



iService User Guide

One-to-One Service.com is a software development company based in Austin, TX.
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Release Notes

1 Release Notes

The version of your iService system is displayed at the bottom of the iService User Interface. The version numbering is comprised of four sections.

Version 9.0.0223 - 2022.09.09 - 12:22:18

- 1) The major release number (9)
- 2) The minor release number (0)
- 3) The build number (223)
- 4) The build date and time (2022.09.09 - 12:22:18)


Version 9.13 Release Notes

Build #: 9.13.0156 - 2025.04.24 - 11:17:36©

This release includes a new integration, accounts and account properties, recurring calendar events, workflow updates, and a new **Reopen Question** button.

Enhancements

New Accounts Feature

You can now [create accounts](#)  for tracking organization level details and grouping your contacts by company. Accounts function similarly to contacts and can have custom properties, like account numbers, or billing details as well as custom contact information. You can create, search, and edit company records like working with contacts. You can search within account properties using the Search Contacts button.

There are several UI updates for accounts that agents should be aware of, including buttons for: creating, searching, viewing, and editing accounts. Accounts have their own page, which includes

methods for managing linked contacts. You can link contacts to an account to manage groups, and label them by type (prospect, customer, vendor, partner, etc.). A full history of all interactions from all agents is shown in the History tab for contacts.

Account properties function identically to contact properties and are created from the same [Contact Properties](#)⁶⁵¹ segment page. You can create properties used for both contacts and accounts or dedicated to one or the other. All the contact property types, like dates, date times, integers, etc. are supported with accounts.

Recurring Calendar Events

Create recurring calendar events that automatically populate according to your schedule. This includes daily events based on the day of the week, or weekly, monthly, and annual events. When combined with Zapier to generate tickets from calendar events, recurring calendar events can become a great way to schedule tasks.

Agent color coding for calendars is now managed within the [Agent admin](#)⁵⁴² page.

Reopen a Question

Resolved questions can be [reopened](#)⁹⁴ with a single button click. The question will be assigned to the agent that reopens the question.

Status Audit Ask AI

iService provides an extensive audit trail for every interaction in the system with a status audit. The new Ask AI feature uses AI to read and explain your status audit in plain English.

You can ask the AI questions about the audit details to gain a better understanding of the interaction.

Expanded Audit Details

A new verbose audit provides a detailed view of events related to every interaction. This includes all the attempted filters regardless of whether they changed the status of the interaction. The details provide a complete view of everything that happened to an interaction, making it easier to troubleshoot configuration issues.

Workflow Feature Updates

Button actions are now configured in the side panel, making it easier to work with narrow inputs on forms. Other changes include:

- New Date and dateTime properties in workflows that support choosing a range of dates, or multiple dates. You can also set the min and max dates for the calendar to prevent users from selecting dates outside your desired range.
- Support for setting contact properties with button clicks and using contact values in email subject lines.
- Override notifications on the unassign action to prevent spamming agents
- Suppress ref# can be set on email notifications. This is useful for salespeople.
- A conditional action switch was added to every button action. This allows you to suppress the action whenever a condition is met or not met.

Other Changes

Security Updates

- The Quick Agent Email configuration data is now only loaded after an agent complete their login. This change was made to ensure that any email addresses in the configuration cannot be discovered by anonymous or customer user types.

Bug Fixes

- Cookies were causing issues with the iService chatbots from connecting to the OpenAI API in certain cases where the cookies were rejected. The required functionality was moved out of cookies into local storage to correct the issue. The chat forms were also updated to re-size better.

Database Changes - This build contains database changes from 9.12 that require an update via the management console.

Version 9.12 Release Notes

Build #: 9.12.0027 - 2025.01.09 - 03:58:52

This release includes updates to the Get Next button, workflow builder improvements, and updates to the workflow inboxes and calendars.

Enhancements

Agent Interface Updates

- Get Next Values Update in Real-time - The number of available questions displayed on the Get Next button is now updated via a web socket connection in real-time. As new questions arrive and existing questions are assigned and resolved, the number of questions available to the agent via [Get Next](#) updates without the need for a browser refresh.

Workflow Updates

- [Redesign of the templates list](#) - Some workflows use their templates in dozens of workflow panels. This can make the list of references very long. The [templates list](#)⁵¹⁵ now loads the references to panels in a collapsed list that can be expanded as needed, improving readability.
- [Payment button available in workflow panels](#) - The [Payment button](#)⁵⁶⁴ can now be added to workflow panels and presented to agents with details such as name, address, and amount filled in by interaction property values.

Calendar Updates

- [Manage Calendars Admin Page](#) - The [Manage Calendars](#)³⁹¹ page was updated to improve usability and the format of events that are saved.

Chatbot Updates

- [Escalate from chatbot to live chat](#) - [Chatbots](#)³⁶⁶ can now be configured to allow users to escalate to a live chat. The chat with agent option is only presented when agents are available for the topic associated with the chatbot.

Other Changes

Security Updates

- Calendar events are now sanitized by iService on the backend before processing. Although the interface is limited to agent use, we still sanitize any content entered into the Google Event body or subject.

Bug Fixes

- Fixed an issue that caused Agent Email Configuration changes to be lost. When agents without access to all configured segments made changes to the configuration, details on segments they could not access were lost.

- Fixed an issue related to getting messages that impacted reporting. If an agent used the **Forward to Agent** button in mass update to self-assign a question, and it would show up in the Forward to Agent column of reports. These are no longer considered message forwarding.

Database Changes - This build contains database changes from 9.11 that require an update via the management console.

Version 9.11 Release Notes

Build #: 9.11.0165 - 2024.11.19 - 14:52:24

This release includes major updates to the workflow builder, integrated calendars, and chatbot configurations.

Workflow Updates

Updates to the Workflow Builder Interface

This release contains the first phase of a design update for the [workflow builder](#)⁴¹⁰. The templates and properties tabs now have a filterable list of elements to make it easier to navigate. There is also a new Import/Export option for copying and importing individual panels and definitions between workflows.

Workflow Features - Panels

There are new panel types that can be added to your workflow.

- **Inbox / Calendar Page** - move interactions with special answer panels out of your My Message Inbox and into their own page. The list of interactions can be displayed as a list or in a calendar format.
- **Manage / Calendar Page** - move interactions with special answer panels out of your Manage Messages page and into their own page. The list of interactions can be displayed as a list or in a calendar format.

Calendar Updates

New Manage Calendars Admin Page - You can now create your Google Calendars directly from the iService web interface in the [Manage Calendars](#)³⁹¹ page. You can also invite and control sharing of the calendar with users from the Calendars Admin page.

Add Calendars to Dashboard - New widgets are available for adding integrated Google Calendars to your dashboard. Create the calendar from the iService interface, and then select it for display on the dashboard. The calendar events can then be integrated with Zapier to automatically create tickets when the event time arrives.

Chatbot Updates

[Chatbots](#)³⁶⁶ can now be configured as a link in the left agent panel. This allows you to provide direct access to company information in the form of a readily accessible chatbot directly inside of iService.

Other Changes

New [Interaction Page](#)¹⁸¹ - A new URL is available for loading a single interaction into the view mode for review and answering without the full iService interface. Page is accessible in the agent app as `app/interaction/###` using the interaction ID.

TO addresses saved in Quick Agent Email - the [Quick Agent Email form](#)²²⁹ now saves the email addresses used in your browser. The list of addresses is presented when you place your cursor into the To field.

Security Updates and Bug Fixes

- The rich text editor was updated to TinyMCE v7.4.1.
- `System.IdentityModel.Tokens.Jwt` is deprecated and was replaced with `Microsoft.IdentityModel.JsonWebTokens`.

- Axios 0.22 javascript library was migrated to 1.7.4.
- All Angular JS code was removed from the project. None of the code was used in v9, but some legacy customer forms relied on Angular JS.

Bug Fixes

- Some workflow interaction were generating two JSON bodies in the database. This is corrected in 9.11.

Database Changes - This build contains database changes from 9.10 that require an update via the management console.

Version 9.10 Release Notes

Build #: 9.10.0195 - 2024.08.27 - 10:50:30

This release includes a new field service management workflow, workflow builder updates, and a Chatbot that leverages OpenAI Assistants. It also includes important updates for Microsoft Graph API mailbox configurations and the Okta OpenID Connect configuration.

New Workflow Features

This release contains a number of enhancements to the [Workflow builder](#)⁴¹⁰.

- A variable picker is now available for building templates used in workflow panels. All of the properties from the workflow and relevant segments can be inserted into your text from a drop down menu. Many new actions were added.
- Add custom CSS to any customer submit form. Generate the form using the no-code form builder and inspect the page to write your custom styles.

- Agent submitted forms can send emails to the submitting agent and customer, and a custom cc: line can be added.
- Move workflow interactions into their own My Inbox separated from incoming questions.


Field Service Management workflow

The Field Service Management (FSM) workflow automates jobs for home services, construction, and other contractors from initial lead through installation. Custom agent menus were designed to track estimates through every stage, and ensure a seamless transition to the installation. This workflow is available on Github at <https://github.com/OneToOneService/iService-Public/blob/master/Workflows/Field%20Service%20Management>.

Some features in FSM workflow are:

- Customizable contact forms to capture leads
- Integration to Google Calendar for scheduling estimates and jobs
- Custom Estimate and Job interfaces for agents that simplify the user experience
 - Contact summary and Google property location map
 - Automated scheduling notifications and on my way dispatch texts
 - Built in price list management and estimator to build job costs and revenue
 - Custom estimation templates for professional quotes

iService Chatbot

[iService Chatbots](#)  integrate an OpenAI Assistant directly into the live chat experience. The chat functions autonomously with runtime parameters that help ensure accurate results. Chatbot interactions can be monitored like live chats, and proactively converted to live chats by agents. All chatBot interactions are saved as contact history.

Knowledge Base Updates

A [column visibility picker](#)¹⁹² was added to the agent view of the Knowledge Base. This allows agents to add columns to the article list for any of the properties associated with articles.

Security Updates

- See [GHSA-59j7-ghrg-fj52](#) for details on the vulnerability in certain libraries, which are used mostly for OpenID authentication methods.
- The Okta integration was updated to remove the requirement to re-authenticate to Okta on every login.
- NTLM login (Windows Authentication) was removed from version 9.10. The concern with NTLM lies in its potential to transmit Windows passwords via weak hashes, making them vulnerable to exploitation through malicious endpoints or spoofed man-in-the-middle attacks.
- Password hashing now uses PBKDF2-HMAC-SHA512 with 210,000 iterations.

Bug Fixes

- The Secure Message with no notification answer panel was updated to set the value for DoNotReply to True.

Database Changes - This build contains database changes from 9.9 that require an update via the management console.

Version 9.9 Release Notes

Build #: 9.9.0023 - 2024.04.08 - 21:46:08

Import update to Graph API - In version 9.8, the Graph API protocol did not remove messages from the Inbox after processing. The behavior in 9.9 was updated to match the way other protocols work. Email is now removed from the Microsoft 365 mailbox after it is retrieved.

New Workflow Features

- A variable picker is now available for building templates used in workflow panels. All of the properties from the workflow and relevant segments can be inserted into your text from a drop down menu.
- You can now add custom CSS to any customer submit form. Generate the form using the no-code form builder and inspect the page to write your custom styles.
- Your agent submitted forms can now send emails to both the submitting agent and contact used in the interaction.

Zapier Update

- Update any contact property when using the Create and Update Contact action in Zapier.

Graph API Update

The Microsoft Graph API retrieval process was updated to purge the Microsoft Inbox after processing. This now matches the other protocols available for email retrieval.

There are no breaking changes or user interface changes that agents need to be aware of with this release. The Merge button is new, but doesn't impact existing product usage.

Database Changes - This build contains database changes from 9.8 that require an update via the management console.

Version 9.8 Release Notes

Build #: 9.8.0064 - 2024.03.13 - 21:27:44

This release provides more actions and features for the workflow orchestrator, updates to the rich text editor, AI updates for custom prompts, improvements to payment forms, support for Microsoft Graph API and several important bug fixes.

Support for Microsoft Graph API

- Support was added for the [Microsoft Graph API](#)^[661] protocol to receive and send email from a Microsoft 365 mailbox. The older protocol, EWS OAuth, is still supported by iService 9.8.
- The credentials for Microsoft Graph API are now set in the [External APIs page](#)^[567], instead of the Segment Mailboxes page. This isolates login information and allows admins to create mailboxes for segments without the need to enter sensitive credentials.

New Workflow Features

- Multiple features were added to support a new price estimator and quotation system being developed for contractors. The major change is a new "grid" property that creates a table of values, like a bill of materials or price estimate. There are also summary options for grouping the rows of large grids into a presentation format you can use with templates.
- New variables were added to insert data into templates for automated document generation.
- The button actions available for workflow submit and answer panels were enhanced.

Updates to the Rich Text Editor

- Additional formatting features were added to the rich text editor. See the [Rich Text Editor](#)^[60] page for details on the formatting features available.

iService Copilot AI Updates

- The iService - OpenAI integration was updated to use GPT-4-turbo-preview model.
- You can now [create your own custom prompts](#)^[327] and embed them into the rich text editor menu. Identify common use cases and write prompts to generate highly customized content for answers, sales outreach, etc. Your prompt is combined with the incoming question and submitted with a single button click.

Merge Tickets in Manage Messages

- A new Merge button was added to the Manage Messages page that allows you to combine multiple tickets into a new single ticket. Use this to reduce the number of emails sent to active customers.
- The button works across multiple topics and segments.

Purging SPAM and Undeliverable messages

- The [Interaction Purge](#) ^[310] process was updated to include interactions in the _Spam and _Undeliverable topics.
- Topics with those exact names are purged with a max age of 45 days.

There are no breaking changes or user interface changes that agents need to be aware of with this release. The Merge button is new, but doesn't impact existing product usage.

Database Changes - This build contains database changes from 9.7 that require an update via the management console.

Version 9.7 Release Notes

Build #: 9.7.0019 - 2024.01.18 - 14:56:16

This release provides more actions and features for the workflow orchestrator, updates to the rich text editor, improvements to payment forms, and several important bug fixes.

New Text Editor Features

- The rich text editor used to compose content was updated to TinyMCE version 6.8.2.
- We added a custom made plugin to **retain the formatting of tables** pasted from Excel into the editor.

New Workflow Features

- Agent submit **forms created for workflows now load directly with the tenant site HTML**, rather than separately after the app loads. This is a performance improvement.
- A new option was added to **workflow properties to require each value to be unique to the database**. Use this to prevent duplicates for values like invoice number or shipment number.

Payment Improvements

- Additional front-end validation was added to prevent users from attempting to process a credit greater than the amount charged.
- Error messages were updated to be more useful.

There are no breaking changes or user interface changes that agents need to be aware of with this release.

Database Changes - This build does NOT contain any database changes from 9.6 that require an update via the management console.

Version 9.6 Release Notes

Build #: 9.6.0123 - 2023.12.28 - 11:15:04

This release includes new AI and chat bot integrations, updates to the payment process, and many new features for the workflow orchestrator.

New AI Features

New AI related features include an integration with openAI and a third party chat bot provided by Velocity Chat. Details about these changes are described below.


- **iService Copilot** is a direct integration with the openAI LLM for generating text. The rich text editor used for composing content now has an AI button that opens a prompt window within iService. The generated response can then be inserted into the

- editor with a single click. Copilot also includes prewritten prompts for tasks like summarizing or improving content.
- **A new API was added to support the openAI integration:** `webapp-api-userchat?api=chatapi`. This API takes the agent input and submits it to openAI for processing. The response from openAI is then available for inserting into the text editor. This integration with openAI will be used for additional use cases in upcoming releases.
 - You can now **use third party chat bots directly within iService**. Add your API key to the External APIs page and then load the `/f/chatbot` form to chat with the bot. The integration uses the same API as the openAI integration, `webapp-api-userchat?api=chatapi`. Contact your account manager with your specific use case or chat bot that you need to integrate.

New [Workflow](#)⁴¹⁰ Features

This release includes many updates to the workflow builder, including the following.

- **Support single and multi-line text input in ticket body** - In addition to interaction properties, you can now capture input in a text input or text area that can be inserted into a ticket or customer email. These inputs do not have the 460 character limits that are imposed by interaction properties.
- **Create ticket for the logged in agent** - Logged in agents can complete workflow submission forms without the need to enter their email address as the contact for a ticket.
- **Method for selecting approvers based on value tiers** - Documenting approvals is a common workflow use case, but sometimes different approvers are required based on an amount. You can now display content dynamically based on the value entered within another input on the form.
- **Support for variables in subject lines** - You can now include inputs from the submission form in the subject line of tickets or emails generated.
- **Prevent the requester from being an approver** - The workflow builder includes an action for Agent Signing, which documents

- the agent and time they click an approve button. This feature prevents the approver from acting on requests they created.
- **Support for conditional inputs** - This uses the same technique as the approval tiers mentioned above. You can now hide or show content based on a value selected by the user.
 - **New access rights for workflow** - Previously all Administrators had access to the workflow page. There is now a specific user access right required.
 - **Set interaction property value** - You can now add the Set Property Value action to a button in workflow panels. For example, when someone clicks an Approve button, set the value for a property named Approved to True.
 - **SMS Opt-in button** - When using SMS, you must obtain customer approval before sending them messages. Add this button to a submit form that includes a mobile form, and automatically create and email to SMS login for the Message Media network when submitted. The customer approval will be documented within their ticket submission.
 - Excel sheets with data like price lists may be uploaded as a [data file](#)  and then referenced within workflows for calculations or appending data.

