# Even Support® Opportunity Functionality

iSupport's Opportunity functionality enables you to create Opportunity records, quotes, and invoices using configured products and product groups. You can use opportunity types, campaigns, and stages for lead and opportunity tracking and reporting. You can generate quotes and invoices in PDF format utilizing correspondence templates that can include data from opportunities, customers, etc.

Opportunity										ô (i) ^
	Print Delet	# Counters	Customer Co	mpany Opportur	ity Correspondenc	e Send Quote	Search Cou	untdown		
File		Display	Customer Ir	nfo	Actions		Other	r in the second s		
Customer Q Steve Johnson iSupport Software 360-397-1004 sj@example.local Details Campaign Comments for Quote:		Stage Type	Barry White Qualification Services Only 48LE563181 Ter Attachments	v rms Net 30 v	Modified Date Estimated Close Actual Close Da Purchase Order	e Date 6/24/20 ate		Rule Group Probabil Total Invoice	Default Opp ity 90 % \$160.00 Add	ortuni 🧿
Credit card payment required										
Hardware Configuration Sevices		Name S	hort Desc.	Group	C	)escription		Quantity	Rate	Total
Application Training Services     Accounting App	Î	WS3100 W	/orkstation	Hardware Configu	ration Sevices V	Vorkstation Setu	p	1	\$60.00	\$60.00
HR App	Î	AA4587 A	ccounting App	Application Trainin	g Services A	ccounting Appli	cation Training	1	\$50.00	\$50.00
	Î	HR5393 H	R App	Application Trainin	g Services H	IR Application T	raining	1	\$50.00	\$50.00
										\$160.00

Quotes are sent in PDF format as an attachment to an email that you configure using the Correspondence Template screen. You'll configure the logo, address, products, product groups, and more. An example of a quote is shown below.

				From custo customer a opportunit	ssigned to t	of re he th	om sup p profil e oppoi signee	
Entered via Quote Info tab in Opportunity Management Basics screen	110 East 17th S Vancouver, WA	98663-3419 fax/360-397-1007		Prepare Steve J sj@exa 360-39 ISuppo Prepare Barry V	ohnson mple.local 7-1004 ort Software d by: /hite Isoft.com		;	8/21/2019
groups defined via Product Groups	l tem Qty		I tem Description Hardware Con	figuration Sevice	l tem Number	Unit Price		tended Price
screen	1	Workstation Setup	Hardware con	ingulation bevice	W\$3100	\$60.00	Ξ.	60.00
Due du este		workstation betup	Useduras Castle	unting Coulors T		\$00.00		
Products defined via			Hardware Config Application T	raining Services	otai		50	60.00
Products	1	Accounting Application Tr		raining services	AA4587	\$50.00	۹.	50.00
screen	1	HR Application Training	aming		HR5393	\$50.00		50.00
Comment		nk Application training	Application Trai	ning Services Tot		\$55.00		00.00
entered via Opportunity ——— screen		Credit card payment req		ning services for	aı			00.00
Notes entered			Т	OTAL			\$1	60.00
Notes entered via Quote Notes tab in Opportunity Management Basics screen		Notes: US dollars - pricing val	lid for 30 days from da	te of quotation Agree To Purcha Today's Da				

# **Configuration Overview**

#### Basic Configuration

- Enable and set basic Opportunity options in the Core Settings | Global Settings | Feature Basics screen, including configuring Intuit® QuickBooks® integration and entering information to include on quotes generated via the Opportunity screen. See "Setting Opportunity Basics Configuration Options" on page 4. If you configure QuickBooks integration, be sure to schedule the QuickBooks Sync Agent on the Miscellaneous tab in the Feature Basics screen to synchronize paid invoices with corresponding opportunities.
- Configure correspondence templates for use with quotes via the Options and Tools | Automate | Templates screen in the Configuration module. See the online help for more information.
- Use the Options and Tools | Customize | Opportunity | Products screen to configure line items that will be available for selection when creating quotes and invoices in the Opportunity screen. See "Creating Product Groups and Products" on page 9.

### Creating Opportunity Records

• You can manually create Opportunity records via the Opportunity screen or by clicking the Opportunity icon in the Customer and Company Profile screens.

### Customizing iSupport Defaults

- If there are fields you need for the Opportunity screen that are not included in iSupport by default, you can create custom fields. See "Configuring Custom Fields" on page 12.
- You can configure opportunity types via the Options and Tools | Customize | Opportunity | Types screen to group opportunities in a descriptive manner for tracking and reporting. Types are assigned to opportunities in the Opportunity screen. See "Creating Opportunity Types" on page 8.
- You can configure product groups via the Options and Tools | Customize | Opportunity | Product Groups screen for classifying and filtering line items. See "Creating Product Groups and Products" on page 9.
- You can configure stages via the Options and Tools | Customize | Opportunity | Stages screen for describing the different parts of the sales process for tracking and reporting. Stages are assigned to opportunities in the Opportunity screen, and you can configure rules to change the stage. See "Creating Stages" on page 8.
- You can configure terms via the Options and Tools | Customize | Opportunity | Terms screen to configure terms that will be available for selection when creating quotes and invoices in the Opportunity screen. See "Configuring Terms" on page 11.

### Sending Notifications

- You can configure Opportunity rules via the Options and Tools | Automate | Rules screen to send Desktop and email notifications when specified conditions based on Opportunity record fields or events are met; for example, you can configure a rule to send a notification when the priority of an Opportunity record is modified. See "Configuring Rules and Rule Groups for Opportunities" on page 19.
- You can use or copy and modify iSupport's default notifications, or you can create new custom notifications via the Options and Tools | Customize | Custom Notifications screen; see "Customizing and Viewing Event Notification Content" on page 30 for more information. You can include data from Opportunity records and designate any applicable recipients.

