



Configuring iSupport[®] Service Contract Functionality

Use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. You can set up contracts based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (time frame in days), or a combination (limiting the number of incidents and/or changes within a specified daily time frame). You can assign a service contract to one or more customers, companies, or assets.

Service Contract

File | **Actions**

Save | Save and Exit | Save and Logout | Print | Delete | Counters | New Correspondence | Use Template | Schedule Meeting

Number: 15VC151194 | **Duration Count:** 10.00 | **Hours of Operation:** 24/7

Name: SJ Work Items | **Duration Count:** Hours | **Notification Event:** Initial Save

Contract ID: 8675309 | **Type:** Both

Status: Active | **Duration Start:** 9/20/2022 | Author

Modified: 1/14/2022 12:16:37 PM | **Duration End:** 9/20/2023 | Customer or Company's Primary Contact

Used: 2.00 / 10.00 Hours | **Send Expiration Reminder:** Internal Contacts

Threshold Value: 10.00 Hours | External Contacts

Days Before: 2.00

Details | History | Contacts | Custom Fields | Attachments

Comments:
Contract applies to all applications.

Customers: Add Remove

| Name | Email | Phone | Company |
|--|------------|--------------|--------------|
| <input type="checkbox"/> Steve Johnson | sj@gwi.com | 360-397-1004 | LBL Services |

Companies: Add Remove

| Name | Phone | Primary Contact | Primary Email |
|----------------------------------|--------------|-----------------|---------------|
| <input type="checkbox"/> LBLSoft | 360-397-1000 | Steve Johnson | sj@gwi.com |

Assets: Add Remove

| Name | Serial Number | Tag Number | Type |
|-----------------------------------|---------------|------------|--------|
| <input type="checkbox"/> Laptop 1 | | | Laptop |

Configuration Overview

Basic Configuration

- Enable and set basic Service Contract options via Feature Basics; see [“Setting Service Contract Feature Basics Options” on page 3](#) for more information.

Creating Service Contracts

- You can create service contracts via the Service Contract screen or the Customer Profile, Company, or Asset screens.

Customizing iSupport Defaults

- If there are fields you need for the Service Contract screen that are not included in iSupport by default, you can create custom fields. See [“Configuring Custom Fields” on page 6](#).
- You can create customized labels for the Service Contract status levels of Active, Inactive, Suspended, and Expired. See [“Defining Custom Status Labels” on page 13](#).
- You can include a field for an automatically generated number entering a custom number specific to your company. See [“Defining Custom Numbers” on page 15](#),
- You can enable your customers to view service contracts on mySupport portals, and you can customize the display screen layouts. See the online help for more information.

Sending Notifications

- You can send notifications when a service contract is initially saved or about to expire, the duration or status changes, or a count is decremented. You can use or copy and modify iSupport's default notifications, or you can create new custom notifications. You can include data from Service Contract records and designate any applicable recipients. These notifications are sent on the schedule of the Service Contract agent that is scheduled on the Service Contract Management | Agents tab in the Feature Basics screen. See [“Setting Service Contract Feature Basics Options” on page 3](#) for more information.
- You can send correspondence email from the Service Contract screen. Correspondence can include data from Service Contract 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.

Using Workflow Features

- You can create templates to populate fields for common service contract settings; see [“Creating Service Contract Templates” on page 18](#).
- You can configure webhooks for posting Service Contract data to a web application. See [“Configuring Webhooks” on page 22](#).

Managing Service Contracts

- You can use the Action menu in the View component on the Desktop to perform actions such as opening and routing multiple items.
- You can configure roles/permissions for support reps and rep groups using Service Contract functionality via the Support Representatives screen. See the online help for more information.

Setting Service Contract Feature Basics Options

The Service Contract Basics screen enables you to enable use of service contracts with incidents and changes, courtesy work items, Service Contract entry screen defaults, and notifications.

Completing the Basics Tab

Use the Basics tab to enable use of service contracts with incidents and changes, courtesy work items, and Service Contract entry screen defaults.

| Enable Features | Basics | Notification Events | Agents |
|---|--|--|--------|
| Asset Management | Use With Incidents | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | |
| Change Management | Use With Changes | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | |
| Configuration Management | Allow Courtesy Work Items | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | |
| Incident Management | Default Create Status | Active <input type="button" value="v"/> <input type="button" value="+"/> <input type="button" value="edit"/> | |
| Knowledge Management | Default End of Duration Status | Expired <input type="button" value="v"/> <input type="button" value="+"/> <input type="button" value="edit"/> | |
| Opportunity Management | Default Correspondence Template | Service Contract Corre <input type="button" value="v"/> <input type="button" value="+"/> <input type="button" value="edit"/> | |
| Problem Management | | | |
| Purchasing | | | |
| Service Contract Management <input type="button" value="right arrow"/> | | | |

Use With Incidents - Select Yes to enable Service Contract functionality in the Incident entry screen.

