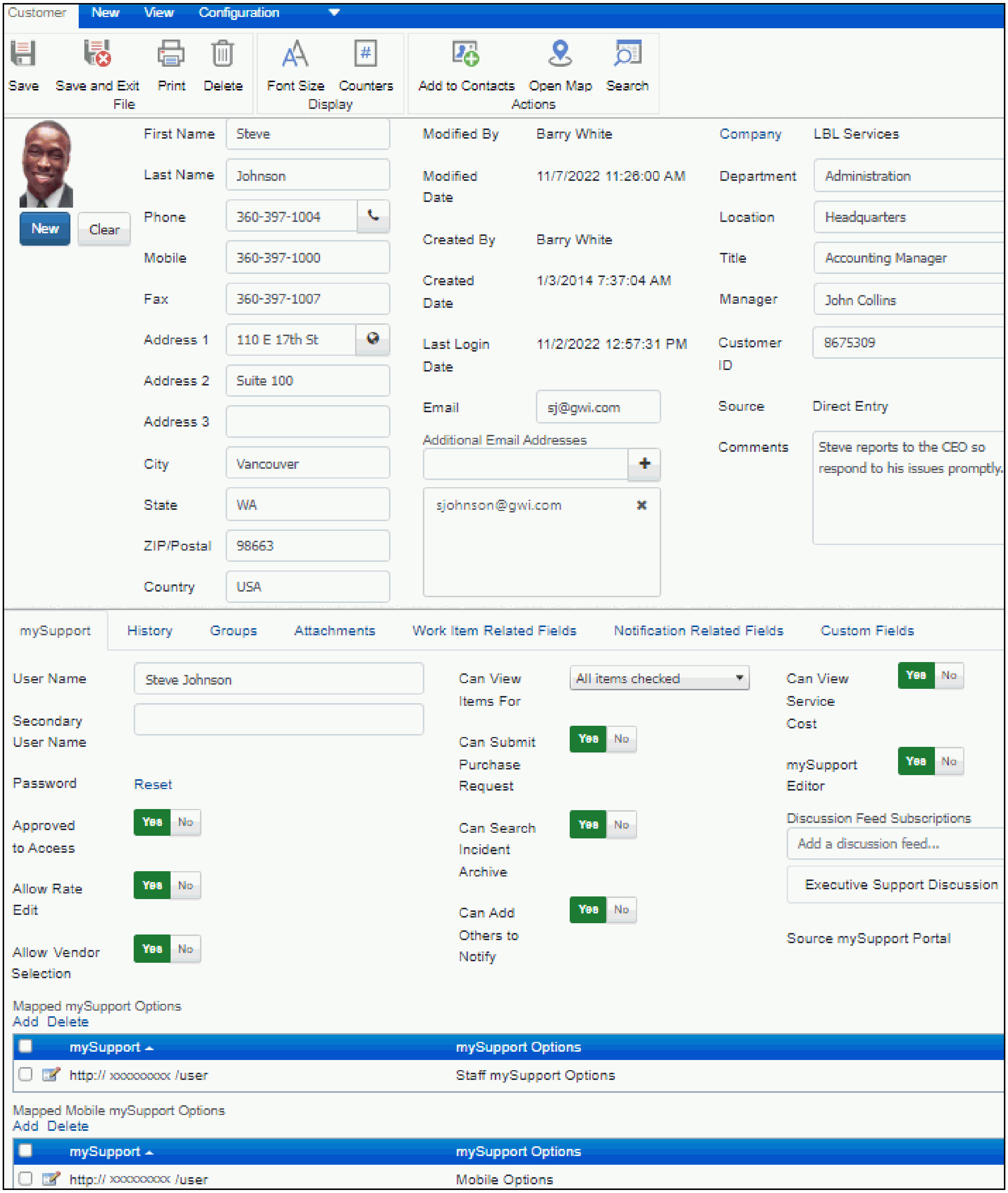
Using the iSupport® Customer Profile Screen

The Customer Profile screen (accessed via the Desktop Create menu) enables you to record customer information that can be used in all iSupport functionality.



Note that the layout of the Customer Profile screen is designed in configuration, and fields discussed in the documentation may not appear on your screen. Administrators can configure customer profile rules that are evaluated when a Customer Profile is saved; if a rule's conditions are met, its actions are performed. This functionality can be used to automatically change field values, send a notification to the customer, and add or remove a mySupport portal URL and options.

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.

Entering Contact and General Information

The following fields may be included in the Customer Profile screen to track a customer's contact information for reference purposes: Phone, Cellular, Fax, Title, Location, Manager, Department, Address, City, State, ZIP/Postal, and Country.

Avatar - Select Browse to select a picture to associate with the customer. In addition to the Customer Profile screen, this picture will appear in discussion posts and on the Approvals tab in the Incident, Change, and Purchase Request screens if the customer is an approver in an approval cycle. Note that this field may be populated by images uploaded via the mySupport portal.

First Name/Last Name - Enter the customer's name. These fields are required in order to save the record.

Email - Enter the customer's email address. This is a required field; if enabled, notifications will be sent to this address. Note: each customer profile must have a unique email address/first name/last name combination.

Additional Email Addresses - Select the Add link to enter additional email addresses for email-submitted processing. The address in the Email field in all Customer Profile records will be checked first in the search for a matching Customer Profile; if there is no match the additional email addresses will be checked.

Customer ID - Enter an identification number for the customer.

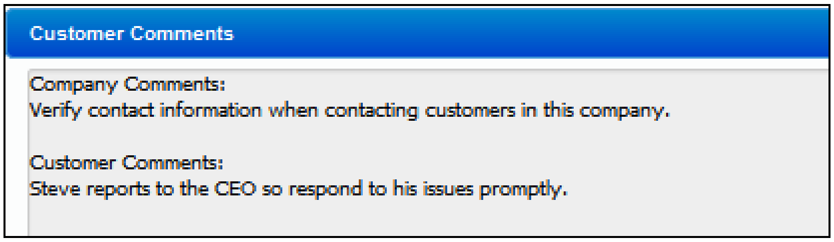
Source - Customer Profile records can be created via one of the following sources, which will display in the Source field if configured:

- Direct Entry if the profile was created via the Customer Profile screen or Incident screen.
- Email Submitted Incident if the profile was created via an email-submitted incident from an email address that did not exist in Customer Profiles.
- mySupport Portal Registration if a customer has registered via the mySupport portal or submitted an incident via the mySupport portal with an email address that does not exist in Customer Profiles.

