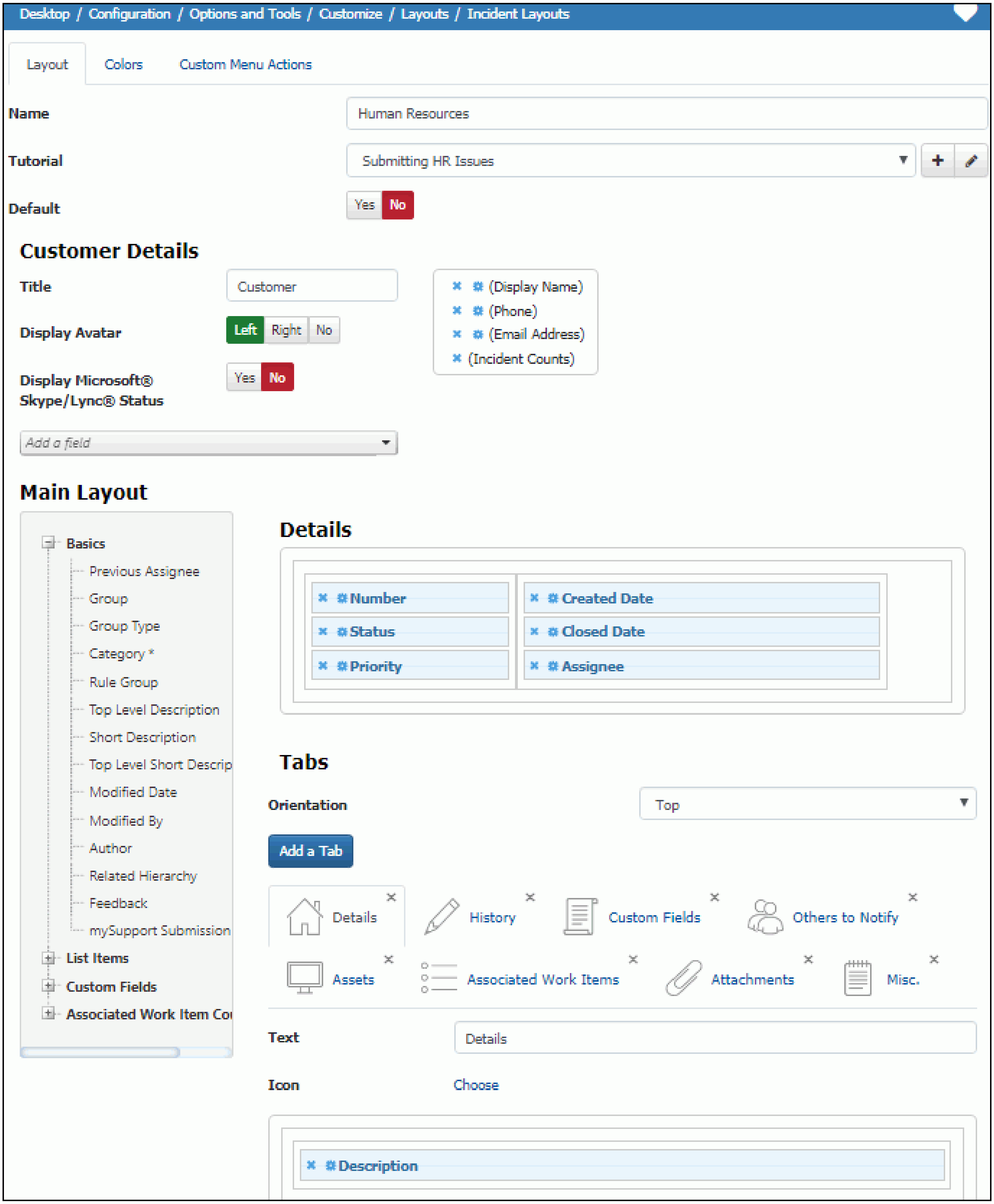
Note that only layouts configured via the Global Settings | Mobile Settings screen will apply to the mobile HTML5 interface. Also, mySupport Customer layouts will appear when the customer selects the View Complete Profile button in the Account Settings screen on a mySupport portal.

You could create layouts based on different types of users, different types of work, etc.



You can assign different layouts to different asset and configuration item types (SD Edition), and you can assign different incident, problem, and change layouts to support representative groups, customer groups, categories. For incidents and changes, you can assign different layouts to templates and hierarchy templates. More than one layout may be applicable to incidents, changes, and assets; for example, if a layout is associated with the logged in rep's primary group as well as with the selected category for an incident. Use the **Order of Precedence** link on the those list screens to specify which layout to use when more than one reference is applicable.

The Layout screen is shown below.



Use the **Tutorial** field to associate a tutorial that will display the first time the support representative accesses a screen with the layout. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can select to display an additional screen of content. Use the Create New and View/Edit options to access the Tutorials screen to create a tutorial or view/modify the selected tutorial; see the online help for more information. In that screen you can associate a tutorial with entry screen layouts, configuration screens, Rep Desktop dashboards, and mySupport dashboards.

Select Yes in the **Default** field to display the layout if none is associated with current support representative group, customer group, category, incident template, or hierarchy template.

For Rep Client layouts, you can use the Preview button at the bottom of the Layout screen after adding required fields to the form to display your layout. You'll need to select a record to use for displaying field data.

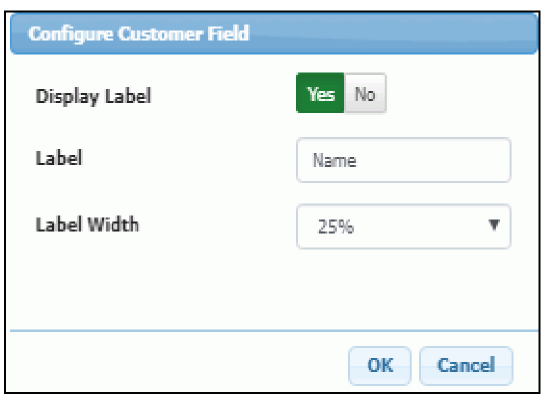
Configuring Customer Details

Rep Incident and Change Screens

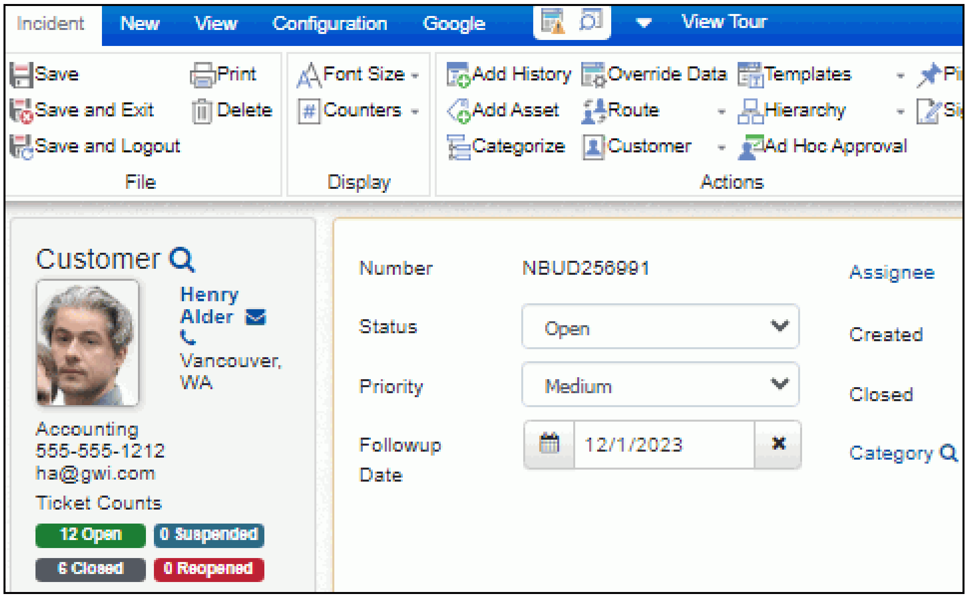
The Customer Details section will appear in the Rep Incident and Change Layout configuration screens as shown below.

Use the **Title** field to customize the text to appear to the left of the search icon in the customer section; "Customer" will appear by default.

To include the customer's avatar (uploaded via the Customer Profile screen or the mySupport portal), select Left or Right in the **Display Avatar** field. Use the Add a Field dropdown to select the fields to appear in the upper left Customer area at the top of the Incident screen. After adding a field, select Configure Field to enable or disable the field label, enter the field label, and select the field label width (which is a percentage of the column in which the field is included).



Note that the **Ticket Counts** field will include Open, Closed, Suspended, and Reopened links in the Customer section of the Incident screen as shown in the example below.

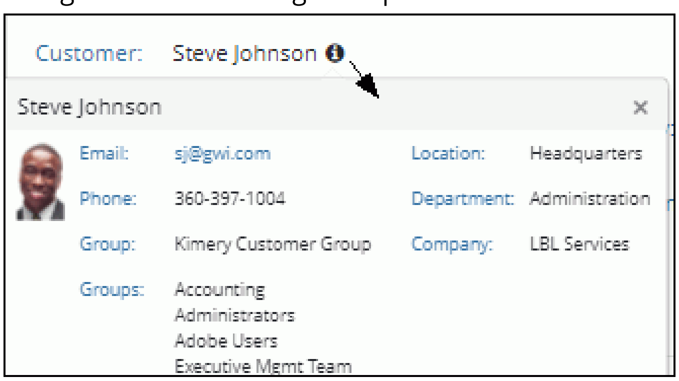


Use the **Display Microsoft® Skype/Lync® Status** field to include an icon that will display the Microsoft Skype/Lync status of a selected customer in the Incident and Change screens and enable the support representative to access Microsoft Skype/Lync functions. In order for the icon to appear, Microsoft Skype or Lync 2013 or later must be installed on your system, the support representative viewing the incident must be using Internet Explorer 10 or 11, and iSupport must be in the intranet or added to trusted sites.

mySupport Incident and Change Screens

There are two methods to include fields for customer information on mySupport portals:

- The Customer field under the Basics section; this includes an information option next to the customer's name which will display a popup dialog as in the following example:

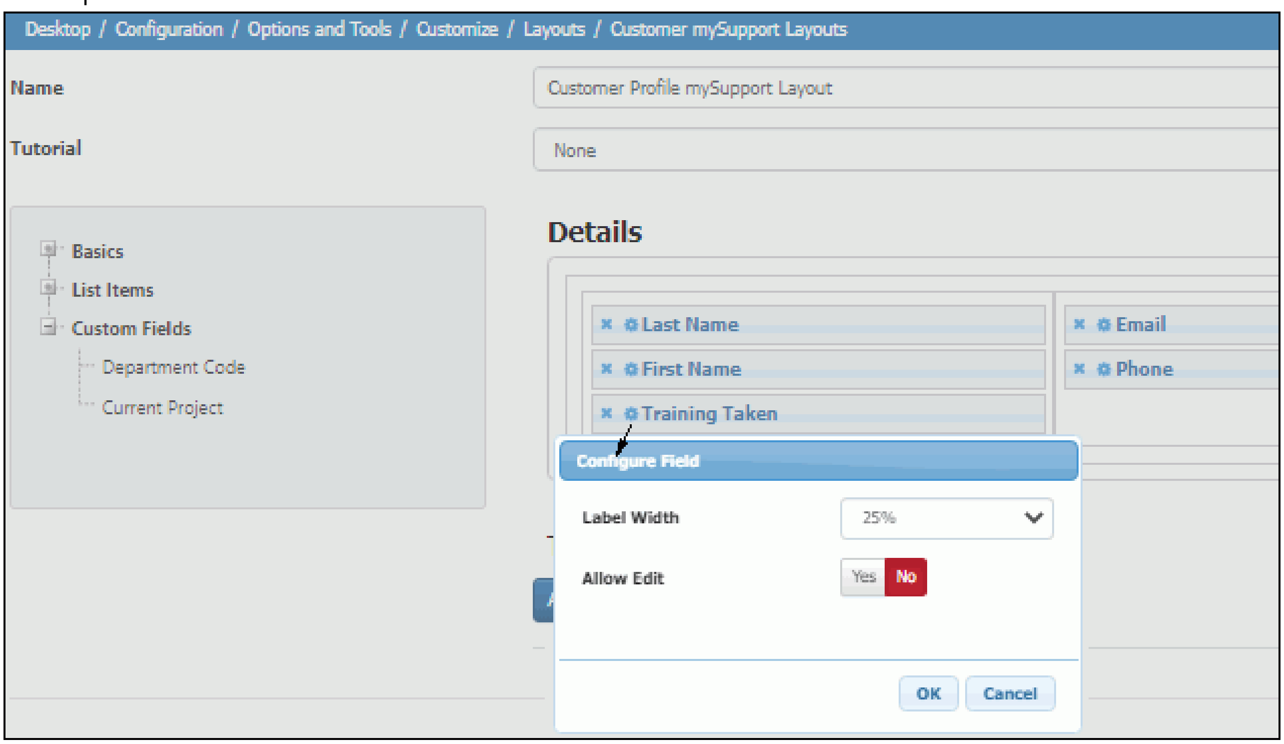


- Individual fields under the Customer Fields section

Note that the Customer Group field will display the customer's primary group, and the Customer Groups field will display all of the groups in which the customer is a member.

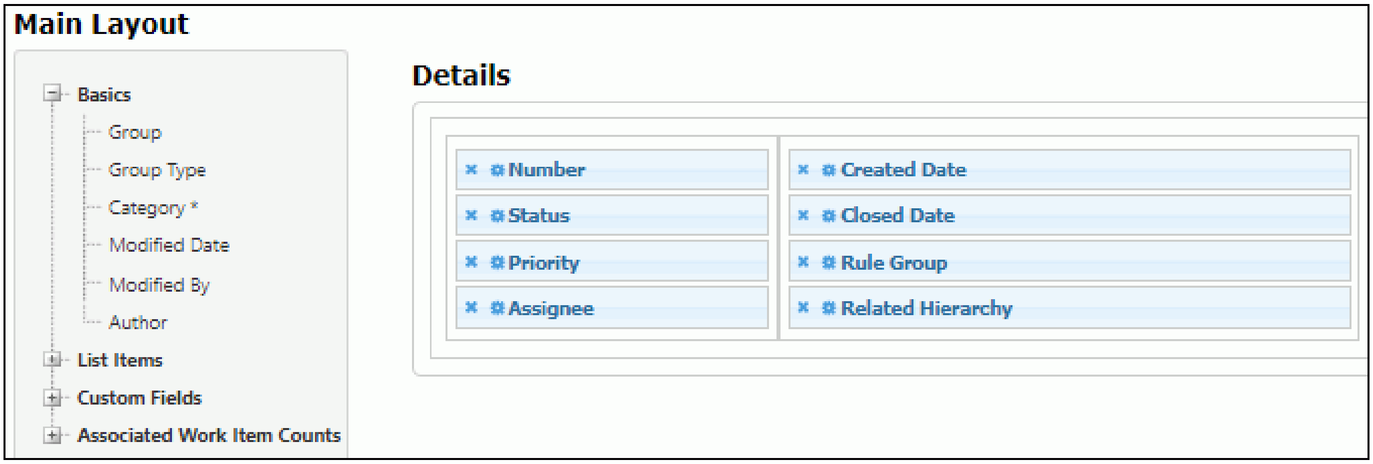
mySupport Customer Profile Custom Field Edit Access

You can use the Allow Edit field on the Configure Field dialog for custom fields on mySupport display layouts to disable/enable an individual Customer Profile custom field to be edited by customers with the mySupport Custom Fields Editor permission.

