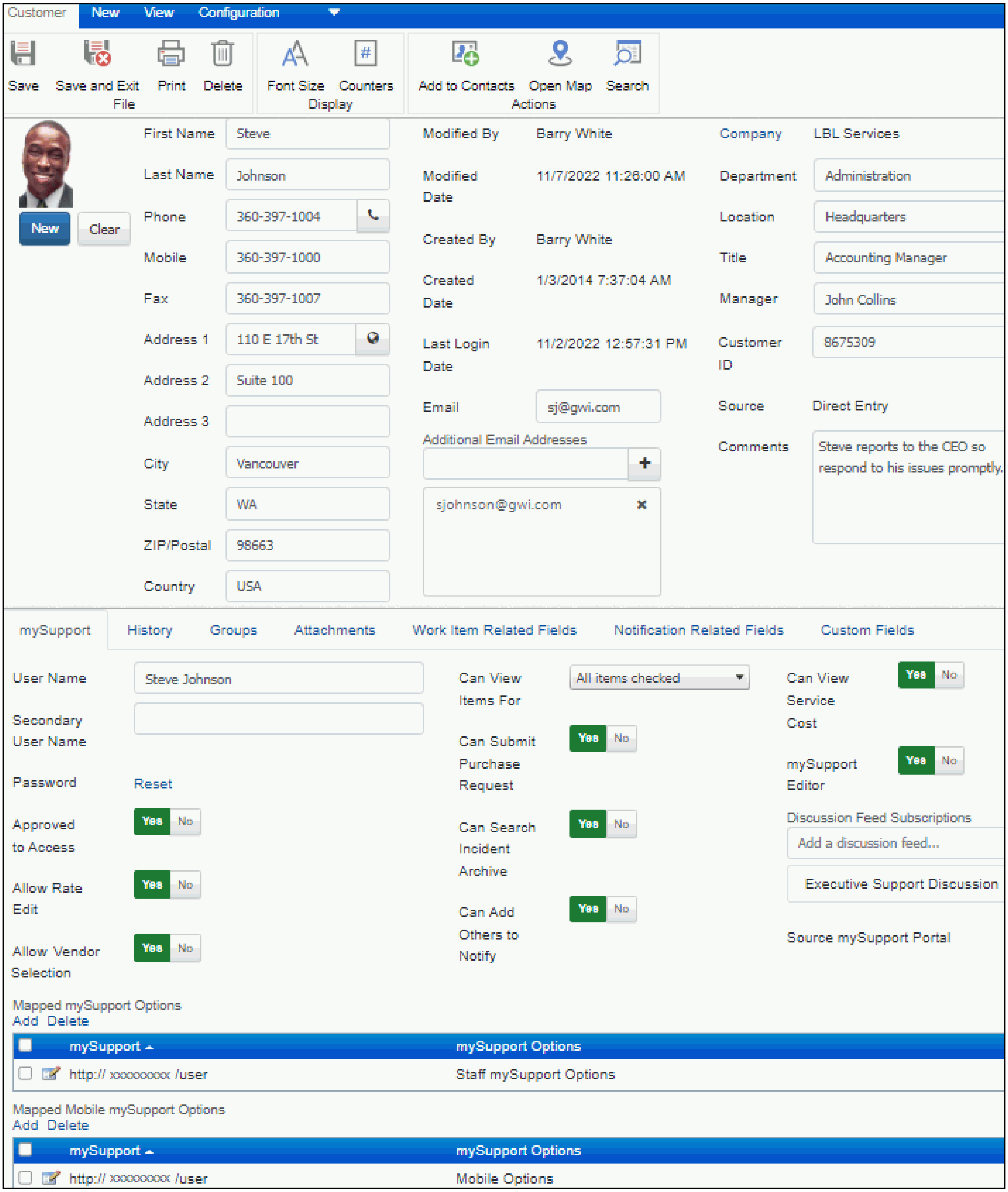
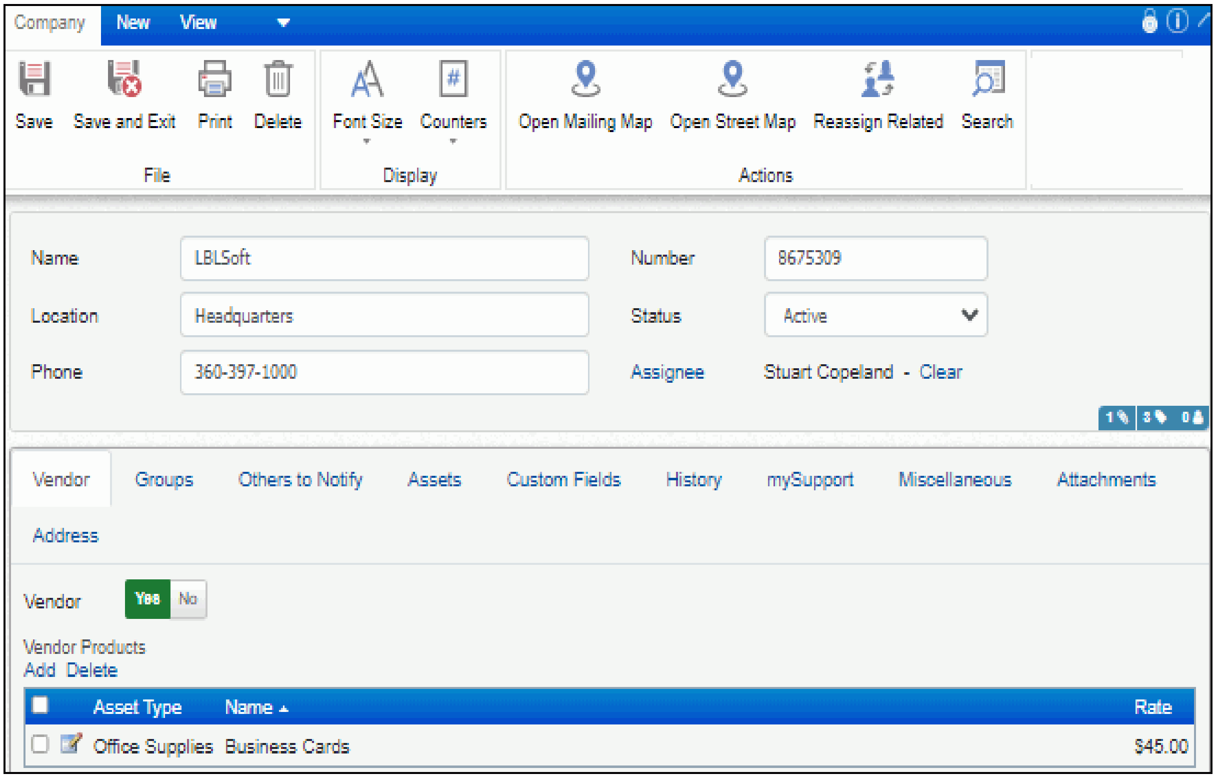
Configuring iSupport Customer and Company Functionality

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



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



Configuration Overview

Creating Customer and Company Profile Records

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

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

Customizing iSupport Defaults

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

Sending Notifications

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

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

Customizing mySupport Portals

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

Managing Customer Profiles

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

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

Using Other Work Item Functionality

- You can use Opportunity Management functionality to create Opportunity records and generate quotes using products and product groups that you create or utilize via Intuit® QuickBooks® integration. See the online help for more information.
- If you have the Service Edition, you can associate configuration items to utilize data in Customer Profile and Company records for views, reports, and correspondence. A CMDB contains configuration items (CIs) for the resources to be tracked and the relationships between those items. See the online help for more information.
- You can configure integration with Google Calendar, Google Meet, Microsoft Outlook, Zoom, and Microsoft 365 Teams to display an icon in the Incident screen for initiating a meeting. See “Configuring Calendar and Meeting Integrations” on page 76 for more information.