If there is an entry in one of the following sources, the entry is created in Customer Profiles.

- Active Directory® (In order for an entry to be added from Active Directory®, it must contain a first name, last name, and email address)
- Microsoft CRM
- Domino Directory
- A remote Microsoft SQL Server database
- LDAP

Comments - Enter comments that will display in an uneditable dialog when the customer is selected in the Incident screen. If a comment is entered for the customer's company as well, the company comment will appear before the customer's comment.



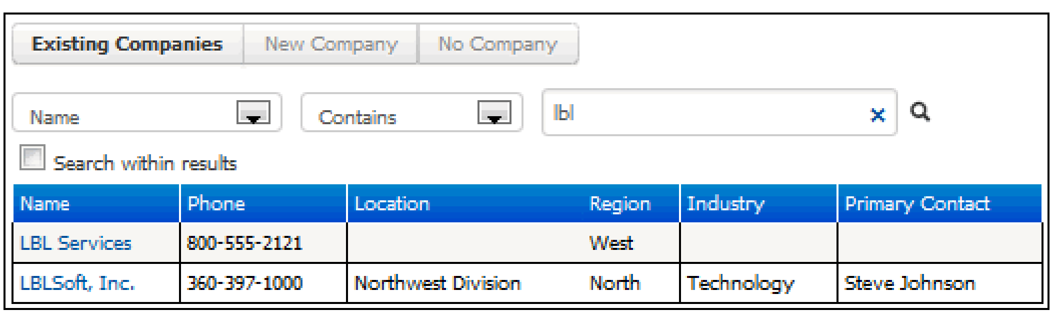
Associating Customer Groups

Customer groups enable you to assign assets, view incidents, and generate correspondence and surveys for a group of customers. You can also enable customers to view incidents, changes, and assets via the mySupport portal for their associated groups. If configured, access to headlines, FAQs, categories, and knowledge entries may be restricted for members of a group. If you have permissions set in your Support Representative Profile, you can add a customer to a group or remove a customer from a group. This can also be accomplished for selected customers and companies using the Add to Group and Remove From Group actions in customer views on the Desktop.

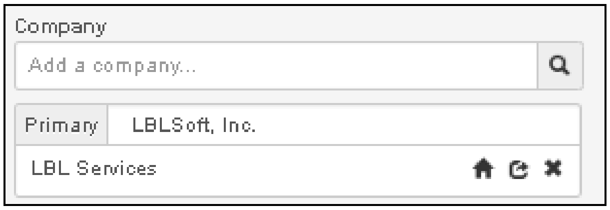
Use the Primary field to designate the customer group used for location-based routing of incidents submitted via the mySupport portal and email. To designate a primary group, hover over a selected group and select Set as Primary.

Associating One or More Companies

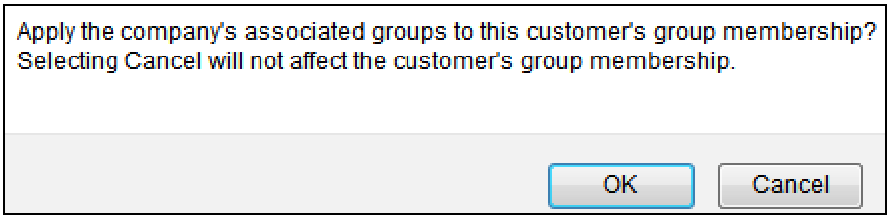
If the Related Companies feature is disabled in configuration, a Company link will appear; a Select Company dialog will appear for you to select an existing company or enter a new company name. When an incident is created for the customer, this information will appear. To enter complete company information, access the Company screen from the Desktop.



If the Related Companies feature is enabled in configuration, place your cursor in the Company field and select the companies to associate with the customer. These companies will display for selection in the Select Customer dialog in the Incident, Change, and Purchase Request screens. To designate as primary, hover over a selected company and select Set as Primary. Select View Company Record or Primary Company on the View menu to display the Company screen for selected companies.