#### Using Workflow Features

- You can automatically change field values on Opportunity records via Opportunity rules. See "Configuring Rules and Rule Groups for Opportunities" on page 19.
- You can use webhooks in the Options and Tools | Automate | Webhooks screen to post Opportunity data to a web application via Opportunity rules. See "Configuring Webhooks" on page 35 and "Configuring Rules and Rule Groups for Opportunities" on page 19.

#### Managing Opportunity Records

- Use the Action menu in the View component on the Desktop to perform actions such as opening, viewing, and deleting multiple Opportunity records.
- You can configure roles/permissions for support reps and rep groups using Opportunity functionality via the Core Settings | Global Settings | Support Representatives or Groups screens. See the online help for more information.

# Setting Opportunity Basics Configuration Options

Use the Opportunity Basics screen to configure Intuit<sup>®</sup> QuickBooks<sup>®</sup> integration and enter information to include on quotes generated via the Opportunity screen.

### Example

Entered via Quote Info tab	110 East 17th S Vancouver, WA				8/21/2019	
	l tem Qty	I tem Description	l tem Number	Unit Price	Extended Price	
		Hardware Configuration Sevices				
	1	Workstation Setup	W\$3100	\$60.00	\$60.00	
		Hardware Configuration Sevices	Total		\$60.00	
		Application Training Services	1			
	1	Accounting Application Training	AA4587	\$50.00	\$50.00	
	1	HR Application Training	HR5393	\$50.00	\$50.00	
		Application Training Services To	otal		\$100.00	
		Credit card payment required				
		TOTAL			\$160.00	
Entered via Quote <u> </u>		Notes: US dollars - pricing valid for 30 days from date of quotation Agree To Purchase				
		2	)ate			

# **Configuring QuickBooks Integration**

Use the QuickBooks tab to enable iSupport's Intuit<sup>®</sup> QuickBooks<sup>®</sup> integration functionality, which enables an Export to QuickBooks icon to appear in the Opportunity screen for sending opportunity information to QuickBooks to create an invoice. (Note that display of the Export to QuickBooks icon is controlled by a permission in the Rep Profile screen.) When information is exported to QuickBooks, if the customer's company does not exist in QuickBooks, a Sync Company to QuickBooks dialog will appear with a list of the companies in QuickBooks and a Create New button for adding the new company to the QuickBooks system. Note: If you configure QuickBooks integration, be sure to schedule the QuickBooks Sync Agent on the Miscellaneous tab in the Feature Basics screen to synchronize paid invoices with corresponding opportunities.

Deskt	op / Configuration / Core S	ettings / Basics			
	Enable Features	QuickBooks®	Quote Info	Quote Notes	Miscellaneous
	Asset Management	Application Name		Example	
	Change Management				
	Configuration	Client ID		*************	
	Management	Client Secret		******	********
	Incident Management			You are authenticated	d to OuickBooks®,
	Knowledge Management			Clear QuickBooks®	
	Opportunity Management >	Access Token Exp	iration	6/18/2020 9:09:28 A	м
	Problem Management	Send Access Toke	'n	*******	
	Purchasing	Expiration Remin Email to	der		
	Service Contract Management	Account		Accounts Receivab	le v

**QuickBooks Integration fields** - Use the information in your QuickBooks API project to make entries in the Application Name and other configuration fields on the QuickBooks tab. Click the Connect to QuickBooks button to authenticate. On the Miscellaneous tab, enable the QuickBooks Sync Agent to synchronize paid invoices with their corresponding opportunities.

# Configuring Quote Info

Use the Quote Info tab to select the correspondence template to display by default when generating a quote, and to enter the address, web site, logo, and vendor information to appear on a quote as shown in the "Example" on page 4.

Enable Features	QuickBooks®	Quote Info	Quote Notes	Miscellaneous
Asset Management	Correspondence To	emplate	Opportunity - Quote	e Cover Letter 🔹
Change Management	Address 1		110 East 17th Street	
Configuration Management	Address 2			
Incident Management	Address 3			
Knowledge Management	Address City		Vancouver	
mySupport	Address State		WA	
Opportunity Management	Address Postal Coo	le	98663	
Problem Management	Address Country			
Purchasing	Dhana		260 207 4000	
Service Contract Management	Phone		360-397-1000	
Survey	Fax		360-397-1007	
Survey	Website		http://www.isupport	com
	Header	[		Choose
			🦉 iSUP	PORT
	Vendor Info (pdf)	ĺ	SupportServiceDeskEc	Choose litionBrochure.pdf Remove

**Correspondence Template** - Select the predefined correspondence template to display by default when generating quotes from the Opportunity screen.

Address 1-3, City, State, Postal Code, Country, Phone, Fax - Enter your company information to include in the upper left corner of the quote under the header logo.

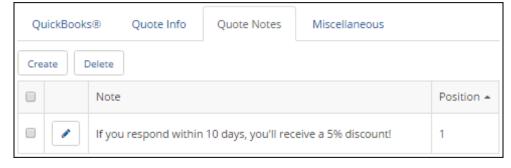
Website - If applicable, enter a URL to include in the upper left corner of the quote under the contact information.

Header - Select an image to include in the upper left corner of the quote.

**Vendor Info (PDF)** - If applicable, select a PDF file to include as the second and following pages in the generated quote PDF.

# **Configuring Quote Notes**

Use the Quote Notes tab to enter information to include under the products on a quote.