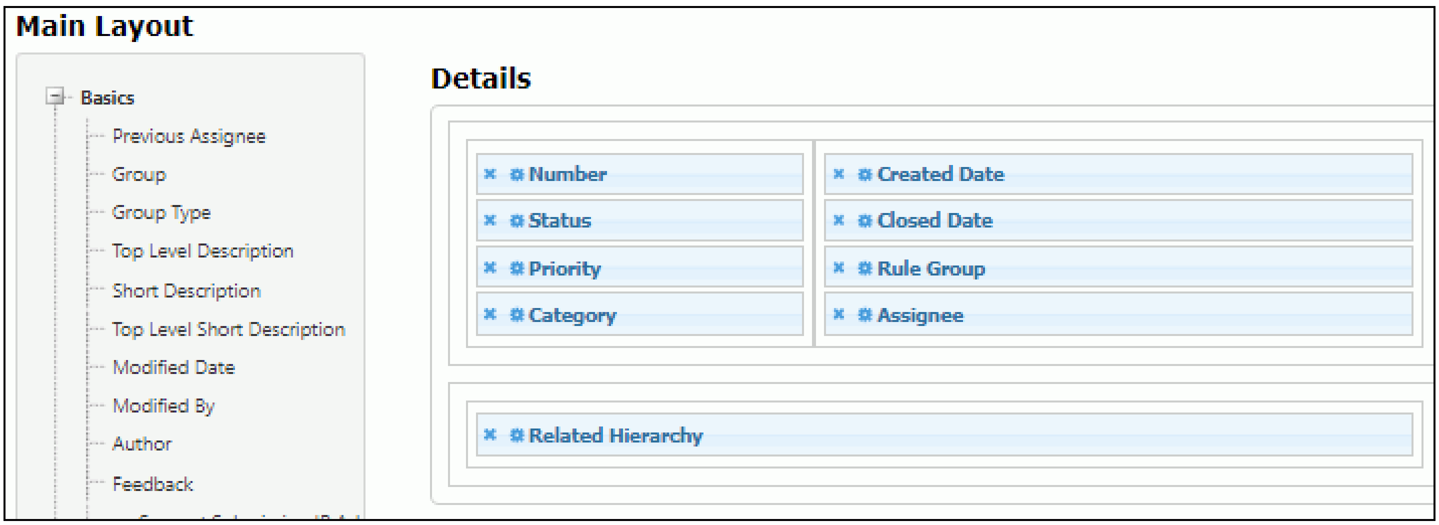


Adding Fields and Tabs

To configure the Details section in the upper right section of the resulting screen, drag fields from the selector on the left to the middle of the Details area on the Layout screen. Required fields are designated with an asterisk in the selector on the left.

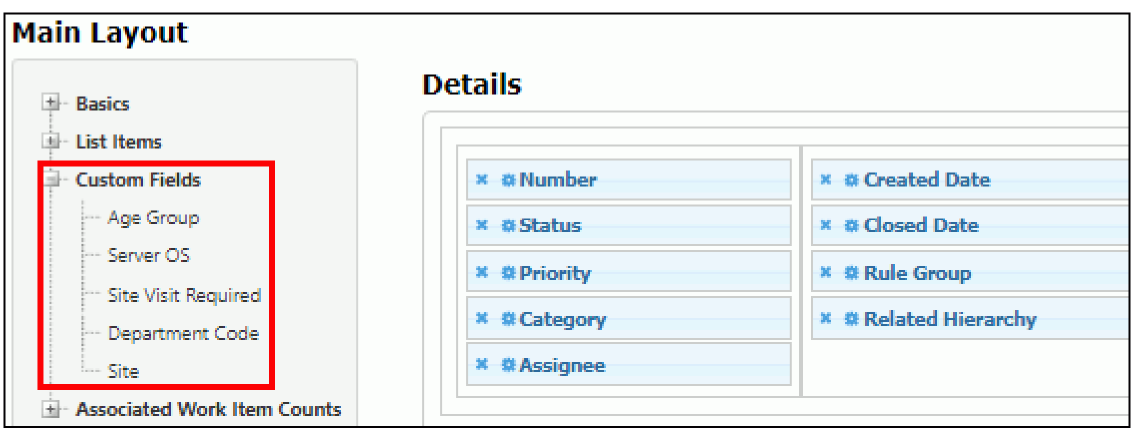


You can drag a field to the lower part of the Details section to create a subsection for a field.

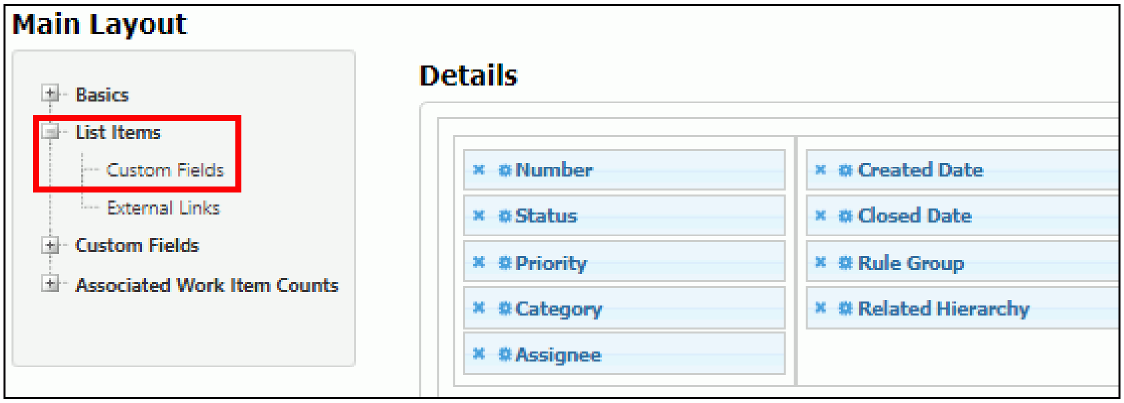


Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, or CI type. To include custom fields on a layout, you can:

- Drag the applicable global custom fields under the Custom Fields section individually:

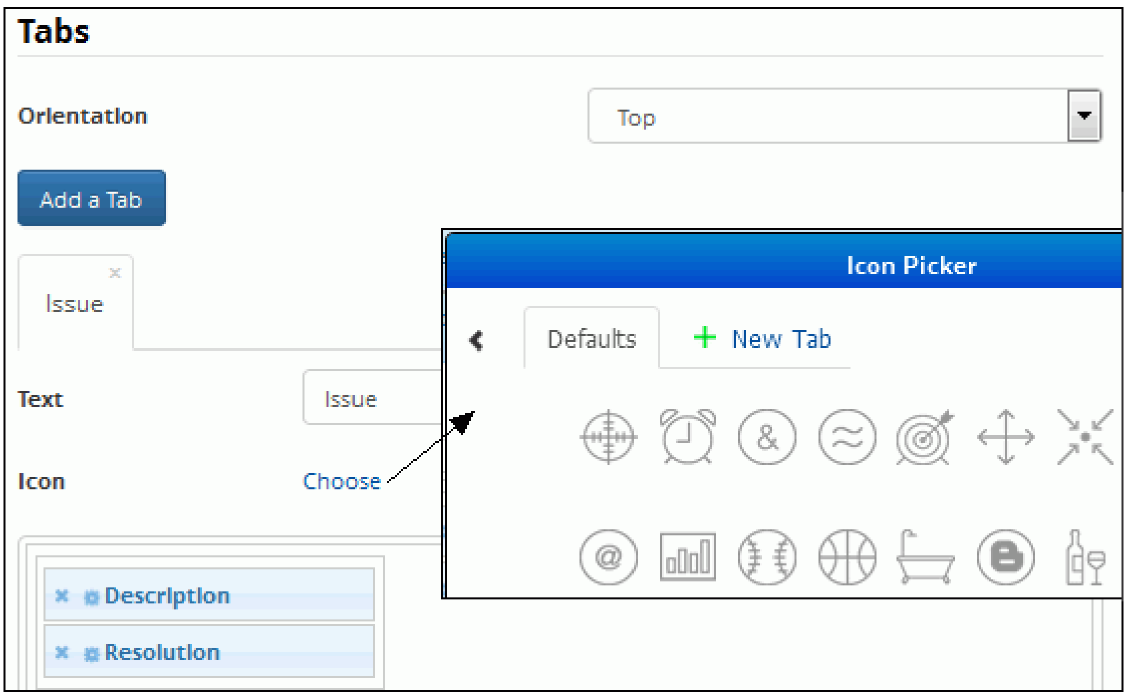


- Drag the Custom Fields field under the List Items section and then select Configure Field to display the Configure Field dialog and select the types of custom fields to include: global custom fields, additionally defined custom fields, or both. See “Configuring Fields” on page 57.

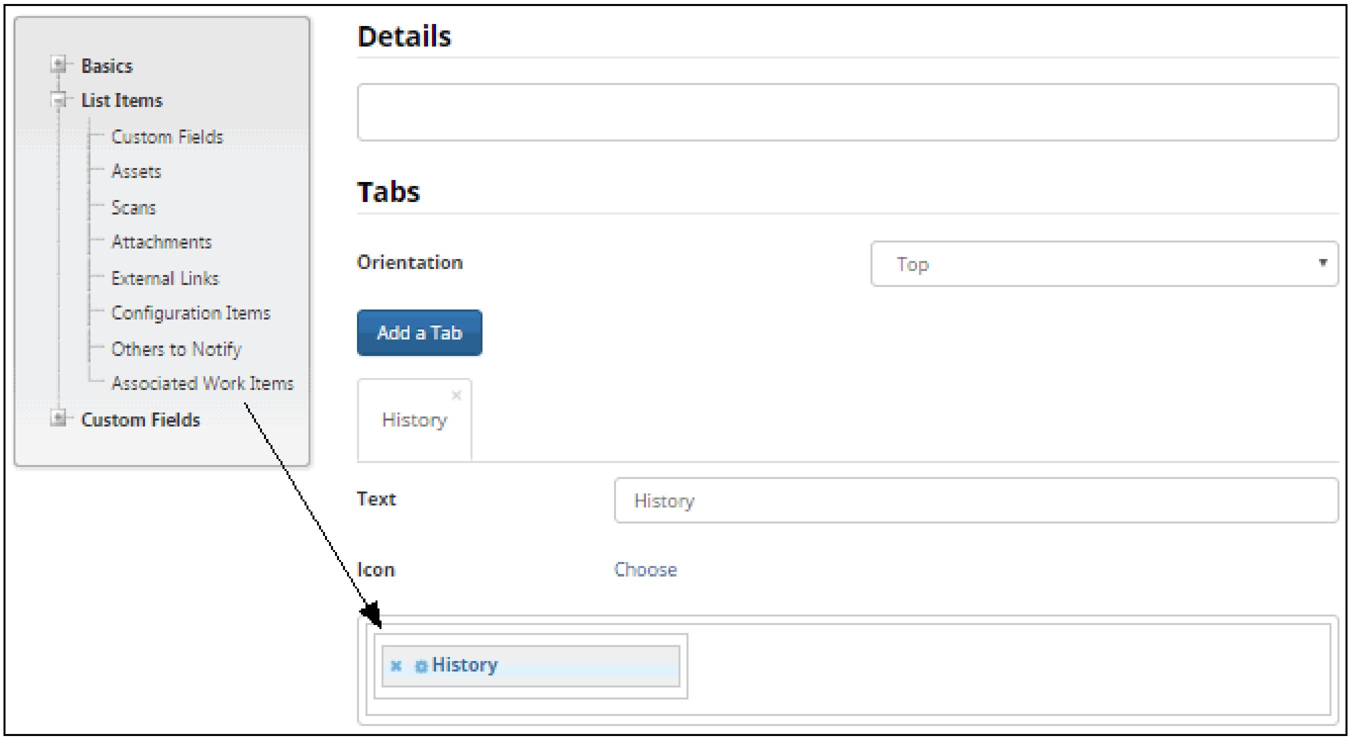


A **[Separator]** field is included for mySupport layouts; it will be blank after you drag it to the Details section or a tab. You can enter a label for it or leave it blank, and it can be used multiple times for adding blank areas to your layout. A Save Button option is included in Submit layouts; if you include it in your layout, the default Save button will still be retained at the top of the Submit screen.

Tabs can display in a row above fields or to the left of fields on the lower half of the resulting screen. To add a tab, select the Add a Tab button and then select on the new tab (named "Tab" by default). Use the Text field to enter the label for the tab. Select the Choose link in the Icon field to select a default or custom image to appear to the left of any text entered as a label. (If no text is entered, only the selected icon will appear.)



To add fields to the tab, drag fields from the selector on the left side of the Layout screen to the middle of the section below the Icon field.

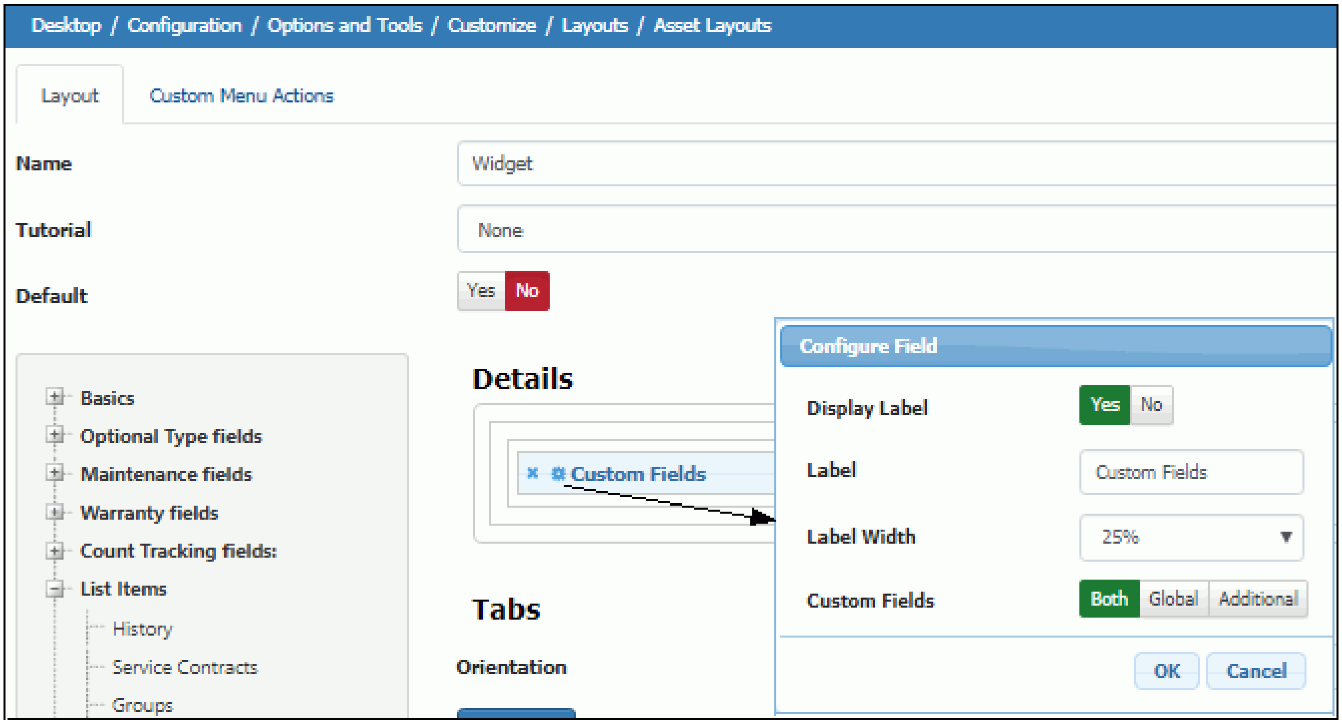


Note: The Description field is optional on mySupport incident submit layouts. The following text will be included in the Description field after submission: "Description field not included in <layout name> mySupport incident submit layout." If the layout is associated with a template, the description configured in the template, if any, will be used.

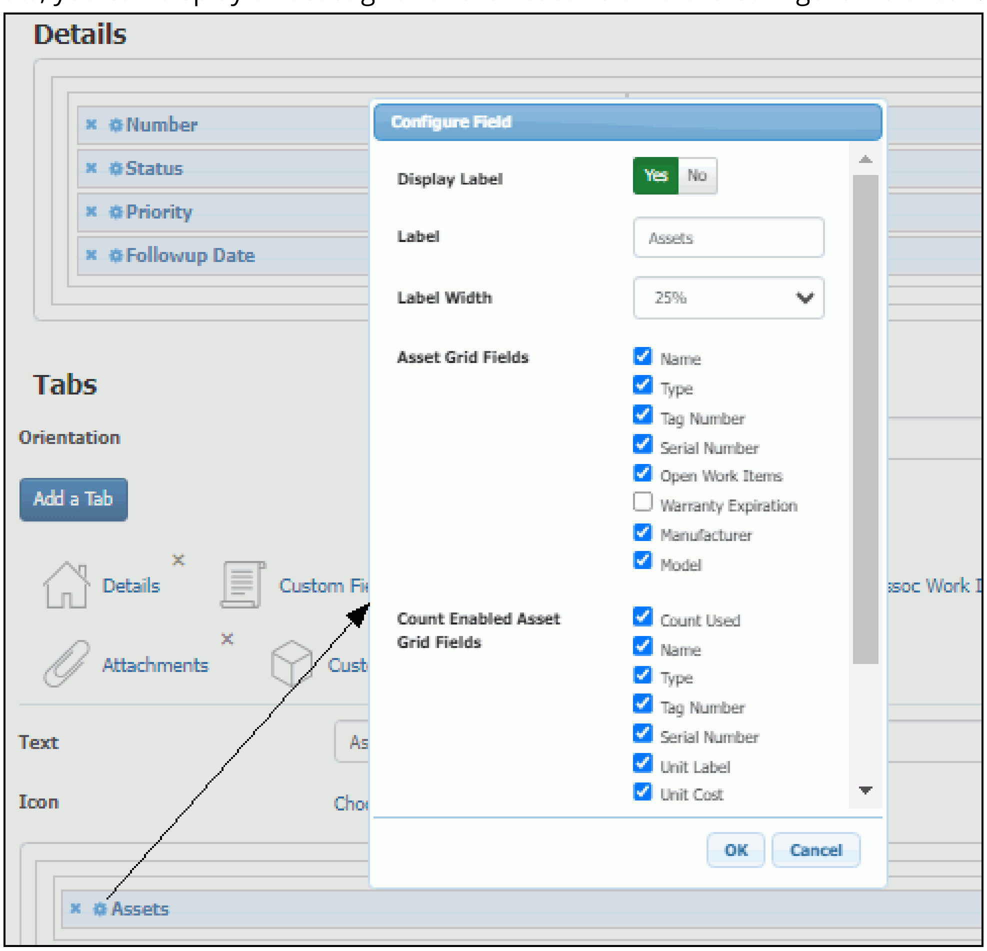
Configuring Fields

After adding a field, select Configure Field to enable or disable the field label, enter the field label, and select the field label width (which is a percentage of the column in which the field is included). Note that the label width will not be applicable on list fields that display a label above the field.