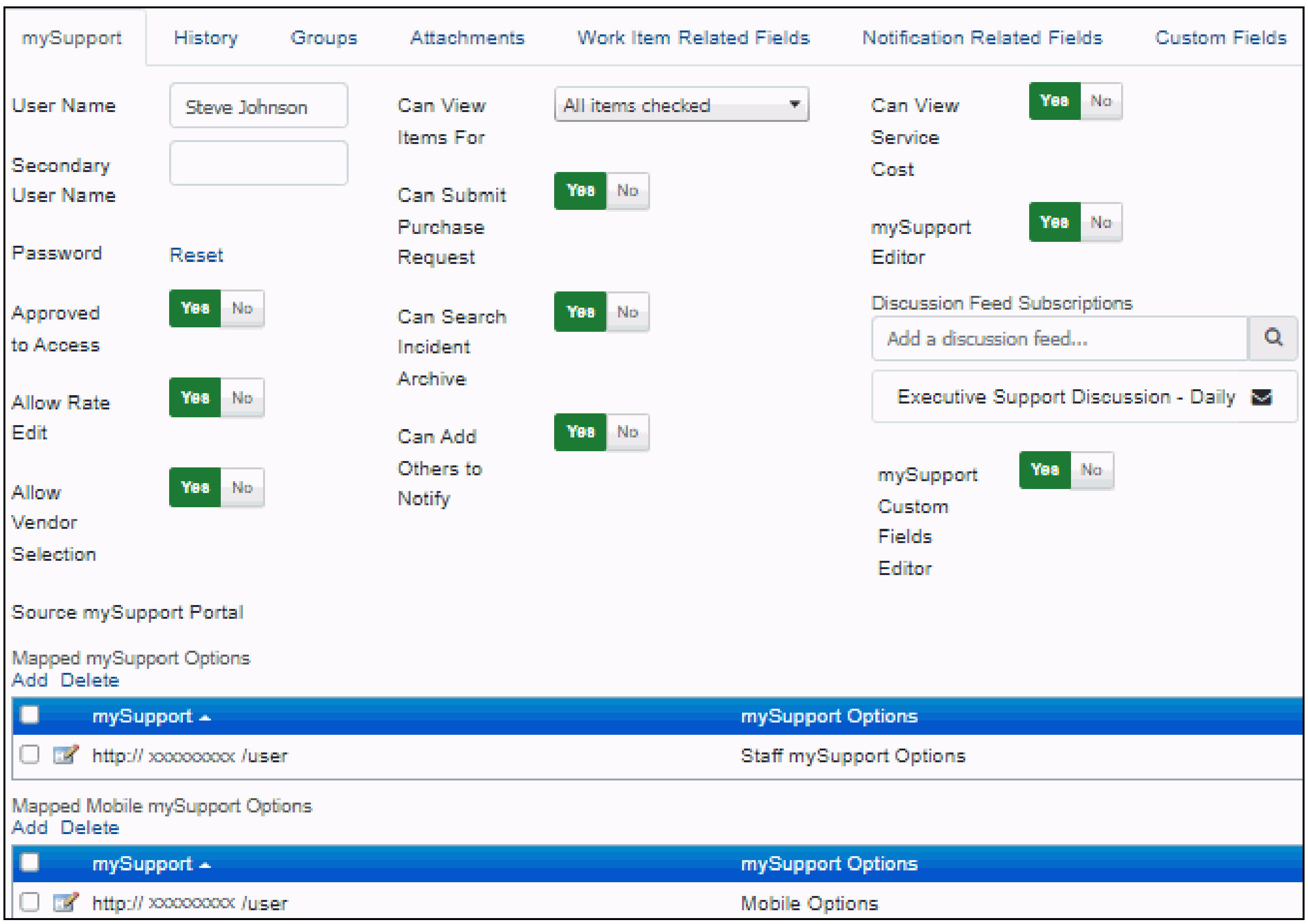


Note that the primary company cannot be changed on Customer Profile records with an active synchronization source. If customer groups are associated with a selected company, the following prompt will appear when you save a new record in the Customer Profile screen; select OK to assign the customer to the company's associated groups.



Completing mySupport Portal Fields

Use these fields to set up the customer's login and other options for the mySupport portal.



User Name - Enter the customer's user name for logging into the mySupport portal.

If using Microsoft® Windows-based authentication with iSupport to bypass the Login prompt for viewing records, enter the customer's complete Microsoft® Windows user name as follows: *domainname\username*.

If using iSupport's Active Directory® integration, this field may be populated during synchronization.

Secondary User Name (optional) - If applicable, enter another user name for logging into the mySupport portal. If using iSupport's Active Directory integration, the initial synchronization process will populate this field.

Password - - If you are *not* using Microsoft® Windows-based authentication with the mySupport portal or Active Directory® integration, enter the temporary password for logging into the portal. (The customer will be forced to enter a new password after entering his/her username and the temporary password.) The typed characters are masked after a few seconds, but you can copy the masked characters in the field. Password requirements set in the Configuration module will be enforced; you can use the Generate New link to create a new temporary password that meets the requirements. This password will apply to both the mySupport portal User Name field and the Secondary User Name field.

Approved to Access - Select Yes to enable the customer to log in to view incidents or change his/her password on the mySupport portal. Clear this checkbox if you wish to prevent the customer from logging in to the mySupport portal. Note that a Registration Review feature may be configured that will disable mySupport portal access in the customer's Profile record when it is created after a registration is submitted by a customer. An incident will be created for the registration request.

Allow Rate Edit - Select Yes to enable the customer to change a line item rate on a purchase request submitted via the mySupport portal.

Allow Vendor Selection - Select Yes to enable the customer to select a vendor when selecting product line items for purchase requests via the mySupport portal.

Can View Items For - Use this field to enable the customer to view (via the mySupport portal) the incidents, changes, assets, purchase orders, and/or service contracts for all customers with a matching company, department, location, Others to Notify, or with matching associated groups in their Customer Profile record. You can also enable the customer to view any incidents for which they are associated as an additional customer in mySupport views and feeds. **Note:** mySupport portal view permissions are cumulative; for example, if you select both the Location and the Associated Groups checkboxes, the customer will be able to view the incidents, changes, assets, of all customers with matching locations *and* groups in their Customer Profile record.

Can Submit Purchase Request - Select Yes to enable the customer to submit a purchase request via the mySupport portal.

Can Search Incident Archive - Select Yes to enable a customer to, if archived incidents are configured to appear on the mySupport portal, enable the customer to perform a search on archived incidents.

Can Add Others to Notify - Select Yes to enable the customer to add another customer to an Others to Notify list via the mySupport portal.

Can View Service Cost - Select Yes to enable the cost configured for service catalog entries to display on the mySupport portal Service Catalog screen for the customer. You can enable this permission for multiple customers via the Add Can View Service Cost Permission action on customer views on the iSupport Desktop.

mySupport Editor - This field appears if you have an unlimited support representative license. Select Yes to enable the customer to choose another customer for a new incident and edit the incidents and FAQs that the customer has access to view.

mySupport Custom Fields Editor - Select Yes to enable the customer to edit the custom fields on mySupport that the customer has access to view. Editing may be prevented on individual custom fields via the Editable on Existing <*work item type*> field on the mySupport Access tab in the Custom Field configuration screen, and for individual Customer Profile custom fields via the Allow Edit field on the Configure Field dialog for custom fields on mySupport display layouts.

Discussion Feed Subscriptions - Select the discussion feeds to which the customer should be subscribed. Use the discussion digest icon to subscribe the customer to an email regarding discussion activity that can be sent daily or weekly (it is sent on the schedule of the Discussion Digest agent that is configured via the Global tab in the Agents screen; the email will list the number of new posts and replies for the day or week, as well as a link to the discussion feed). You can use the Send Email After New Post option to enable an email to be sent every time a new post is added to the feed; use the Discussion Post Custom Notifications screen to customize this notification. You can also use the Remove All option to remove a feed subscription.

Source mySupport Portal - If the customer registers via a mySupport portal, the URL of the portal is included in this field.