Use With Changes - Select Yes to enable Service Contract functionality in the Change entry screen.



Allow Courtesy Work Items - A courtesy work item is an incident or change that does not count against the service contract in effect for a customer, company, or asset; it is created for an incident or change if the Mark This a Courtesy Work Item checkbox is enabled in the Select Service Contract dialog that appears after a customer is selected.

Select Yes to include the Mark This a Courtesy Work Item checkbox in the dialog that appears for selecting a service contract in the Incident and/or Change screens.

Default Create Status - Select the status level to display by default when a service contract is created. Use the New and View/Edit options to access the Custom Status Labels screen; see ["Defining Custom Status Labels" on page 13](#) for more information.



Default End of Duration Status - Select the Expired status level to assign to the contract by default when the date in the Duration End field is reached. Use the Create New and View/Edit options to access the Custom Status Labels screen; see ["Defining Custom Status Labels" on page 13](#) for more information.

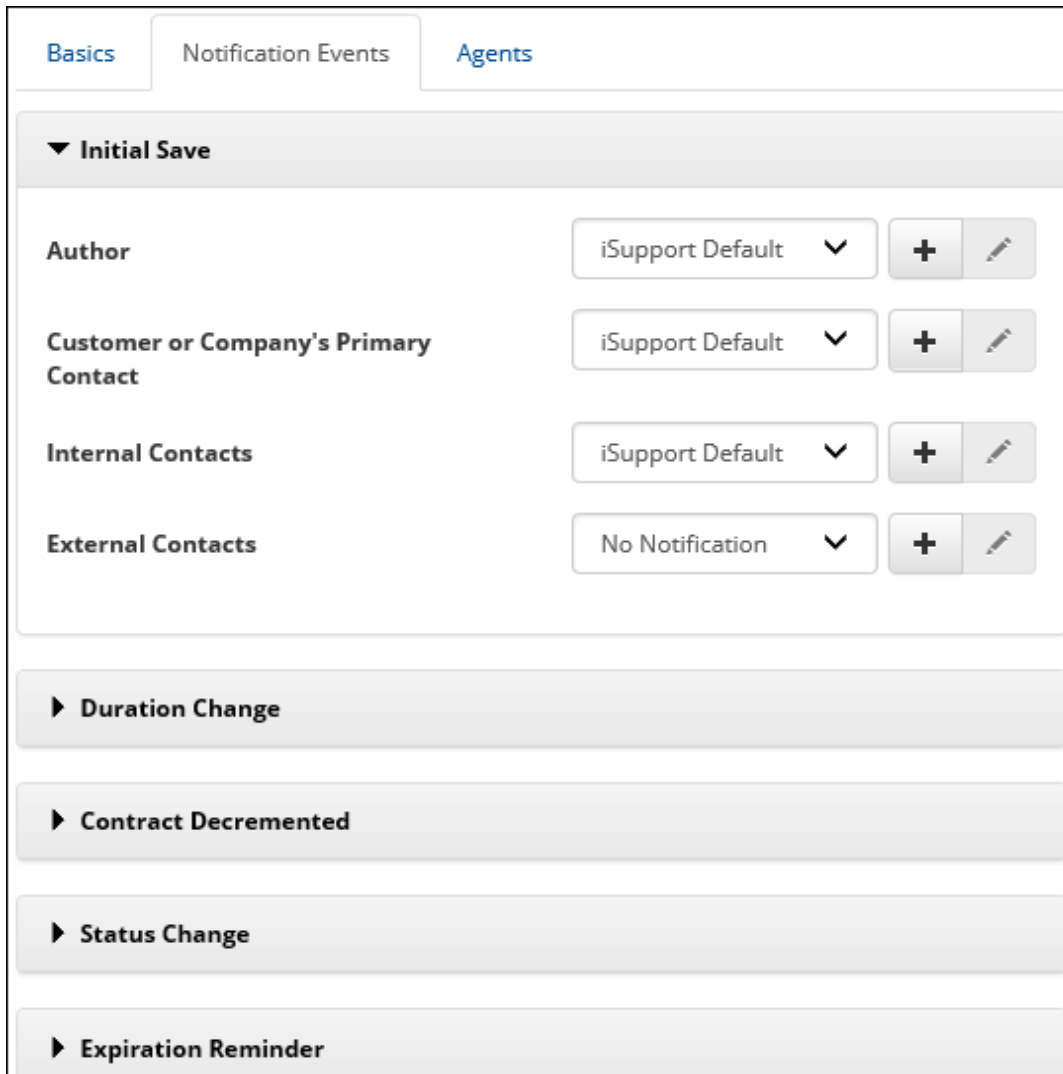
Default Correspondence Template - Select the correspondence template that will apply by default when a support representative initiates a correspondence via the Service Contract entry screen. Correspondence templates that are

active and enabled for the Service Contract module will be available for this feature. Use the  Create New and  View/Edit options to access the Correspondence Template screen.