# Setting Miscellaneous Options

Use the Default Correspondence Template field on the Miscellaneous tab to select the correspondence template that will apply by default when a support representative initiates a correspondence via the Opportunity entry screen. Correspondence templates that are active and enabled for the Opportunity module will be available for this feature. Use the + Create New and / View/Edit options to access the Correspondence Template screen.

Desktop / Configuration / Core Setting	gs / Basics	$\sim$
Enable Features	QuickBooks® Quote Info Quote Notes Miscellaneous	
Asset Management	Default Correspondence Template Opportunity - Quote Cover Letter	v + 🗡
Change Management	QuickBooks® Sync Agent	
Configuration Management	The QuickBooks® Sync agent syncs paid invoices with their corresponding opportunity.	
Incident Management	Enable Yes No Run Now	
Knowledge Management		
Opportunity Management		

In the QuickBooks Sync Agent section, select Yes in the Enable field to schedule the QuickBooks Sync Agent on the Miscellaneous tab in the Feature Basics screen to synchronize paid invoices with corresponding opportunities.

# **Creating Opportunity Types**

Use the Options and Tools | Customize | Opportunity | Types screen to create opportunity types for grouping opportunities in a descriptive manner for reporting. Types are assigned to opportunities in the Opportunity screen, and you can configure rules to change the type.

Deskto	op / Configuration /	Options and Tools / Customize / Opportunity / Types		
	Opportunity T	ypes Search		×
	Create De	lete		
		Name	Position .	
	C 🖪 🗉	New Product	1	•
	Create Delete Position *			
		Services Only	3	

# **Creating Stages**

Use the Options and Tools | Customize | Opportunity | Stages screen to create stages for describing the different parts of the sales process. Stages are assigned to opportunities in the Opportunity screen, and you can configure rules to change the stage.

Stages Search										
	Create	elete								
		Name	Requires Win/Loss Reason	Position 🔺						
	C 🖪	Qualification		1 •						
		Demonstration	No	2						
		Evaluation	No	3						
		Vision Match	No	4						
		Purchasing	No	5						
		On Hold	No	6						
۰		Won	Yes	7						
		Lost	Yes	8						

Use the Requires Win/Loss Reason field to require an entry in the Win/Loss Reason field and automatically populate the current date in the Actual Close Date field after selecting the status and saving an Opportunity record. This will also prohibit modification of the Assignee, Stage, Type, Estimated Close Date, Actual Close Date, Purchase Order, and Probability fields in the Opportunity screen. The Edit Closed Opportunity permission will enable modification of the Assignee, Stage, Type, Estimated Close Order, and Probability fields after a stage requiring a win/loss reason is selected in the Opportunity screen and the opportunity is saved.

# **Creating Product Groups and Products**

Products are selected in the Opportunity screen via the Products tab:

Details 😡 Campaign 📜	Products	Attachments					
Comments for Quote:							
Payment terms are net 30							
Hardware Configuration Services	Name	Short Desc.	Group	Description	Quantity	Rate	Total
Accounting App	💼 WS3100	Workstation	Hardware Configuration Services	Workstation Setup	1	\$80.00	\$80.00
	AA4587	Accounting App	Application Training Services	Accounting Application Training	1	\$50.00	\$50.00
	HR5393	HR App	Application Training Services	HR Application Training	1	\$50.00	\$50.00
							\$160.00

Product groups and products are included on quotes as shown in the example below:

	110 East 17th S Vancouver, WA	Prep Stevi 98663-3419 360- fax/360-397-1007 ISup pport.com Prep Barry BW@	otation red for: 2 Johnson xample.local 397-1004 port Software red by: ( White Holsoft.com 397-1000		8/21/2019
	l tem Qty	I tem Description	l tem Number	Unit Price	Extended Price
		Hardware Configuration Sevi	oes		4
	1	Workstation Setup	WS3100	\$60.00	\$60.00
Product		Hardware Configuration Sevices			\$60.00
group		Application Training Service			4
• •	1	Accounting Application Training	AA4587	\$50.00	\$50.00
Product ——	1	HR Application Training	HR5393	\$50.00	\$50.00
		Application Training Services 1	otal		\$100.00
		Credit card payment required			
		TOTAL			\$160.00
		Notes: US dollars - pricing valid for 30 days from date of quotation Agree To Purc Today's			

Use the Options and Tools | Customize | Opportunity | Product Groups screen to create product groups for classifying and filtering products that are available for selection in the Opportunity screen.

Desktop /	esktop / Configuration / Options and Tools / Customize / Opportunity / Product Groups								
Pro	duct Group	S Search	×						
	Create De	lete							
		Name	Position A						
	C	Hardware Configuration Sevices	1 •						
	Application Training Services 2								
		Services	3						

Use the Options and Tools | Customize | Opportunity | Products screen to create products that will be available for selection in the Opportunity screen.

Deskt	Desktop / Configuration / Options and Tools / Customize / Opportunity / Products									
Pro	ducts									
Creat	Delete									
		Name 🛥	Short Desc.	Group	Description	Rate				
۲	CB	AA4587	Accounting App	Application Training Se 🔻	Accounti	\$50.00				
		HR5393	HR App	Application Training Services	HR Application Training	\$50.00				
	1	Product 1B	Product 1B	Hardware Configuration Sevices	Product 1B Details	\$200.00				
	/	Service A	Service A	Services	Service A Details	<b>\$</b> 50.00				
	1	Service B	Service B	Services	Service B Details	\$100.00				
		W53100	Workstation	Hardware Configuration Sevices	Workstation Setup	\$60.00				

# **Configuring Terms**

Use the Options and Tools | Customize | Opportunity | Terms screen to enter terms for selection in the Opportunity screen.