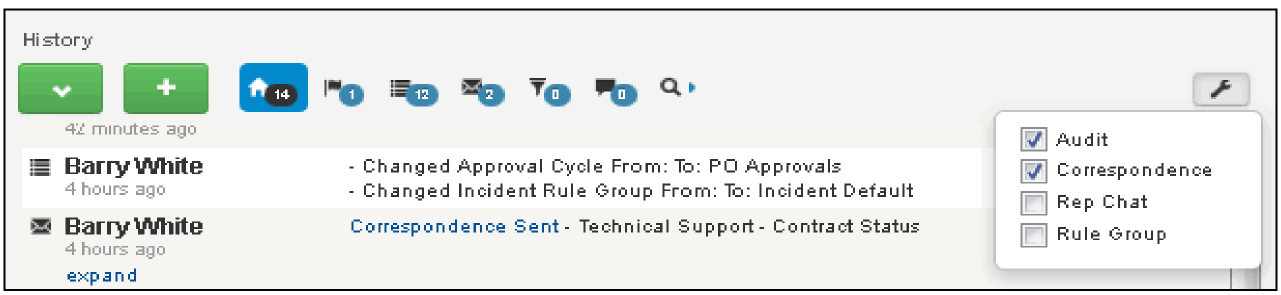
Mapped mySupport Portal Options - Select the mySupport portal definition URL and mySupport portal option set to appear when the customer logs in to the portal. mySupport portal option sets include configuration settings for the structure and content of the interface mySupport portal, and can be assigned to customers, customer groups, and companies. The order of precedence is determined by a setting in configuration. Any assigned options will be used; if none are assigned or if a customer does not log in, the default mySupport portal option set specified in configuration will be used.

Mapped Mobile mySupport Portal Options - Select the mySupport portal definition URL and mySupport portal options that have been configured for display on a mobile device for the customer. mySupport portal options include configuration settings for the structure and content of the mySupport portal interface. Mobile mySupport portal options can be assigned to customers, companies, and groups; the order of precedence is determined by a setting in configuration. Any assigned options will be used; if none are assigned or if a customer does not log in, the mySupport portal options specified as default in configuration will be used. Note that mapped mobile mySupport portal options can be set via a configured rule that runs on save of a Customer Profile record.

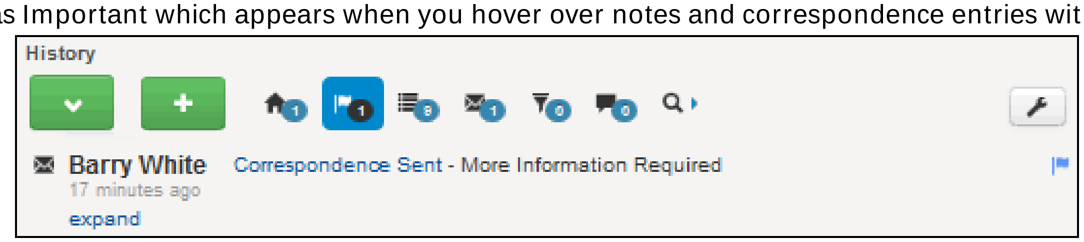
Entering Work History and Viewing Historical Information

The History field includes notations on all customer profile actions. Select Add Note to enter a note that can be viewed by anyone viewing the History field. You can flag notes and correspondence entries via the Mark as Important option that appears when you hover over those entries with your cursor; once marked, the icon changes to Unmark as Important for removing the flag. Note that the Ref ID that appears on expanded correspondence entries is included for reference; it is used by iSupport's email processing engine.

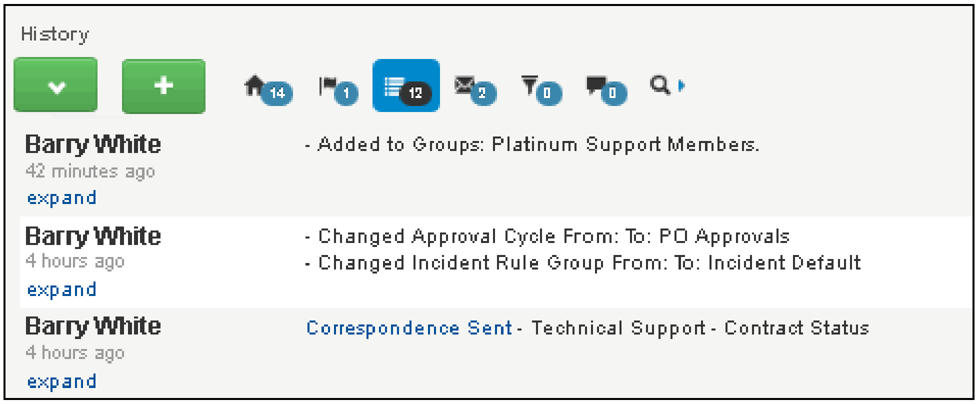
- The Feed option displays a list of all actions performed on the record; you can filter the content via Settings.



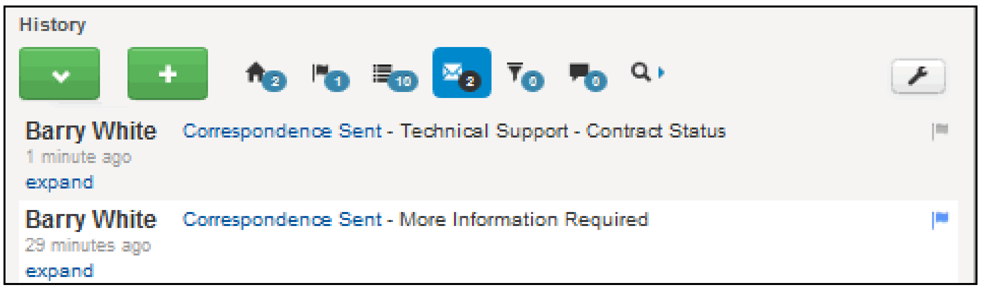
- The Important option displays notes and correspondence entries that have been flagged as important via Mark as Important which appears when you hover over notes and correspondence entries with your cursor.



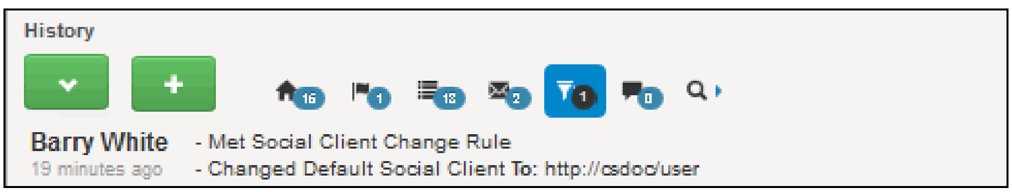
- The Audit option includes entries on functions performed by the system and support representatives (for example, field changes), as well as correspondence entries. Work history, chat, and approval entries are not included.