There are no breaking changes or user interface changes that agents need to be aware of with this release. The use of iService Copilot is optional.

Database Changes - This build contains database changes from 9.5 that require an update via the management console.

— Version 9.5 Release Notes

Build #: 9.5.0065 - 2023.10.25 - 11:08:08

This release includes a new payment integration, updates to the Manage Messages page, and many new actions added to the workflow builder.

- A new [External APIs](#)^[556] settings page was added to the Tenant Settings menu, and the prior Open ID page was removed. Use the External APIs page to configure Open ID and Embedded Payments. The External APIs settings page will be expanded in future releases for other configurations.
- The [Workflow](#)^[410] Orchestrator user interface was updated with many new controls for building customer submit forms, agent submit forms, and answer panels with custom buttons and actions.
- Our first production release of embedded payment is included in 9.5. The initial release supports integration with the Heartland global payments gateway. To configure embedded payments, obtain your merchant account with Heartland and enter the required keys into the External APIs page. You can control access to the [Payment button](#)^[114] based on [user types](#)^[615].
- The [Manage Messages](#)^[215] page now includes options to display any interaction property and the due date for each question in the message list.

Database Changes - This build contains database changes from 9.4 that require an update via the management console.

— Version 9.4 Release Notes

Build #: 9.4.0048 - 2023.08.16 - 06:15:26

In this release, we focus on making data exporting smoother, refining our workflow orchestrator, and adding the initial steps towards seamless payment processing. This is a small release with no required database updates and small bug fixes.

- More enhancements were added to the Excel export process to ensure proper formatting.
- Our [Workflow](#)^[410] Orchestrator user interface was updated with new controls for building answer panels with custom actions.

- Our first release of embedded payment is included in 9.4, but is in beta mode. Payment processing can only be setup at this time with assistance from your account manager.

Database Changes - This build does NOT contain any database changes from 9.3 that require an update via the management console.

Version 9.3 Release Notes

Build #: 9.3.0091 - 2023.07.03 - 14:35:04

The primary changes in version 9.3 are:

- A new [workflow builder](#)^[410] that makes it easy to customize the agent menus for various interactions. The tool includes a submit form builder for creating custom forms, and an agent action panel builder for customizing the agent menus under various scenarios.
- A new [Webhook](#)^[719] action can be used in filters and forms to pass interaction details to other systems.
- A new Email to SMS login type was created to separate E2S logins from regular email logins. Users that send SMS messages from iService using an email to SMS process can now separate those logins from regular email.
- The [Dashboard](#)^[321] admin page was updated to support adding custom HTML directly to the dashboard.
- A new Excel export library was implemented to improve the format of data exported from iService.

Database Changes - This build does NOT contain any database changes from 9.2 that require an update via the management console.

Version 9.2 Release Notes

Build #: 9.2.0142 - 2023.04.12 - 12:31:22

The primary changes in version 9.1 are:

- A new [Customer Chat Form configuration tool](#)^[355] that makes it easy to create customer chat forms.
- [OpenID](#)^[556] support for integrating [Okta](#) as an identity provider for the agent login panel.
- A newly written integration to [Zapier](#)^[747] built using the Zapier CLI method. This is a foundational change that will be leveraged in future releases to expand the triggers and actions available within Zapier.
- Added the [Forward a Copy](#)^[104] action to the answer panel so it can be used from the My Message Inbox page.
- Optimized the stored procedure `iServiceInteractionsSearchCompleteCanGet` to eliminate deadlocks and improve performance.

Database Changes - This build contains database changes from 9.1 that require an update via the management console.

Version 9.1 Release Notes

Build #: 9.1.0200 - 2023.01.11 - 10:53:58

Version 9.1 replaces the WebSync COMET server with a new custom web socket solution for updating the agent browser. Other major changes are included below:

- New filter and alert action for [Select Notifications](#)^[699] will override message acknowledgment, agent notifications, and contact creation notices.
- Support for login using [Google and Microsoft](#)^[69] openID Connect. See [OpenID](#)^[556] for details on configuring your iService tenant for openID.
- New [error page](#)^[69] to alert customers that log into the agent app by mistake, and [redirect option](#)^[326] on the agent login panel.
- Added secure email to the [Quick Agent Email](#)^[229] form.

- Mailbox passwords are no longer displayed in the [mailbox settings](#)^[655] page. You can change a password, but the value is no longer displayed.
- Remember the selected topics in Manage Messages when returning to that page.
- New [customer portal configuration](#)^[329] pages, including updated chat options.

Database Changes - This build contains database changes from 8.8 that require an update via the management console. However, the updates are compatible with 9.0.

— Version 9.0 Release Notes

Build #: 9.0.0223 - 2022.09.09 - 12:22:18

Version 9.0 provides a replacement for the agent user interface and is written in Vue.js 3 and Bootstrap 5. The APIs and backend database remain compatible with v8, and the agent user interface looks the same as v8.

Enhancements

Replace AngularJS with Vue.js - The AngularJS framework provided by Google is no longer supported. All pages were rewritten in Vue.js using the same design as v8.

Improved performance - As a single page application, most of the content is loaded upon login. This greatly improves the performance of pages that require a lot of data (e.g., Manage Messages).

Improved error checking - A new design was implemented for validating forms before they are submitted. Required fields are highlighted and guidance is provided when an agent attempts to submit forms that have incomplete or invalid data.

- New [Server Process Management](#)^[307] pages for [Interaction Purge](#)^[309], and [SMTP Out Monitor](#)^[311].

- User password creation requirements updated to follow NIST guidance. Spaces are allowed and passwords must be at least 12 characters.
- Add Save and Resolve action to the [External Answer Page](#)²³⁶.
- Include attachments from original question when using [Forward a Copy](#)¹⁰⁴.
- Logging was added for the [Interaction Purge](#)³⁰⁹ process.

Database Changes - This build contains database changes from 8.8 that require an update via the management console. However, the updates are compatible with 8.8.

Version 8.8 Release Notes

Build #: 8.8.0574 - 2022.05.19 - 06:40:00

Change IDs

Note - There are only a few changes in 8.8 that are within the v8 AngularJS pages. Most changes are associated with the new VUE.js-based website that agents will not see unless they load the /app page. The changes below were to the AngularJS app.

89, 783, 1847, 3028, 3371, 3557, 3613, 3615, 3690, 3693, 3803, 3842, 3941, 4026

Enhancements

The primary purpose of 8.8 is to allow users to configure the new Vue.js application prior to release 9.0.

iService agent websites created prior to 9.0 were written using the Google AngularJS framework, which was deprecated as of January 1, 2022. Google no longer updates AngularJS to fix security, browser compatibility, or jQuery issues.

Version 8.8 contains a complete replacement for the iService agent website that is written using the VUE.js framework as a replacement for AngularJS. The website is an API first application that was written as a single page application to maximize speed. Users can access the new app manually by appending /app to their tenant URL (e.g., <https://tenant.iServiceCRM.com/app>). Version 9.0 will load the new Vue application by default.

Minor Enhancements and Bug Fixes

- The [agent inactivity check](#)³⁰⁸ was moved from the Windows Service to a new web service running in a worker pool. The check can be turned on or off in the new [server-process-management](#)³⁰⁷ page.
- Provided separate access right for `configure mass mailing` and `send mass mailing`.
- Improve error logging for EWS mailboxes.
- Update .NET Framework to 4.6.2
- Update AngularJS to version 1.8.2, which is the final version supported by Google.
- When an Alert has no topics selected, the alert will now be disabled. Previously this condition was interpreted as a request to include all topics from the tenant.
- Include file attachments from original interaction in the Forward Copy action.
- Fixed issues with pasting in CKEditor using Ctrl-v.
- Display secure email in the Customer Portal Tabs for customers.

Database Changes - This build contains database changes from 8.7 that require an update via the management console.

Version 8.7 Release Notes

Build #: 8.7.0040 - 2021.09.30 - 18:27:12

Change IDs

3516, 3520, 3513, 3522, 3387, 3523, 3527, 64, 3219, 3546, 3533, 3534, 3540, 2235, 3558, 3528, 3547, 3509, 3567, 3545, 3570, 3572, 3555, 3571, 3411, 3574, 3577, 3537, 3560, 3423, 3569, 3581

Enhancements

- [EWS Oath](#)⁶⁵⁵ is now a supported protocol for incoming and outgoing email processing.
- A [new secure messaging answer panel](#)³⁵² is available that sends notifications to your customer when an answer is provided to their question.
- The [External Answer page](#)²³⁶ now includes an option for resolving questions that don't need an answer.
- A Paste from Word option was added to the [Rich Text Editor](#)⁶⁰ that makes it safe to paste content from MS Word or Outlook. The option removes proprietary styling tags that are not safe for HTML, ensuring that recipients can read the answer.
- Customer chat forms were updated to indicate agent availability for each topic.
- File size is now validated before the user attempts to attach a file to an interaction. This prevents users from attempting to attach files > 10MB in size.

Minor Enhancements and Bug Fixes

- Many UI enhancements were made to the CustomerPortal-Tabs form.
- Lazy loading was added to the Skills page because the page loads slowly when there are many skills and references to topics and agents.

- In some cases, interactions in the Full Case View were not in chronological order.
- Customer email with inline images and file attachments were not displaying the file attachment when created in certain email programs.
- The segment default value for message notifications was not working properly, and in some cases could not be set for specific topics.
- Questions resolved by filters were not included in the Topic Summary by Status report.

Database Changes - This build contains database changes from 8.6 that require an update via the management console.

Version 8.6 Release Notes




Build #: 8.6.0074 - 2021.08.25 - 17:45:30

Change IDs

3370, 3329, 3186, 3077, 3363, 2433, 3373, 3294, 3374, 3380, 3197, 3385, 3382, 3339, 3383, 2927, 3399, 3412, 3408, 3413, 3391, 3351, 3423, 3422, 3421, 3424, 3348, 3436, 2243, 3425, 3437, 3438, 3439, 2651, 3443, 3435, 3457, 2843, 3397, 3461, 3450, 3455, 3139, 3470, 3481, 3388, 3434, 3480, 3483, 3402, 2959, 3493, 3497, 3498, 3296, 3369, 1256, 3485, 3487, 3478, 3508, 1952, 3492, 3475, 3496, 3510, 3454, 3511, 3445, 3512, 3464

Enhancements

- A new [Delete Interactions](#)¹³⁸ button allows privileged users to remove interactions from an iService tenant database. This is typically used to remove confidential data, inappropriate content, a virus, etc. An audit trail is recorded for every deletion, and a new report is available to track usage of this feature.
- New access rights allow non-Administrators to configure the [Manage Agent Email](#)⁴⁰⁵ form without direct access to the forms and websites settings pages.

- The password reset process was enhanced to provide better error messaging and user experience.
- Multiple design enhancements were made to the CustomerPortal-Tabs form.
- The GUID used with agent notifications for the [External Answer](#)  page is now available until the question is resolved. Other enhancements were made to the External Answer page related to attachment handling and display.
- Validation was improved in the [Mailboxes](#)  and [Websites](#)  settings pages.
- The rich text editor now includes a [Paste from Word](#) feature that makes MS Word content safe for email.

Minor Enhancements and Bug Fixes

- In some cases, images in KB articles were appearing as attachments and not displaying inline.
- Detect bounced email address on external answer page and display friendly message.
- When we create an agent email from the View Mode, we quote the prior interaction as the prior message. The date/time inserted should be from the resolved interaction. Instead, we were inserting the date/time the unsent response was created.
- Agent settings were included in Search Contacts, but didn't display data for non-admin agents. They were removed from Search Contacts since they are already accessible from Agent Settings.
- Many UI enhancements were made to the CustomerPortal-Tabs form.

Version 8.5 Release Notes


Build #: 8.5.0047 - 2021.07.07 - 17:07:32

Change IDs

3274, 3256, 3297, 3280, 3298, 3300, 3320, 3289, 3292, 3277, 3303, 3317, 270, 3331, 3301, 3302, 3342, 3337, 3335, 3343, 3346, 3345, 3333, 3183, 2961, 3245, 3262, 3312, 3252, 3310, 3318, 3338, 3340, 3341, 3344, 3349, 3308, 3309, 3336, 3364, 3365, 3347, 3368, 3366, 3330, 3350, 3372

This release makes it easier to incorporate help from non-iService agents. A new External Answer form and updates to the Answer by Email process provide key features that allow third parties to provide answers to your customer questions. It also includes some updates to the tabs version of the customer engagement center to support sharing KB content with social media. The Date and Time property type had a few bugs in 8.4, and those were also corrected in this release.

Enhancements

- A new [External Answer page](#)  provides a convenient way to answer a single question. It allows agents to invite anyone to answer a question using a one-time GUID that is valid until the question is resolved. The invitation link can also be included in agent notifications to provide an additional way to answer questions without logging into iService. The page allows anyone with the link to load the question and provide an answer. The link to the page can be generated with the Forward to External Agent action or from a system generated agent notification.
- The Answer by Email process was updated to support file attachments, and now allows any email address to provide answers without the need for an iService license. The process is designed specifically for iService agents, but the notification template can be forwarded to anyone allowing them to answer by responding to the email.

- The Tabs version of the customer engagement center now allows users to share knowledge base articles via social media (Facebook, Twitter, and LinkedIn).
- The [Knowledge Base](#)¹⁸⁴ page received some performance enhancements and a [stock response picker](#)¹⁹⁰ to streamline creating articles.

Bug Fixes

- A defect was preventing images from being displayed within the Rich text editor in certain scenarios and has been corrected.
- The `date and time` property value type had various defects when used in custom forms. These were corrected in this release.

Database Changes - This build does not contain any database changes from 8.4 that require an update via the management console.

Version 8.4 Release Notes

Build #: 8.4.0144 - 2021.06.11 - 09:24:22

Change IDs

3041, 893, 2644, 2956, 1025, 3018, 3019, 2917, 3034, 2711, 3015, 3086, 2464, 600, 3085, 3087, 3099, 3112, 3122, 3131, 3106, 3120, 1145, 3116, 3114, 3098, 3110, 3118, 1032, 3140, 3113, 3115, 3144, 3153, 3148, 3143, 3160, 3046, 3061, 3097, 3111, 3119, 3138, 3141, 3142, 3156, 3158, 3159, 3152, 1708, 3000, 2985, 3066, 3145, 3169, 3174, 3194, 3175, 3200, 3155, 3203, 3177, 3179, 2585, 3212, 3217, 3230, 3198, 3176, 3184, 3248, 3195, 3224, 3218, 3214, 3193, 3259, 3250, 3255, 3249, 3251, 3166, 3096, 3154, 3260, 3185, 3266, 3182, 3264, 3261, 3275, 3241, 3257, 3201, 3284, 3283, 3282, 3281, 3279, 3278, 3276, 3271, 3287, 3288, 3243, 3234, 3235, 3252, 3270

This release was focused on enhancements for sales and customer self-help tools. A new content creation system was added for making knowledge base articles, and a new customer engagement center incorporate the knowledge base into the Ask a Question process. It also includes updates to some of the admin settings pages.

Enhancements

- The new [Preview Dialer](#)¹⁵⁰ form allows agents to search on any contact property to build a list of contacts that need a follow call. The form loads contacts one at a time, and provides a quick view of recent interactions, contact information, a script for the call, and the ability to add call notes.
- The new [Manage Knowledge Base Articles](#)¹⁸⁴ interface provides a simple interfacing for creating content you can publish to help customers find answers to common questions. Articles created can be designated as public, or as private content only viewable by other agents. Customers can subscribe to content, and the knowledge base manager can notify them when content is updated.
- A new type of [interaction property](#)⁶⁴⁴, Knowledge Base Property, can be used to categorize content in your tenants knowledge base. These new properties can store any of the existing types of values.
- A new customer engagement center, the CustomerPortal-Tabs form, provides an easy to customize website for engaging with customers and prospects. The portal includes a customizable support home page, features for searching or browsing articles in the knowledge base, a new contact form with self-help integration, and access to history and contact details.
- The [Service Levels](#)⁶⁰³ page was converted to the v8 format.
- The [Interaction Properties](#)⁶⁴⁴ page was converted to the v8 format, and includes new features for displaying where the properties are used within skills, topics, and filters.

- The [Contact Properties](#) ⁶⁵¹ page was converted to the v8 format, and includes new features for displaying where the properties are used within service levels, other contact properties, and interaction properties.
- The multi-line property value was expanded from 128 to 450 characters of input.

Bug Fixes

- In some scenarios with lots of filter actions, the status audit was truncated. The status audit field was increased to 450 characters to prevent truncation.
- Secure Notifications were being excluded from the built-in Message Center form. They are now included.
- Fixed an issue that caused the customer chat window to links in the chat form, instead of a new browser.
- In some scenarios with multiple tenants, the View Topics button was displaying a malformed hierarchical topics list.
- Fixed the User Type delete dialogue to only require a replacement User Type if contacts were associated with the type being deleted.
- Removed interaction property-based skills from the Topics page, because they are not associated with topics.

Database Changes - This build contains database changes from 8.4 that require an update via the management console.

Version 8.3 Release Notes

Build #: 8.3.0033 - 2021.03.09 - 11:25:42

- Change IDs
2674, 3020, 3027, 2962, 2987, 2976, 2964, 2947, 2986, 3006, 2963, 2375,
3060, 3059, 3100

This is a small release with minor bug fixes and usability enhancements. It includes the correction for a defect in 8.2 that removed a database constraint which prevented users from adding duplicate mailboxes.