Deskt	op / Co	nfiguration / Options and Tools / Customize / Opportunity / Terms	ß
Te	erms		
Cre	eate	Delete	
		Name 🔺	Default
		Net 30	Default
	/	Net 60	

# **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.

Desktop / Configuration / Option	s and Tools / Customize / Incident Custom Fields			
Basics >	Row	1		¥
mySupport Access	Label	Server OS		
Conditional Display Options	Tooltip	Server Operating System		1
	Required on Save	On Off		
	Required on Close	On Off		
	Available to Reps	On Off		
	Encrypt	On Off		
	Туре	Check Box		¥
	Data Source	None 🔻	+	/
	Options	✓ Windows		
		Mac Mac	ø	0
		Other		
	Max Columns	2		

**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 17 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"</li>

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.

Check Box	Option 1      Option 2      Option 3	Date Field	03/08/2019	
Radio Button	● Yes   ○ No   ○ I don't know	Date/Time Field	O3/07/2019 3:27:00	
Text Area		Single Selection Drop- Down	Option 1	٣
Text Field		Multiple Selection List Box	Option 1 Option 2 Option 3	• •
Currency Only	\$ 123	Hyperlink	iSupport's Web Site - Edit	
Number Only	123			

**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  $\checkmark$  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 17 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.

Basics >	Row	9 🔻
mySupport Access	Label	Install Date
Conditional Display Options	Tooltip	Select a date between one and five days after today.
	Required on Save	On Off
	Required on Close	On Off
	Available to Reps	On Off
	Encrypt	On Off
	Туре	Date Field
	Default Value	@Today+2
	Validation	On Off
	Date Validation Type	Between (Inclusive of Valid Start and 🔹
		Note: 0 = today, positive values for future dates, negative values for past dates.
	Valid Start	1 Days
	Valid End	5 Days

**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.

Desktop / Configuration /	Option	ns and Tools / Customize / Incident Custom Fields	
Basics		Available to mySupport	On Off
mySupport Access	>	Editable on New Incidents	On Off
Conditional Displa Options	У	Editable on Existing Incidents	On Off
		Select mySupport portals with access	<ul> <li>http://xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx</li></ul>

### 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.

Desktop / Configuration / Options and Tools / Customize / Incident Custom Fields						
Basics	Enable Conditional Display	On Off				
mySupport Access	Match Any V		+			
Conditional Display Options	Site Visit Required 🔻 Is	Yes	• •			

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.

Incident	Name	Asset Types
Problem		
Change	Connection String	server=.; database=cSupport; Trusted_Connection=True
Customer	SQL Query	select Type from ASSET_TYPES
Company		÷.
Asset		Retrieve Items
Purchase	ltems	Cell Phone
Service Contract	items	Copier Desktop
Configuration Item		Laptop Office Supplies
Knowledge Entry		Printer Server Tablet
Opportunity		Training Widgets
Advanced	Active	Yes No
Data Sources 🔉 🔉	Active	
	Synchronization Interval	15 minute 💌

**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.

Desktop / Configuration / Options	and Tools / Customize / Incident Custom Fields	
Basics >	Row	4
mySupport Access	Label	Affected Item
Conditional Display Options	Tooltip	
	Required on Save	On Off
	Required on Close	On Off
	Available to Reps	On Off
	Encrypt	On Off
	Туре	Multiple Selection List Box
	Data Source	Asset Types 🔹 🕇
	Options	Cell Phone
		Copier
		🗆 Desktop 🧭 🕑
		Laptop
		Office Supplies
	Max Rows	2

# Configuring Rules and Rule Groups for Opportunities

Use the Opportunity Rules screen to create **rules** that will perform actions when specified conditions based on Opportunity record fields or events are met. This functionality can be used to automatically:

- Change values in the Assignee, Customer, Probability, Stage, Type, Estimated Close Date, and custom fields for an Opportunity record
- Send notification via email, Desktop, and SMS
- Execute a webhook for posting Opportunity data to a web application

In order for a rule to be utilized, it must be included in a **rule group**. When an opportunity is saved, the matching rule group is first determined. Then, all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed.

Rule groups are applied to Opportunity records through customers, companies, and support representatives. (If a customer profile does not have an associated rule group, the rule group associated with the customer's company will be used for the customer.) You can specify the order of precedence if multiple rule groups apply, and the rule group designated as default will be used if none are applicable.

A default opportunity rule group will be included in iSupport on installation or upgrade. Use the Opportunity Rule Groups screen to create new rule groups and assign them to customers, companies, and support representatives. (You can also assign rule groups via those entry screens.) See "Creating Rule Groups" on page 27 for more information.

# **Rule Types**

• On Opportunity Save rules do not incorporate time frames; when an opportunity is saved, rules in the associated rule group are evaluated, and if conditions are matched, their actions are performed.

Name	Notify Manager When Probability Over 50%				
Configure Conditions					
Rule type is	On Opportunity Save				
Hours of Operation:	Default Hours of Operation 🔹 🛨 🖍				
Match All of the following conditions:					
<b>j</b>					
Notify - Email 🔹 Assignee - Fir	rst Rep to Notify 💌 With Custom Notification 💌 High Probability Opportunity 💌 🌒 🕂 🖍				

**Time-Based** and **Time-Based**: **Cumulative** rules incorporate time frames with conditions; when conditions are true upon save of an Opportunity record, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent.