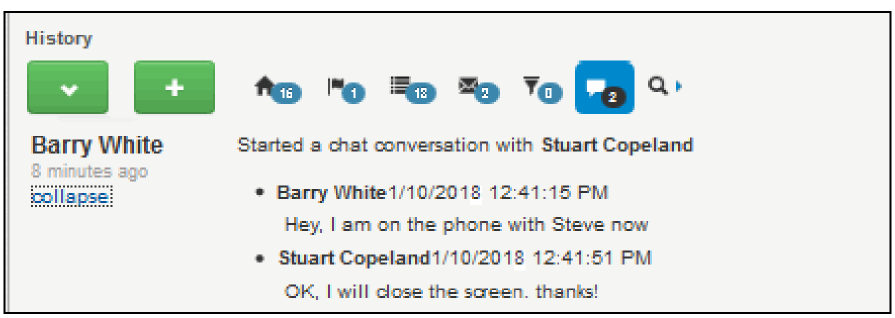
- The Correspondence option displays entries for sent and received correspondence, including the subject line; you can select the Expand link to display the body of the correspondence. The Correspondence Received and Correspondence Sent links display the Correspondence screen.



- The Rule Group option displays all rule group events such as when a rule is met and actions taken by rules in the rule group.



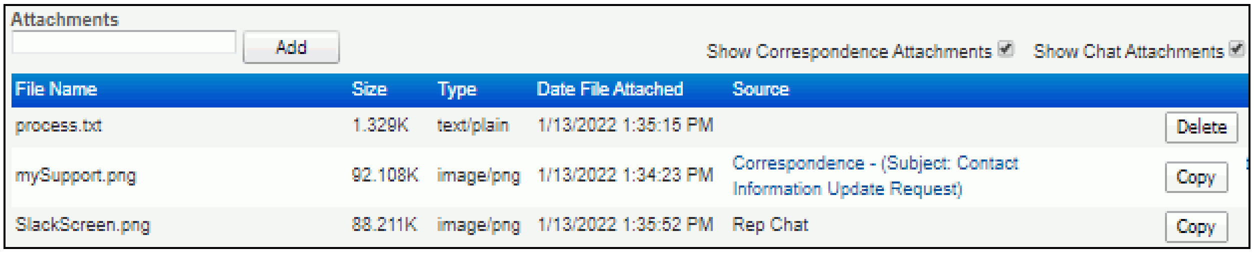
- The Chat option displays the content of work item awareness chats between support representatives in the same Customer Profile record.



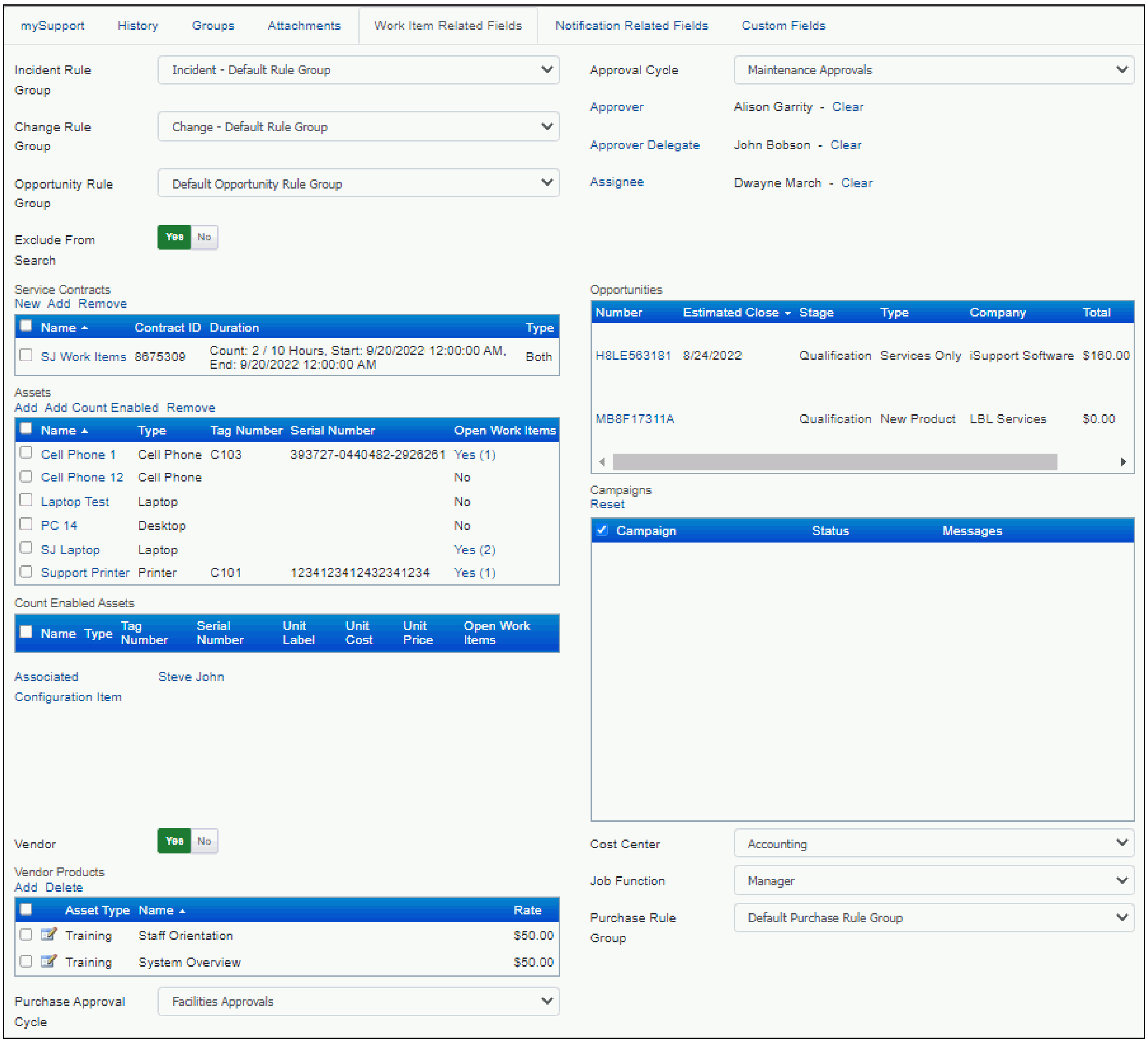
- The Search option enables you to enter a search string to search through history entries.

Attaching Files

To attach a file to the Customer Profile record, select Add in the Attachments field and select the file. You can select the Show Correspondence Attachments checkbox to display attachments from all sent or received correspondence (including attachments from an inbound email update) associated with the profile. If a chat was initiated while the profile was open, use the Show Chat Attachments checkbox to display any files attached during the chat. A Copy button will be included next to correspondence and chat attachments; you can use it to directly associate the attachment to the profile.