Enhancements

- Add lazy loading to the mailboxes so users know the table is loading data. This generally only impacts users with over 500 mailbox definitions.
- Add lazy loading to the topic selection menu of the Agent Email form in the Customer Info - Contacts page. This generally only impacts users with over 500 topic definitions.
- Remove the Segment name when displaying the root topic for a segment, since the segment name is already displayed.

Bug Fixes - This release contains fixes for the following pages and forms:

- Add back the constraint to the Mailboxes table to prevent duplicate mailboxes.
- Keep cases status open until all questions are resolved.
- Fixed issues with exporting data to Excel.
- Show message when a contact has more than 2500 interactions and the full history can't be shown in the browser.
- Sort the agent list properly on the User Type column.
- Remove agent related content from the UI when logged in as a customer.

Database Changes - This build contains database changes from 8.1 that require an update via the management console. Do not install 8.2.

Version 8.2 Release Notes

Build #: 8.2.0092 - 2021.01.21 - 13:54:06 (not available for on-premise installation)

Change IDs

2741, 2761, 2760, 2779, 2733, 2776, 2792, 2793, 2794, 2795, 2796, 2801, 2802, 2808, 2807, 2623, 2825, 2769, 2815, 2813, 2582, 2755, 2818, 2811, 2803, 2814, 2821, 2816, 2827, 2478, 2820, 2846, 2812, 2841, 2824, 2842, 2835, 2819, 2829, 2791, 2798, 2853, 1629, 1861, 2850, 2772, 28 00, 2848, 2845, 2849, 2863, 2852, 2783, 2851, 2844, 2774, 2817, 2869, 2874, 2876, 2865, 2885, 2673, 2879, 2883, 2868, 2866, 2889, 2892, 2421, 2810, 2822, 2896, 2895, 2870, 2904, 2903, 2908, 2909, 2907, 2530, 2875, 2888, 2906, 2916, 2789, 2585, 2674, 29 00, 2884, 2920, 2919, 2828, 2925, 2923, 2922, 2918, 2934, 2939, 2938, 2940, 2942, 2944, 2933, 2945, 2946, 2935, 2957, 2955, 2954, 636, 2921, 2937, 2965

Enhancements

- New [secure message portal](#)^[340] designed for customers to read messages and submit questions.
- New [secure answer panel](#)^[340] designed for agents that are only allowed to submit answers via the secure message portal. No email is sent using this answer panel
- New customer [chat form](#)^[340] designed specifically for the message portal.
- Support for [Microsoft Exchange Web Services \(EWS\)](#)^[655] for sending and receiving email via Microsoft O365 mailboxes. Updated mailbox page design and set encryption by default.
- Increased display to 2500 interactions in customer history
- Updated the [Topics Settings page](#)^[691] to the new v8 design.
- Updated the Contact Details page to show agent settings in a new panel.
- Updated Search Interactions to return 2500 interactions.
- Change Topic filter now allows selecting topics in other segments.

Bug Fixes - This release contains fixes for the following pages and forms:

- Validate segment access for credit memo submitters
- Fixed error messages on chat forms
- Fixed issues with the Forms wizard
- Set From address for agent email when created in the View Mode
- Fixed issue that prevented agents from updating their agent settings
- Improved performance of the mailbox API
- Case status now shows Open and Resolved status correctly

Database Changes - This build contains database changes from 8.1 that require an update via the management console.

NOTE: This build has a defect that allows users to mistakenly add duplicate mailboxes. The defect is corrected in 8.3, and should be used instead of 8.2 when upgrading from v8.1. That is, on-premise users should migrate from 8.1 directly to 8.3.

Version 8.1 Release Notes

Build #: 8.1.0097 - 2020.11.04 - 12:54:46

Change IDs

2115, 2636, 2667, 2662, 2656, 2658, 2559, 2643, 2631, 2641, 2640, 2365, 2635, 2629, 2514, 2497, 2512, 2564, 2637, 2580, 2619, 2339, 2630, 2633, 2622, 2620, 2604, 2615, 2614, 2612, 2607, 2610, 2609, 2606, 2600, 2599, 2598, 1675, 2597, 2596, 2595, 2594, 2579, 2259, 2583, 2593, 2587, 415, 2561, 2584, 2578, 2577, 2571, 2567, 2459, 2565, 2645, 2655, 2649, 2650, 2652, 2661, 2581, 2663, 2666, 2664, 2679, 2653, 2677, 1676, 2624, 2659, 2689, 2688, 2687, 2686, 2684, 2678, 2638, 2282, 2281, 2323, 2660, 2681, 2691, 2692, 2693, 1831, 2330, 2293, 2174, 2466, 2695, 2702, 2701, 2703, 2698, 2708, 2710, 2697, 2704, 2709, 2715, 2639, 2714, 1587, 2712, 2657, 2723, 2727, 2713, 2716, 2156, 2728, 2725, 2573, 2726, 2719, 1587, 2307, 2745, 1974, 2752, 2751, 2748, 2749, 2724, 2747, 2731, 2744, 2750, 2759

Enhancements

- New system for [generating quotes](#)^[204] and [tracking follow up](#)^[225] (Quote System)
- Enhancements to the [Websites settings](#)^[623] page (improvements to placeholders and new help tooltips)
- Enhancements to the [Agent settings](#)^[542] page (Improved process for adding and removing agents, and integrated settings on main page)
- [New dashboard page](#)^[140] (home page) with customizable widgets
- Updated [Manage Chats](#)^[221] topic selection interface to match Manage Messages
- Preview the contents of [stock responses in a tooltip](#)^[120]
- Add TLS 1.1 and 1.2 support with web services framework targeting .NET 4.6.1

Bug Fixes - This release contains fixes for various style and design inconsistencies, and fixes for the quick agent email and credit memo processes.

Security - Updated libraries to latest version (Angular JS, Bootstrap, JQuery)

Database Changes - This build contains database changes from 8.0 that require an update via the management console.

Version 8.0 Release Notes

Build #: 8.0.938 - 2020.08.27 - 13:40:42

Change IDs

2453, 2471, 2495, 2496, 2489, 2461, 2505, 2406, 2506, 2508, 2511, 2465, 2519, 2518, 2498, 2529, 2532, 2534, 2483, 2531, 2538, 2539, 2540, 2419, 2542, 2543, 2545, 2546, 2541, 2517, 2558, 2557, 2240, 2370, 2516, 2163

Enhancements

- Added segment as an optional column for the message list on the manage messages page
- Improved the layout of the contact summary page

- Added popover and tooltip help to multiple pages
- Added portal option that removes the SEND button and only allows secure messaging

Bug Fixes

- The list of cc addresses was missing from the details and attachments tab in some pages
- Various fixes to the display of default mailboxes when answering questions that are transferred between segments

Database Changes - This build does not contain any database changes.

Build #: 8.0.915 - 2020.08.10 - 10:45:08

☐ Change IDs

2476, 2460, 2490, 2469, 2441, 2472, 2473, 2481, 2319, 2509, 2482

Enhancements

- Separated segments in the Manage Messages page with segment name labels
- Added a check mark to indicate which segments have been configured in the Manage Agent Email Form
- Show agent settings in the Contact Details page when an agent views their own contact
- New form shows agents that have messages queued and their age in business hours (/f/assigned-messages-count)

Bug Fixes

- Add DB constraint to prevent duplicate properties when properties are configured for a single value
- Fixed the date and number format for data exported to Excel in datatables

Database Changes - This build contains database changes from 8.0.910 that required an update via the management console.

Build #: 8.0.910 - 2020.08.02 - 18:14:46

☐ Change IDs

2458, 2462, 2467, 2474, 2475, 2476, 2489

Enhancements

- Enable round-robin assignments via alerts
- Load the view mode after credit memo is approved
- Add DB constraint to prevent duplicate properties
- Performance improvement for interaction searches to improve speed of My Message Inbox and Manage Messages

Bug Fixes

- Error loading contact details tab in My Message Inbox
- Allow all values to display when multiple values are saved for a single value property
- Error deleting skill
- Agent settings are not shown to agents

Database Changes - This build contains database changes from 8.0.902 that required an update via the management console.

Build #: 8.0.902-x64 2020.07.27.20.18.40

☐ Change IDs

2452, 2445, 2444, 2454, 2455, 2420, 2456, 2457, 2458, 2459

Enhancements

- Updated the skills page to show the segments that have topics using the skill
- Disable buttons after approving a credit memo

Bug Fixes

- Logout Agent button in the agent settings page was not logging out the selected agent
 - In some cases, questions could not be answered in segments that didn't have a default mailbox
-

Build #: 8.0.899-x64 2020.07.23.15.43.48

Change IDs

2407, 2404, 2400, 2397, 2380, 2373, 2350, 2410, 2363, 2394, 2418, 2420, 2408, 2393, 2401, 2426, 24 40, 2405, 2428, 2431, 2432, 2434, 2436, 2427, 2438

Enhancements

- Upgraded the Quick Agent Email topic list to include the full set of topics
- Changed the Manage Messages page to load with the agent's topics selected
- Improved the error handling and layout on the credit memo submit form
- Send agent notifications when the round-robin filter assigns a question
- Improved the layout of interaction properties in ticket bodies

Bug Fixes

- Agents could not see there own stock responses
- Performance improvement for the credit memo submit form

- In some cases, questions could be resolved without values for required answer properties
 - Changing the topic of approved credit memos was causing a display problem
 - Removed word highlighting when filtering the mailbox list in Forward to Segment because it was causing a performance problem
 - Custom styling on check boxes was causing a performance problem in the credit memo configuration page
 - Change Topic actions and newly assigned questions were causing agents to lose their selected message in the My Message Inbox
-

Build #: 8.0.885-x64 2020.07.13.10.31.19**Change IDs**

2390, 2387, 2386, 2378, 2377, 2359, 2304, 2159, 2061

Enhancements

- The format for dates was updated in the manage messages page to improve performance.
- Help text was updated in several pages.
- Small enhancements were made to the customer info section of the customer portal.

Bug Fixes

- Agent stock responses were not being displayed for certain types of agents.
 - The quick agent email configuration was not being properly loaded after the initial set up.
 - The select all button in the manage messages topic list was ignoring the Show My Topics switch.
-

Build #: 8.0.881-x64 2020.07.09.09.07.00

This is the first generally available release of iService 8.0. It's a complete replacement for the agent user interface. Changes are summarized below.

Tenant Website - The tenant website is completely replaced beginning with this version. The new website is described within this user guide.

SQL Server Database - There are no schema changes from version 7.8 to this release. There are new stored procedures added, but the database remains compatible with the 7.8 website.

Mail Popper - There are no changes to the mail popper component.

— Version 7 and Prior Release Notes

To read release notes for versions prior to 8.0, see the legacy user setup guide at https://www.iservice.info/guides/setup/index.html?version_history.htm

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template if you want it completely blank.

Introduction

2 Introduction

This user guide is intended for users of the iService web interface, utilities, and reports. Most of the set up and configuration of an iService tenant is done through this web interface. See the [iService Technical Guide](#) for details on installing, upgrading, and maintaining an iService installation.

Feature Overview

iService provides a number of ways to interact with your customers, as depicted in the diagram below.



iService Features

Email response - iService includes a skills-based routing process for helping you answer customer questions. The most common questions come

from customer email, but other questions can be submitted through iService forms or the agent ticket interface.

Web self-help - iService has an integrated knowledge base that can help your customers find answers to their questions.

Email marketing - You can use the integrated mass mailing feature (iCentives®) to send messages to iService contacts, or add contacts to multi-message campaigns.

Contact management - You can extend your view of contacts with custom properties, such as account numbers or preferences. Every interaction with your customer is archived with their full interaction history.

Business intelligence - iService includes over 50 reports that can be delivered to your inbox, run on demand, or integrated into other analytical tools.

Integrated forms - iService forms provide a complete framework for building interaction workflows and custom user experiences. In fact, the entire iService web interface is built using iService forms. Whether it's a simple contact us form for a detailed approval workflow, the iService interface can be adapted to meet the needs of your enterprise.

Mobile support - All of the iService interfaces are built as mobile first apps, including the agent website and customer portals.

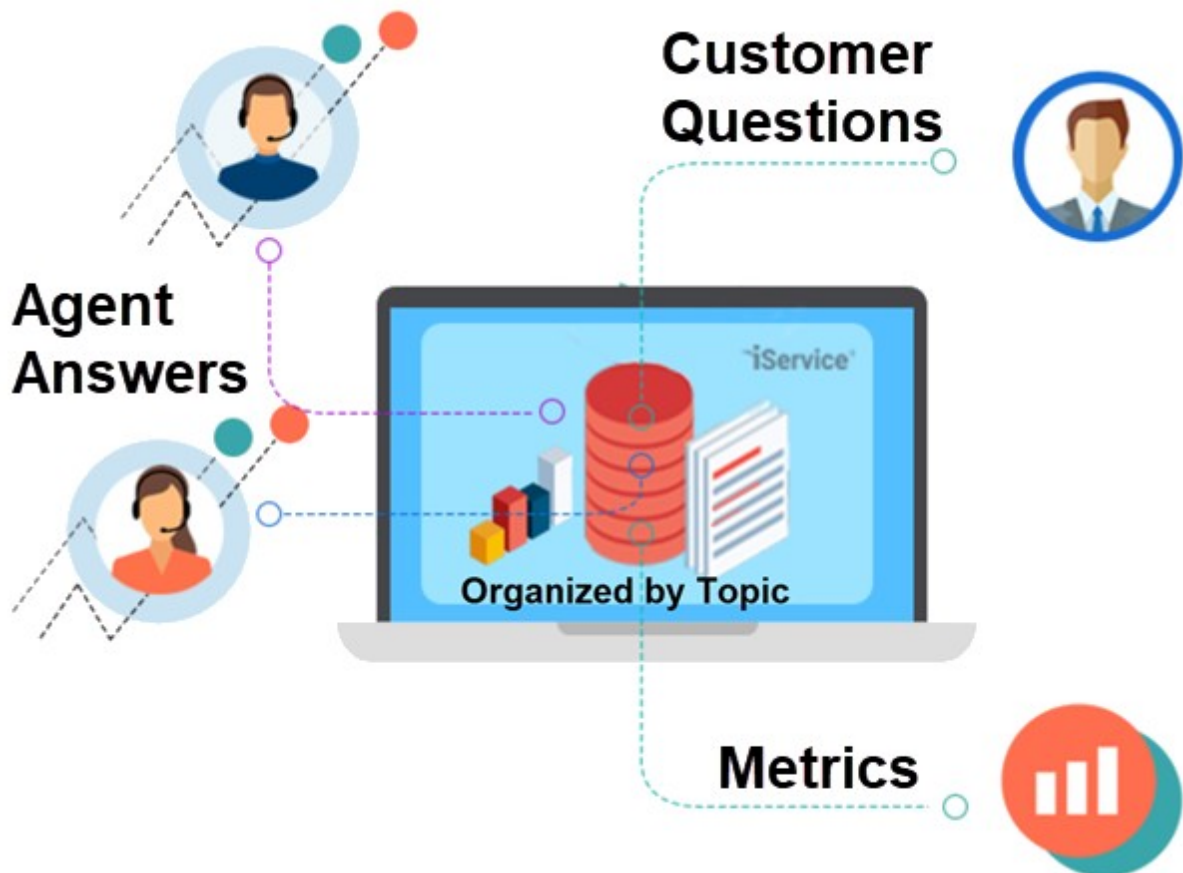
Live chat - iService chat uses the same skills-based routing configuration as email response. You can chat with customers while browsing the rest of the iService interface.

2.1 iService Core Concepts

iService is a platform for interacting with customers and getting work done. Most of the work you do in iService will be in the form of a conversation. For example, a customer might ask a question via email and you might provide

the answer via an agent response. Or, you might initiate the conversation with an agent email. These conversations are stored in the iService database as interactions organized by topics.

This concept is depicted below.



The core concept of iService

Contacts – every interaction is associated with a contact. This is usually a customer, but can be any entity with an email address or login. For example, you might receive automated notifications from other systems as well as from people. iService will create a contact for every incoming question if one doesn't already exist.

Agents – agents are contacts that provide answers. Their user type grants them access to various features that are appropriate for their role. Learn

more about configuring agent user types in [Settings – User Types](#)⁶¹⁵. Agents are given skills to determine the types of questions they can answer.

Topics – are used to categorize questions and answers. They control routing and queuing of incoming messages, and are used as a topology for the iService knowledge base. [Skills](#)⁶¹¹ are associated with topics to limit the agents allowed to provide answers. Only agents with all of the required skills are routed questions from the [topic](#)⁶⁹¹.

Metrics – all of the interaction and contact data are available for detailed [metrics and KPIs](#)⁷⁶².

2.2 User Types And Roles

There are three types of users that interact with iService: anonymous, customer, and agent. The anonymous and customer user types only have one value, but each tenant can have an unlimited number of agent user types. To learn more about configuring user types, see the [Settings – User Types](#)⁶¹⁵ page.



Anonymous

Anonymous Users – these are users that are not authenticated.

Users that have not logged into iService can still view public knowledge base articles and submit questions. As soon as they ask a question, iService will create a contact for them and begin archiving their conversation history.



Customer

Customers – iService provides a user registration processes that can be customized depending upon your requirements. Customers can view their questions and read agent answers in message

history. They can subscribe and unsubscribe from mailing lists and mailing campaigns. They can view and change their contact properties. They are limited to viewing contact information and interaction details tied to their contact ID.



Agents – there are various levels of access granted to agents based on their role. iService includes six standard user types. All agents can view the contact information and interaction history for their assigned segments.