•

Name	Purchasing Closure					
Configure Conditions						
Rule type is	Time-Based					
Hours of Operation:	Default Hours of Operation	1				
Match All  of the following conditions:  Stage  Is  In Purchasing  +  Configure Time Frame Intervals and Actions						
Intervals Time Minutes/Hours/Day(s)       1     8.00     Hours						
Notify - Email 💌 Assignee - First Rep	to Notify 💌 With Custom Notification 💌 Purchase Closure Needed 💌 🛛 + 🖍 🛛 + -	٢				

If the conditions required to meet the rule do not change before the interval time frame is reached, the performs the actions specified. If conditions change prior to the recorded date and time:

- Time-Based rules will clear all pending actions and if conditions are met again the time frame will restart.
- **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

**Note:** If you change a condition, time interval, or time value in an existing time-based rule and interval timers are in process for any records associated with it, the timers will be reset.

• **Time-Based: Important Dates** rules enable you to specify a number of days before or after the value in a specified date field. This type of rule will be evaluated when the defined number of days before or after the value

in the specified date field occurs. Actions will be performed if the rule's conditions are met at the time the Time-Based Rule agent runs.

Name	High Probability Assignment				
Configure Condition	S				
Rule type is	Time-Based: Important Dates				
Hours of Operation:	Default Hours of Operation				
Match All  of the following conditions:  Probability Greater Than T5 % + - Configure Time Frame Interval and Actions					
1.00 Day(s) After  Created Date					
Change 💌	Assignee 🔽 To Alex, Robert 💌 🕂				

Ensure that the Time-Based Rules is enabled via the button in the Rules list screen.

Edit Agent Settings	×
This agent searches all configured time-based rules, monitors time frames, and performs configured actions if conditions in the rules are met.	
Enable Yes No Run Now	

### Creating Rules

Rule creation involves entering a name for the rule, selecting the type of rule, selecting one or more conditions and time frame intervals if applicable, and then selecting one or more actions to perform if those conditions are met. The type of rule will determine the fields that appear. All rules include conditions and actions; see the following sections "Configuring Conditions" on page 21 and "Configuring Actions" on page 22 for more information. See "Creating Time Frame Intervals for Time-Based Rules" on page 24 for information on configuring interval time frames and actions to perform with each set of intervals.

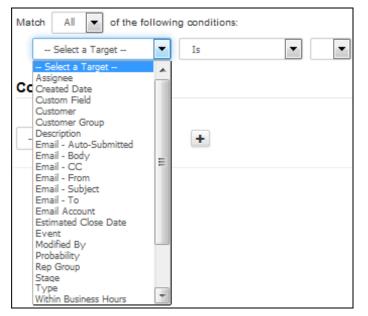
#### Configuring Conditions

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.

Match	All	۳	of the following conditions:	+	
	All				
	Any				

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 opportunity save. In the Select a Target dropdown, select what to evaluate: an opportunity field or event, or whether it is within business hours.



In the next dropdown, select the comparison method.

Match All 💌 of the	following cond	litions:			+	
Event	▼ Is	-	Opportunity Initially Saved	-	+	
	Is Is Not					

Finally, select the value to be used with the comparison method.

Match All 💌 of the follow	ng condi	itions:			+
Event 🔻	Is	-	Opportunity Initially Saved	-	+
Configure Actions			Opportunity Correspondence Sent Opportunity Exported to QuickBooks Opportunity Initially Saved		
Select an Action Type	+		Opportunity Invoice Added Opportunity Quote Sent Opportunity Reopened Opportunity Updated via Email		

Select + Add Condition if you wish to include another condition. You can use the <u></u>Add Condition Group option 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 use the + Add Action option to create another action. Use the Remove Action option to remove any action lines.

Configure Action	IS
Change	•
Change Execute Slack Webhook Execute Webhook Initiate Approvals Notify - Desktop Notify - Email Notify - SMS	

You can configure the following actions:

٠

٠

• **Change a field** by selecting Change, the field to change, and the value to change it to.

Configure	Actions			
Change	Assignee Assignee	▼ To	Alex, Robert	• +
	Custom Field Customer Estimated Close Date Probability Stage Type			Cancel

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

Configure Ac	tions	5			
Execute Webhook	•	opportunity webhook	•	+	

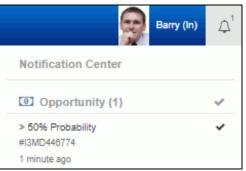
- Send a notification via Desktop notification, email, or SMS.
  - Desktop notification: To display an entry in the A<sup>5</sup> Notification list on the Desktop, select Notify Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.

Configure Act	ions			
Notify - Desktop 🔻	Select Recipients 🔻	Select Support Reps tify X	▼ Select Support Groups	> 50% Probability

Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/name) 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.

<b>Configure Actions</b>							
Notify - Email		LA GHL					
Assignee (via email)	*	With	Default Notification	۲	Quote Sent - Rep	• 0	+ 🖊
Assignee - First Rep to Notify Assignee - Second Rep to Notify							
Assignee (via email)							
Assignee (via alt email)							
Customer Email Sender							ſ
Group							Cancel
Selected Customer							÷
Selected Customer Group							
Selected Support Rep							
Selected Support Rep Group							

You can select the default or a custom notification. Notification options will include one of iSupport's default notifications that match the condition or recipient. Use the + Create New and  $\checkmark$  View/Edit options to access the Custom Notification screen. Select Show Notification to display the contents of the selected notification; see "Customizing and Viewing Event Notification Content" on page 30.