Completing Work Item Related Fields



Assignee - If you have the Service Desk Edition and Opportunity Management functionality is enabled, select the support representative to assign to the customer for use with opportunities.

Exclude From Search - Select Yes to keep the customer from appearing as a result in searches made via work items and the Desktop.

Approvers and Approval Cycles

Approval cycles require incidents, changes, and purchase requests (to be approved by designated approvers before most record functions can be performed. (However, a configuration setting can allow modifications under approval.) Approval cycles are set up in the Configuration module, configured with serial or concurrent approvers, notifications, and statuses for each stage of the process. Approvers can be support representatives or customers (who specify a verdict via the mySupport portal). An approval cycle can be associated with a customer profile, company record, or category.

Approver - If approvals are enabled and you are not using Active Directory as a data source, select the approver to be available for use in approval cycles when the customer is selected for an incident, change, or purchase request. If using Active Directory as a data source, a record in Active Directory has a value in the Manager field, and an existing Customer Profile record contains that manager, the manager will be inserted into this field; otherwise, this field will be blank.

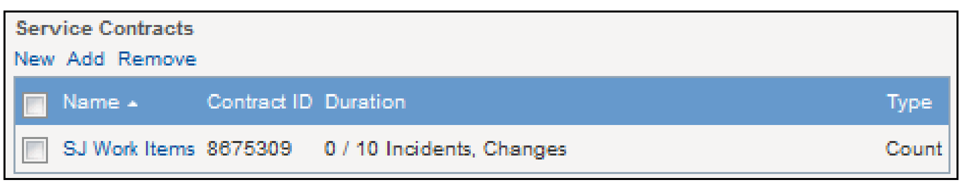
Approver Delegate - Select a customer who can specify a verdict in addition to the approver(s) designated for an approval cycle in effect for the customer.If enabled in the mySupport Portal Options screen, a customer can designate their own approver delegate via the mySupport Portal Account Settings screen.

Approval Cycle - Select the predefined approval cycle to associate with the customer. The rule group in effect for the incident, change, or purchase request controls whether approvals are required, the first approval cycle, and any additional cycles to apply if the first cycle results in an approval. You can associate multiple customers or companies with an approval cycle via the Associate Approval Cycle action on customer and company views.

Service Contracts

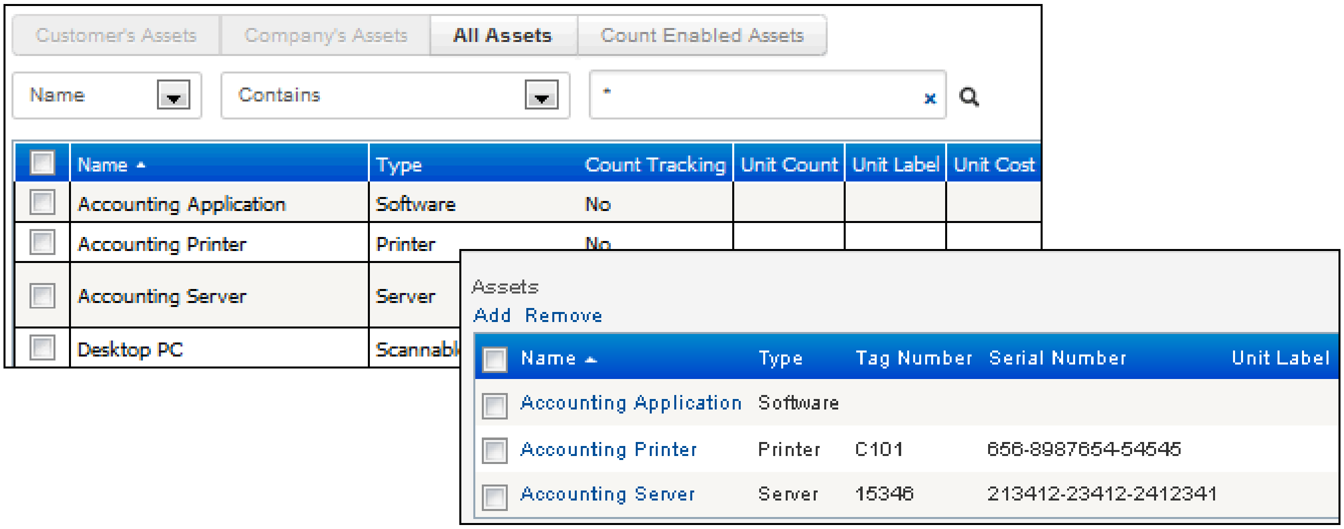
If enabled, use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (time frame in days), or a combination (limiting the number of incidents and/or changes within a specified daily time frame).

In the Service Contracts field, select New to create a new service contract and assign it to the customer, select Add to assign the existing contract to the customer, or select Remove to remove the assignment.

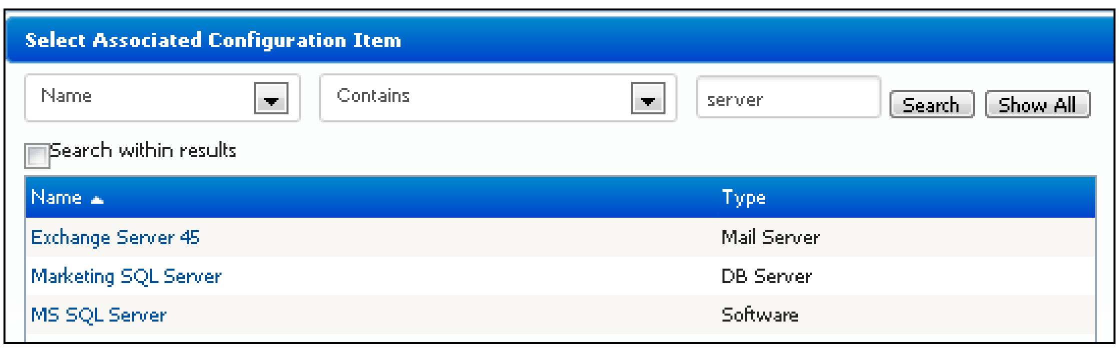


Assets and Configuration Items

Associate assets with Customer and Company records to enable targeted customer and asset lookups when you create an incident while viewing a saved Asset, Customer Profile, or Company record. Select Add to select the asset(s) to associate with the company.