CSR – These agents cannot pick questions; they can only answer questions via the get next assignment process or when assigned by a manager.

QA CSR – these agents have the same access rights as CSR, except they can only propose answers. Their proposed answer is queued for a QA manager to review and approve before it's delivered to the customer.

QA Manager - these agents have full access to customer information and questions in their segments. They can reassign any message, including proposed answers. Managers can access the settings – agents page.

CSR Manager – these agents have the same access rights as QA managers, except they can't see the proposed answers from QA CSR's.

Administrator – Administrators have access to all tenant settings, and segment settings for their segments. Administrators cannot create other administrators.

Superuser – the superuser can perform every function. It is the only user type that can create administrators.

2.3 iService Business Rules



The iService system has business rules that define how the system functions. This chapter explains these business rule.

The most important of these business rules are defined below.

Contacts



One of the requirements of every interaction is to select a contact. This is the person that you're sending your answers to. They send you questions in the form of customer emails, customer tickets from form submissions, or agent tickets.

Business Rules

1. A contact is synonymous to a person. They are external users of the iService product sometimes referred to as customers.
2. Each contact must have membership with (i.e., be associated with) at least one segment.
3. A contact may be associated with more than one segment.
4. The standard customer information fields are available to everyone that has rights to view the contact, regardless of their segment. That is, the standard contact details (Name, phone, address, email, organization) are shared among all segments.
5. Interaction History for contacts will be viewable based upon the Segment in which the interaction took place. Agents without privilege to see history related to a particular segment cannot view the interaction.

Departments

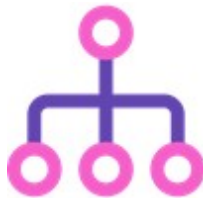


Departments are ways to group agents together. They aren't required as part of an interaction or any other process within iService. But they can make it easier for managers to administer your agents. As a separate entity in the database, departments can be used within custom reports to more easily identify agents.

Business Rules

1. Departments are used to simplify the management of agents.
2. Agents that are assigned to a department (e.g., sales, support, human resources) will inherit the skills and segment access in that department.
3. Departments are used for round-robin message assignment in filters. Agents that are members of a department used in a round robin assignment filter will be assigned questions based on the last time they were assigned a question relative to other agents in the same department.

Segments



Some enterprises operate multiple business units with different brand identities, names, etc. iService supports separate configurations for each business unit with their own set of mailboxes, topics, properties, etc. Access to customer information and interaction histories are controlled through segment access.

Business Rules

1. A Segment is a grouping of information within iService that supports separate levels of security and presentation. Segments are often used to separate Contacts of different business units.

2. Segments are defined as Standard or Information Only. Information only segments do not have topics or mailboxes. They are used to manage access to contact properties and provide hierarchy in the segment configuration only. Interactions (customer email, notes, etc.) cannot be entered into an information only segment.
3. Each Standard Segment must have a Default Mailbox. A mailbox may exist in only one segment of the tenant.
4. Each Standard Segment has a Topic Tree that is used to categorize incoming questions, and present articles in the iService knowledge base.
5. Agents are only assigned interactions from the Get Next process if they have access to the segment and all required skills for the interaction.
6. Contact properties within the Global Segment (default fields such as name, login, etc.) are shared across Segments. For instance, a phone number entered for a Contact in Segment 1 is visible when the same Contact is viewed by an agent that only has access to Segment 2 (as long as the Contact is associated with Segment 2).
7. Segments may have additional Contact Properties that are separate from the Standard Contact Properties. These contact properties are viewable based upon whether they are shared or private. If the property is shared, all users with access to the contact can view them. If the property is not shared, only users with access to the Segment may view those properties.
8. Customer Info Search Results are limited based on the Segments to which the Agent has access. (i.e., searches performed within the Customer Info – Search tab).
9. Find Answers Search Results are limited based on the Segments to which the Agent or Contact have access.
10. All interactions (customer emails, tickets, agent emails, etc.) are tied to a specific Segment and topic within that Segment.
11. Parent Segments are automatically granted access to the information (contacts and details) from their child segments.
12. Each tenant has a global hidden segment that is not visible to administrators. This segment contains the standard contact details that are shared with all segments.

13. Contact properties and interaction properties may be populated for a Contact or Interaction even if they are not a member of the segment that the properties are in.

Tenants



iService is designed as a multi-tenant system where a landlord installs and maintains the software for tenants. Tenants have their own iService system and are unaware of other tenants within the environment. If you are an on premise customer, your company is acting as your landlord running iService on their own equipment.

Business Rules

1. A tenant is a separate database within iService that contains all the configuration information for your company.
2. Tenant information is completely isolated from other tenants. As a result, it is not possible for a user logged into one tenant to see any information from other tenants.
3. Reporting is designed to be on a tenant by tenant basis, without the ability to generate reports that combine more than one tenant.
4. Tenants have the ability to configure their iService system any way they choose, without regard to how other tenants configure and use their systems.
5. Tenants share a common website, but may customize the interface via custom forms.

2.4 Working With Data Tables

iService uses data tables extensively to display search results and lists of information (My Message Inbox, Message List in the Manage Messages page, etc.). These tables all have similar functionality, which is described below.

The screenshot shows a 'Search Results' interface. At the top left, there are buttons for 'Excel' (1) and 'Column visibility' (2). A 'Show 10 entries' dropdown (3) is next to it. On the right, there is a 'Filter Results' input box (4). The table has columns: Name (5), First Name, Last Name, Email, Company, and Phone (Work). The 'Name' column is sorted, indicated by a bold arrow icon. The table contains 14 rows of customer data. At the bottom, there is a pagination bar (6) with 'Previous', '1', '2', and 'Next' buttons. A status message 'Showing 1 to 10 of 14 entries' is located at the bottom left of the table area.

Name	First Name	Last Name	Email	Company	Phone (Work)
1, Customer	Customer	1	customer1@qavmmail02	One Source United	(Fax) 217-555-1212
10, Customer	Customer	10	customer10@qavmmail02	The Company	
2, Customer	Customer	2	customer2@qavmmail02	Two	
4, Customer	Customer	4	customer4@qavmmail02		
5, Customer	Customer	5	customer5@qavmmail02		
6, Customer	Customer	6	customer6@qavmmail02		
7, Customer	Customer	7	customer7@qavmmail02		
8, Customer	Customer	8	customer8@qavmmail02		
9, Customer	Customer	9	customer9@qavmmail02		
One, Customer	Customer	One	customer1@qavmmail02.champaign.1to1		

An example of data tables

1 - The **Excel** button exports the contents of the table to an Excel file. All rows will be exported regardless of the number of entries shown per page.

2 - The **Column Visibility** button allows you to add and remove columns in the table. The columns available for selection vary depending upon the table.

3 - The **Show x Entries** menu adjusts the pagination level.

4 - You can **filter** the results of the table by typing into this filter box. The table only display rows that have matching values.

5 - Every column in the table is **sortable**. The sort icon for the current sort column is shown in bold.

6 - When there is more than one page of content, **pagination** is shown on the bottom.

7 - When a row contains an **expand / collapse** icon, you can click the icon to see more options.

2.5 Working With The Rich Text Editor

iService includes a rich text editor (TinyMCE) for displaying customer messages, creating new messages, editing find answers articles, and other text areas when an agent views or creates text. The functions within the editor are similar to most word processors, except for the View Source Code button at the far right of the toolbar. This button toggles between the HTML edit mode, which displays the full HTML that is being created by the editor. This mode should only be used if you are familiar with HyperText Markup Language.

The functions of the editor are shown below.



The rich text editor

#	Feature description
1	Use these to undo or redo your last action.
2	Set the font of the selected text to bold, italics, or underline.
3	These are the iService Copilot buttons. The AI button opens a prompt window, and the drop down presents a list of pre-configured prompts. These buttons only appear if you have enabled the OpenAI integration. Read more ⁶² about iService Copilot.

#	Feature description
4	Use preset styles for selected text, or change the font type and size to specific settings.
5	Change the font color.
6	Set a background color for the font, like a highlighter.
7	Remove all styling from the selected text.
8	Convert a list into a numbered list or unordered list with bullet points. Use the drop down to specify the type of numbering or bullets.
9	Set alignment for the selected text to left, right, or fully aligned.
10	Insert and table and configure it's styling. You can also paste directly from an Excel spreadsheet to insert a table. Most formatting will be preserved from the Excel styles.
11	Reduce or increase the indentation of the selected text.
12	Insert and configure hyperlinks.
13	Expand the editor to full page.

Spell Checking


Spell checking is a function of your browser (Chrome, IE, Firefox, etc.). The standard approach to spell checking in browsers is to underline misspelled words with a red line. Follow the instructions of your browser to access it's spelling recommendations.

Embedding Images Into the RTE Text Area

In most cases, you will be able to copy and paste images into the editor using the copy and paste keyboard shortcuts (Ctrl-c and Ctrl-v). iService

will convert your embedded image into a file stored in the iService database and display it properly as needed.

Full Page Edit

The Full Page Edit mode  allows you to expand the editor to full screen, complete your edits, and then toggle back to the prior view. This is useful when the customer question contains large graphics or spans several pages of text.

2.5.1 iservice-copilot



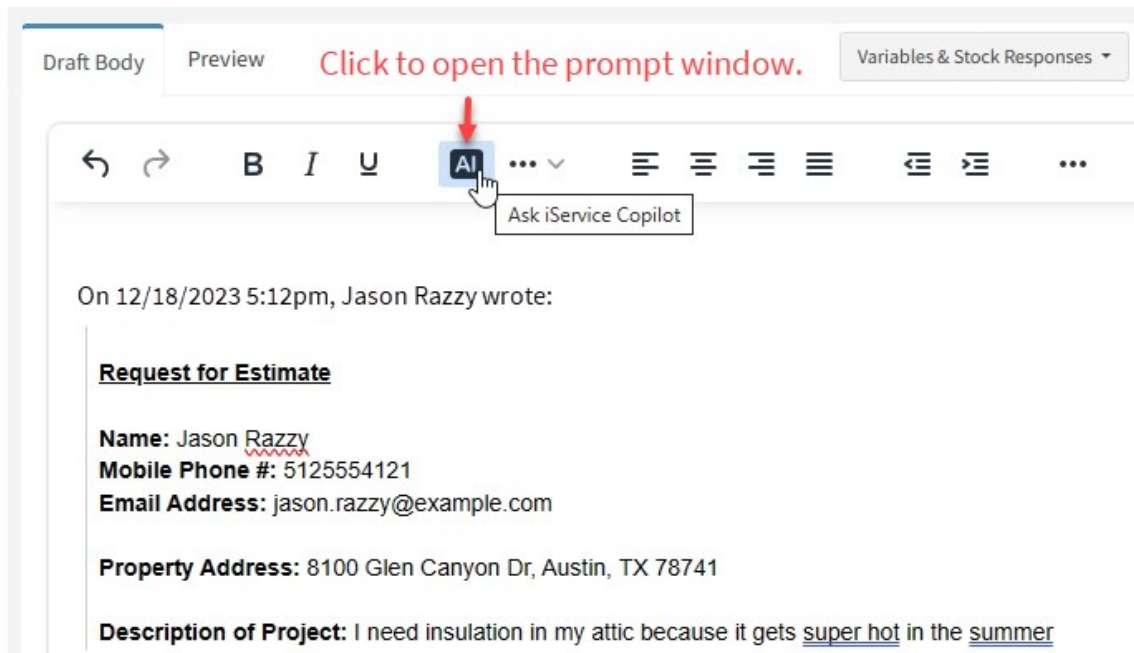
iService includes an integration to the openAI large language model (LLM) for generating text. The buttons are automatically added to agent rich text editors when the integration is configured in the External APIs page by pasting your organizations openAI API key generated from the openai.com website. See the [External APIs](#) ⁵⁵⁶ page for details on setting up the integration.

The integration includes two modes: generating new text from a prompt window, and evaluating and revising existing text with the editor. This allows agents to create create new answers, summarize existing content, or improve the writing of existing content. Your prompts are augmented with system prompts added by iService as guardrails to keep responses relevant.

— Using the iService Copilot Prompt Window

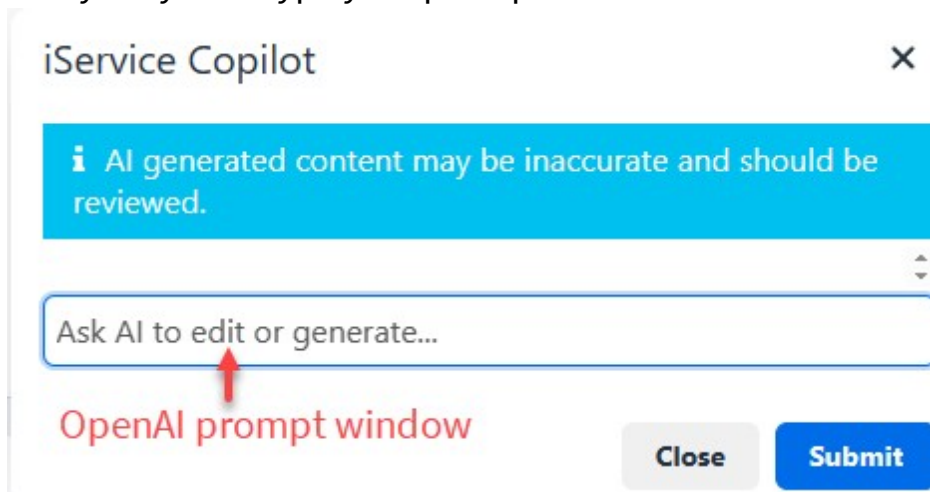
There are two options within the copilot integration: a general prompt window and prewritten prompts for improving writing. The example below illustrates how to use the general prompt window.

To open the prompt window, click the main AI button in the editor.



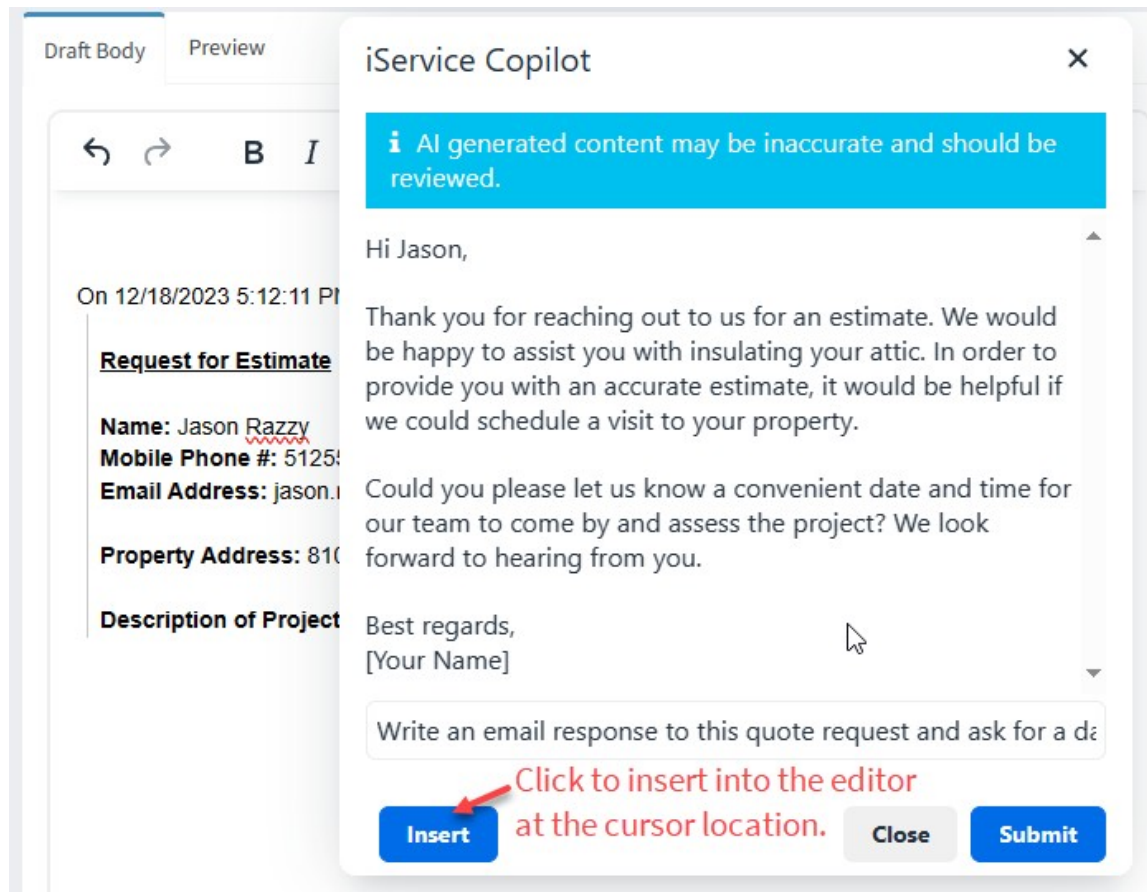
The general prompt window button

When you click the AI button, you will see the empty prompt window ready for you to type your prompt.



The copilot prompt window

In our example, we ask copilot to write a response to a request for an estimate. We enter the prompt along with the customer question to get a generated answer, and click Submit. The answer is generated and an insert button is provided to paste the answer into the draft agent response.



A generated response ready for insertion

After clicking the Insert button, the agent response is ready for final review and sending. One advantage of using copilot over stock responses is the level of personalization. The LLM is very good at identifying small details, like the details of the request, and incorporating them into the response. In this example, the customer was requesting insulation for an attic so the response is tailored to that need.