Setting Up Notifications for Service Contract Events

You can configure notifications to be sent when service contract events occur such as record creation, a change to the duration of the contract, an incident or change is counted against the contract, a support representative makes a change in the Status field, or an expiration reminder is sent.

The notifications on this screen are used as defaults for the Notification Event field in the Service Contract entry screen. Use the fields below to enable specified notifications to be sent to specified recipients for Service Contract events. You can select the default notification or a predefined custom notification; use the  Create New and  View/Edit options to access the Custom Notifications screen. Note that these settings will be used if nothing is selected in the Notification Event section in the Service Contract entry screen and no template is selected. Notifications are sent according to the schedule of the Service Contract agent; see [“Enabling the Service Contract Agent” on page 5](#).



| Event | Notification | Actions |
|---------------------------------------|------------------|---------|
| Initial Save | | |
| Author | iSupport Default | + ✎ |
| Customer or Company's Primary Contact | iSupport Default | + ✎ |
| Internal Contacts | iSupport Default | + ✎ |
| External Contacts | No Notification | + ✎ |
| Duration Change | | |
| Contract Decremented | | |
| Status Change | | |
| Expiration Reminder | | |

Initial Save - Select the recipients and notifications to be sent when a service contract is initially saved.

Duration Change - Select the recipients and notifications to be sent when an entry is changed in the Duration fields for a service contract and the record is saved.

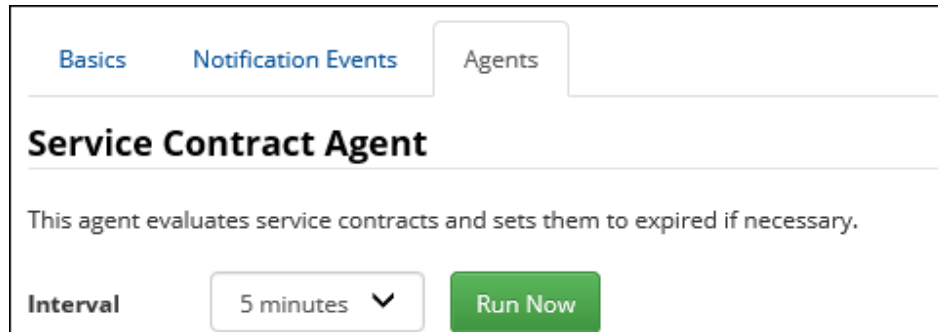
Contract Decremented - Select the recipients and notifications to be sent when an incident or change is counted against a service contract.

Status Change - Select the recipients and notifications to be sent when an entry is made in the Status field for a service contract and the record is saved.

Expiration Reminder - Select the recipients and notifications to be sent when a contract is about to expire.

Enabling the Service Contract Agent

In the Service Contract Agent Interval field, select the number of minutes in the interval for the Service Contract agent to check all service contracts for counts and/or end dates/times; if the specified total count and/or end date/time is reached, the status changes to an Expired status. You can select Daily to run the agent every day at a specified start time.



The screenshot shows a configuration interface for the Service Contract Agent. At the top, there are three tabs: 'Basics', 'Notification Events', and 'Agents', with 'Agents' being the active tab. Below the tabs is the title 'Service Contract Agent' and a descriptive text: 'This agent evaluates service contracts and sets them to expired if necessary.' At the bottom, there is an 'Interval' label, a dropdown menu showing '5 minutes' with a downward arrow, and a green 'Run Now' button.

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 | Label | Tooltip | Required on Save | Required on Close | Available to Reps | Encrypt | Type | Data Source | Options | Max Columns |
|-----|-----------|-------------------------|------------------|-------------------|-------------------|---------|-----------|-------------|---|-------------|
| 1 | Server OS | Server Operating System | Off | Off | On | Off | Check Box | None | <input checked="" type="checkbox"/> Windows <input type="checkbox"/> Mac <input type="checkbox"/> Other | 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 11](#) 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.

| | | | |
|---------------|---|-----------------------------|---|
| Check Box | <input checked="" type="checkbox"/> Option 1 <input checked="" type="checkbox"/> Option 2 <input type="checkbox"/> Option 3 | Date Field | <input type="text" value="03/08/2019"/> |
| Radio Button | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> I don't know | Date/Time Field | <input type="text" value="03/07/2019 3:27:00"/> |
| Text Area | <input type="text"/> | Single Selection Drop-Down | <input type="text" value="Option 1"/> |
| Text Field | <input type="text"/> | Multiple Selection List Box | <input type="text" value="Option 1"/> <input type="text" value="Option 2"/> <input type="text" value="Option 3"/> |
| Currency Only | <input type="text" value="\$ 123"/> | Hyperlink | iSupport's Web Site - Edit |
| Number Only | <input type="text" value="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 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 11](#) 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.