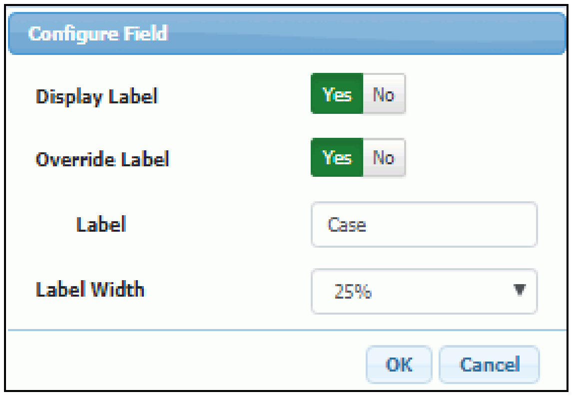
Global custom fields can be defined in the Custom Fields screen for the type of work item screen for which you're creating a layout, and additional custom fields can be defined for a category, asset type, change type, CI type, and cost center. When you drag the **Custom Fields** field under the List Items section to include all of the custom fields at once, you can control which types of custom fields to include on layouts: global custom fields, additionally defined custom fields (defined for a category, asset type, CI type, change type, or cost center), or both. Note that all custom fields that have met any conditional display conditions will be created upon mySupport work item submission regardless of whether they are included on a mySupport submission layout.



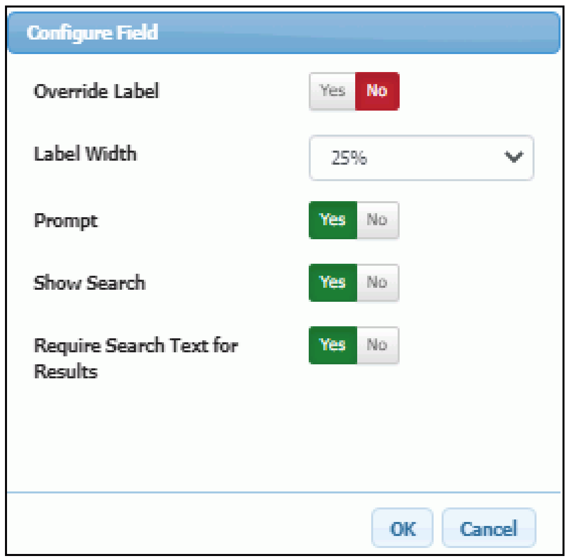
For work item layouts, you can display an asset grid for the Asset field via the Configure Field icon:



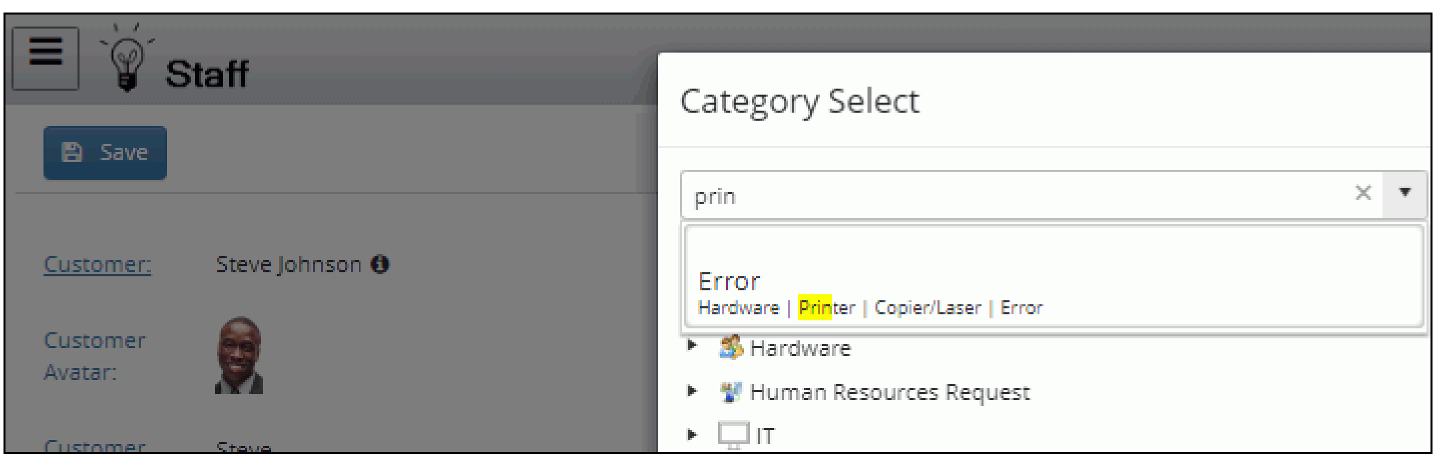
- Select Yes in the **Override Label** field to enter a field label that is different from the default. Note that this label will override any text that may be entered via the Resource Editor. See the online help for more information on the Resource Editor.



- If configuring the **Category** field:

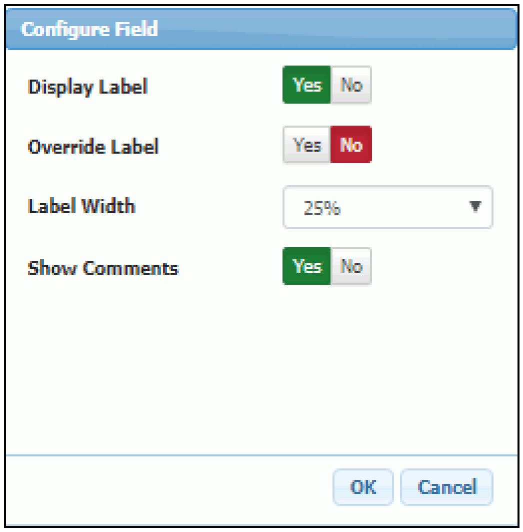


  - Select Yes in the **Prompt** field to initially display the Category Select dialog when the Incident or Change Submit screen appears.
  - Select Yes in the **Show Search** field to include a search field in the Category Select dialog.



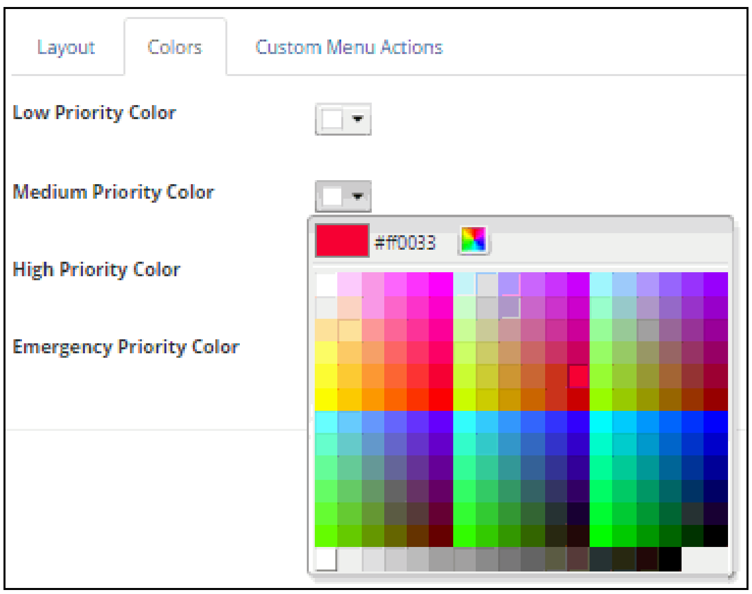
  - Select Yes in the **Require Search Text for Results** field to prevent display of the results until the user has started typing.

- If including the Assets list field, select Yes in the **Show Comments** field to control display of the Comments field that may be included (depending on the asset type).



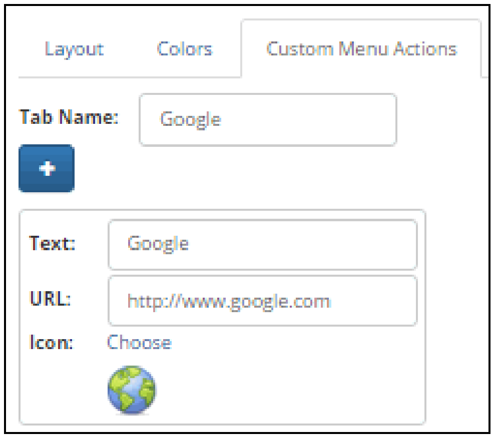
Configuring Priority-Based Background Colors

Use the Colors tab to configure the priority-based background colors for the upper portion of the Incident, Problem, and Change screens. You can choose from the color picker or input an HTML color code.

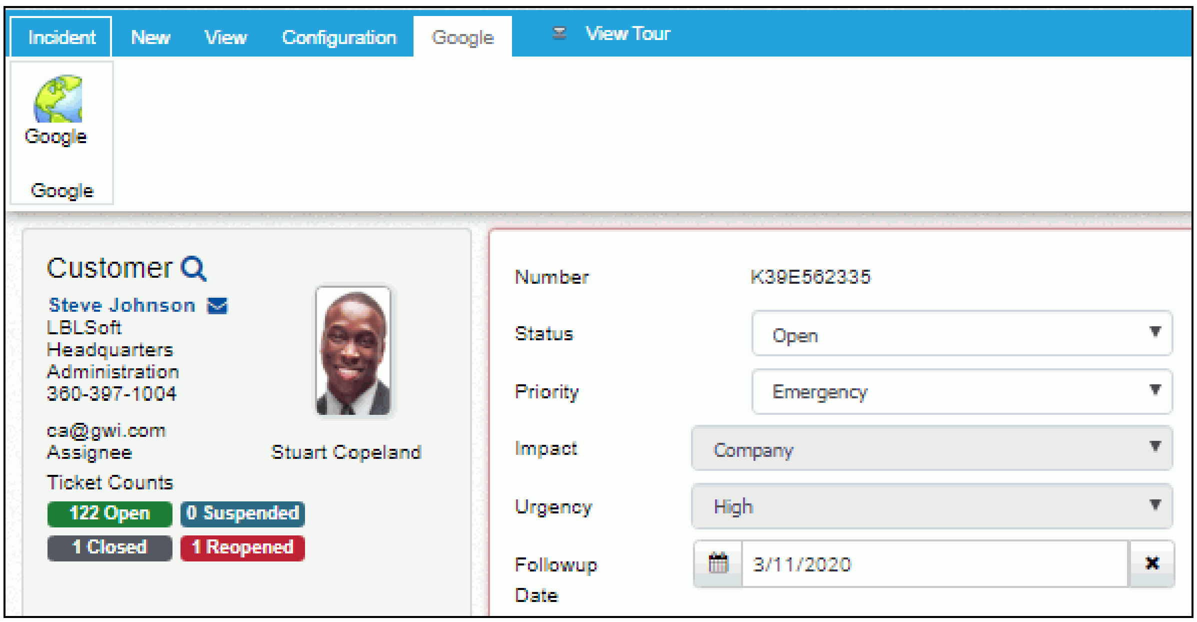


Configuring Custom Menu Actions

Use the Custom Menu Actions tab in the Layout screen to create a new tab, and link via an icon to a URL. Note that this tab and option will not appear in the work item screen until after the work item is saved because the URL will be generated with the work item ID appended to it.



Example:

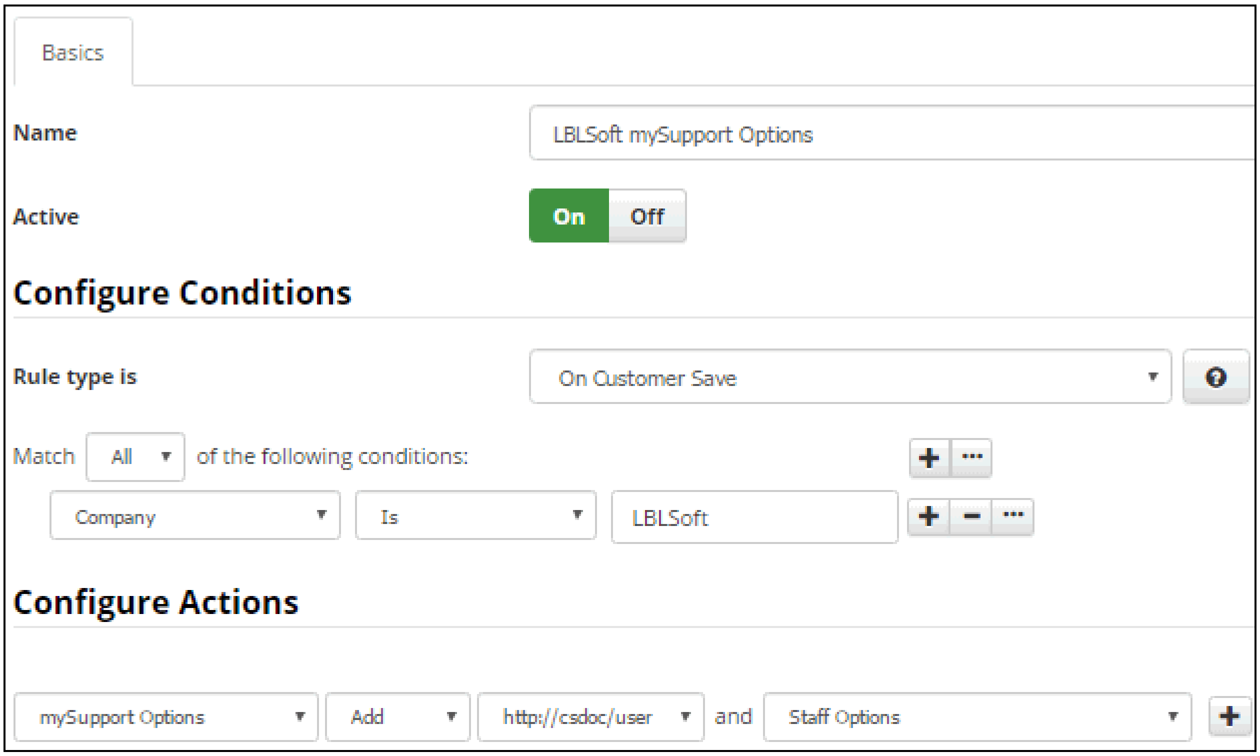


Configuring Rules for Customer Profiles

Overview

Use the Customer Rules screen to create **rules** that will perform actions when specified conditions based on Customer Profile record fields or events are met. Unlike incident and change rules, customer rules are not included in rule groups. Customer rules are evaluated when a Customer Profile is saved; if conditions are matched, their actions are performed. You can execute a rule on a one-time basis via the Run rule button. This functionality can be used to automatically:

- Change values in Customer Profile fields
- Send a notification
- Add or remove a mySupport portal URL and options



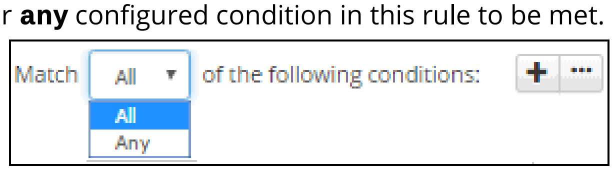
- Add or remove a mySupport portal URL and options for mobile use
- Execute a webhook for posting Customer data to a web application