The screenshot shows an email editor interface with a 'Draft Body' tab and a 'Preview' tab. The draft body contains the following text:

Hi Jason,

Thank you for reaching out to us for an estimate. We would be happy to assist you with insulating your attic. In order to provide you with an accurate estimate, it would be helpful if we could schedule a visit to your property.

Could you please let us know a convenient date and time for our team to come by and assess the project? We look forward to hearing from you.

Best regards,
[Your Name]

On 12/18/2023 5:12pm, Jason Razy wrote:

Request for Estimate

Name: Jason Razy
Mobile Phone #: 5125554121
Email Address: jason.razy@example.com

Property Address: 8100 Glen Canyon Dr, Austin, TX 78741

Description of Project: I need insulation in my attic because it gets super hot in the summer

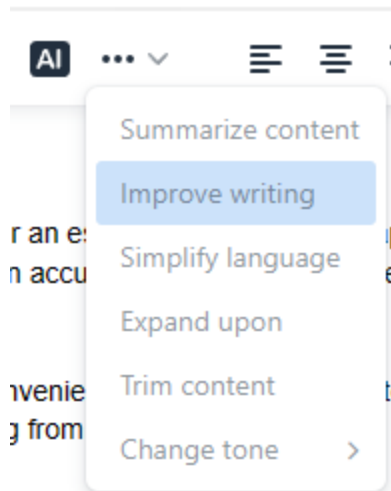
A red box highlights the AI-generated text, and a red arrow points from the box to the text: "Generated answer inserted into the agent response."

Generated response ready for review

It's important to review the text generated by AI to ensure it's accurate and does not include fictitious information. Although your prompt is augmented with requests to only provide answers when the LLM is sure of the answer, unexpected behavior can occur with any AI model.

— Copilot Writing Assistant


The writing assistant provides prewritten prompts that you can apply to existing text within the editor. The menu is not enabled until you select text. The options included are shown below. Insert the updated text using the Insert button after the text is generated.



Writing assistant options

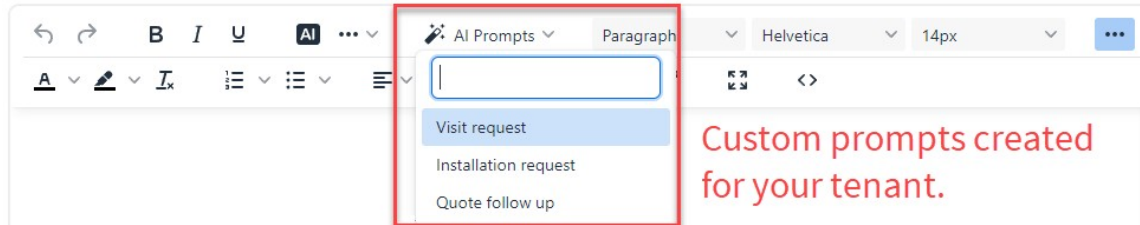
Writing Option	Purpose	Integrated Prompt
Summarize content	Use this option to summarize long text for a quick read. This helps agents get a quick understanding of the customer needs.	Provide the key points and concepts in this content in a succinct summary.
Improve writing	This prompt will rewrite the text to improve the grammar and description while keeping the original meaning.	Rewrite this content with no spelling mistakes, proper grammar, and with more descriptive language, using best writing practices without losing the original meaning.
Simplify language	This will reduce the amount of text used to make it easier to read.	Rewrite this content with simplified language and reduce the complexity of the writing, so that the content is easier to understand.
Expand upon	Use this to provide a more complete description with more details.	Expand upon this content with descriptive language and more detailed explanations, to make the writing easier to understand and increase the length of the content.
Trim content	If the text is too long and includes redundant information, this will	Remove any repetitive, redundant, or non-essential writing in this content without changing the

Writing Option	Purpose	Integrated Prompt
Change tone	streamline the content to eliminate excess details.	meaning or losing any key information.
	Use this to change the tone of the text to fit the conversation. There are five options to choose from after you select content in the editor.	
	Professional - Use a more formal tone in the writing.	Rewrite this content using polished, formal, and respectful language to convey professional expertise and competence.
	Casual - Use a more casual tone in the writing.	Rewrite this content with casual, informal language to convey a casual conversation with a real person.
	Direct - Make the content more directed to the customer.	Rewrite this content with direct language using only the essential information.
Confident - Write the content in a way that indicates the writing knows what they are talking about.	Rewrite this content using compelling, optimistic language to convey confidence in the writing.	
Friendly - Make the content less formal and more comforting to the customer.	Rewrite this content using friendly, comforting language, to convey understanding and empathy.	

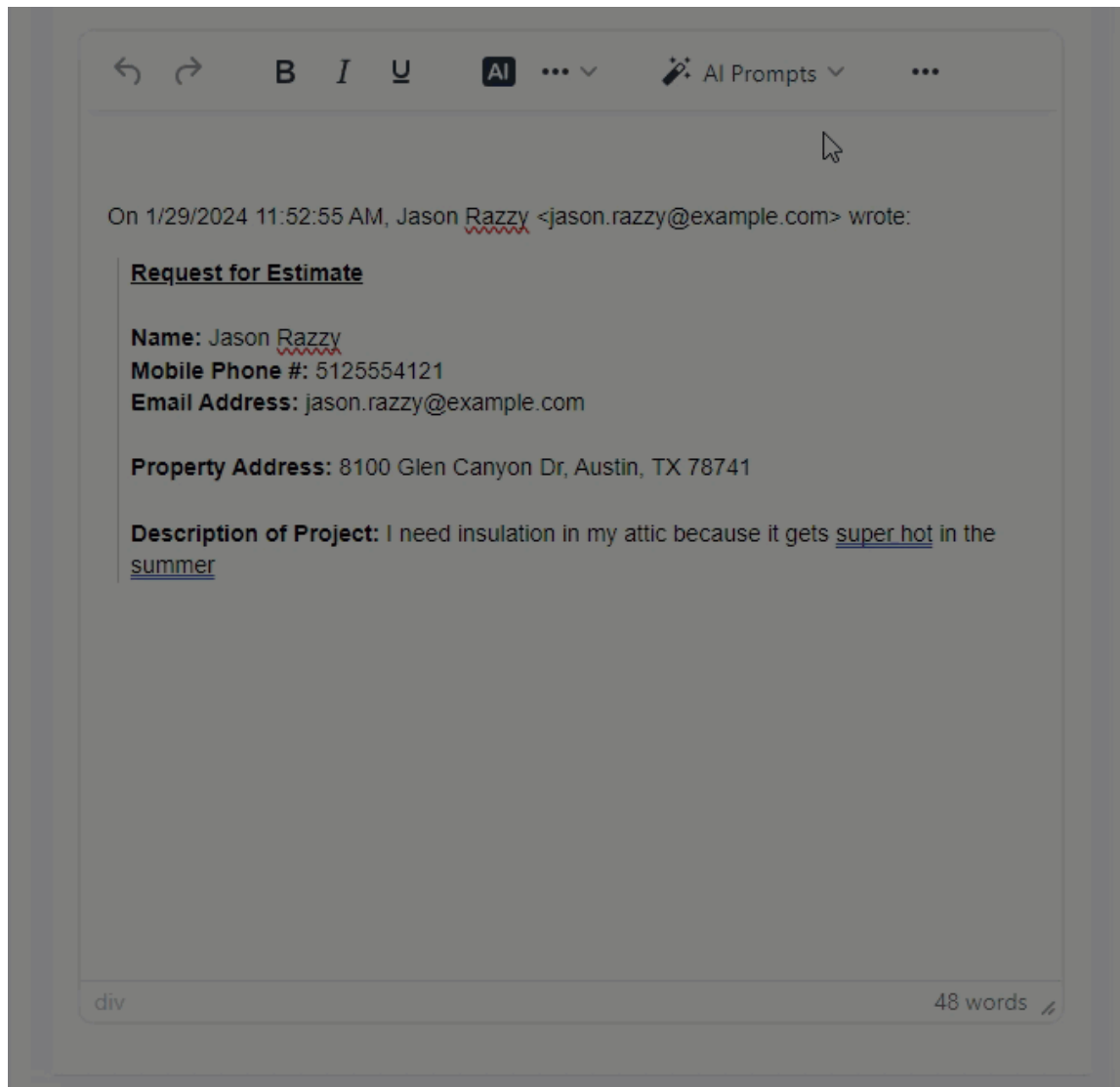
 AI Prompts Menu

The AI Prompts menu provides a filterable list of prompts that have been custom written for your companies use cases. For example, if your business involves coordinating appointments you can write prompts that generate appointment setting emails. The prompts are created by

an administrator in the Agent Interface settings page, and then presented to all agents in the rich text editor as shown below.



When the prompt is selected, iService combines the question body with the user prompt and submits it to OpenAI for a response. The response can then be inserted into your answer. See the [Agent Interfaces](#)³¹⁵ page to learn more about creating prompts.




Using a custom AI prompt


2.6 Logging Into iService

Open a web browser and enter the login name and password provided by your administrator for your iService tenant. The standard login screen is shown below.

iService[®]

Sign in to start your session

Login Name 

Password 

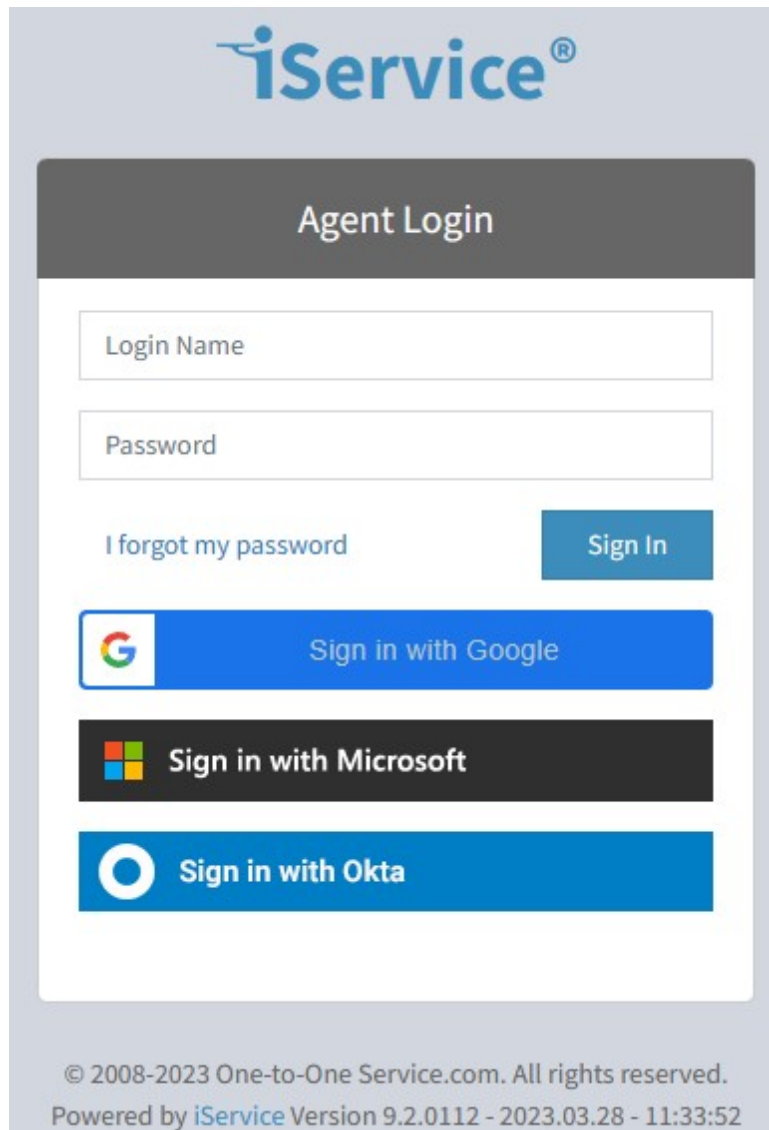
[I forgot my password](#) [Sign In](#)

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Powered by iService Version 8.0.562 - 2020.02.04 - 08:40:26

The standard login screen

Logging In With Google, Microsoft, or Okta (Open ID)


If your iService tenant is configured for logging in with your Google or Microsoft account, you will see additional buttons in the login panel. These settings are controlled from the [OpenID](#)⁵⁵⁶ settings page.



The screenshot displays the iService Agent Login interface. At the top, the iService logo is visible. Below it is a dark grey header with the text "Agent Login". The main content area contains a "Login Name" input field, a "Password" input field, a link for "I forgot my password", and a blue "Sign In" button. Below these are three Open ID login buttons: "Sign in with Google" (blue), "Sign in with Microsoft" (black), and "Sign in with Okta" (blue). At the bottom, there is a copyright notice: "© 2008-2023 One-to-One Service.com. All rights reserved. Powered by iService Version 9.2.0112 - 2023.03.28 - 11:33:52".

The Open ID login buttons

To connect your Google, Microsoft, or Okta account to your iService agent login, click the `Sign In with` button. If you are not logged into your identify provider's account, you will be prompted to authenticate and grant permission before continuing.

 Sign in with Google

Confirm you want to sign in to
iservicecrm.com as [redacted]



To create your account, Google will share your name, email address, and profile picture with iservicecrm.com.

Cancel

Confirm



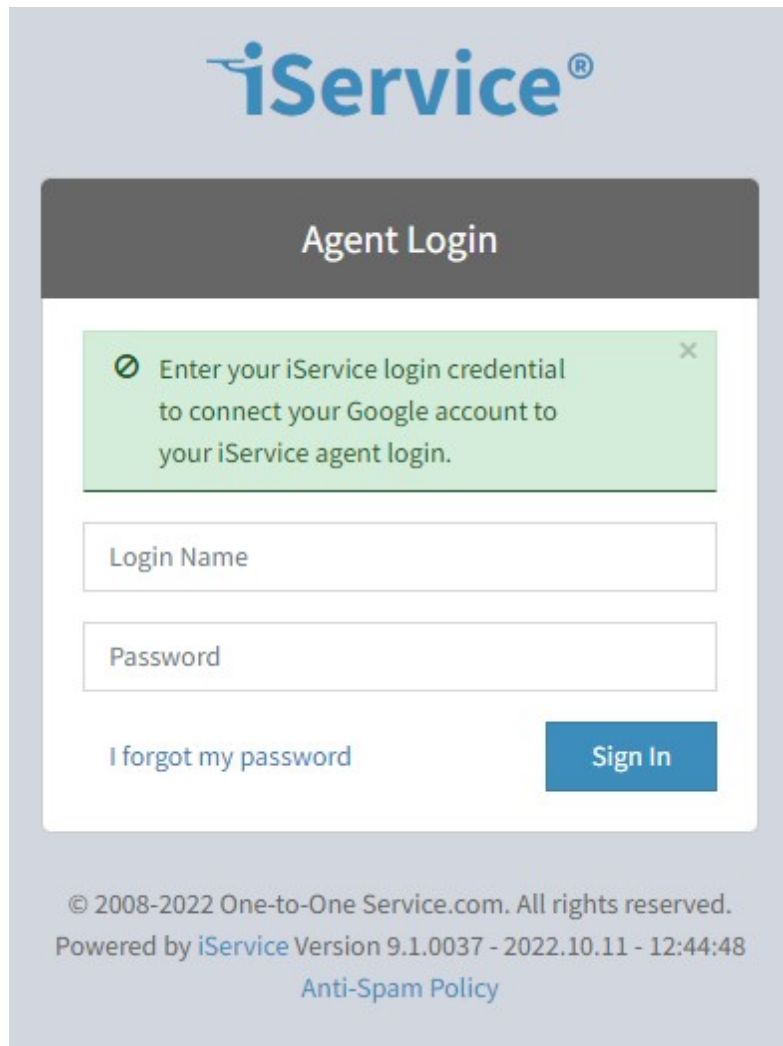
English ▾

[Help](#)

[Privacy Policy](#)

[Terms of Service](#)

Once you are authenticated to your openID provider, you will be presented with an agent login screen. Enter your iService agent email address and password that was provided to you, as shown below to connect your iService agent to your Google or Microsoft account.