The screenshot shows a configuration panel for a field. On the left, there is a sidebar with 'Basics' selected, and 'mySupport Access' and 'Conditional Display Options' listed below it. The main area contains the following settings:

- Row:** 9
- Label:** Install Date
- 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)
- Type:** Date Field
- Default Value:** @Today+2
- Validation:** On (Off)
- Date Validation Type:** Between (Inclusive of Valid Start and Valid End)
- Valid Start:** 1 Days
- Valid End:** 5 Days

A note at the bottom states: 'Note: 0 = today, positive values for future dates, negative values for past dates.'

- **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 be 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.

The screenshot shows the configuration page for Incident Custom Fields. The breadcrumb trail is: Desktop / Configuration / Options and Tools / Customize / Incident Custom Fields. On the left, there is a navigation menu with three items: Basics, mySupport Access (which is selected and highlighted in blue), and Conditional Display Options. The main content area contains four settings:

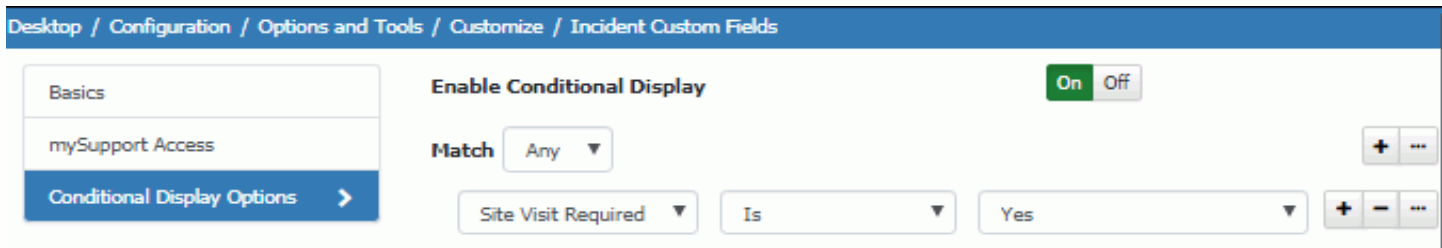
| | |
|--------------------------------------|---|
| Available to mySupport | <input checked="" type="radio"/> On <input type="radio"/> Off |
| Editable on New Incidents | <input checked="" type="radio"/> On <input type="radio"/> Off |
| Editable on Existing Incidents | <input checked="" type="radio"/> On <input type="radio"/> Off |
| Select mySupport portals with access | <input checked="" type="checkbox"/> http:// xxxxxxxxxxxx .com/user/ <input type="checkbox"/> http:// xxx.com |

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

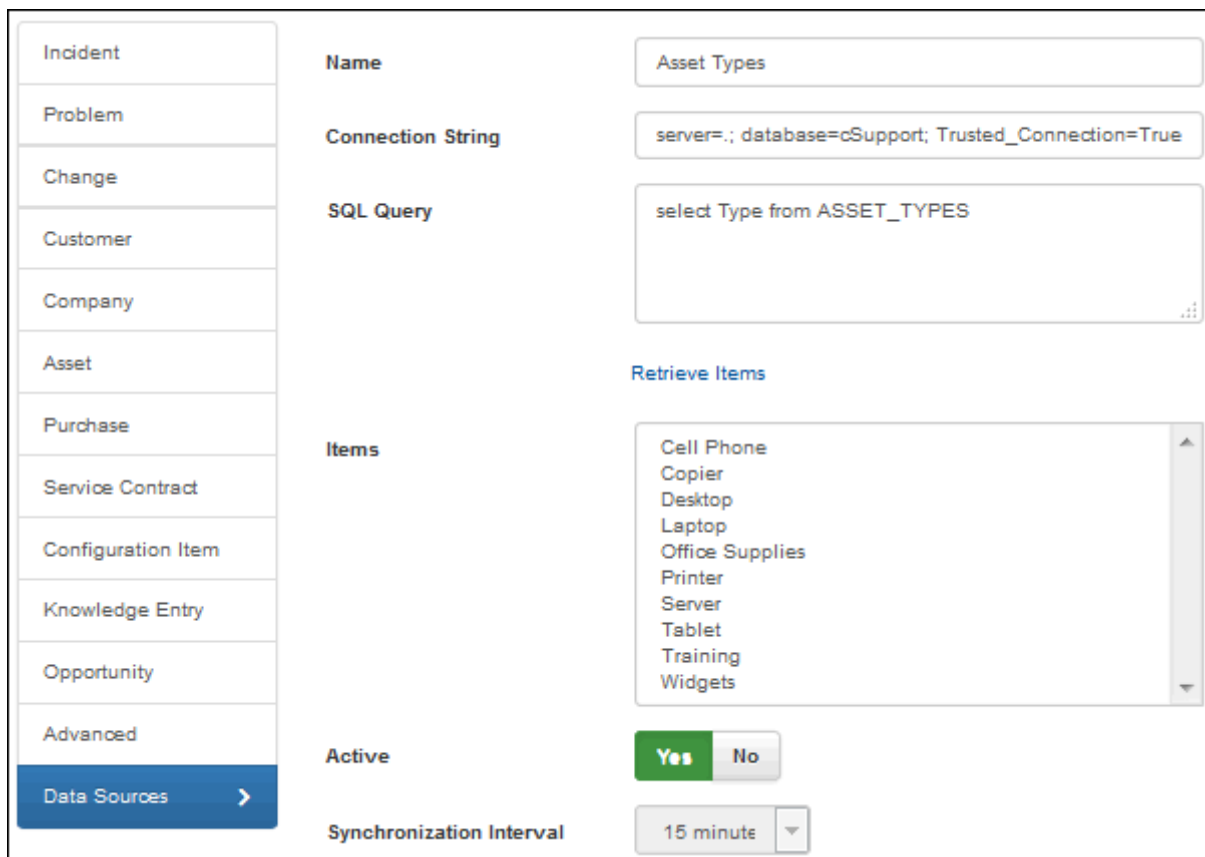
Enable Conditional Display - Select On to enable the Conditional Display Options fields for configuring conditions on which to base display of the custom field.