• **SMS**: To send an SMS notification, select Notify - SMS, the recipient, and the notification to be sent. The contents of the SMS Text field in the custom notification will be sent; if that field is blank or if it is a default notification, the contents of the Subject field will be used. If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, the address in the Email field. If sending to a customer, the message will be sent to the following in their Customer Profile record: if Twilio integration is configured, the number in the Mobile field; if Twilio integration is configured, the number in the Mobile field; if Twilio integration is configured, the number in the Address in the Email field. If sending to a customer, the message will be sent to the following in their Customer Profile record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the SMS email from mySupport (email to text); if that is unavailable, the address in the Email field. See "Configuring Twilio Integrations" on page 33 for more information on Twilio integration.

Configure Action	ns									
Notify - SMS	•									
Customer		<b>v</b> V	With	Default Notification	Ŧ	Closure - Cust	Ŧ	0	+	/

Creating Time Frame Intervals for Time-Based Rules

#### Time-Based and Time-Based: Cumulative Rules

With Time-Based and Time-Based: Cumulative rules, the Time Frame Interval Settings section will include Intervals, Time, Minutes/Hours/Day(s) fields as well as a set of fields for entering an action to be performed when the condition is met for the interval time frame. The difference between these rules is that, if conditions change prior to the configured interval settings, **Time-Based** rules will clear all pending actions and the time frame will restart if

conditions are met again; **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

Name	Purchasing Closure					
Configure Conditions						
Rule type is	Time-Based 💌 🔍					
Hours of Operation:	Default Hours of Operation 🔹 🕇 🖍					
Match All v of the following conditions: Stage V Is V In Purchasing V + - ··· Configure Time Frame Intervals and Actions						
Intervals Time Minutes/Hours 1 8.00 Hours Notify - Email  Assignee - First Rep						

In the Configure Time Frame Intervals and Actions section, use the Intervals field to specify the number of times a time frame should be established and monitored, and use the Time and Minutes/Hours/Day(s) fields to specify the amount and unit of time (in minutes, hours, or days) in the time frame. Use the dropdowns in the indented actions line to specify the actions to perform if conditions are met for that interval time frame. In the example above, the opportunity will be monitored for eight hours after initial save; if the stage remains at In Purchasing for the entire eight hours, the Purchase Closure notification will be sent to the assignee's first rep to notify.

#### **Time-Based: Important Dates Rules**

Time-Based: Important Dates rules enable you to specify a number of days before or after the value in a specified date field. This type of rule will be evaluated when the defined number of days before or after the value in the specified date field occurs. Actions will be performed if the rule's conditions are met at the time the Time-Based Rule agent runs.

Name	High Probability Assignment							
Configure Condition	Configure Conditions							
Rule type is	Time-Based: Important Dates							
Hours of Operation:	Default Hours of Operation 🔹 🛨 🖍							
Match All  of the following conditions:  Probability Greater Than T5 % + Configure Time Frame Interval and Actions								
1.00 Day(s) After	Created Date							
Change	Assignee <b>T</b> o Alex, Robert <b>+</b>							

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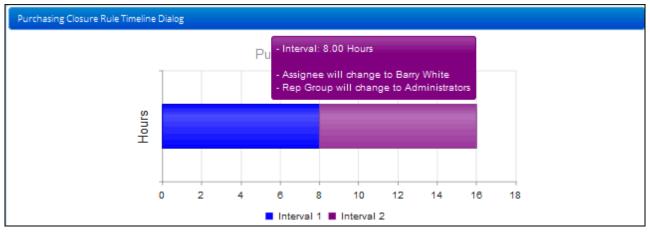
### Configuring Multiple Time Frame Intervals

You can select <sup>O</sup> Add Interval to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The  $\checkmark$  Move Down and  $\checkmark$  Move Up options will appear for changing the order in which the interval time frames will be evaluated. In the example below, the opportunity will be monitored for an eight hour time frame and if the stage remains at In Purchasing for the entire eight hours the Purchase Closure Needed notification will be sent to the assignee. The opportunity will then be monitored for an additional eight hour time frame. If the stage remains at In Purchasing for the entire eight hours, the opportunity will be assigned to Barry White.

Name	Purchasing Closure										
The second se											
Configure Conditions											
Rule type is	Time-Based 🗸 🖌										
Hours of Operation:	Default Hours of Operation 🔹 🛨 🖍										
Match All  of the following conditions	с <b>+</b>										
Stage 💌 Is 💌	In Purchasing 💌 🛨										
Configure Time Frame Interval	s and Actions										
The second se											
Intervals Time Minutes/Hours/Day											
1 8.00 Hours	▼										
Notify - Email 💽 Assignee (via ema	ii) 💌 With Custom Notification 💌 Purchase Closure Needed 💌 🛛 + 🖍 + - 🛇										
1 8.00 Hours	▼										
Change Assignee	▼ To White, Barry ▼										

## Displaying a Timeline for Configured Time Frame Intervals

Use the View Timeline button at the bottom of the screen to display a dialog with a gauge chart depicting the time frames for each interval; actions will appear when you hover over a time frame with your mouse.



### 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.

### Associating Rules With Rule Groups

After creating a rule, you'll need to include it in a rule group. You can do this via the Rule Group tab in the Rules screen, or via the Rule Group screen. On the Rule Groups tab, click the Add link. Rule groups configured via the Rule Group screen appear; select the applicable group(s) and click OK. The rule group displays along with its position as shown below:

	Basics	Add	Remove					
	Rule Groups		Name 🔺	Position in Group				
		Default Opportunity Rule Group	Default Opportunity Rule Group	1				

All rules in the rule group associated with an opportunity are evaluated when an opportunity is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

# **Creating Rule Groups**

Click the Create link in the Opportunity Rule Groups screen to create a rule group that can be designated as the default Opportunity rule group and applied to customers, companies, and support representatives.