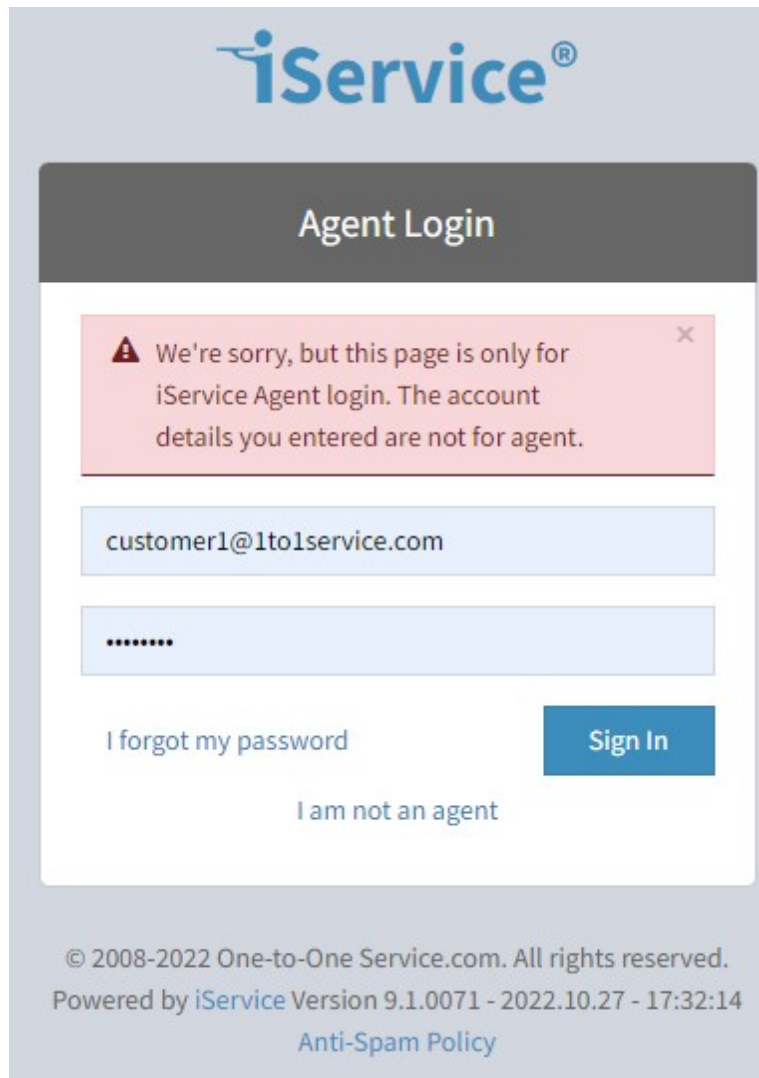


The image shows the iService Agent Login page. At the top is the iService logo. Below it is a dark grey header with the text "Agent Login". The main content area is white and contains a green error message box with a close button (X) in the top right corner. The message reads: "Enter your iService login credential to connect your Google account to your iService agent login." Below the message are two input fields: "Login Name" and "Password". At the bottom left of the form is a link "I forgot my password" and at the bottom right is a blue "Sign In" button. At the bottom of the page, there is copyright information: "© 2008-2022 One-to-One Service.com. All rights reserved. Powered by iService Version 9.1.0037 - 2022.10.11 - 12:44:48" and a link for "Anti-Spam Policy".

After you enter your iService agent email address and password, click sign In. This will add your account ID to your iService contact, and future logins will not require you to enter your email and password.

If you attempt to connect your social login to a customer contact from the agent login page, you will received the error below.

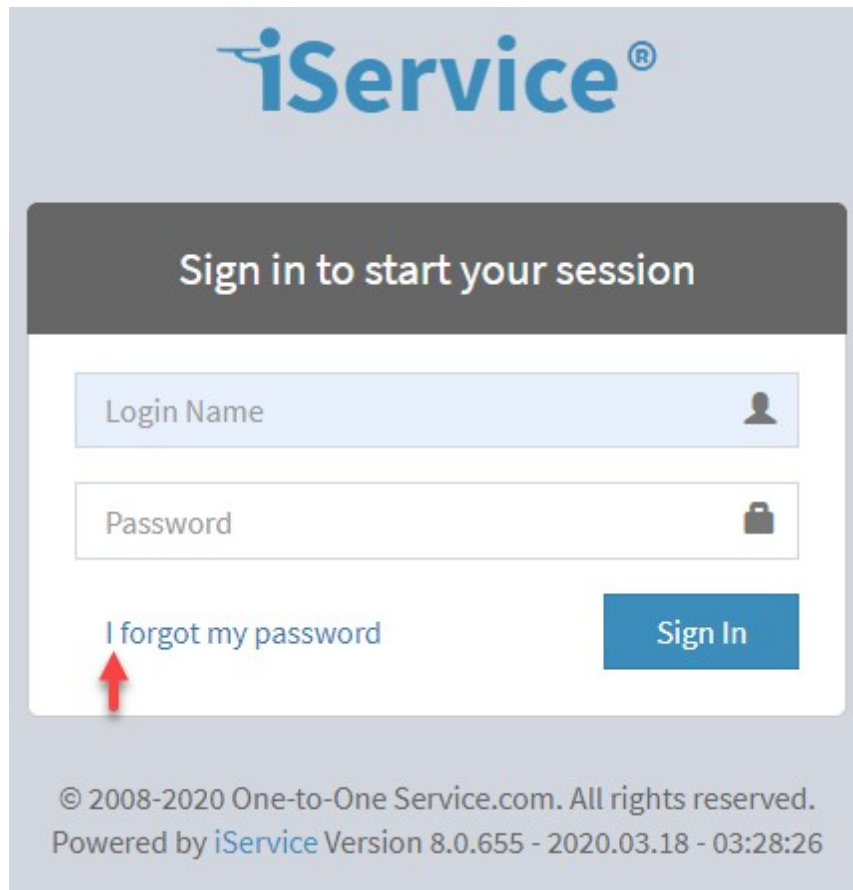
We're sorry, but this page is only for iService Agent Log



Trying to connect a customer account to an agent login

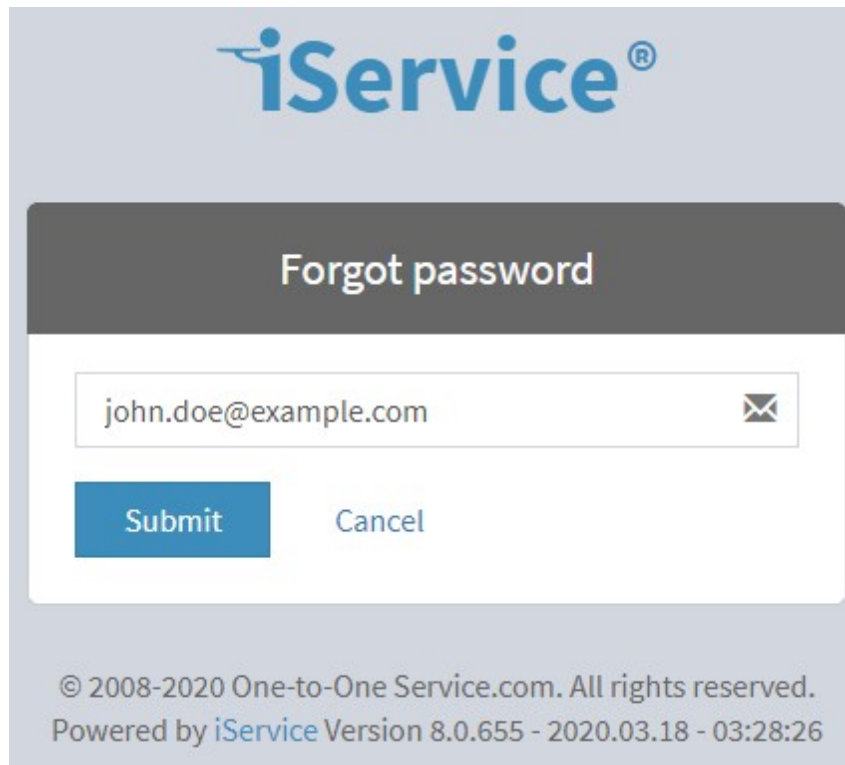
Resetting your password

If you forget your password and need to reset it, use the forgot password link on the login page.

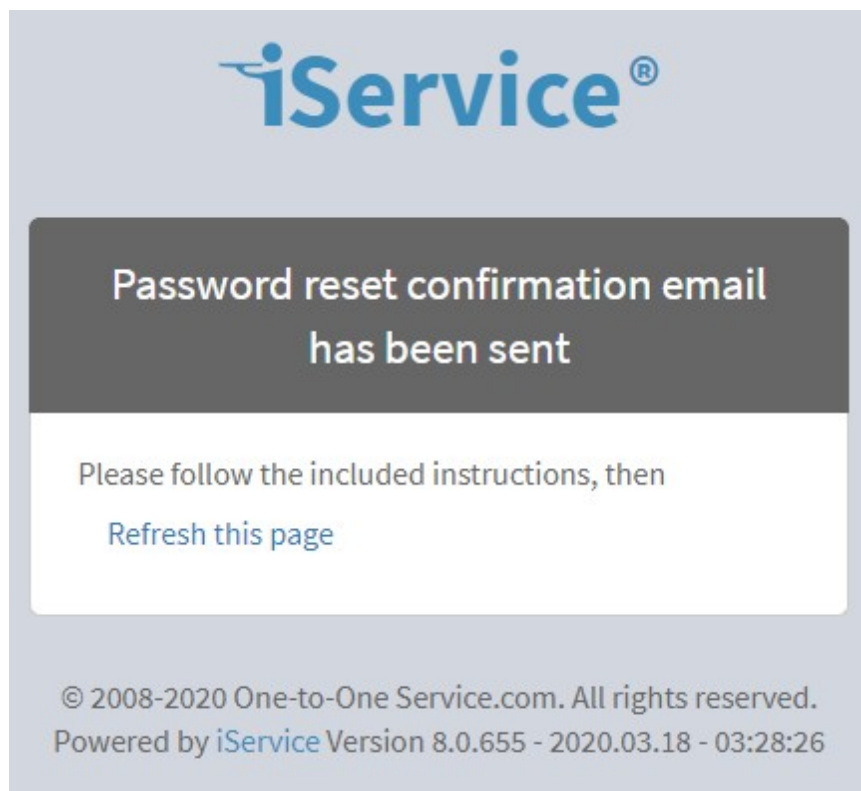
A screenshot of the iService login page. At the top, the iService logo is displayed in blue. Below it, a dark grey header contains the text "Sign in to start your session" in white. The main content area is white and contains two input fields: "Login Name" with a person icon and "Password" with a lock icon. Below the password field is a blue "Sign In" button and a link that says "I forgot my password". A red arrow points to the "I forgot my password" link. At the bottom of the page, there is a copyright notice: "© 2008-2020 One-to-One Service.com. All rights reserved. Powered by iService Version 8.0.655 - 2020.03.18 - 03:28:26".

The forgot password link

This link will open a page where you can enter your email address and request a reset.



Entering your email address in the password reset page



After you submit your email, you will receive a message with a link for changing your password. The password reset notification template is customized for every installation, but should look similar to the example below.

Dear John,

We received a request to reset your password for <https://eshop.iServiceCRM.com>. Please click on the URL below and enter a new password.

<https://eshopadmin.iservicecrm.com/./PasswordReset.aspx?confirm=a79a8aa0-d3da-444a-93be-b1574ba7a3eb>

This request was from a computer at the following IP address.
10.121.45.250

This is an automatically generated message from eShop. If you have any questions, please visit the support website at <https://eshop.iServiceCRM.com/FindAnswers.aspx>. Do not respond to this email because it was generated from an account that is not monitored.

Sincerely,

The eShop Support Team

Powered by [iService CRM](#)

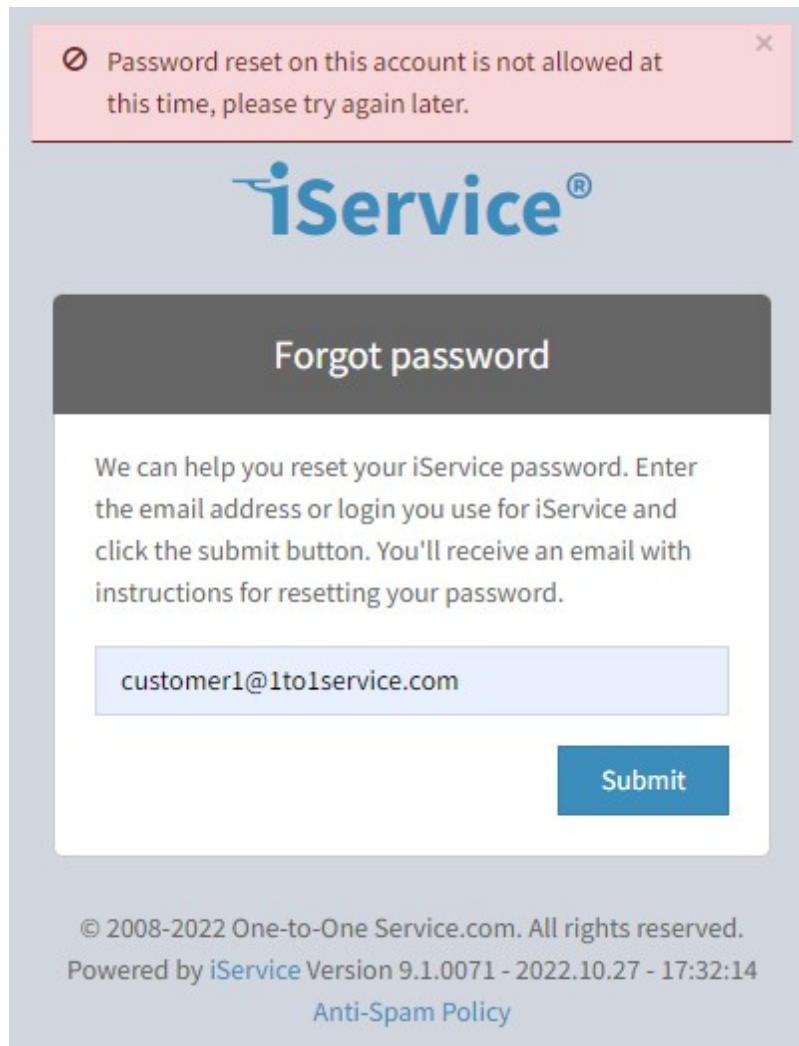
An example password reset template

The URL in the email will expire after 10 minutes.

Waiting period for additional requests

To protect against abuse, you must wait 10 minutes before requesting another password reset email. If you attempt to request a 2nd reset right away you will see an error message.

Password reset on this account is not allowed at this time.



The screenshot shows a web interface for iService. At the top, there is a red error message box with a close button (X) that reads: "Password reset on this account is not allowed at this time, please try again later." Below this is the iService logo. The main content area is titled "Forgot password" and contains the following text: "We can help you reset your iService password. Enter the email address or login you use for iService and click the submit button. You'll receive an email with instructions for resetting your password." Below the text is a text input field containing the email address "customer1@1to1service.com" and a blue "Submit" button. At the bottom of the page, there is a footer with the text: "© 2008-2022 One-to-One Service.com. All rights reserved. Powered by iService Version 9.1.0071 - 2022.10.27 - 17:32:14 Anti-Spam Policy".

Error displayed if logged into agent pages as a customer

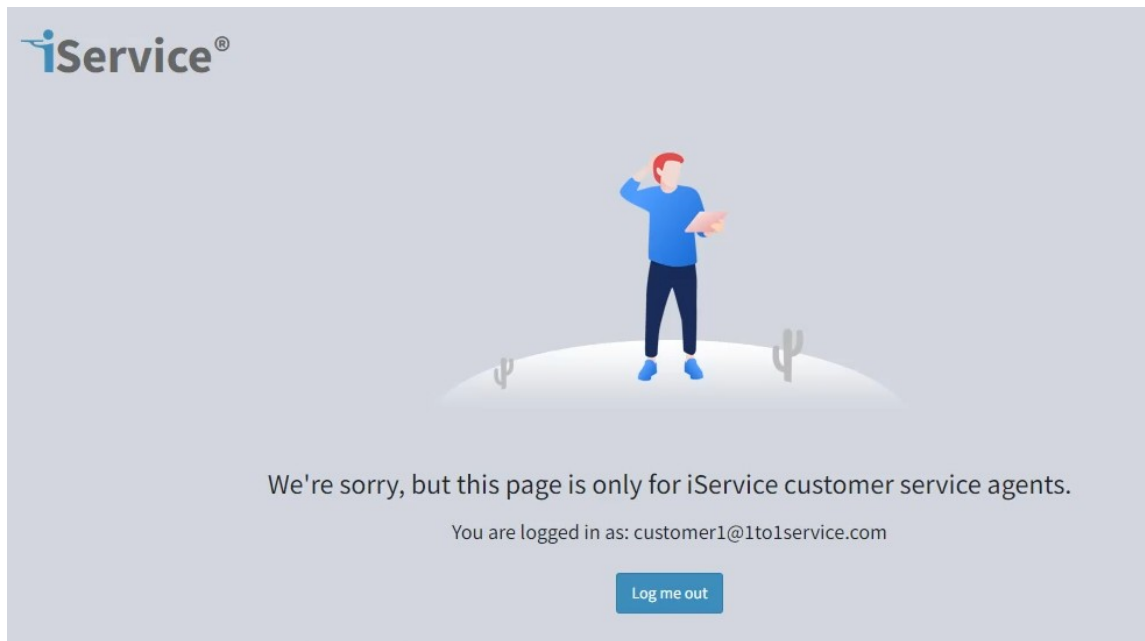
iService includes customer portals and the ability to create an unlimited number of custom forms to help customers. Customers can log into those forms to access information, such as their contact properties, subscriptions, and interaction history. These pages are typically loaded from a URL that looks like