If applicable, select a configuration item to associate with the customer profile. You can utilize the data on an associated item for views, reports, and correspondence; for example, you can send a correspondence to an associated group from the Configuration Item screen.



Opportunities/Campaigns - If you have the Service Desk Edition and Opportunity Management functionality is enabled, a list of opportunities and campaigns associated with the customer appears.

Purchasing

The following fields may be included if you have the Service Desk edition and Purchasing functionality is enabled.

Vendor - Select this checkbox to designate the customer as a vendor, which enables association with Product records for use in purchase requests.

Vendor Products - This field appears if Yes is selected in the Vendor field. When vendor products are associated with a customer, the products are available for selection on purchase requests. Products can also be associated with customer vendors in the Product screen. Select Add to associate products with the customer.

> **Asset Type** - Select the predefined asset type for the product to be associated with this customer vendor.
>
> **Name** - Select the product to be associated with this customer vendor.
>
> **Rate** - Enter the cost of the product to be multiplied by the quantity entry for a line item in the Purchase Request screen.

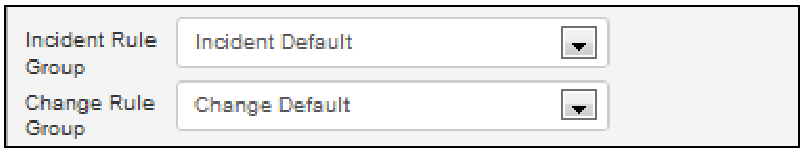
Cost Center - Select the predefined cost center to associate with the customer. When the customer is selected as a recipient on a purchase request, this cost center will populate the Cost Center field in the purchase request. You can also associate a cost center with a customer via the Associate Cost Center action on customer and company views.

Job Function - Select the predefined job function to associate with the customer. When the customer is selected as a recipient in a purchase request, this job function will populate the Job Function field in the purchase request.

Purchasing Approval Cycle - Select the predefined purchasing approval cycle to associate with the customer. Approvals require a purchase request to be approved by designated approvers before most functions can be used. (However, a setting in configuration can allow modifications to purchase requests under approval.) The rule group in effect controls whether approvals are required, the first approval cycle, and any additional cycles to apply if the first cycle results in an approval. You can associate multiple customers or companies with an approval cycle via the Associate Approval Cycle action on customer and company views.

Rule Groups

Rules perform actions when specified conditions are met. In order for a rule to be evaluated, it must be included in a rule group; rule groups are applied to incidents and changes through customers, companies, category combinations, and templates. (A default rule group will be used if none are applicable.) When an incident or change 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. This functionality can be used to automatically change field values, send notifications, route via load balancing or the round robin method, and initiate an approval cycle.

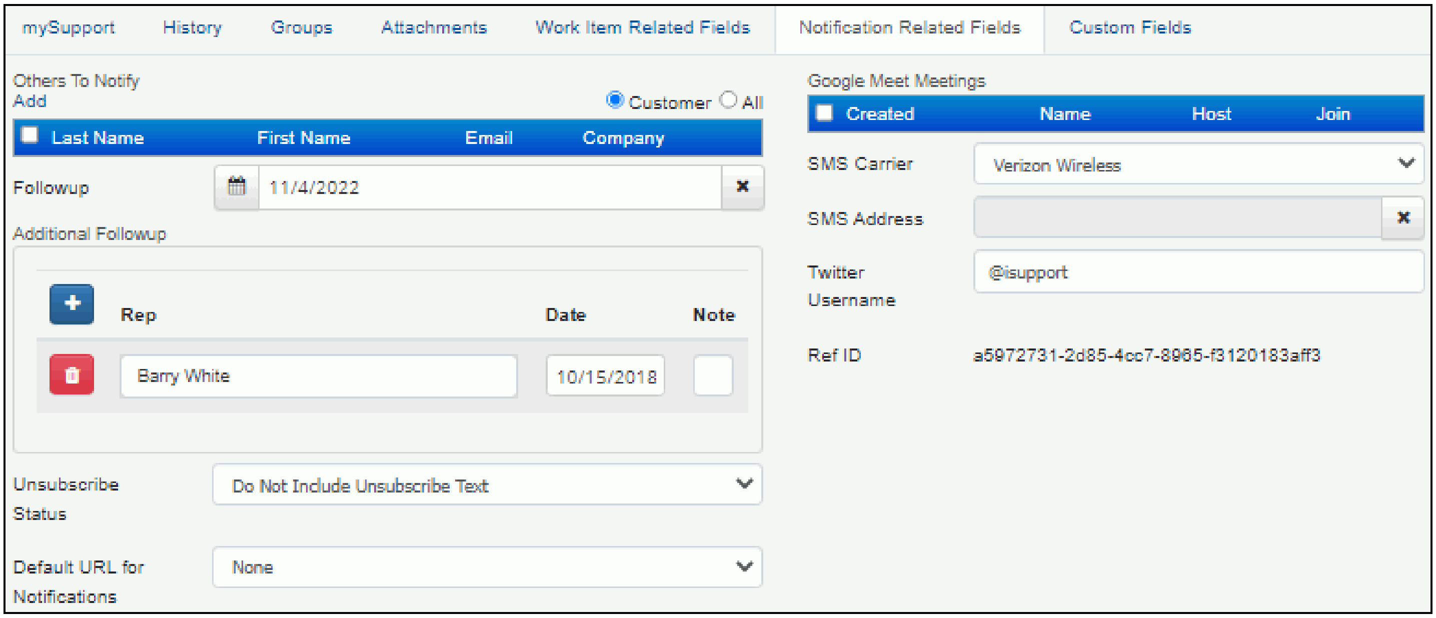


Incident Rule Group - Select the incident rule group to associate with the customer, to be applied when the customer is selected for an incident. If a customer profile does not have an associated rule group, the rule group associated with the customer's company will be used for the customer; however, if an incident template or hierarchy template selected for the incident has a rule group, it will override any other rule group that may apply. A setting in configuration determines specify what will take precedence if an incident's customer and categorization both have a rule group.

Change Rule Group - Change functionality is available if you have the Service Desk Edition. Select the change rule group to associate with the customer, to be applied when the customer is selected for a change. 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; however, if a change template or hierarchy template selected for the change has a rule group, it will override any other rule group that may apply. A setting in configuration determines specify what will take precedence if a change's customer and categorization both have a rule group.