Creating Rules

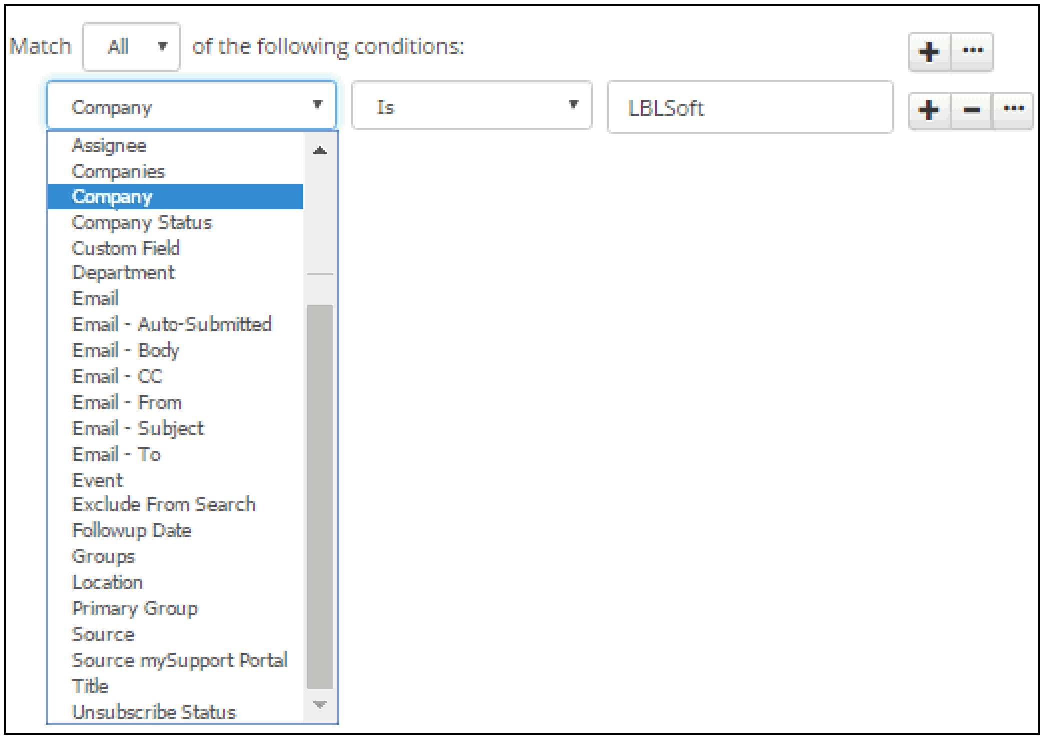
Rule creation involves entering a name for the rule, selecting one or more conditions and then selecting one or more actions to perform if those conditions are met. You can use the Active button to prevent the rule from executing after every save of a Customer Profile record.

Configuring Conditions

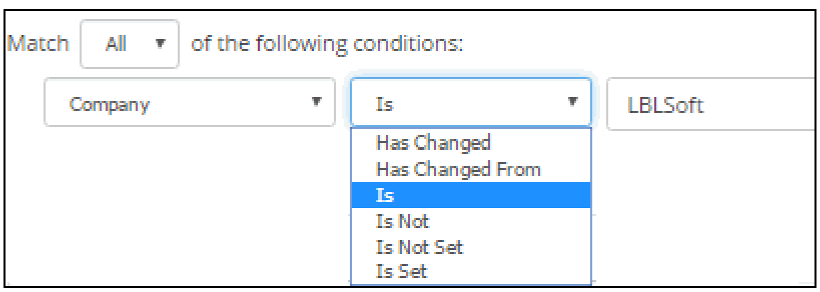
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



Use the Add Condition and Remove Condition options to display and remove a set of condition dropdown fields (a list of fields, a list of comparison methods, and a list of values applicable to the selected field) to evaluate upon save of a Customer Profile record. In the Select a Target dropdown, select the field to evaluate.



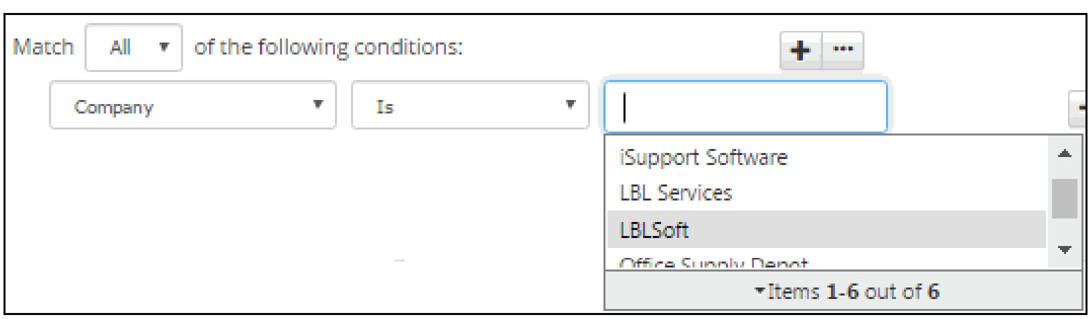
In the next dropdown, select the comparison method.



Note that:

- **Contains** returns a true result if the value is included in the field but other characters are included in a field as well; the value can be embedded in a word.
- **Is** returns a true result if the value is the only set of characters included in a field.

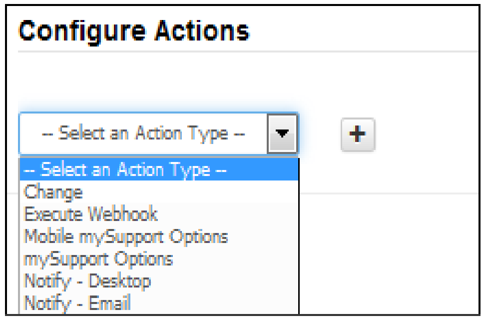
Finally, if Is or Is Not is selected as a comparison method, select the value to be used with the comparison method.



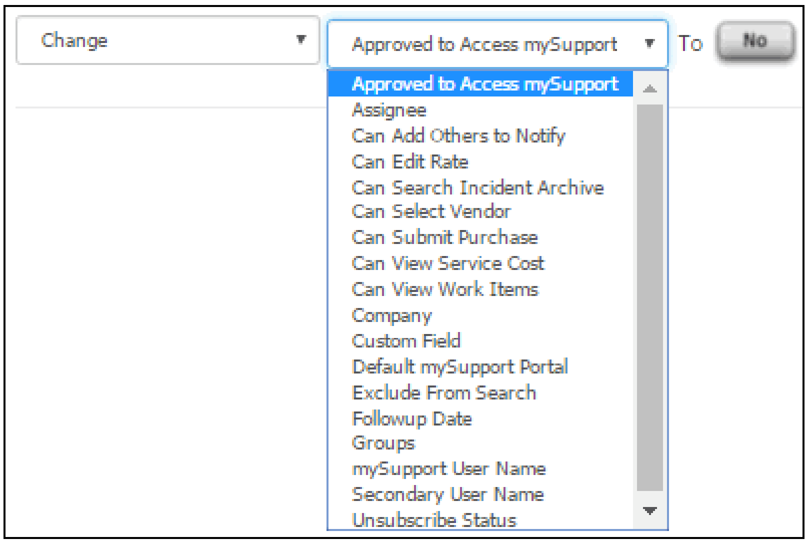
Select Add Condition if you wish to include another condition. You can select Add Condition Group to put a set of conditions to be evaluated together in a group.

Configuring Actions

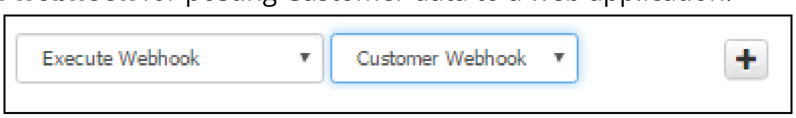
Use the Actions section to select the actions to perform when the conditions are met. After creating the first action you can select + Add Action to create another action. Select − Remove Action to remove any action lines.



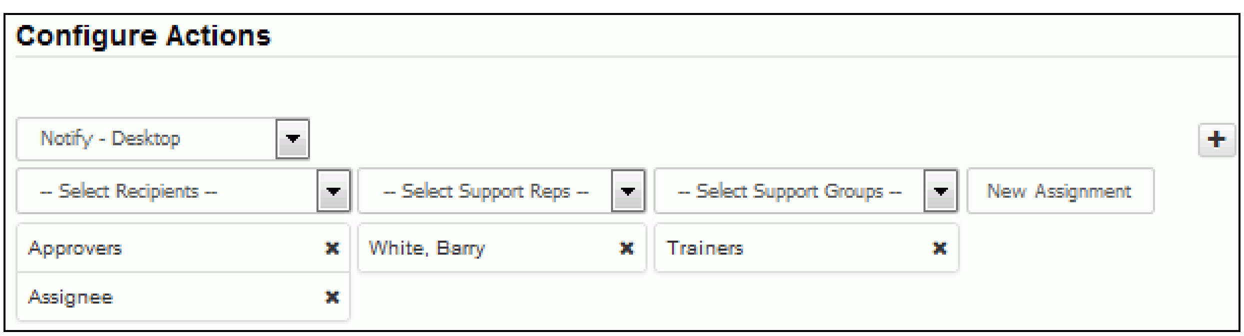
- **Change a field** by selecting Change, the field to change, and the value to change it to. For the Groups and Owners fields, there are Add, Remove, and Reset options; the Reset option will result in the removal of any existing owners or groups and addition of the one specified.



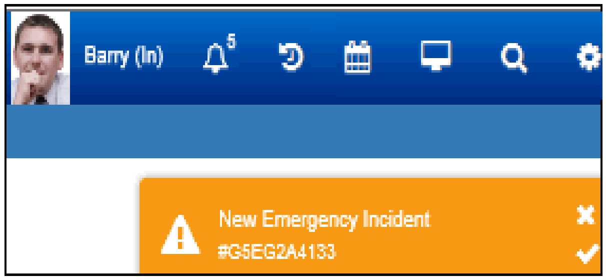
- **Execute a configured webhook** for posting Customer data to a web application.



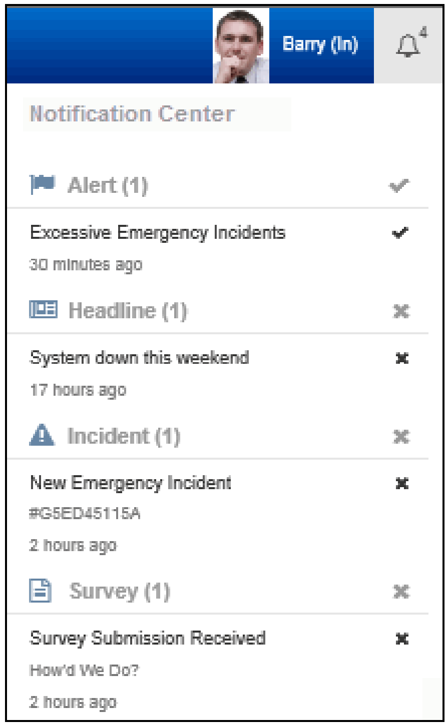
- **Send a notification** via desktop notification or email.
  - **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



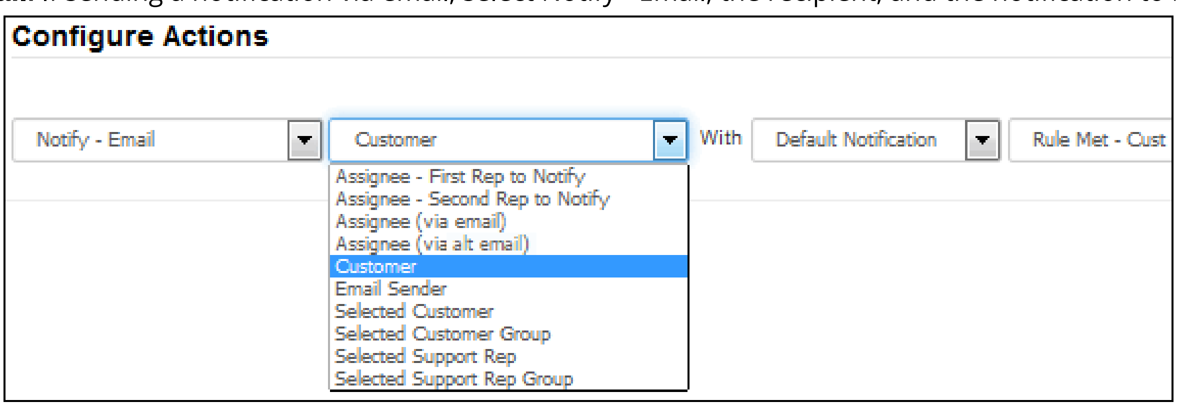
Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:



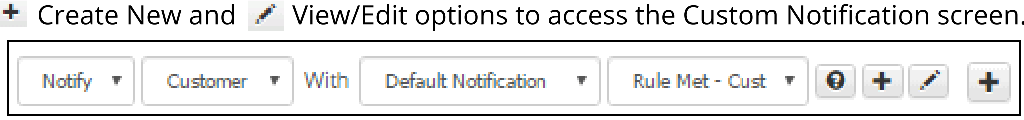
An example of the dropdown is shown below.



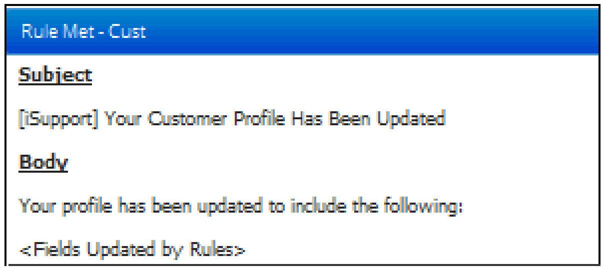
- **Email:** If sending a notification via email, select Notify - Email, the recipient, and the notification to be sent.



Use the + Create New and View/Edit options to access the Custom Notification screen.



Select Show Notification to display the contents of the selected notification.



- **Add or Remove mySupport Options** by selecting mySupport Options, Add or Remove, the mySupport portal URL, and the mySupport portal options.

- **Add or Remove Mobile mySupport Options** by selecting Mobile mySupport Options, Add or Remove, the mySupport portal URL, and the mySupport portal options to assign for mobile use.

Printing a Rule

Click the Print button to display a summary of your entries; you can click the Print link in the dialog to send the information to the printer.

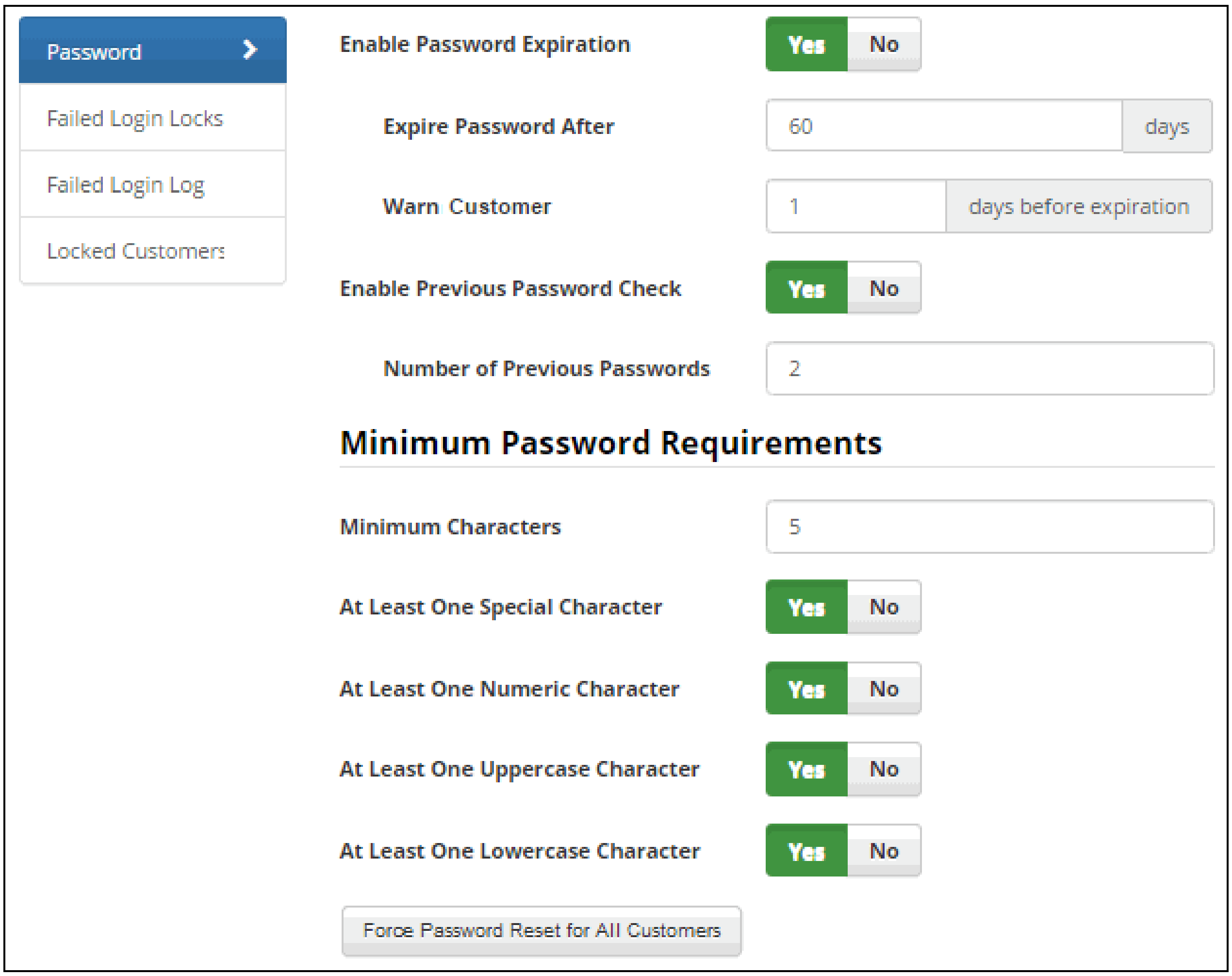
Configuring Password Complexity, Expiration, and Login Locks for Customers

If you are not using Microsoft® Windows-based authentication with iSupport, you can use the Customer Security screen to enable password security options and configure locks to prevent a customer who has exceeded a specified number of failed login attempts from logging in.