Rule Groups		Search				
Asset		Create Copy Delete Order of Precedence Rules				
Change		Default				
Email		Default Opportunity Rule Group	Default			
Incident						
Knowledge Entry						
Opportunity						
Problem						
Purchase						
Survey						

Complete the fields at the top of the Rule Groups screen.

Basics >	Name	Sales Rule Group	
Customers	This is the default	On Off	
Companies	Opportunity Rule Group		
Reps	Hours of Operation: 24/7 🔻		
	Add Rules to This Rul	Position -	

**Name** - Enter a name for the rule group; this name will appear in the Opportunity screen when the rule group is in effect for an opportunity.

This is the Default Opportunity Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the customer, company, or support representative associated with an opportunity.

**Hours of Operation -** Select or create the Hours of Operation definition with the time frame to be used to determine the time intervals set in time-based rules. You can click the Hours of Operation link to display details on the selected definition. Note that an assigned Hours of Operation only applies to On Opportunity Save rules if Within Business Hours is used in a condition.

#### Adding Rules

Use the Add link on the On Save and Time-Based tabs to add previously configured rules to the rule group. All rules in the rule group associated with an opportunity are evaluated when an opportunity is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence. You can use the Create button to create a rule and add it to the current rule group.

#### Assigning a Rule Group

Use the Add link on the Customers, Companies, and Support Representative tabs to associate the rule group with one or more customers, companies, and support representatives. You can also do this via the Customer Profile and Company screens.

Basics	Add					
Customers 🔉	Last Name	First Name	Phone	Location	Company	Departmen
Companies	Johnson	Steve	360-397-1004	Headquarters	LBLSoft	Administrat
Reps	•					4

#### Printing the Rule Group Summary

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

# Setting the Rule Group Order of Precedence

Use the Order of Precedence button in the Rule Groups list screen to designate which should take precedence if a rule group is associated with an assignee, customer, and/or company is in effect for an opportunity.

Rule Groups	Search		
Asset	Create Copy Delete Order of Precedence Rules		
Change	Opportunity Order of Precedence     X		
Email			
Incident	S Assignee		
Knowledge Entry	Customer		
Opportunity	Company		
Problem			
Purchase	Save Cancel		
Survey			

# **Customizing and Viewing Event Notification Content**

Go to Options and Tools | Customize | Custom Notifications to view and customize the content of notifications for iSupport events. All default notifications include "[iSupport]" preceding the subject text, but you can remove that text by creating a custom notification. Event notifications are initiated in two ways:

- For iSupport's Asset, CMDB, Alert, Discussion Digest, and View Subscription functionality, notifications are sent via s configured in the Options and Tools | Administer | s screen.
- For modules with rule-based functionality (Customer, Incident, Problem, Change, Opportunity, Email, Discussion Post, Purchasing, and Knowledge), notifications are sent via rules that will perform actions when specified conditions are met. (The Time-based rule monitors time frames for time-based rules, however.)

In the Custom Notification screen, you can display and copy iSupport's default notifications via the Default subtab, and create new custom notifications via the Custom subtab.

Custom	Default				
Basics	incident Save		Cop	ny	
Initial Incident Save Initial Incident Save by Customer Incident Route			Name 🔺	Subject	
			Initial Save (by Support	[iSupport] New Incident Ticket	
···· Incider	nt Closure			Representative) - Cust	Created
····· Email-Submitted Incident Creation ····· Incident Closure Exceeded				Initial Save (by Support Representative) - Rep	[iSupport] New Ticket Created for <customer name=""></customer>

# About Recipients

Recipients for default notifications can include both support representatives and customers, and the default notification text is different for each. Support representative notifications (designated as "Rep") typically contain customer details, the priority, the assignee, the URL to Desktop incident, and the URL to Mobile incident. Customer default notifications (designated as "Cust") typically contain a link to the record on a mySupport portal; this link will go to the URL specified in the mySupport Portal Configuration screen.

Duplicates will be checked in order to prevent a recipient from receiving the same notification more than once. However, duplicate notifications to the same recipient may still occur. For example, if the incident creation notification is configured to be sent to the Customer and CC: Others to Notify as well as the Assignee and CC: Others to Notify, and the customer is on the Others to Notify list, the customer could receive a customer-targeted incident creation notification as well as a support representative-targeted incident creation notification, and the link on the support representative-targeted incident creation may not be accessible to the customer. Use the Others to Notify views on the Desktop to review potential notification recipients.

Recipient email addresses are validated; if a blank address exists, no attempt will be made to send it. Automatic notifications sent via agent will note errors in the Event Log. If an agent is run manually, errors will also display in a dialog after the agent runs. The SMTP server will be checked for responsiveness; if it is unresponsive, an error will be included in the log and processing will stop for that time. The notification failure threshold is 36 hours and all attempts will be stopped after that point. If a component of a notification is missing and cannot be resolved, an error will be included in the log and the notification will be deleted after 36 hours.

# Creating a Custom Notification

Use the Custom Notifications screen to select the delivery priority, enter subject and body text, and attach files for a custom notification. You can include data from the associated record via the Include Field link.

Desktop / Configuration / Options and Tools / Customize / Custom Notifications			
Name	Initial Save (by Support Representative) - Rep		
Delivery Priority	Low Normal High		
Include Attachment(s) from Incident	On Off		
Subject	New Incident Created for <customer name=""></customer>		
SMS Text	New Incident for <customer name=""></customer>		
	Subject used if unspecified		
Attachments	Attach a file		
Design Template	None		
Notification Message: Include Field			
😻 🖶 🛔 🐰 🖻 🍤 - Cl -	Β Ζ Ц 🗒 - 🖏 🖑 🦉 Ω - Φ -		
	📭 🚎 🛓 🗄 🦷 MS Sans Ser 🛛 2 🔹		
This <priority> priority incident ti</priority>	cket was created for <customer name="">.</customer>		
Customer Details Name: <customer name=""></customer>			

Name - Enter a name for the custom notification.