`https://tenantURL/f`

If a customer logs into iService but navigates to the agent pages at

`https://tenantURL/app`

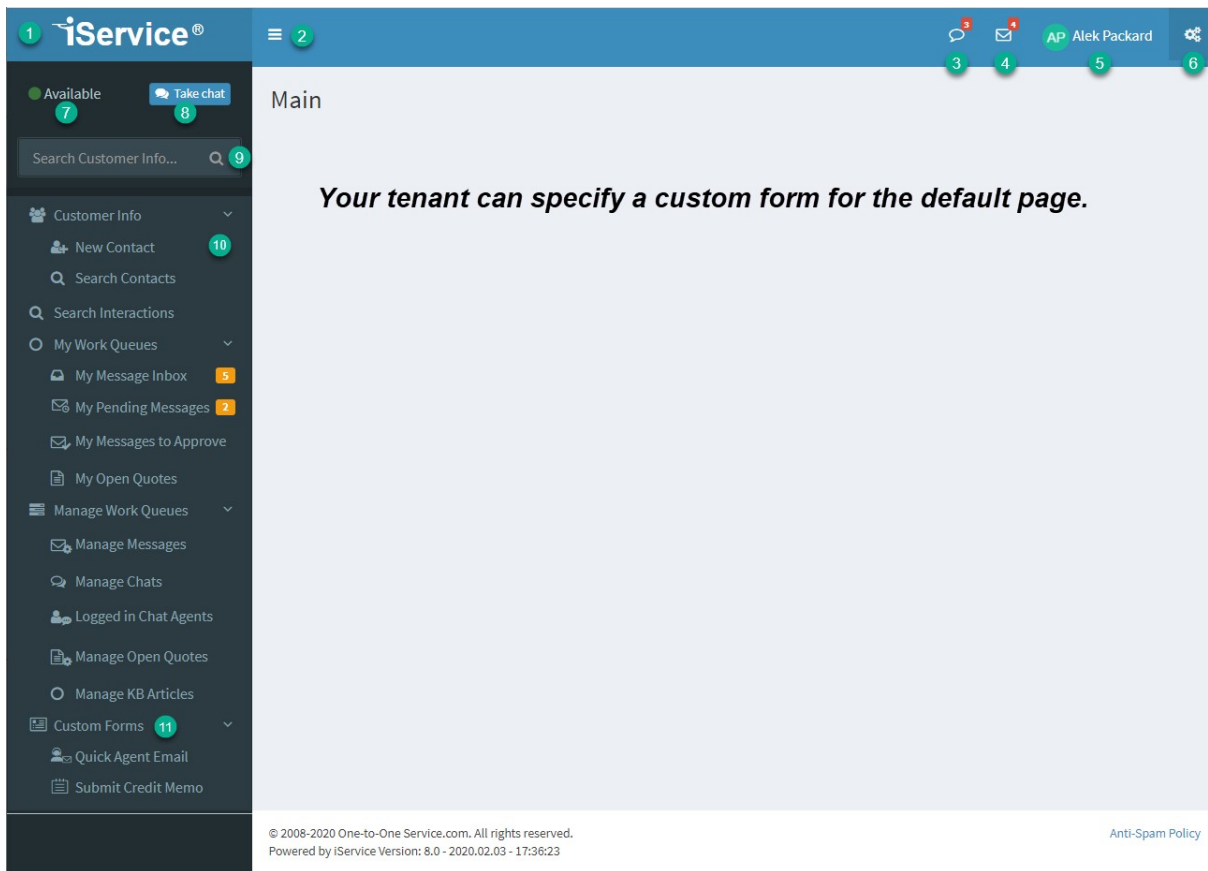
they will be shown an error page similar to below. This informs them that they are in the wrong place and shows the login they used. From time to time, agents might login with an alternate email they used for testing or interacting with your tenant. If that occurs they will see this page and should logout and log back in using their assigned agent login.



Logged into /app as a customer

2.7 The iService User Interface

The iService web interface is a mobile first application that adjusts to your screen size. Most agents use a full desktop view, and the optimal screen resolution is a width of 1366px. The main elements of the web interface are shown below.



The iService web interface

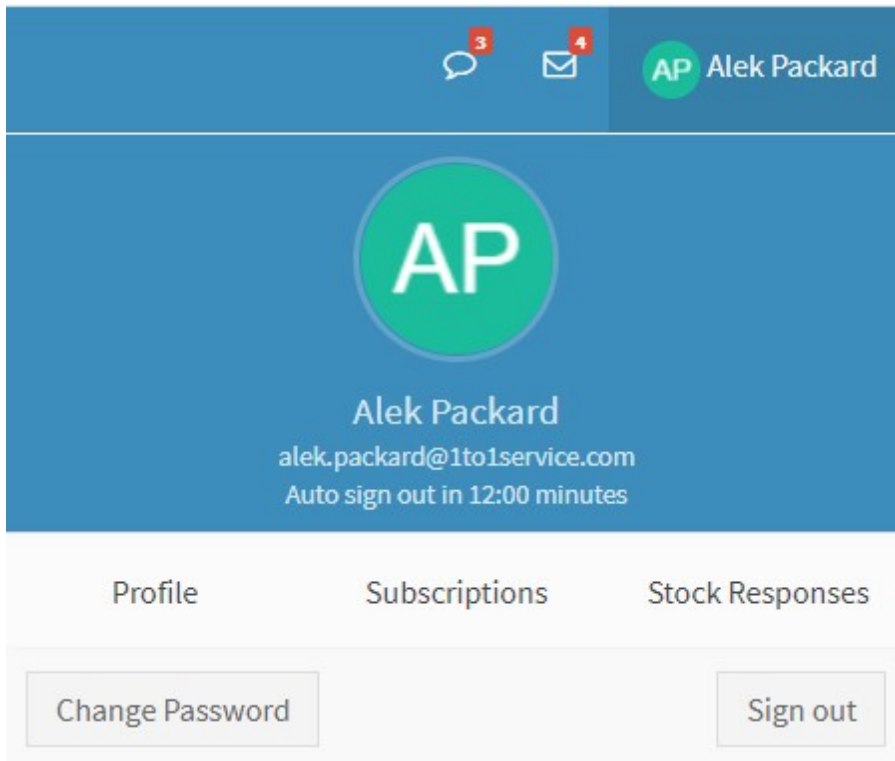
1 – the iService logo is a hyperlink to the default page of your website.

2 – the hamburger icon is used to contract and expand the left panel. If you need more space for your screen, click this to collapse the left navigation menu.

3 – if you have the answer chat access right, this icon will show the number of chats waiting for you in a red badge that is flashing. you can click this button to take the next available chat.

4 – this is the get the next button. the number of questions that match your skills and access is shown here. Click this button to assign the next question to yourself.

5 – this is your my account section. Click your name to expand the menu and reveal the following options.



The My Account panel

This panel includes links to your profile where you can update your contact details and mailing list subscriptions. The stock responses link opens a panel where you can create your own agent stock responses to use when composing answers. You can also change your password on this page.

6 – the gears icon opens the settings menus. These menus are only accessible to agents with manager and above access rights. The settings menus are described in the [configuring and administering iService](#)⁵⁴⁰ section.

7 – if you have the answer chats access right, your availability for chat is shown here. Click here to toggle between available and unavailable.

8 – if you have the answer chats access right, the take chat button will flash when chats are waiting to be answered. Clicking this button is the same as the chat icon in the top panel (see 3 above).

9 – use the quick search option to look up a contact. The quick search looks for matching logins and email addresses.

10 – The iService pages that you can access are displayed in the left navigation menu. They're organized by function.

2.8 The iService Style Guide

The iService web interface follows a style guide that we publish for developers and customers to use as they create custom forms and user interfaces. The style guide includes mockups for all pages in iService and detailed examples for their styles. As new pages are envisioned, they are added to the style guide and provide an opportunity for customers to comment on new functionality. Although the style guide is not a fully functional version of iService, it can be useful when training agents on the user interface.

You can access the style guide at <https://app.iservice.info/>

iService®
AP Alek Packard

Available Take chat

Search Customer Info...

Pages

- Dashboards
 - My Dashboards
 - Segment Dashboard**
- Customer Info
 - New Contact
 - New Account
 - Search Contacts
 - Contact
 - Account
- Search Interactions
- My Work Queues
 - My Message Inbox 5
 - My Pending Messages 2
 - My Messages to Approve
 - My Open Quotes
- Manage Work Queues
 - Manage Messages
 - Manage Chats
 - Logged in Chat Agents
 - Manage Open Quotes
 - Manage KB Articles
- Custom Forms
 - Quick Agent Email
 - Submit Credit Memo
- Page Components
 - Interaction (view mode)
 - Interaction (action mode)
 - Send Agent Email
 - Create Note
 - Create Ticket
 - Agent Chat Panel
 - Customer Chat Panel 1 - Offline
 - Customer Chat Panel 1 - Online
 - Customer Chat Panel 2 - Offline
 - Customer Chat Panel 2 - Online
 - Login Panel
 - Forgot Password
 - Password Reset
 - Page Element Examples
 - Date Sort Examples
 - Logout Notice
 - Forward.aspx.html
- Interaction Status Labels
- Typography
- Colors
- Main & Sub Navigation
- Tabs
- Buttons
- Icons
- Tables
- Form Elements
- Panels
- Widgets (date pickers, loader, etc.)
- Notifications
- Pagination
- Tree Views
- Charts
- Timeline

Segment Dashboard

Today's Metrics (Calculated since midnight your local timezone.)

Sales Segment

? 50
New Questions

? 45
Answers Sent

x 05
Resolved No Response

🕒 01:10
Average Response Time

🗣️ 30
Questions Unassigned

🗣️ 20
Questions Assigned

🗣️ 01:10
Topics Without Agents

✔️ 05
Total Chats Resolved

Loggedin Agents Activity

Filter Agents

Agent Name	Questions		Chats	
	Assigned	Resolved	Assigned	Resolved
Alek Packard	10	9	10	9
Jacob Smith	12	8	8	6
Jhon Doe	7	5	9	7
Alex Hall	10	8	6	5
David Warner	8	4	6	6

Agents Leader Board

JP Jacob Smith	100
JT Justin Time	90
AP Alek Packard	80
JH Jonie Hewlett	50
JD Jhon Doe	50

Most Recent Questions

- ? Samsung 32" 1080p 60Hz LED Smart HDTV a minute ago
- ? 26" Mongoose Dolomite Men's 7-speed, Navy Blue. an hour ago
- ? Xbox One Console Bundle with Halo Master Chief Collection. a day ago

Most Recent Answers

- A Samsung 32" 1080p 60Hz LED Smart HDTV a minute ago
-Alek Packard
- A 26" Mongoose Dolomite Men's 7-speed, Navy Blue. an hour ago
-Steve Smith
- A Xbox One Console Bundle with Halo Master Chief Collection. a day ago
-Steve Smith

Agent Summary

Legend: ● Logged In Agents, ● Logged Out Agents

Total Agents With Empty Inbox

Legend: ● Logged In, ● Logged Out

Question And Answers Flow

01/01/2019 - 01/07/2019

Legend: ▒ Answers Flow, ▒ Questions Flow

2.9 Understanding Contacts and Accounts



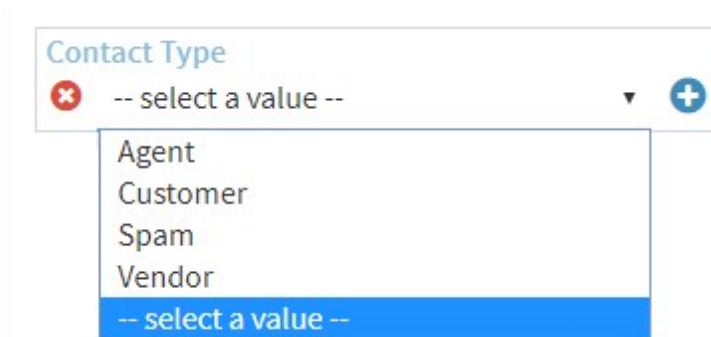
Every time iService receives a question (customer email, chat, customer ticket submitted from a form), it determines whether a contact exists for the sender. If there isn't already a contact in the database, iService will create a new contact. Information you gather about contacts is stored in contact properties.

Agents can create new contacts using the [New Contact](#)^[146] page. Contacts are a key aspect of iService, because every interaction is associated with a single contact. All of your conversations with a contact are archived within their history.

While contacts represent individuals, you can also create an Account for tracking information about an organization using a similar process. The [New Account](#)^[148] page functions identically to the New Contact page, but creates an account instead of a contact. You search for and edit contacts and accounts using the same [Search Contacts](#)^[150] page.

Contact Types

The Contact Type field is used to label and group contacts.



The Contact Types property

The values in the list can be updated in the [Settings - Lists](#)^[601] page. The values are just labels with no special purpose, except for the Spam label. This label is added to a contact whenever an agent uses the [Mark as Spam](#)^[92] action on one of the contact's questions. Filters are often created to categorize future questions from contacts marked as Spam into the _Spam topic. So care should be taken when using this label.

Contact Properties

Contact properties are used to store information about a contact or account. Every tenant has default properties for customer information such as name, email address, etc. You can create an unlimited number of custom properties to store information relevant to contacts and accounts that interact with your organization. These custom properties are shown in a separate section of the [Contact Details](#)¹⁶² page grouped by segment. To learn about creating contact properties, see the [Settings - Contact Properties](#)⁶⁵¹ page.

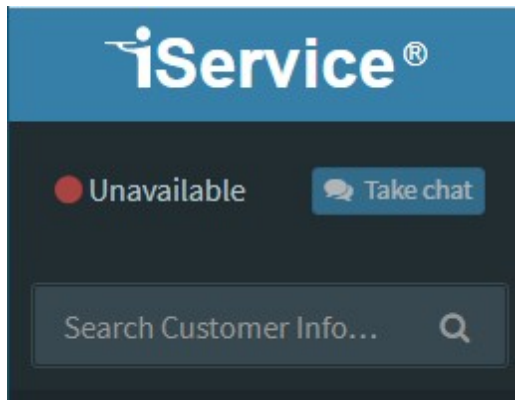
The screenshot displays a contact profile for John Doe. The profile is divided into several sections: Contact Information, Address, Segment Membership, and a list of segments. The Contact Information section includes fields for First Name (John), Middle Initial, Last Name (Doe), Phone (Work, 217-555-1212), Contact Type (Vendor), Company (Example Company), Job Title (Purchasing Manager), and Logins (Email, customer1@1to1service.com). The Address section includes Address1 (123 Main), Address2, City (champaign), State (IL), Postal Code (61825), and Country. The Segment Membership section shows a checked checkbox for 'e-shop'. Below this, there is a list of segments: 'e-shop' and 'Human Resources'. A green arrow points to the 'e-shop' segment, which is highlighted. A text box on the right explains that custom properties are shown by segment and access is limited to agents with access rights to the segment.

Custom contact properties are grouped by segment

Finding Contacts and Accounts

The first step in interacting with a contact or account is finding them. There are several ways to find contacts and accounts.

Searching - the most common way to load details is to perform a search. You can use the quick search box in the left navigation panel to search by email address or login. Or, you can use the full [Contact Search](#)^[150] page to construct a more detailed search query. Both of these search methods will return matching contacts and accounts.



Quick customer search box

Links from Interactions - you can also load contact details using the hyperlink on the contacts email address in [interaction search](#)^[176] results.

A screenshot of a search results page. At the top left, there is a search icon and the text "Search Results". To the right, there is a green heading "Contact Email is a hyperlink to the Contact page". Below this, there are controls for "Excel", "Column visibility", "Show 10 entries", and "Filter R". The main content is a table with three columns: "Subject", "Contact Email", and "Date". The "Contact Email" column contains hyperlinks to the contact page. A mouse cursor is pointing at the first hyperlink.

Subject	Contact Email	Date
[ref#: 99-99] Test40	customer10@qavmmail02	2007-02-04 12:07
[ref#: 85-85] Test31	customer1@qavmmail02	2007-02-04 12:07
[ref#: 83-83] Test30	customer10@qavmmail02	2007-02-04 12:07

Customer email hyperlink to the contact page

My Message Inbox - the [My Message Inbox](#)^[197] page loads the contact details for each interaction selected. Since the history is also shown here, there is usually no need to load the contact page separately.

My Message Inbox

Message List

Copy Excel PDF Column visibility Show 10 entries Filter Inbox

Contact Name	Date	Subject	Segment	Topic
John Doe	3 days ago	[ref#: 42998-42998] Travek camera		Cameras

Showing 1 to 1 of 1 entries

Previous 1 Next

The contact details are shown for the contact in this tab when answering questions.

Message Details History Contact Details

Contact Information

First Name John	Address1 123 Main
Middle Initial	Address2
Last Name Doe	City champaign
Phone Work 217-555-1212	State IL
Contact Type Vendor	Postal Code 61825
	Country

Segment Membership

e-shop

Contact details within the My Message Inbox

The Contact and Account Page

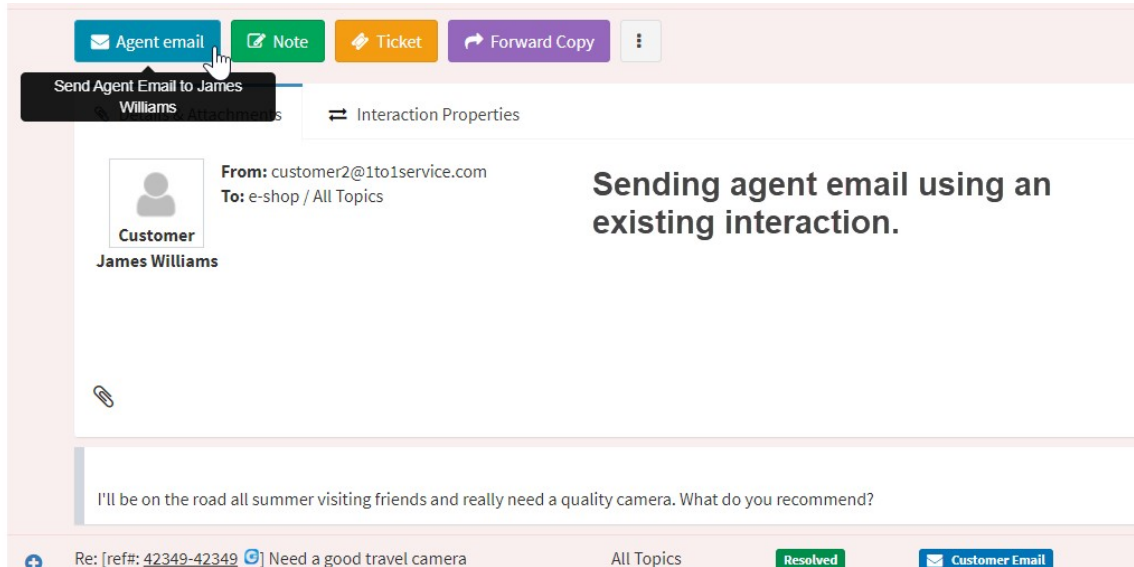
Everything you need to know about a contact or account can be found in the contact or account page. This includes all of their contact property values, subscriptions to mailing lists and campaigns, and the history of every interaction you have had with the contact.