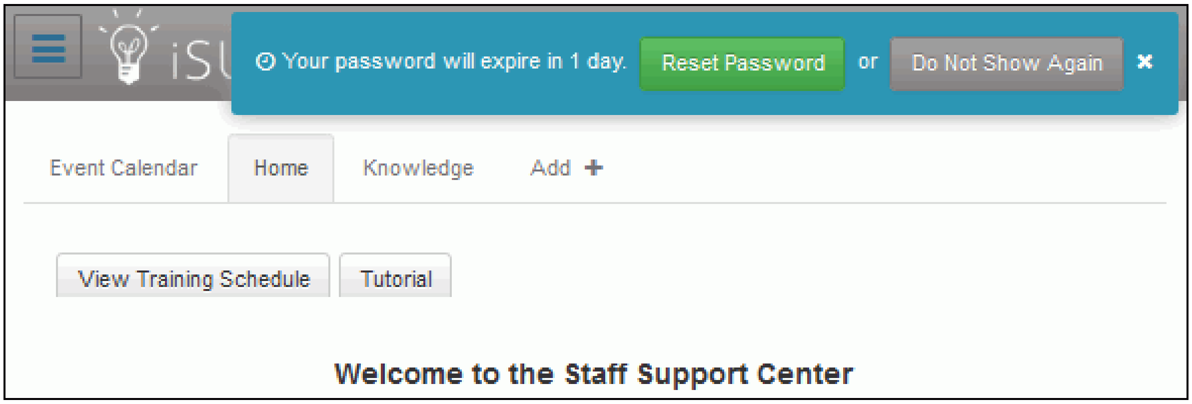
Note that CAPTCHA and multi-factor authentication can be enabled for a mySupport portal via the Login tab in the mySupport Options configuration screen; see the online help for more information.

Configuring Password Complexity and Expiration

Use the Password tab to enable a Forgot Password link, password expiration after a specified number of days, a previous password check with a specified number of previous passwords, and minimum password requirements. You can also force a password reset for all customers.



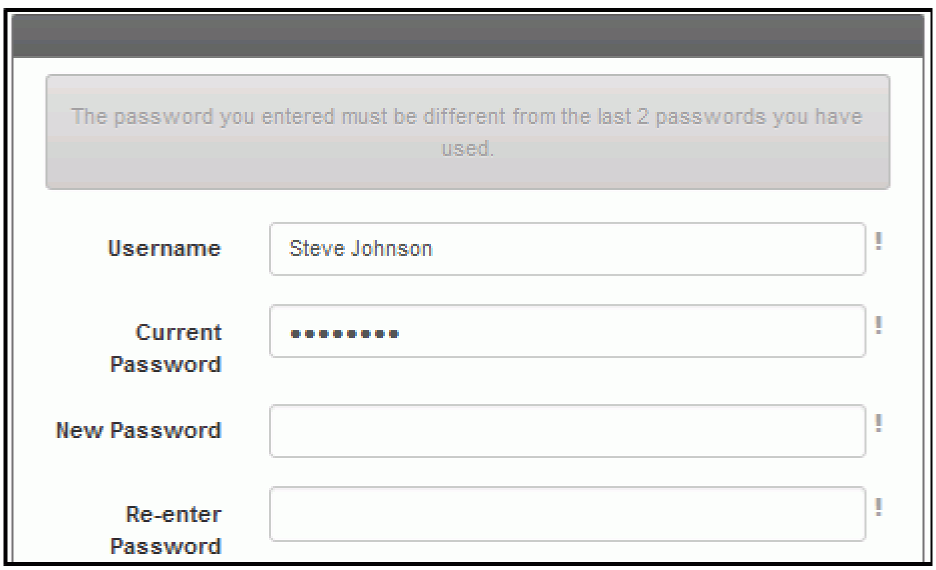
Enable Password Expiration - Select Yes to specify a number of days after which a newly entered login password will expire. The Password Expiration Warning dialog will display to the customer after every login via the mySupport portal until the configured time frame has been reached. The expiration timeframe will be based on the last time a customer reset their password or the date and time at which the Password Expiration feature was last configured. Note that expiration warnings will not appear on the mobile client.



Expire Password After *xx* Days - Enter the number of days after which a newly entered login password will expire. The expiration time frame will be based on the last time a customer reset their password or the date and time at which the Password Expiration feature was last configured.

Warn Customer *xx* Days Before Expiration - Enter the number of days before the expiration date in which to display the Password Expiration Warning dialog.

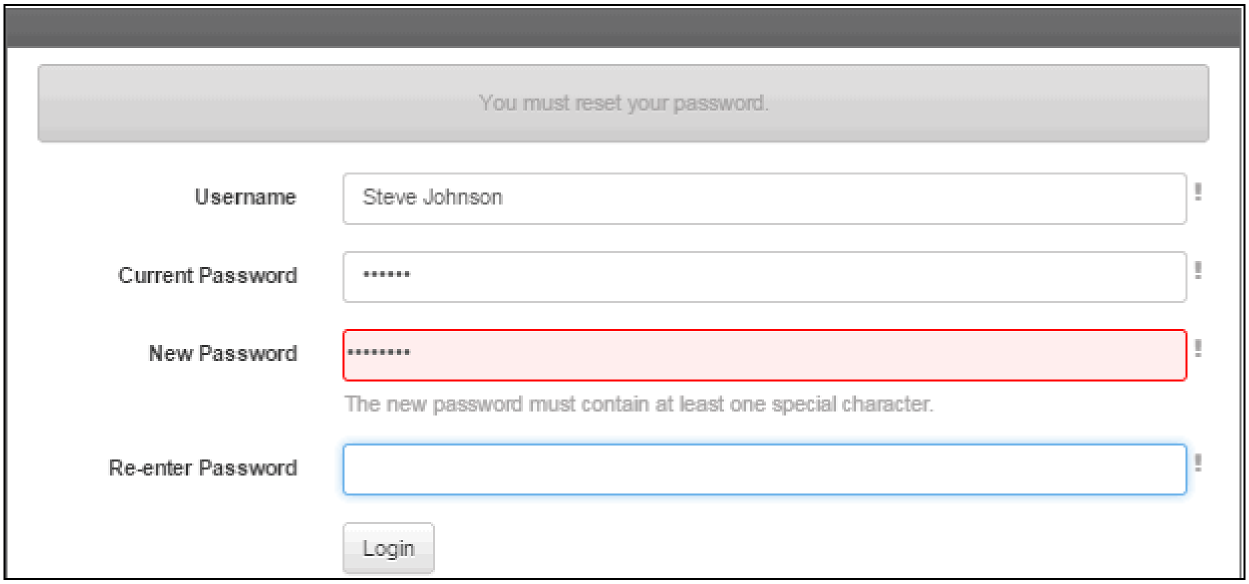
Enable Previous Password Check - Select Yes to compare a customer's new password with a configured number of the customer's previous passwords and prevent use of a matching password.



Number of Previous Passwords - Enter the number of passwords to check against a customer's new password.

Minimum Password Requirements

Use the fields in this section to require new passwords to contain at least one special character (not a number or a letter), numeric character (0-9), uppercase character, and lowercase character, as well as a minimum number of characters. If a customer tries to enter a password without the minimum requirements, a message will appear with the missing requirement.



Note that configured password requirements will be enforced when you enter a password in the Customer Profile screen.

Minimum Characters - Enter the minimum number of characters that a customer can use in a newly-entered password.

At Least One Special Character - Select Yes to require a customer's newly entered password to contain at last one special character that is not a number or letter.

At Least One Numeric Character - Select Yes to require a customer's newly entered password to contain at least one number.

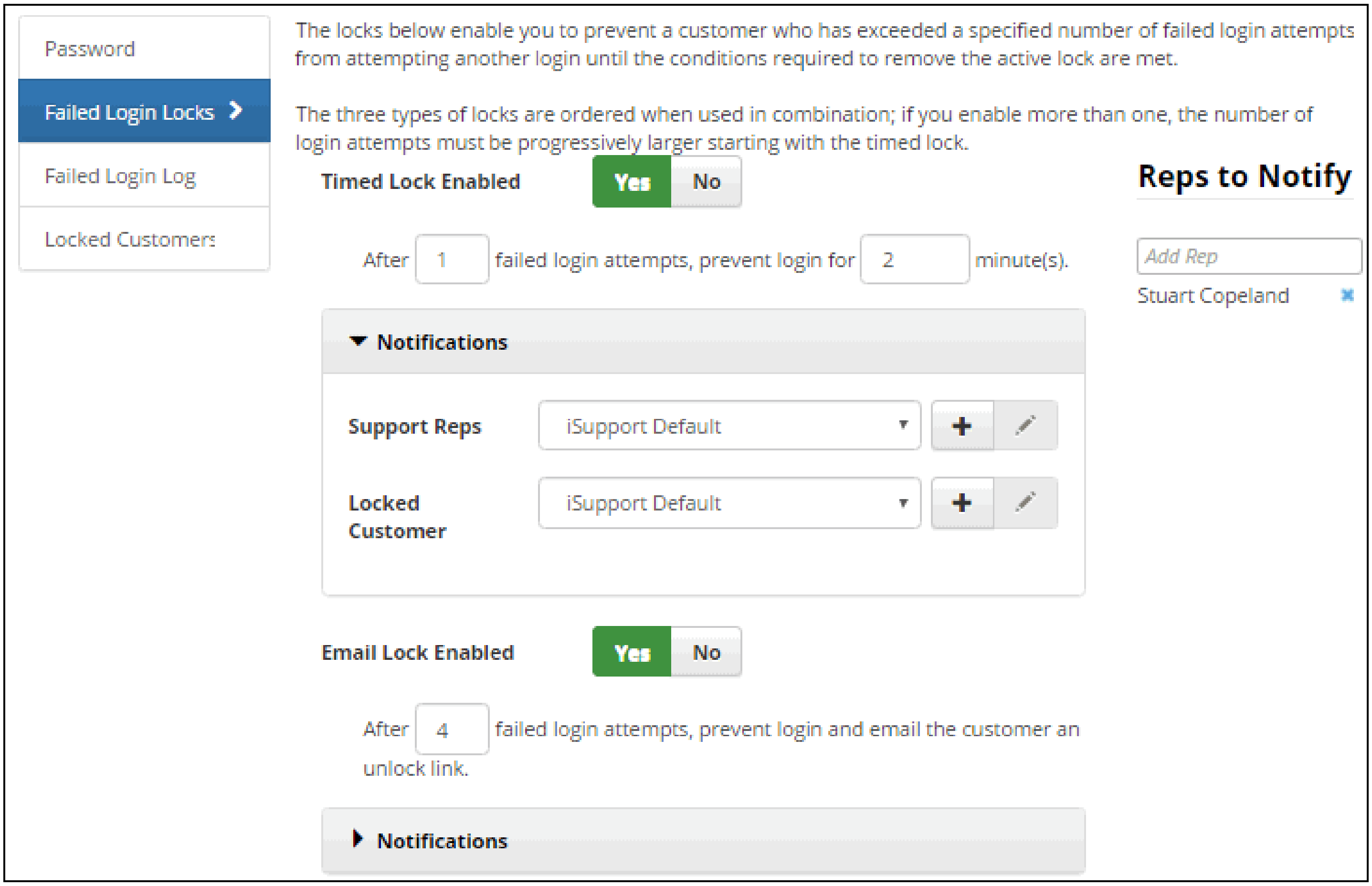
At Least One Uppercase Character - Select Yes to require a customer's newly entered password to contain at least one capital letter.

At Least One Lowercase Character - Select Yes to require a customer's newly entered password to contain at least one small letter.

Force Password Reset for All Customers - Select this button to, for each customer, display the password reset dialog the next time the customer logs in and require a new password to be entered.

Configuring Failed Login Locks

Use the Failed Login Locks tab to configure locks to prevent a customer who has exceeded a specified number of failed login attempts from logging in. You can set a timed lock, an email lock requiring login via a link in an email, or a support rep lock which requires an administrator to reset the login lock.



You can use the Failed Login Log tab to display information on customers who have unsuccessfully attempted a login, and the Locked Customers tab to display those who are locked out due to exceeding the configured number of failed login attempts.

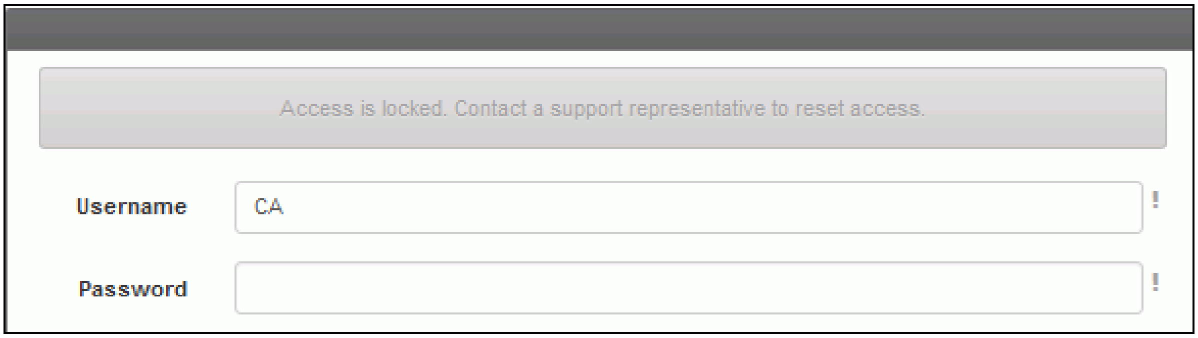
You can send notifications for each type of lock; support representatives selected in the Reps to Notify field will be notified for each notification selected for a lock. These notifications can be customized via the Custom Notifications screen. The three types of locks are ordered when used in combination; if you enable more than one, the number of login attempts must be progressively larger starting with the timed lock.