Opportunity Rule Group - Opportunity functionality is available if you have the Service Desk Edition. If you have the Service Edition and Opportunity Management functionality is enabled, select the opportunity rule group to associate with the customer, to be applied when the customer is selected for an opportunity. 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.

Using Notification-Related Fields



To send an email from the Customer Profile screen, select Customer | Correspondence. The customer's email address will populate the To field.

Others to Notify - If enabled in configuration, you can use the Others to Notify feature to set up a list of customers and support representatives that are not directly involved to be sent event notifications and other correspondence. For example, notifications could be configured to be sent to a salesperson whenever an incident is created for one of their accounts. An Others to Notify list can be set up for an individual customer, all customers in a company, a category set, and an individual incident, problem, change, or configuration item.

Followup - This field appears if Opportunity Management functionality is enabled; select a date for contacting the customer.

Additional Followup - Select a support representative and date, and enter a note for contacting the customer.

Unsubscribe Status - If configured, text and links will be added to the bottom of the correspondence for customers to use to unsubscribe from future email sent from the Desktop, Customer Profile, and Opportunity screens. The Unsubscribe Status field will contain a customer's status: Unsubscribed, Do Not Include Unsubscribe Text, and Include Unsubscribe Text. If you have the Change Unsubscribed Status permission, you can change the status in this field and the prompt "Customer has unsubscribed from correspondence. Click Continue to proceed." will appear when a correspondence is initiated for a customer with an Unsubscribed status. The Include Unsubscribe Text option will be included in the Correspondence screen for overriding the Do Not Include Unsubscribe Text status and including the text and links.

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

Google Meet Meetings - If Google Calendar integration is configured, Google Meet sessions for the customer are included in this field.

SMS Address - This field is populated via the Account Settings screen on mySupport portals; it includes the customer's phone and SMS carrier. If SMS **is** enabled, a Twilio account is specified, and the customer has a specified phone number, the code is sent to that number via SMS. If the code has not been sent and the customer has a specified phone number and SMS Carrier, the code will be sent to *<phone number>@<SMS carrier email>* via SMS. If the code has not been sent and the customer has a specified SMS address (populated via mySupport Account

Settings), the code will be sent to that address via SMS. If SMS **is not** enabled, the code is sent to the email address in the customer's Profile record.

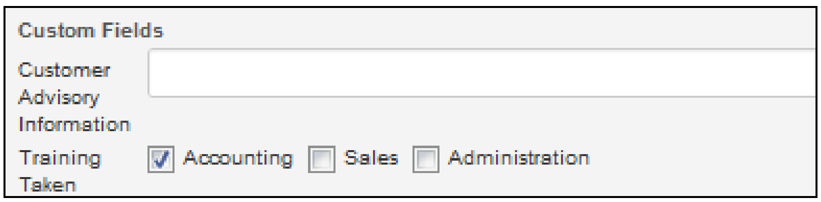
SMS Carrier - Select the SMS (Short Message Service) carrier to be used for sending authentication codes and notifications via SMS (commonly known as text messaging). Available SMS carriers are defined in the Options and Tools | Integrate | SMS Carriers screen in configuration.

Twitter Username - Enter the username to be used for a customer lookup from the Twitter Monitor component when creating a new incident. The Twitter Monitor component searches Twitter feeds and displays tweets that include a specified search term; you can reply to tweets directly from iSupport by replying via Twitter, or by creating an incident which will also send a reply directly to the Twitter user with their incident number included. The tweet will be included in the Description field. If the Twitter username exists for a customer in Customer Profiles, the matching customer profile will be used for the incident.

Reference ID - This field is used for reference; it is used by iSupport's email processing functionality.

Entering Custom Fields

Fields specific to your company may be configured; you may be required to enter information in these fields.



Scheduling Meetings and Tasks

If configured, a New Meeting option will appear for scheduling a Microsoft Office Outlook calendar and/or Google Calendar meeting. You can view the schedules of meeting attendees, create a meeting, and configure a notification to be sent to meeting attendees. Use the View | Meeting to view scheduled meetings.

If configured, options may appear for scheduling meetings: Microsoft Teams, Zoom, Google Meet. When the icon is selected, a Generate Join URL dialog will appear with options for entering the topic, sharing the Join URL, and emailing a link to the meeting. The Share Join URL option will display a dialog with the URL and an option to start the meeting; the Email Link option will display the Correspondence dialog. You can also use select Planner Task to access Microsoft Planner and create tasks with prefilled references to the iSupport work item number.

Adding to Contacts

Select Add to Contacts to add to your personal contact list of customers that will display by default when type ahead is used in the address fields in the Correspondence screen.

Sending a Survey

If iSupport's Survey functionality is enabled, you can send survey questionnaires to the customer. Surveys are defined in the Configuration module, and if configured, surveys can be sent automatically on an interval basis. You can send surveys to multiple customers and view survey responses via the Desktop. To send a survey, select New | Survey. The Send Survey dialog appears; the survey will be sent after you select a survey.

Creating New Records From the Customer Profile Screen

Use the Customer | New menu to create the following from the Customer Profile screen.

- Customer Profile - You can select Customer Similar Profile to create a new customer profile with the Address, Company, Location, Manager, Groups, OTN, Rule Group, and Department fields populated from the existing Customer Profile record.

- Incident - populates the Customer field with information from the Customer Profile record.
- Change - populates the Customer field with information from the Customer Profile record.
- Correspondence - create and send an email to the customer.
- Opportunity (if you have the Service Edition and Opportunity Management functionality is enabled) - opens the Opportunity screen and populates the Customer field.
- Service Contract - create a new service contract.

Viewing Items Associated with a Customer

Use the View menu in the Customer Profile screen to display incidents, changes, and assets entered for a customer and correspondence sent to a customer.

- To display a list of the customer's incidents, select options under the Incidents sub menu. You can display open, closed, or all incidents for the customer or their company, location, or department.
- To display a list of changes assigned to the customer, select options under the Changes sub menu. You can display open, closed, or all changes for the customer or their company, location, or department.
- To display a list of assets assigned to the customer, select Assets.
- To display a list of all correspondence sent to the customer from the Incident, Change, or Customer Profile screens, select Correspondence.

View results will display at the bottom of the screen in the view frame. The frame will be minimized by default; select the up arrow to expand and collapse the frame. Select Open In New Window to display the view in a new window. Your selected view and settings will be stored in a cookie, so your selection will be retained until you change it again.