**Delivery Priority** - Select the priority level to assign to the email: High, Normal, or Low.

**Design Template** - If desired, select the design template with the elements (text and images) to appear around the body of the correspondence template and support representative signature (if applicable). You can select the Create

New or 
View/Edit options to access the Design Template screen; see "Configuring Design Templates" on page 32 for more information.

**SMS Text** - Enter the text to be sent when a rule using the Notify - SMS action is met. Note that if this field is blank or if it is a default notification, the text in the Subject field will be used.

If sending to a support representative, the message will be sent to the following in their Support Representative record: if Twilio integration is configured, the number in the Mobile field; if Twilio is not configured, the address in the Alt Email field; if that is unavailable, the address in the Email field. See "Configuring Twilio Integrations" on page 33 for more information.

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

Subject/Notification Message - In the Subject field, enter the subject line for the email notification.

On the Body tab, enter the body of the email notification. You can select the Notification Message link to display a larger window for entry. Use the Include Field link to add field values from the current record. The field will be

included in brackets, and the field data will be inserted into the email when it is generated. (If data does not exist for a required field, nothing will be inserted; the field area will be blank.)

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

🐨 Select Field to Include	—	$\times$
Current Date		
Rep URL to Read Online		1.1
mySupport URL to Read Online		
Incident		
URL to Desktop Incident		
URL to Mobile Desktop Incident		
URL to mySupport Incident		
Asset Details		
Custom Fields		
Custom Fields List		
Age Group		
Server OS		
Site Visit Required		
Department Code		
Date		-

**Include Attachment(s) from <record type>** - For all modules except Asset, CMDB, Discussion Posts, Security, and Alerts, select this checkbox to associate any attachments from the referenced work item type to the notification when it is sent.

Attachments - Use the Attachments tab to attach a file to be sent with the notification.

**Note**: If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

# **Configuring Design Templates**

Use design templates to add common design elements such as header and footer text or images to outbound email generated from iSupport. Use the Design Templates tab in the Core Settings | Email screen to enter a title and text and images; the <Correspondence Body> tag indicates where the email data will be inserted when the design template is applied.

Title	Logo Footer
Body:	
****	)• C* - B / Ü ĝ • Ŝ Ŝ Ω • Ø • 🖬 🖬 🖬 ≡ ≡ 📰 🕅 ¶
'Times New R ▼ 3 ▼	Normal • A •
<correspondence body=""></correspondence>	
🗑 ISUPPORT	
🖊 Design 🚯 HTML	S Preview

If a support representative sending a correspondence with the design template has a signature block, design elements that are after the <Correspondence Body> tag will appear after it.

Subject:	Contact Information Update Request
Hello, Please ser Steve Johr sj@examp 360-397-11	le.local
Thank you	
Barry Whit Support Re 360-397-11 bw@exam	epresentative 000
🗑 iSUPP	ORT

# **Displaying the Notification Queue**

Use the Notification Queue option under Options and Tools | Administer to display all notifications that have not been sent. You can use the checkboxes to restrict the notifications to appear in the screen, and delete any notifications that you do not wish to be sent.

View:	🗹 Incident 🕑 Cl	hange 🕑 Problem 🕑 Purchase	Service Contract	Configuration Item		
Del	Delete Selected Notifications Clear All Notifications					
	Туре	Event	Date Created 👻	Number		
	Purchase	Initial Purchase Request Save	2/2/2019 2:32:49 P	PM G22F435A17		
	Purchase	Initial Purchase Request Save	2/1/2019 11:25:28	AM G21C3639A7		
	Service Contract	Initial Save	1/26/2019 10:31:17	7 AM G1RB351683		

# **Configuring Twilio Integrations**

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

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

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

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

Desktop / Configurati	on / Options and Tools / Integrate / Twilio® Integrations				
Use this screen to integrate with Twilio for sending iSupport notifications via SMS (Short Message Services) messaging. Sign up at Twilio.com. In this screen enter a name for the integration, the number for an SMS-enabled phone from which notifications can be sent, and the values from your Twilio.com account dashboard in Account SID and Auth Token fields.					
Name	Twilio1				
Phone Number	x00000000x				
Account SID	x0000000000000000000000000000000000000				
Auth Token	x0000000000000000000000000000000000000				
Default	Yes No				

Name - Enter a name for the Twilio integration.

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

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

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

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

# **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.

Desktop / Configuration / Options and Tools / Integrate / Incident Webhooks				
Name	Webhook			
URL	http://xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx			
Content Type	x-www-form-unlencoded 350N			
Parameters & Payload Example				
Basics	iSupport Field Parameter Name	{ "Number":"Number", "Identifier":"Identifier" }		
··· Identifier ··· Number	Number >			
··· Status	1 Identifier			
··· Status Identifier ··· Priority				

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.

Desktop / Configur	ration / Options and Tools / Automat	e / Incident Rules		
Basics	Name	Webhook Rule		
Rule Groups	Configure Condit	ions		
	Rule type is	Time-Based	♥ 0	
	Hours of Operation:	None	v + /	
	Match All 🗸 of the following conditions:		+	
	Custom Field	✓ Current Project Is ✓ Set Va	alue: Beta +	
	Configure Time Frame Intervals and Actions			
	1 0.50	Hours	+ 💿	
	Execute Webhook	♥ Webhook ♥	+ - 0	

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