Email and Timed Locks

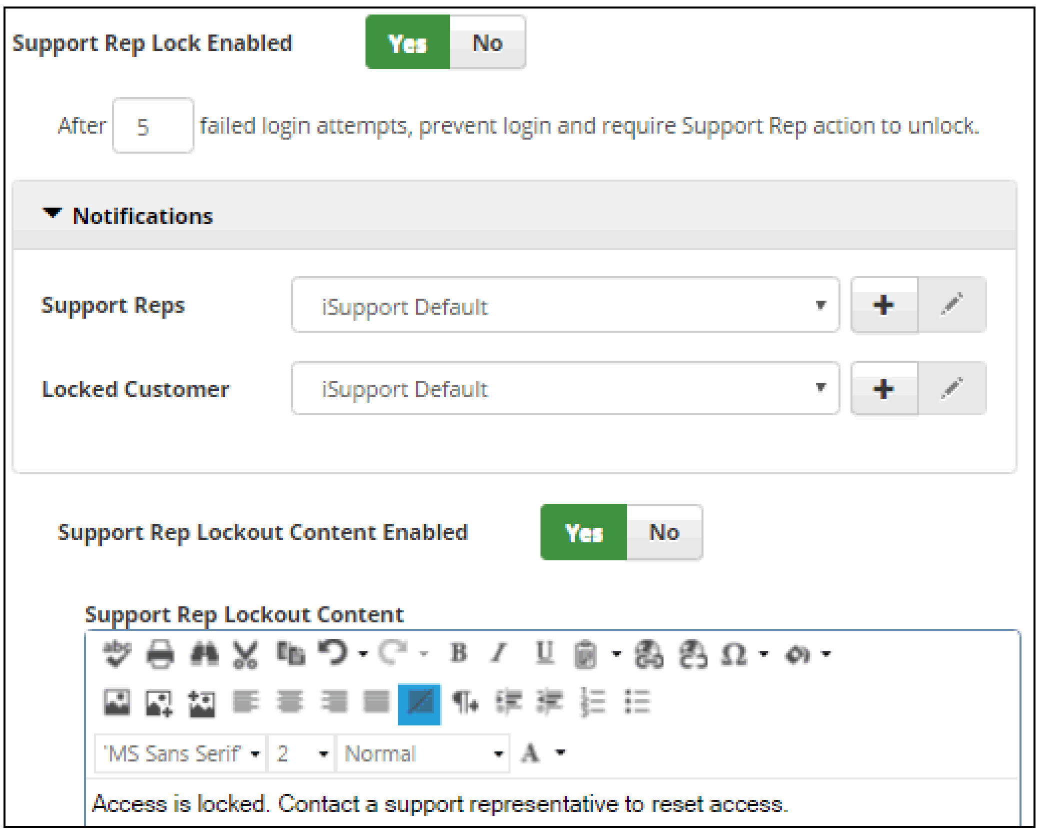
- A **timed lock** prevents login for a specified period of time (the lock would prevail during that time even if the correct login were entered).
- A more restrictive **email lock** displays a message regarding the lock and sends an email to the customer, who must use the link in the email to reconnect to the login page in order to continue. If the customer doesn’t use the link and logs in directly, the lock would prevail even if the correct login were entered.

Support Rep Locks

An even more restrictive **support rep lock** prevents the customer from logging in until a support representative unlocks his/her customer profile. A configurable message will appear to the customer if the configured number of failed login attempts has been exceeded.



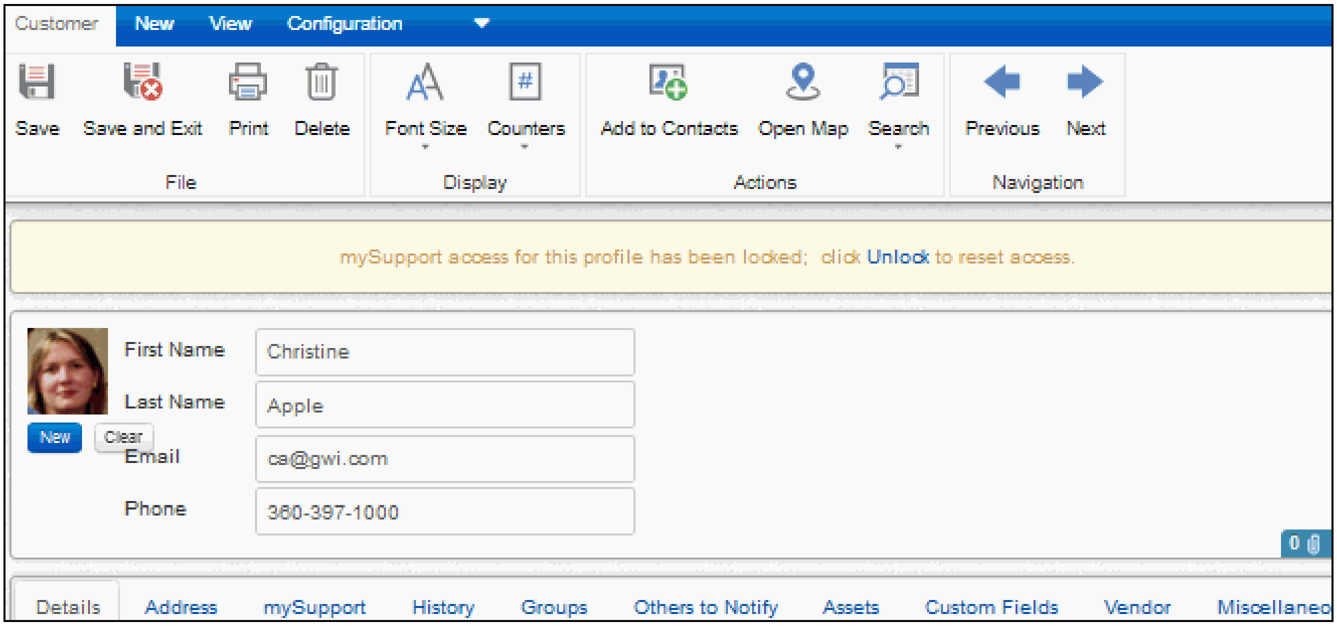
To configure a support rep lock, select Yes in the Support Rep Lock Enabled field, enter the number of failed login attempts, and select notifications to be sent to the support representative and customer if applicable. You can use the Support Rep Lockout Content Enabled and Support Rep Lockout Content fields to configure the content of the message to appear to the customer after the number of failed login attempts has been exceeded.



Support representatives with Customers | Unlock mySupport Access permission can unlock a Customer Profile in the following ways; both will set the failed login attempt count to zero.

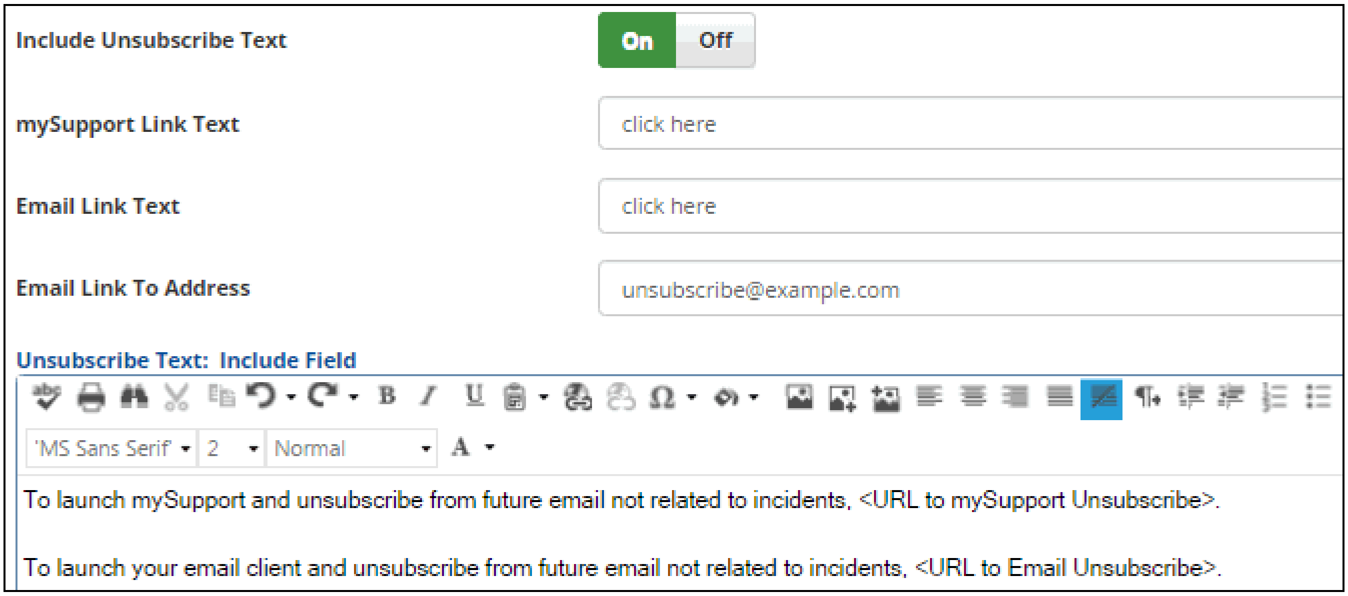
- Select the Unlock Access option on the Actions menu on the Locked Customers tab or Locked Customers view on the Desktop.

- Click the Unlock link that displays in the banner in the Customer Profile screen when a profile is locked.

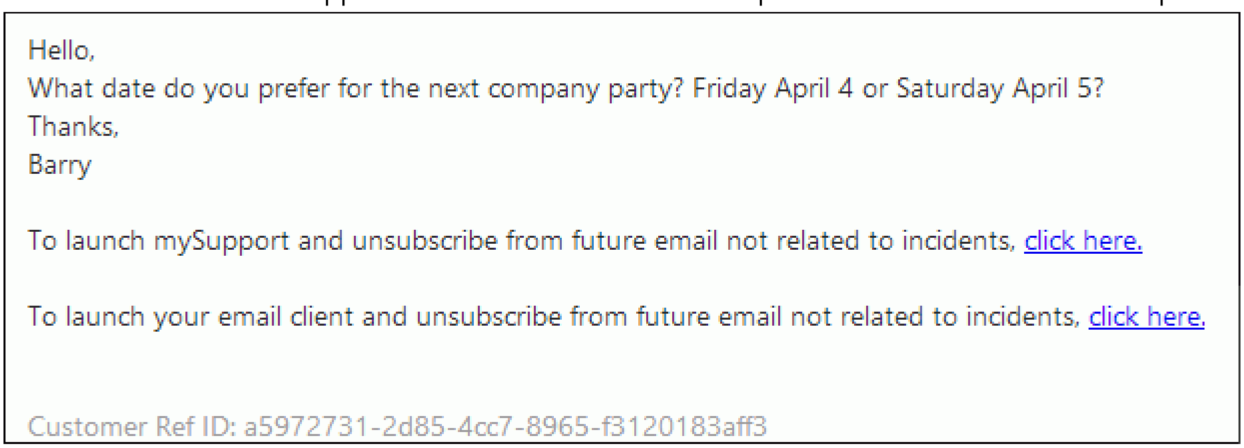


Configuring Unsubscribe Settings

Go to Core Settings | Email | Unsubscribe Settings to configure unsubscribe links and text that will be appended 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. You can configure links to launch a new email or mySupport. A customer's unsubscribe status can be changed; see "Changing a Customer's Unsubscribe Status" on page 75 for more information.



Configured links and text will be appended to outbound email correspondence as shown in the example below:



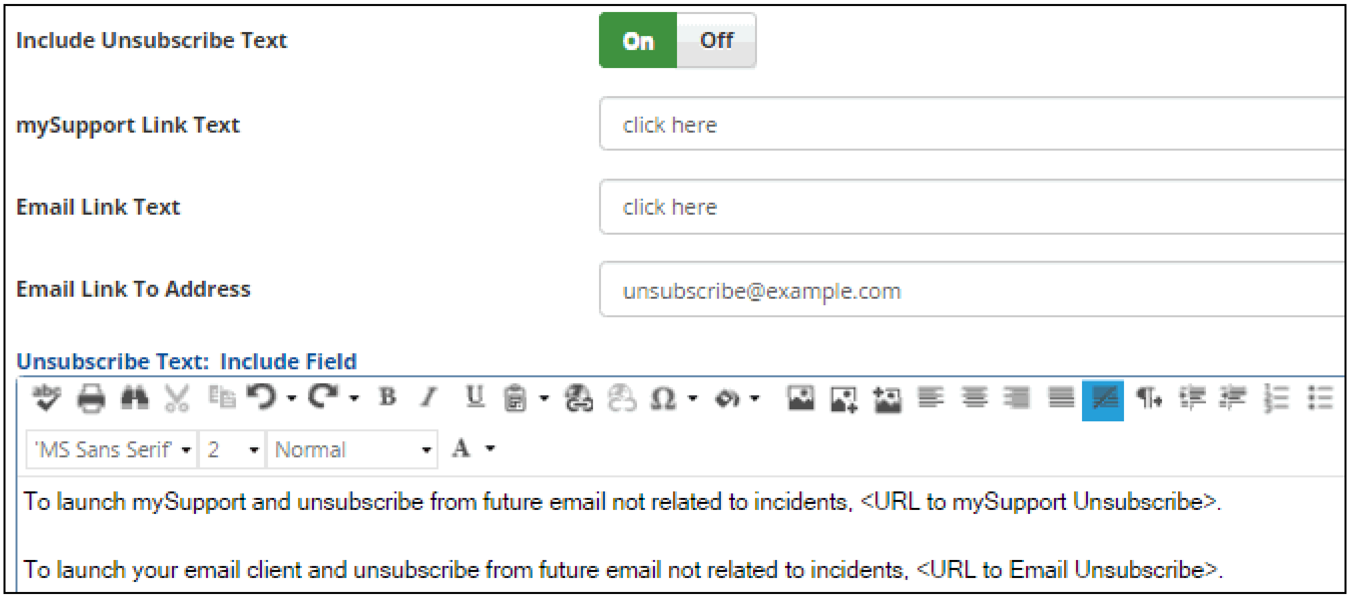
A customer's profile contains their unsubscribe status; see "Changing a Customer's Unsubscribe Status" on page 75 for more information.

To configure this feature:

- Complete the fields in the Unsubscribe Settings screen.
- Use the Change Unsubscribe Status permission in the Rep Profile screen or the Support Representative Group screen to control a support representative's ability to change a customer's unsubscribe status. If a support representative does not have this permission, the Correspondence menu option will be disabled in the Customer Profile and Opportunity screens and the support representative will not be able to send correspondence to unsubscribed customers via the Desktop. If a support representative has this 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.
- Use the Customer Layout screen to add the Unsubscribe Status field to the Customer Profile screen.

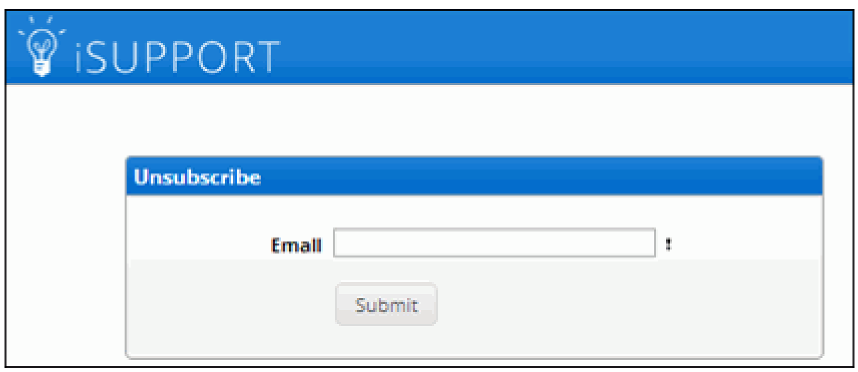
Completing Unsubscribe Settings Fields

Use the following fields to configure unsubscribe links and text that will be appended to outbound email correspondence.

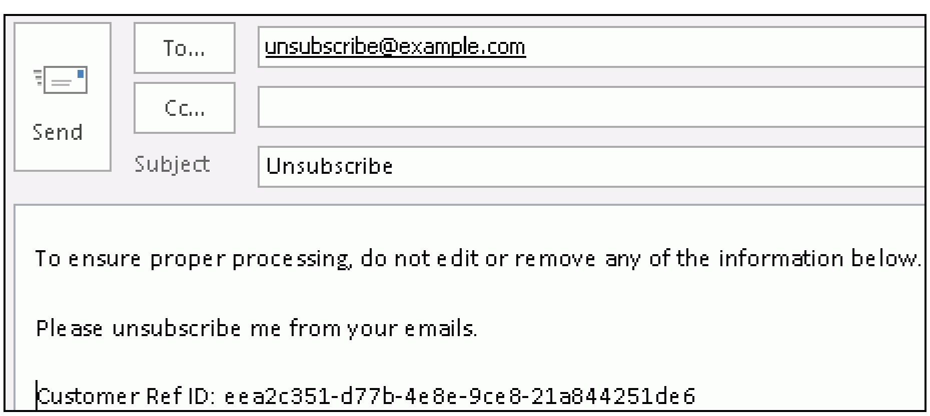


Include Unsubscribe Text - Select Yes to display fields for configuring unsubscribe links and text that will be appended to outbound email correspondence.

mySupport Link Text - Enter the text to appear for the link that will launch the mySupport portal and an Unsubscribe dialog for the customer to enter their email address. This link corresponds to the URL to mySupport Unsubscribe include field, so be sure to use that include field in the Unsubscribe Text field.