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.

The screenshot shows the configuration interface for an Incident Custom Field. The breadcrumb trail at the top reads: Desktop / Configuration / Options and Tools / Customize / Incident Custom Fields. On the left, a sidebar contains three menu items: 'Basics' (selected), 'mySupport Access', and 'Conditional Display Options'. The main configuration area is divided into two columns. The left column lists various settings, and the right column contains the corresponding input fields or controls.

| Setting | Value / Control |
|-------------------|---|
| Row | 4 |
| Label | Affected Item |
| Tooltip | |
| Required on Save | On Off |
| Required on Close | On Off |
| Available to Reps | On Off |
| Encrypt | On Off |
| Type | Multiple Selection List Box |
| Data Source | Asset Types |
| Options | <ul style="list-style-type: none"><input type="checkbox"/> Cell Phone<input type="checkbox"/> Copier<input type="checkbox"/> Desktop<input type="checkbox"/> Laptop<input type="checkbox"/> Office Supplies |
| Max Rows | 2 |

Defining Custom Status Labels

Use the Options and Tools | Customize | Custom Status Labels screen to create custom labels for iSupport's work item status levels. These labels will be included in views and reports, and will appear for selection in work item screens; however, you can restrict access via the Template and Support Representative Group configuration screens. Use the **Order of Precedence** link in the Custom Status Labels screen to set which will prevail if both a template and a support representative group have a restricted status.

You can also create labels that will appear to customers using mySupport.

If you have the Incident Management Edition, you can define labels for the following work item types:

- Incident: Open, Closed, Suspended, Scheduled, Reopened
- Service Contract: Active, Inactive, Suspended, and Expired.

If you have the Service Desk Edition, you can define labels for the following of work item types:

- Change: Open, Closed, Suspended
- Problem: Open, Closed
- Purchasing: Open, Closed

Note: For all except Company and Configuration Item, there must be at least one status label of each type. For incidents, there must be only one Reopened and Scheduled type.

| | | Label | mySupport Label | Type | Position ↑ | Default List |
|--------------------------|--|--------------------|--------------------|-----------|------------|--------------|
| <input type="checkbox"/> | | Open | Open | Open | 1 | Yes |
| <input type="checkbox"/> | | Closed | Closed | Closed | 2 | Yes |
| <input type="checkbox"/> | | Suspended | Open | Suspended | 3 | No |
| <input type="checkbox"/> | | Reopened | Open | Reopened | 4 | Yes |
| <input type="checkbox"/> | | Scheduled | Scheduled | Scheduled | 5 | Yes |
| <input type="checkbox"/> | | Update Added | Updated | Open | 6 | No |
| <input type="checkbox"/> | | In Process | In Process | Open | 7 | Yes |
| <input type="checkbox"/> | | Customer Submitted | Customer Submitted | Open | 8 | Yes |
| <input type="checkbox"/> | | Declined | Declined | Open | 9 | No |

Label - Enter the name for the status.

mySupport Label - Enter the status label to appear on the mySupport portal. Enable the status label via the <work item type> Display tab in the Core Settings | mySupport | Portals | Options configuration screen.

Type - Select the basis for the custom status label: Open, Suspended, Reopened, or Closed. Note: Since there can only be one Reopened status label, it will not be available for new status labels.

Position - Select the number of the position for the status to display in the Status field dropdown list. (Row one will be the first status, row two will be the second status, and so on.)

Default List (incidents/changes) - Enable to include the status as an available option in the default list that will appear in the Status field when a support representative creates a new incident or change. If not enabled, the status will only display if configured for a template that has been applied, set as the default status (on Incident or Change Basics for an email account or mySupport Portal Options), or a rule configured with the Change Status Label action is met. Note that status label display can also be controlled via the Restrict Statuses/Statuses to Display fields on the

Advanced tab in the Incident and Change Templates screen and on the Work Item UI tab in the Rep Group configuration screen (applies only to each support representative's primary group).

Defining Custom Numbers

You can include a field on the Incident, Problem, Change, Service Contract, and Purchase Request screens for entering a custom number, or an automatically generated number consisting of a prefix, suffix, and sequence that you configure. The number can be up to 15 characters.

The Custom Number configuration fields appear after selecting Yes in the Include Custom <record type> Number field. There are two methods for configuring custom numbers: a manually entered option or an automatically generated option.

Configuring a Manually Entered Number

The Manually Entered option displays a field for entering a custom number. Select Yes in the Required on Save field to require entry in this field before the work item can be saved. Select Yes in the Mark Read Only Once Saved field to prohibit entry in the field after the work item is saved.

| | |
|--------------------------------|---|
| Include Custom Incident Number | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
| Custom Number Label | <input type="text" value="ID"/> (14 characters maximum) ? |
| Method | <input type="radio"/> Automatically Generated <input checked="" type="radio"/> Manually Entered |
| Required on Save | <input checked="" type="checkbox"/> On <input type="checkbox"/> Off |
| Mark Read Only Once Saved | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off |

Configuring an Automatically Generated Number

The Automatically Generated option creates numbers automatically based on prefix, suffix, and sequence settings that you configure. You can either use a static (fixed) custom prefix and suffix, restricted via a start and end number if desired. Prefixes and suffixes can be static (fixed) or dynamic; however, if you have a dynamic prefix you must have a static suffix. The number cannot exceed 15 characters; the box above the Use Prefix field contains a current character count and example of your entries.

| | |
|-------------------------|--------------|
| Current Character Count | 12 out of 15 |
| Prefix | 3 |
| Suffix | 3 |
| Sequence Number | 6 |
| Custom Number Example | LBL1LOL |

Configuring the Prefix

In the Prefix Options section, select the Use Prefix checkbox to configure characters that will precede the custom number. Then select the prefix type: static (fixed) or dynamic (a day, month, and/or year combination).

- If using a Static prefix type, enter the characters (letters, numbers, or symbols) in the Prefix field.

The screenshot shows a form titled "Prefix Options". At the top, there is a toggle switch for "Use Prefix" which is currently set to "On". Below this, the "Prefix Type" is set to "Static" (highlighted in green) and "Dynamic" is disabled. The "Prefix" field contains the text "LBL".

- If using a Dynamic prefix type, select the day, month, and year combination in the Prefix field. You can optionally enter a character (such as a hyphen) in the Prefix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.

The screenshot shows a form titled "Prefix Options". The "Prefix Type" is set to "Dynamic" (highlighted in green) and "Static" is disabled. The "Prefix" field has three radio button options: "ddmmyy (08Mar19)", "mmyy (Mar19)", and "yyyy (2019)", with "yyyy (2019)" selected. The "Prefix Separator" field contains a hyphen "-" and has a tooltip that says "(Optional, 1 character maximum)".

Configuring the Sequence

Use the fields in the Sequence Details section, to configure the sequence number between any configured prefix and any configured suffix.

- Enter the number to start the sequence in the Start Sequence At field.
- Your selection in the Prefix field will determine the Restart Sequence field. If you select yyyy and you wish to restart the sequence when the first work item is created after 12:00pm on December 31, select Yes in the Restart Sequence Yearly field.
- If you wish to restart the sequence after the sequence number reaches a specified maximum (for example, after the sequence number reaches 1000), enter the maximum number in the Restart Sequence After field. If not specified, sequence will restart at maximum allowed (999999999).

The screenshot shows a form titled "Sequence Details". The "Start Sequence At" field contains the number "1". The "Restart Sequence Yearly:" toggle switch is set to "On". Below the toggle, there is a note: "Sequence will restart earlier if number reaches maximum allowed (999999999)."

Configuring the Suffix

Select On in the Use Suffix field to configure characters that will be placed after the custom number. If using a Dynamic prefix type, you'll need to use a static suffix.