Email Link Text - Enter the text to appear for the link that will launch the user's email client and create a new email as shown in the example below. This link corresponds to the URL to Email Unsubscribe include field, so be sure to use that include field in the Unsubscribe Text field.



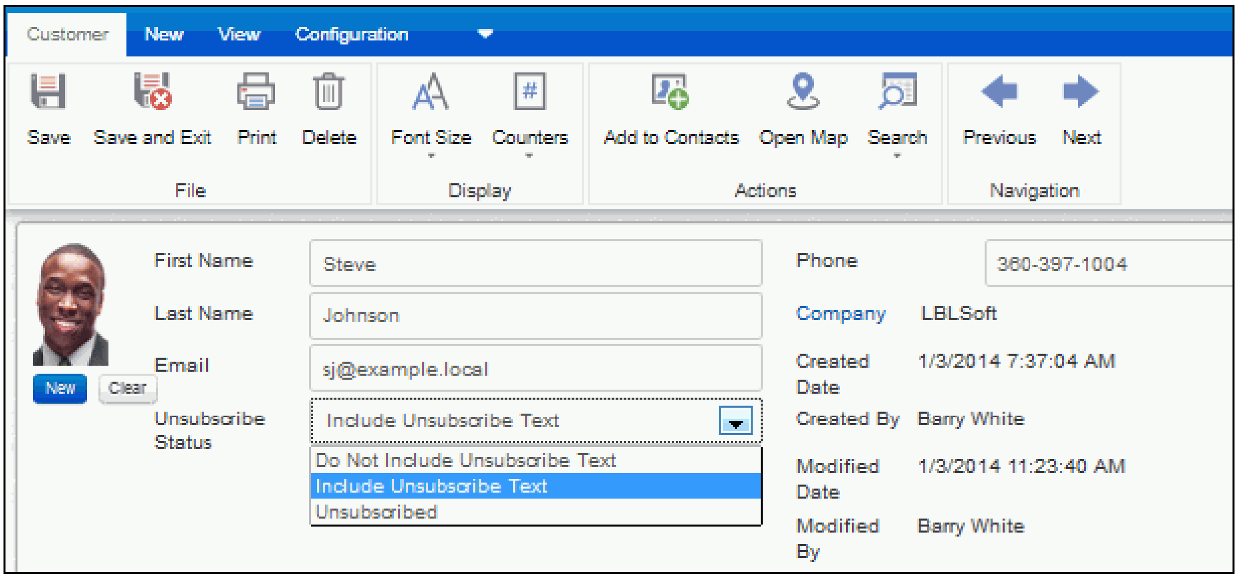
Email Link To Address - Enter the email address to populate the To field in the email launched when the user clicks the link text entered in the Email Link Text field.

Unsubscribe Text - Enter the text that will be appended to outbound email correspondence sent by support representatives via the Desktop, Customer Profile, and Opportunity screens. Click the Include Fields link to insert the URL to mySupport Unsubscribe include field for launching the mySupport portal Unsubscribe dialog and/or the URL to Email Unsubscribe include field for launching the user's email client and creating a new email.

Changing a Customer's Unsubscribe Status

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
- Include Unsubscribe Text to enable correspondence to be sent with the unsubscribe links



Use the Change Unsubscribe Status permission in the Rep Profile screen or the Support Representative Group screen to control a support representative's ability to change a customer's unsubscribe status. If a support representative *does not have* this permission, the Correspondence menu option will be disabled in the Customer Profile and Opportunity screens and the support representative will not be able to send correspondence to unsubscribed customers via the Desktop. If a support representative has this 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.

You can use the Add Unsubscribe Status condition in a Customer rule to perform an action such as changing a customer profile field value or sending a notification based on the unsubscribe status. You can also change the unsubscribe status via a customer rule action.

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

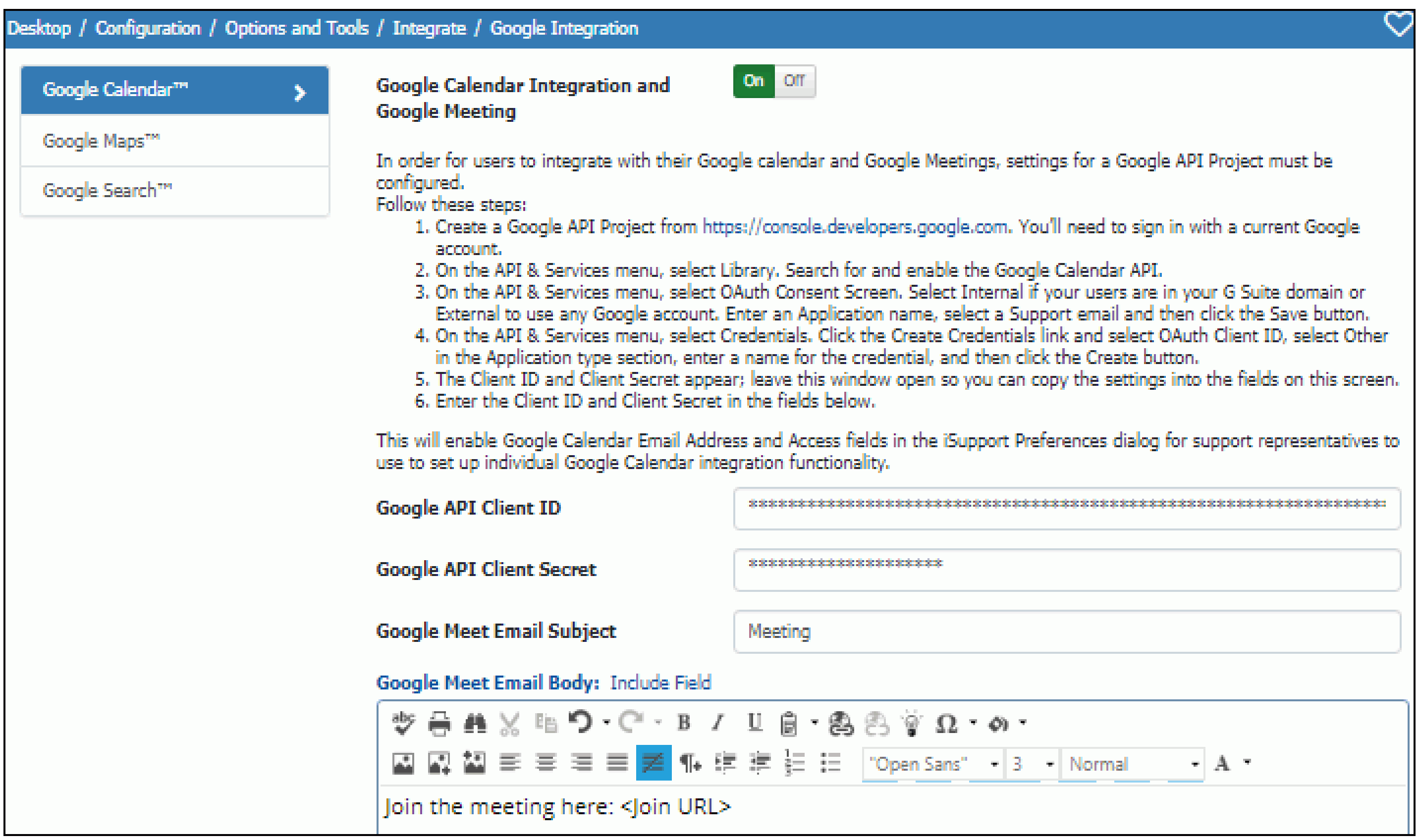
Set up Google Calendar integration in the Options and Tools | Integration | Google Integration screen to enable users to access their Google Calendar for the Calendar option on the Desktop and mySupport portals, a New Meeting option in iSupport entry screens for scheduling a Google Calendar meeting,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

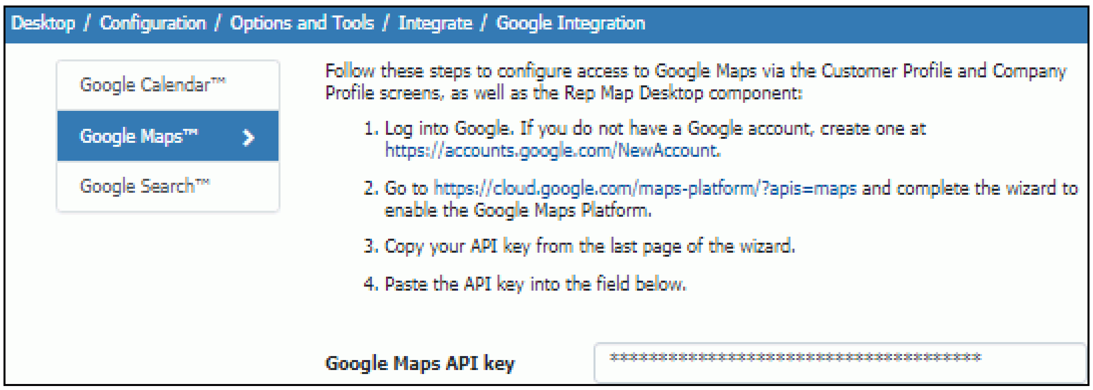


Note: Support representatives will need to use the Google Calendar Email Address and Google Calendar Access fields on the Details screen in the Preferences dialog to enable access to their calendar(s) and set the work day hours during which they are available to be scheduled via iSupport. (The dates/times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

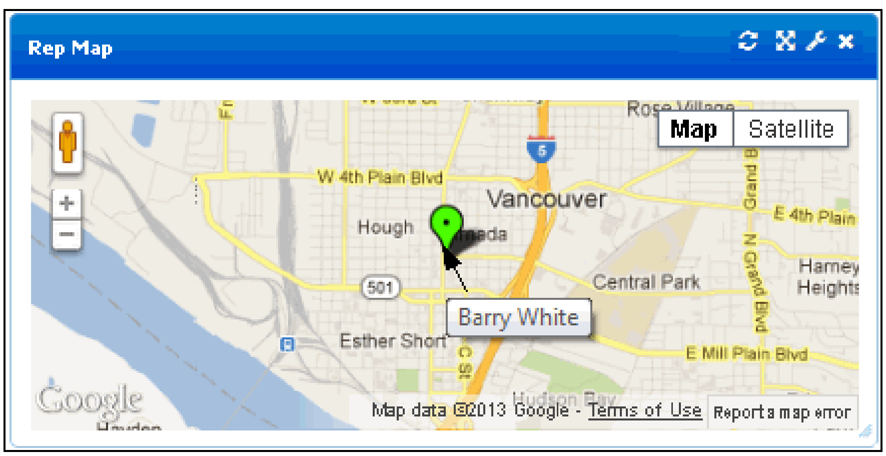
Google Meet meetings can be included in work item screens; add the Google Meetings field to a work item screen layout via the Layouts configuration screen.

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.

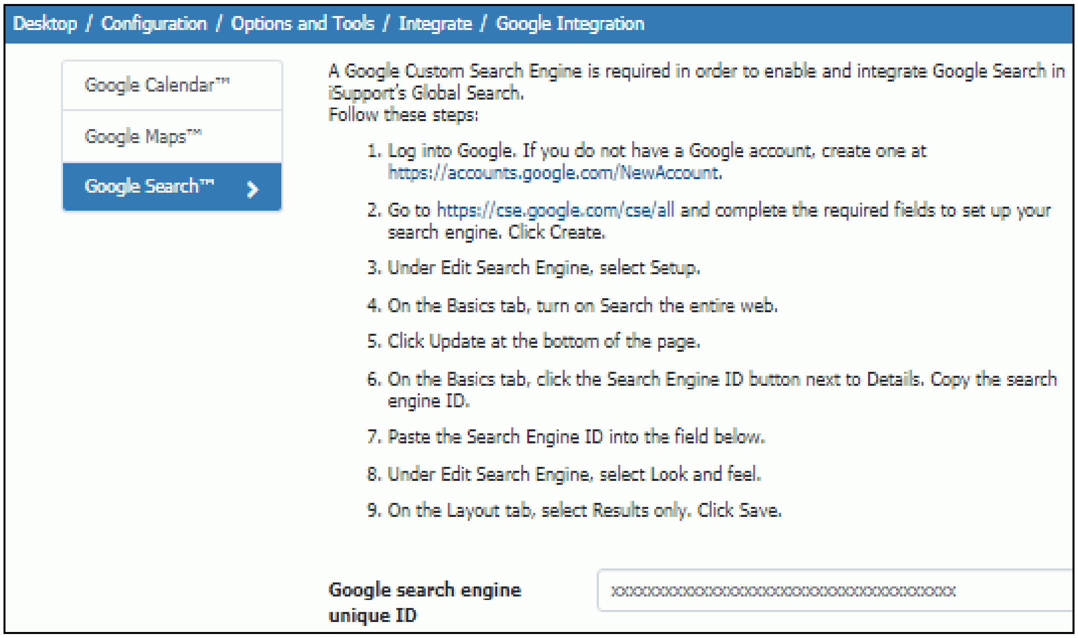


Maps will appear as shown in the example below.

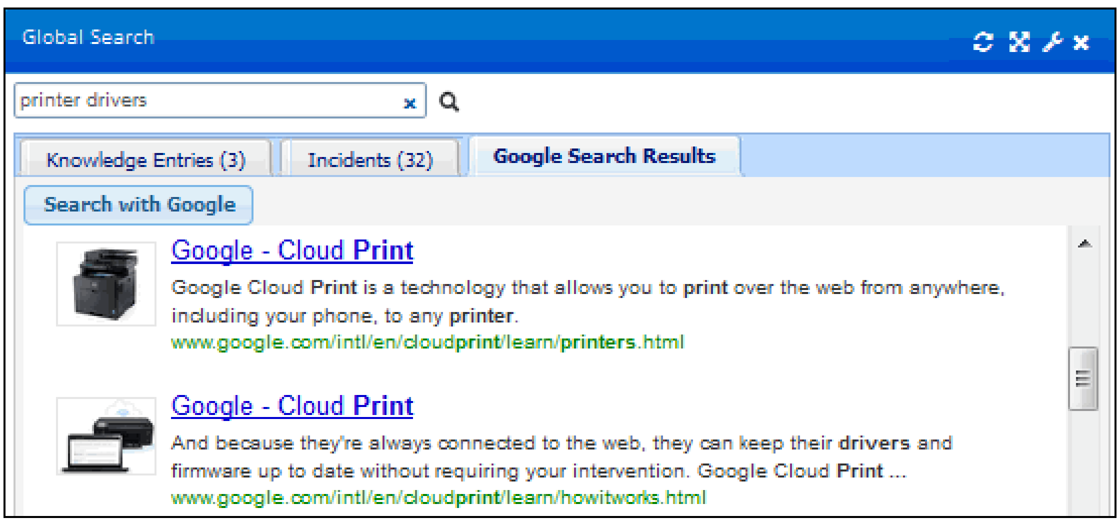


Google Search

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.