- If using a Dynamic suffix type, select the day, month, and year combination in the Suffix field. You can optionally enter a character (such as a hyphen) in the Suffix Separator field. Note that the year will change when the first work item is created after 12:00pm on December 31.

Suffix Options

Suffix Type Static Dynamic

Suffix ddmmmyy (08Mar19) mmyy (Mar19) yyyy (2019)

Suffix Separator (Optional, 1 character maximum) ?

- If using a Static suffix type, enter the characters (letters, numbers, or symbols) in the Suffix field.

Suffix Options

Suffix Type Static Dynamic

Suffix

Creating Service Contract Templates

Use the Service Contract Templates screen to create templates for service contracts that are entered frequently.

The screenshot displays the configuration interface for creating service contract templates. On the left, a sidebar menu includes 'Basics' (selected), 'Contacts', and 'Notifications'. The main configuration area includes the following fields and controls:

- Name:** A text input field containing 'Unlimited Duration'.
- Available to Support Representatives:** A toggle switch set to 'On'.
- Default Status:** A dropdown menu set to 'Active', with '+' and edit icons to the right.
- Hours of Operation:** A dropdown menu set to '24/7', with '+' and edit icons to the right.
- Type:** A dropdown menu set to 'Duration'.
- Duration Start Interval:** A text input field containing '0'.
- Duration End Interval:** A text input field containing '30'.
- Send Expiration Reminder:** A toggle switch set to 'On'.
- Threshold Value:** A text input field containing '8'.
- Comments:** A text area containing the text 'Hard copy file in Accounting'.

Name - Enter a name for the template to appear in the template selection dialog and by default in the Name field in the Service Contract screen after the template is selected.

Default Status - Select the Active, Inactive, Suspended, or Expired status level to populate the Status field in the Service Contract entry screen. Select the status level to display by default when a service contract is created. Use the Create New and View/Edit options to access the Custom Status Labels screen; see ["Defining Custom Status Labels for Service Contracts" on page 506](#) for more information.

Type - Select the contract basis to display by default in the Type field in the Service Contract entry screen:

- Duration - a specified number of incidents and/or changes within a specified time frame (in days)
- Count - a specified number of hours or work items (incidents and/or changes)
- Both - a specified number of incidents and/or changes within a specified daily time frame

Duration Count - Enter the number to display default in the Duration Count field in the Service Contract entry screen. This value is the maximum number of hours or incidents and changes allowed under the contract. Hours or incidents and/or changes are counted against a contract when the record is initially saved.

Duration Count Type - Select one of the following to display by default in the Duration Count Type field in the Service Contract entry screen:

- Hours to base the contract on the number of hours entered for time worked on incidents and changes.
- Work Items to base the contract on the number of incidents and changes created for the associated customer, asset, or company.

Duration Start Interval - Enter the number of days to be added after the current date in the calculation of the date to display by default in the Duration Start field in the Service Contract entry screen.

Duration End Interval - Enter the number of days to be added after the current date in the calculation of the date to display by default in the Duration End field in the Service Contract entry screen.

Make Available to Support Representatives - Select this checkbox to include the service contract template in the list of templates available for selection in the Service Contract entry screen.

Hours of Operation - Select the Hours of Operation definition that has the time frames in which the contract should be in effect; incidents and/or changes will be counted against the contract during the these time frames. Click the Hours of Operation link to display details on the selected definition.

| 24/7 | | | |
|-----------|----------|----------|--|
| Day | Open | Close | Blocked Dates |
| Sunday | 12:00 AM | 11:59 PM | Wednesday, December 25, 2019 Tuesday, December 31, 2019 |
| Monday | 12:00 AM | 11:59 PM | Wednesday, January 1, 2020 |
| Tuesday | 12:00 AM | 11:59 PM | Monday, February 17, 2020 Monday, May 25, 2020 |
| Wednesday | 12:00 AM | 11:59 PM | Friday, July 3, 2020 Saturday, July 4, 2020 |
| Thursday | 12:00 AM | 11:59 PM | |
| Friday | 12:00 AM | 11:59 PM | |
| Saturday | 12:00 AM | 11:59 PM | |

Use the  Create New and  View/Edit options to access the Hours of Operation screen.

Send Expiration Reminder - Select this checkbox to enable the Expiration Reminder checkbox in the Service Contract screen by default. An Expiration Reminder is a notification that the contract is about to expire. The notification will be sent according to the value specified in the applicable Threshold Value or Days Before field. Recipients are specified on the Notifications tab.

Threshold Value - Enter the number to display by default in the Threshold Value field in the Service Contract entry screen. This value is the number of hours or incidents and/or changes to be reached before triggering the Expiration Reminder notification to be sent.

Days Before - Enter the number to display by default in the Days Before field in the Service Contract entry screen. This value is the number of days before the Duration End date in which to trigger the Expiration Reminder notification to be sent.

Comments - Enter text to display by default in the Comments field in the Service Contract entry screen.

Selecting Contacts

Use the Contacts tab to select the customers, companies, and/or support representatives to populate the Internal Contacts and External Contacts fields.

The screenshot shows a web interface with a 'Contacts' tab selected. Below the tab are two sections: 'Internal Contacts' and 'External Contacts'. Each section has a header with 'Add: Customer Company Support Representative | Remove' and a table with columns for Name, Email, Type, and Company Name. In the Internal Contacts table, Barry White is listed with email BW@example.local and type Support Representative. In the External Contacts table, Steve Johnson is listed with email sj@example.local and type Customer, with company name LBLSoft.

| Internal Contacts - Add: Customer Company Support Representative Remove | | | |
|---|------------------|------------------------|--------------|
| <input type="checkbox"/> Name | Email | Type | Company Name |
| <input type="checkbox"/> Barry White | BW@example.local | Support Representative | |

| External Contacts - Add: Customer Company Support Representative Remove | | | |
|---|------------------|----------|--------------|
| <input type="checkbox"/> Name | Email | Type | Company Name |
| <input type="checkbox"/> Steve Johnson | sj@example.local | Customer | LBLSoft |

Internal Contacts - Select customers, companies, and/or support representatives to populate the Internal Contacts field in the Service Contract entry screen. Internal contacts can be selected as recipients for service contract notifications.

External Contacts - Select customers, companies, and/or support representatives to populate the External Contacts field in the Service Contract entry screen. External contacts can be selected as recipients for service contract notifications.

Configuring Notifications

Use the Notifications tab to populate the Notification Events field in the Service Contract entry screen when the template is selected. These settings will override any defaults set via the Notifications tab in the Service Contract Basics Configuration screen.

The screenshot shows a configuration screen with three tabs: 'Single', 'All', and 'Summary'. Below the tabs are four sections of checkboxes for notification events: 'Initial Save', 'Duration Change', 'Contract Decrement', and 'Status Change'. Each section has three options: 'Author', 'Customer or Company's Primary Contact', and 'Internal Contacts'. The 'Expiration Reminder' section has three options: 'Author', 'Customer or Company's Primary Contact', and 'External Contacts'. The 'Author' checkbox is checked in all sections except 'Expiration Reminder'.

Initial Save:

- Author
- Customer or Company's Primary Contact
- Internal Contacts
- External Contacts

Duration Change:

- Author
- Customer or Company's Primary Contact
- Internal Contacts
- External Contacts

Contract Decrement:

- Author
- Customer or Company's Primary Contact
- Internal Contacts
- External Contacts

Status Change:

- Author
- Customer or Company's Primary Contact
- Internal Contacts
- External Contacts

Expiration Reminder:

- Author
- Customer or Company's Primary Contact
- Internal Contacts
- External Contacts

Initial Save - Select one or more recipients to notify when a service contract is initially saved.

Duration Change - Select one or more recipients to notify when an entry is made in the Duration fields for a service contract and the record is saved.

Contract Decrement - Select one or more recipients to notify when an incident or change is counted against a service contract.

Status Change - Select one or more recipients to notify when an entry is made in the Status field for a service contract and the record is saved.

Expiration Reminder - Select one or more recipients to be sent a notification that the contract is about to expire.

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.

The screenshot shows the 'Incident Webhooks' configuration interface. At the top, the breadcrumb trail reads: Desktop / Configuration / Options and Tools / Integrate / Incident Webhooks. The main form includes the following fields:

- Name:** Webhook
- URL:** http://xxxxxxxxxxxxxxxx/webhookexamples/webhook
- Content Type:** x-www-form-urlencoded (selected), JSON (highlighted in green)

Below these fields is a section titled 'Parameters & Payload Example'. On the left, a tree view under 'Basics' lists fields: Identifier, Number, Status, Status Identifier, and Priority. In the center, a table maps iSupport fields to parameter names:

| iSupport Field | Parameter Name |
|----------------|----------------|
| Number | Number |
| Identifier | Identifier |

On the right, a JSON payload example is shown:

```
{ "Number": "Number", "Identifier": "Identifier" }
```

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.

The screenshot shows the 'Incident Rules' configuration interface. The breadcrumb trail is: Desktop / Configuration / Options and Tools / Automate / Incident Rules. The 'Basics' tab is selected, and the 'Name' field is 'Webhook Rule'. The 'Configure Conditions' section includes:

- Rule type is:** Time-Based
- Hours of Operation:** None
- Match:** All of the following conditions:
 - Custom Field: Current Project Is Set Value: Beta

The 'Configure Time Frame Intervals and Actions' section includes:

- Intervals:** 1
- Time:** 0.50
- Minutes/Hours/Day(s):** Hours
- Action:** Execute Webhook (Webhook)