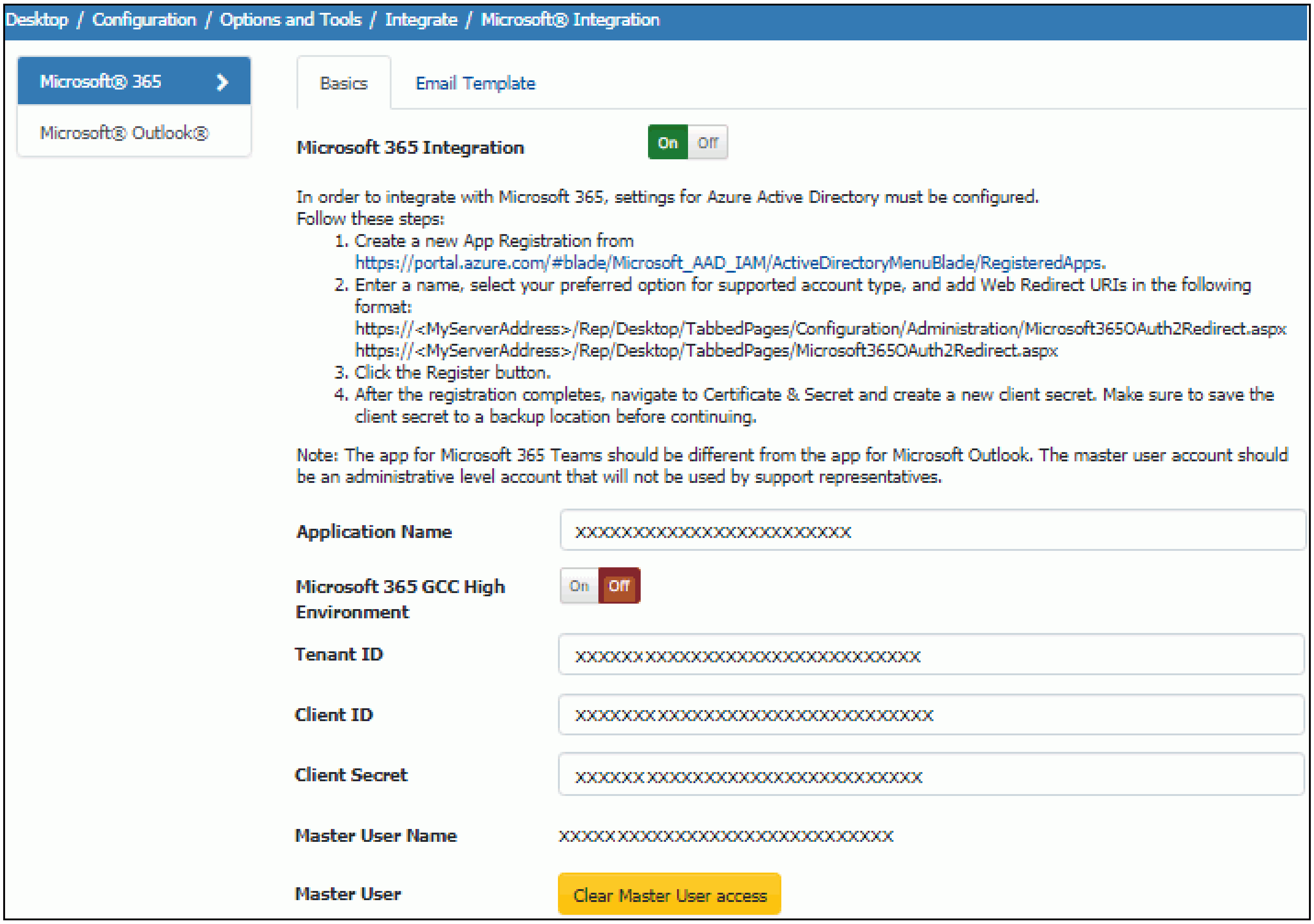
The Google Search tab will appear in the Global Search component as shown in this example.



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

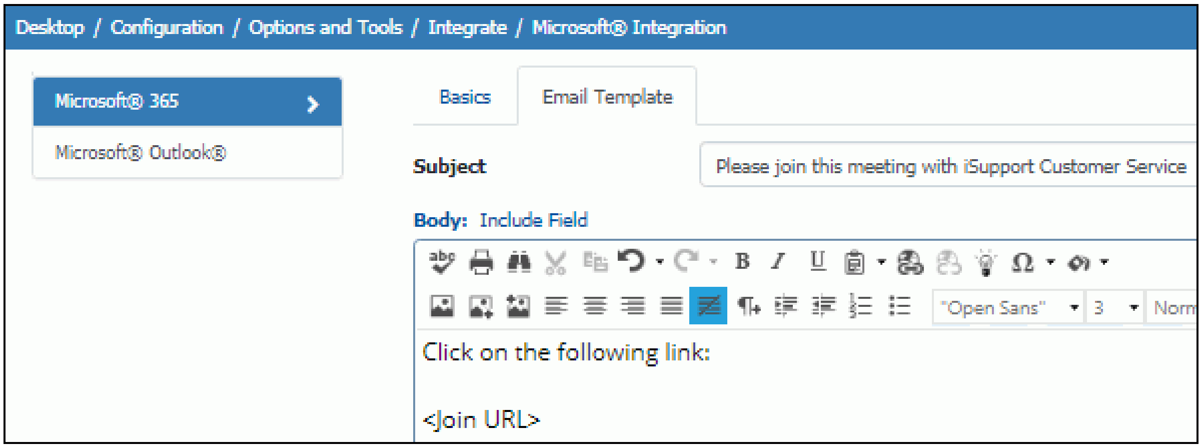
Microsoft Teams tasks, and enabling Microsoft Teams Meeting and Planner Task option to appear in work item screens for creating meetings and tasks with prefilled references to the iSupport work item number.



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.

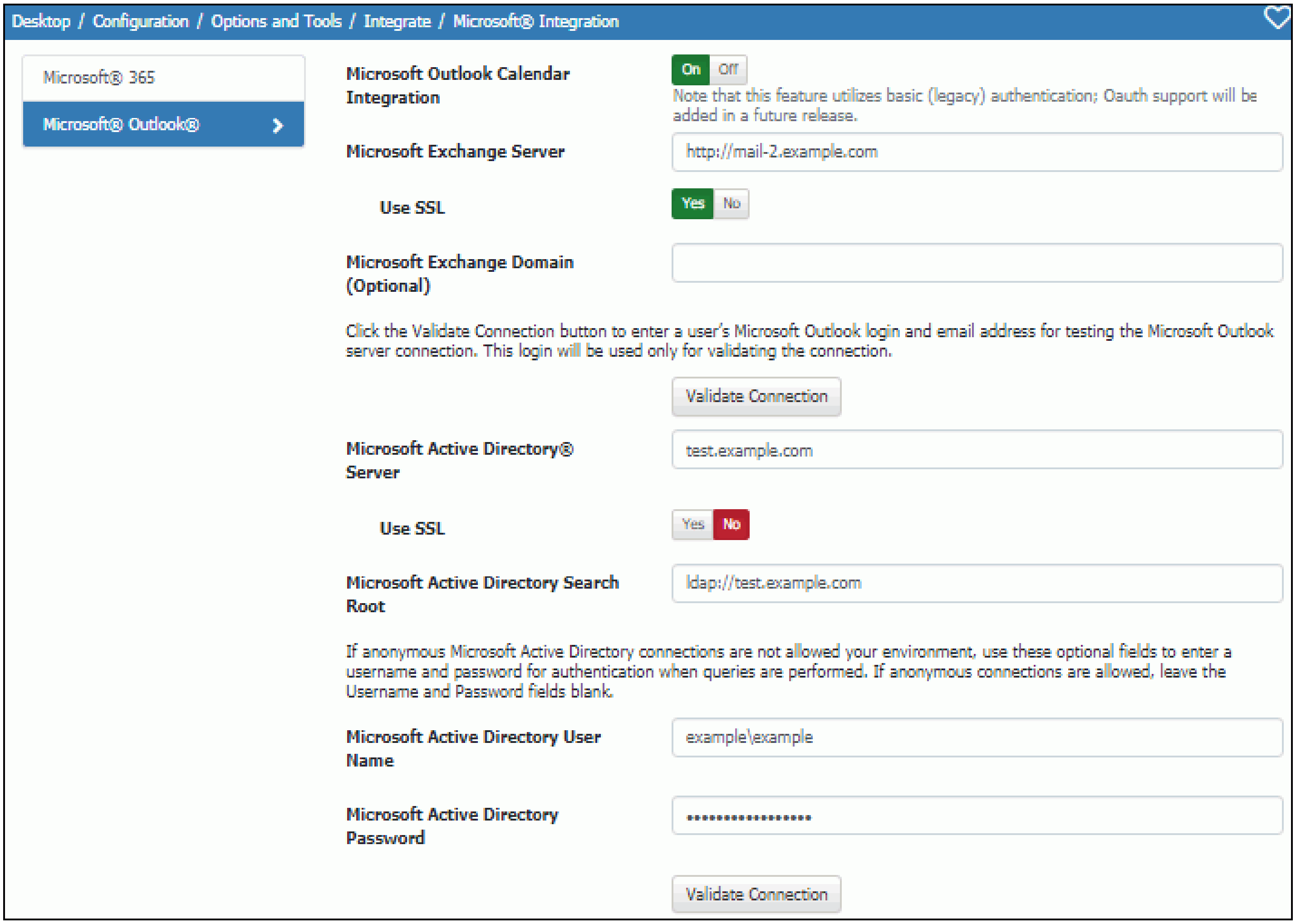
Microsoft Outlook Calendar Integration

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://

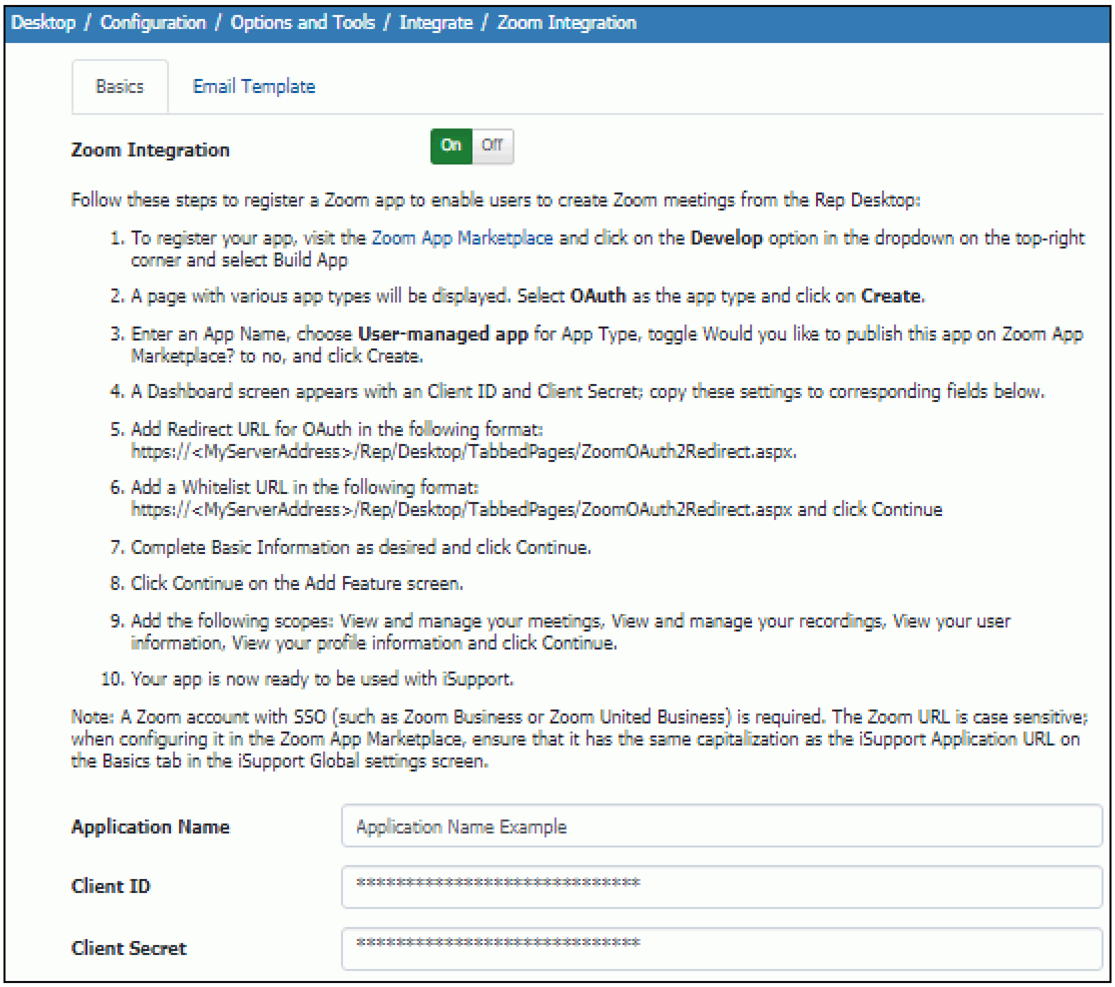
Microsoft Active Directory User Name/Microsoft Active Directory Password - If anonymous Active Directory® connections are not allowed in your environment, use these optional fields to enter a login for authentication when queries are performed. The username should be in the following format: DOMAINNAME\usernameIf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

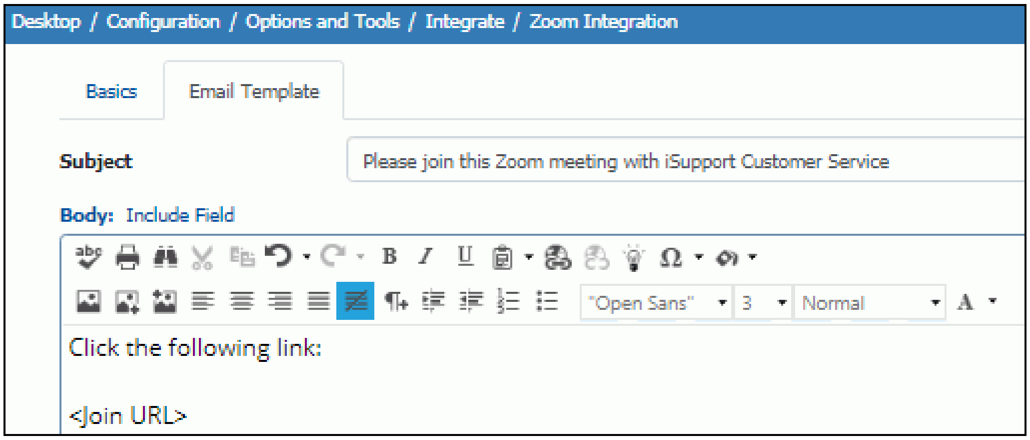
Use the Options and Tools | Integrations | Zoom Integration configuration screen to enable a Zoom Meeting option to appear in the Incident, Change, Problem, and Customer screens for scheduling an on-demand Zoom meeting. When the option is selected, a Generate Join URL dialog will appear for you to enter 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.

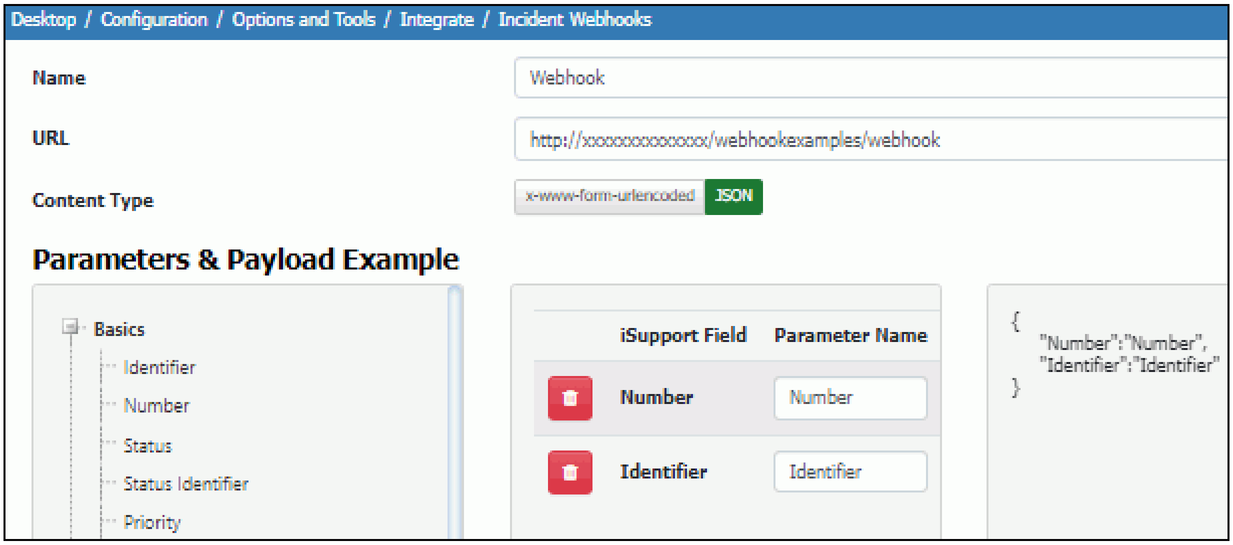


Zoom meetings can be included in work item screens; add the Zoom Meetings field to a work item screen layout via the Layouts configuration screen.

Configuring Webhooks

Use the Webhooks screen to configure webhooks for posting iSupport data to a web application. You will specify a web application URL for iSupport to post data to and the fields containing the data you want to receive, and iSupport will post the field data to the URL when configured rule conditions and time frames are met.

In the Webhooks screen, enter the name of the webhook definition that will be used in the Rule screen and URL to which iSupport data should be posted. Drag the iSupport data source fields containing the data you want to receive into the frame on the right, and enter the corresponding fields on your web form in the Parameter Name column. Note that you can drag field rows vertically to reposition fields. Use the Content Type field to enable the output to be set to JSON (JavaScript Object Notation) Mime type and display the text of what the webhook will generate.



Use the applicable Rule screen to configure the conditions and time frame on which the post action will occur. Select the rule type, enter the condition(s) to be met in order to initiate the post, select the Execute Webhook action, and then select the webhook definition. Be sure to add the rule to a rule group.