In addition to all of the details about the contact, a [contact summary](#) page shows an overview of contact information, recent interactions, and important metrics. The summary page can be modified by your administrator to reflect your unique requirements.

Emailing A Contact

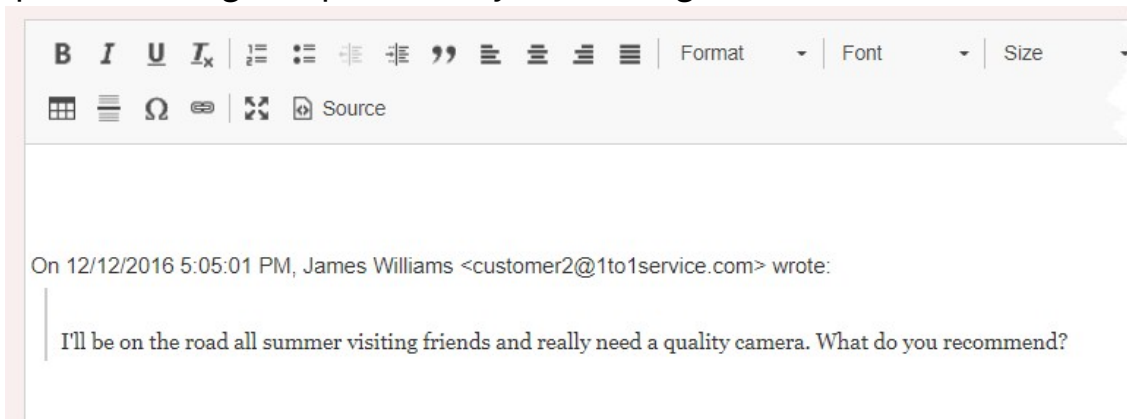
One of the main features of iService is managing email correspondence with your customers. The most common processes is responding to a question, but you can also initiate a conversation using the Agent Email action.

The built-in agent email action is presented with every interaction that you view.



Sending agent email from history

When you send an agent email from an existing interaction iService quotes the original question in your message.



Original question quoted in an agent email

You can also send agent email from the contacts summary page or the [contact search page results](#) ¹⁵⁰.

If you know the contact's email address, you can use the [Quick Agent Email Page](#)²²⁹ without finding the contact..

2.10 Understanding Topics



Topics are a critical part of iService. They are used to organize answers within the iService knowledge base and to create message queues for routing questions to agents. Topics are organized into a hierarchical topic tree as "branches" or topic categories that can be publicly visible or private.

For information about creating and managing topics, see the [Topic Settings](#)⁶⁹¹ chapter.

How topics affect message queues

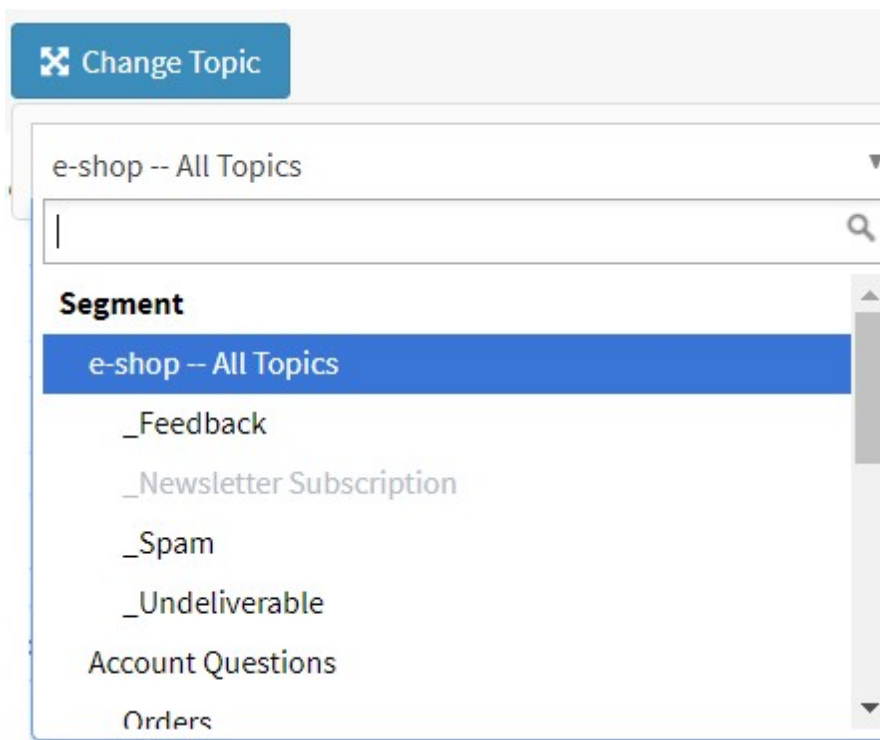
Every interaction in iService is associated with a topic. For incoming questions, the topic helps determine the skills required to provide the answer. For example, a technical support topic might require that agents have a technical skill to answer its questions.

The organization of your topics is driven by the way you do business with your customers. In some environments, requests can be handled by anyone on the team. In these cases the nature of the question might be the most important way to categorize topics (e.g., Shipping, Returns, Refunds, etc.). In other cases, you might have teams of people dedicated to a single client or group of clients. In those cases the name of the client or vertical market might be a more appropriate way to categorize topics.

The interaction properties that you see when working with questions are also driven by the topic. When topics are created, the appropriate

interaction properties are associated with them. For example, technical support questions might have a property named "Priority" or "Severity". Or, questions about returns might have a property named "Return Reason." These properties are shown based on how the interaction's topic is configured.

Since topics are used for generating metrics and business intelligence, it's important to ensure questions are associated with the correct topic. When working with an interaction, use the change topic button to re-queue a question that is in the wrong topic.



Use the change topic action to fix questions in the wrong topic

How topics affect the knowledge base

The iService knowledge base is a collection of articles organized within a hierarchical topic tree. iService uses the same topic structure for presenting answers in the knowledge base as it does for queuing and routing questions.

Knowledge base articles are interactions in the iService database, just like questions and answers. They have all the same attributes as other interaction types (subject, body, etc.). Rather than determining routing or queuing, the topic associated with a knowledge base article is used for categorization.

2.11 Understanding Interactions



iService is a customer interaction solution that connects you with your customers. It's designed to facilitate interactions across multiple communication channels and get questions to the right agents at the right time. It sends various notifications to customers and agents to keep everyone informed about the status of their request. All of these questions, answers, and notifications passing through iService are called interactions.

Interaction types and statuses

iService has three groups of interactions: questions, answers, and system notifications. Within each group there are defined interaction types that have preset statuses (e.g., questions are unassigned, then queued, and finally are resolved when an answer is provided). When viewed in customer history, each interaction type has a different colored background.









Questions

There are two types of questions in iService: messages and chat requests. Messages (customer email, customer tickets, and agent tickets) are asynchronous, meaning the parts of the conversation can happen at different times and with different people. The conversation is a series of separate back and forth messages. Messages all have the same status of unassigned, queued, and resolved. When unassigned, they're available for assignment via the get next button at the top of the page.

Messages are fundamentally different than live chat or telephone calls, which are a synchronous form of conversation. Synchronous interactions are queued and handled differently in iService because the request must be assigned quickly and the conversation takes place all at one time. Chat requests have the statuses of chat waiting, chat in progress, and resolved. When chats are in the chat waiting status, they can be assigned by clicking the "Take Chat" button at the top of the page or next to the chat availability button.

Messages are shown in the Manage Messages page, and chats are shown in the Manage Chats page.

Interaction Type and Status Icons

Interaction Type	Valid Statuses For Type	
Questions		
 Customer Email	Unassigned Queued Pending Resolved	
 Agent Ticket	Unassigned Queued Pending Resolved	
 Customer Ticket	Unassigned Queued Pending Resolved	
 Chat	Chat Waiting Chat In Progress Resolved	

Interaction types and statuses for questions

Customer emails - These are incoming emails sent TO one of your company's monitored mailboxes (for example, support@1to1service.com). iService retrieves the incoming email from your monitored mailboxes, and converts it to an interaction in the iService database. You view these emails in the iService web interface rather than an email client.

Customer tickets - Rather than sending email, your customer might submit an iService form with their request. iService forms may be integrated into your website, or accessed directly at a URL you provide your customer. These are converted into interactions that are displayed in a similar format to customer emails.

Agent tickets - These are similar to customer tickets, but are submitted by iService agents. The agent ticket forms are displayed when you view a contact, or an interaction in [View Mode](#)¹⁰⁴.

Chats - chats are considered questions because they are incoming requests for help. iService includes built-in customer chat forms, but your company may create their own customized version.

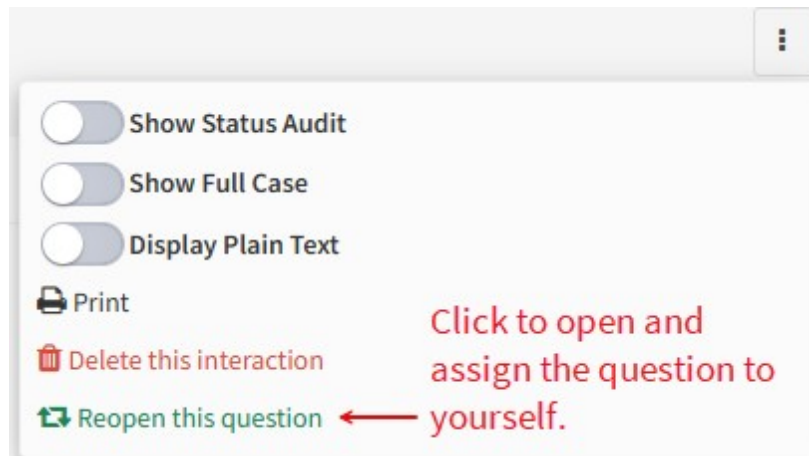
Question Statuses

Questions (other than chat) have an initial status of Unassigned, and are then Queued for an agent when assigned. When the question is answered with a response or resolved, the status is set to Resolved and it's no longer shown in the work queues. When a [QA CSR proposes an answer](#)²⁰⁰, the status is changed from Queued to Pending while it waits for a QA Manager to provide approval. When the proposed answer is approved, it is sent to the customer and the question is then set to Resolved.

Chats have a different set of statuses than other questions. When a customer submits a chat request, the chat is set to Chat Waiting status. When assigned to a chat agent, the status is changed to Chat in Progress. When the chat is completed, the status is set to Resolved.

Reopening questions that have been resolved

Resolved questions can be reopened by using the Reopen Question button in the **More Actions** menu. The question will be assigned to the agent that reopens the question.
























Answers

Answers are created by agents, but they aren't always in response to a question. Only agent responses, secure email, and resolve notes resolve questions. The other answer types can be part of an existing case or created as separate cases for contact. As shown below, some answers send a message to the contact while others do not. The color coding in history is based on whether the answer was sent to the contact or recorded for history only.

The unsent response answer type is only used with work in progress. When you're working on a response to a question, iService doesn't know what type of answer you're going to provide until you're finished. For example, you might click the note button and convert your unsent response into a note. Or, you might click the send button and convert your unsent response into an agent response. For this reason unsent responses only have a single status of unsent.

Find answer articles are also unique. They aren't related to a contact at all; they're used to display information in the knowledge base.

 Interaction Type and Status Icons

Interaction Type	Valid Statuses For Type	
Answers (Message-sent)		
 Agent Email	Sent Sent Waiting Reply	
 Agent Response	Sent Sent Waiting Reply	
 Secure Email	Sent Sent Waiting Reply	
 Secure Response	Sent Sent Waiting Reply	
 Mass Mailing	Sent	
Answers (No message sent)		
 Public Note	Completed	
 Private Note	Completed	
 Resolve Note	Completed	
 Unsent Response	Unsent	
 Find Answer Article	Completed	

Interaction types and statuses for answers

The Payments interaction is only available for tenants that are using an iService embedded payment configuration. Payments are notes that contain the details associated with a payment transaction (charge, credit, etc.).

 Payment


Answers that send email

Agent email – sometimes you need to email a customer, but there is either no question needing a response or you don't want to resolve the question. For example, you might need to follow-up on a phone call when there is no related question in iService. Or, you might be responding to an existing question but you don't want to resolve it.

Agent response – when you answer a question using the send button, you're creating an agent response that will be emailed to the contact. Your response will mark the question as resolved, removing it from the message queues.

Secure email - the Agent Email send action includes an option for using the secure message process. When you select that option, the message you type will be saved as a secure email that must be read after logging into a customer portal. iService will send a secure notification template to the contact letting them know how they can read your message.

Secure response – when you use the send secure option to answer a question, you pick a notification template that will be emailed to the contact. The answer that you type will be saved as a secure response that must be read after logging into a customer portal. iService will send a secure notification template to the contact letting them know how they can securely get their answer.

Mass mailing – emails that are sent from a mass mailing or mailing campaign are not associated with a particular agent. This means that responses to mass mailings will be queued for any agent rather than routed back to the agent that sent the mailing. These interactions are composed in the Mass Mailing - [Messages](#)  page.

Answers that don't send email

Public note – you can add notes to contact history as part of a new case, or as a case of its own. These public notes are viewable by the customer within a customer portal. All agents that have access to the segment can see public notes.

Private note – these are identical to public notes, except they are not shown to the customer in a portal. They are only viewable by agents.

Resolve note – when you use the resolve button to resolve the question, iService saves the contents of your unsent response as a resolve note. The resolve note will mark the question as resolved.

Unsent response – when you assign a question, either through get next or the forward to agent menu, iService presents an interface to the assigned agent for composing an answer. That interface is called the Action Mode and shows details about the question as well as an editor for composing your response. iService doesn't know what type of response you're creating until you finalize your draft and click one of the action buttons. For example, you might compose a private note to be added to the case history and click the Save - Private Note button. Or, you might click the Send button and generate an agent response. You can think of the unsent response interaction as work in progress, because it will eventually be converted into another type of answer.

Find answer article – the iService knowledgebase stores its content within the database as an interaction, similar to other questions and answers. These types of interactions are unique because they are not associated with a contact. They are created when you create a new article in the knowledgebase.

Answer Statuses

Answers that are sent to a customer only have a single status. Most answers have a status of Sent, but if the agent selected the expect customer reply parameter the status will be Sent Waiting Reply. The waiting reply parameter causes a copy of the answer to be displayed in the My Pending Messages page. When the customer replies to the agent's answer, the new customer question is automatically assigned to the agent and the answer is removed from the My Pending Messages page. Answers that are not sent to the customer have a status of completed.



















The exception to this is the Unsent Response interaction type. Unsent response is a temporary interaction type that will eventually

become an answer. When an agent composes an answer, iService doesn't know the type until they finished their composition and select an action button. The unsent response is work in progress that will eventually become an agent response, agent email, note, etc. When an agent reassigned there work in progress to another agent, the unsent response is then edited by the new agent.

Notifications

System notifications are used to keep people informed of events. They usually direct the recipient to take an action. They are outgoing answers, except for private emails. Private emails are incoming emails that contain an answer to a question. iService extracts text from the private email and uses it to compose an agent response.

The sent waiting reply status is used when the agent selects "Expect Reply" in the Send menu. Selecting that option places a copy of the response into your Pending Messages tab. When the contact replies, the pending message is removed and the customer reply is automatically assigned to you.

Interaction Type and Status Icons		
Interaction Type	Valid Statuses For Type	
System Generated Responses (Notifications)		
 Agent Notification	Sent	
 Message Acknowledgment	Sent	
 Contact Creation	Sent	
 External Agent Notification	Sent	
 Find Answers Article Update	Sent	
 Password Reset	Sent	
 Alert	Sent	
 Secure Notification	Sent	
System Generated Responses (No Notifications Template)		
 Private Email	Resolved	

Interaction types and statuses for notifications

Notifications are created in the Segment – [Notifications](#)⁶⁷¹ page.

Agent notification - iService can notify agents when questions arrive that they can answer. This requires configuration within your segment and agent settings. These notifications can include options for answering via email in addition to details about the question.

Message acknowledgment – when iService receives a new question, it can send an acknowledgment to the submitter letting them know the question was received.

Contact creation – if you're using a customer portal, your customers will need to know where and how they can login to access their history. iService automatically creates a password for every new contact that is created from an incoming question. This notification can send those login details to the customer and direct them to your customer portal.

External agent notification – when you use the Forward to External Agent action, iService sends a notification to that email address asking them to answer the question. These notifications are listed in the drop-down menu for the Forward to External Agent action button. These notification templates must be configured before the Forward to External Agent menu can be used.

Find answers article update – the iService knowledgebase allows customers to subscribe to articles so they can be notified when they are updated. This notification is used to notify those subscribers when articles are updated. These are only used if you are using the iService knowledgebase.

Password reset – iService includes a password read it function that will email a reset link to the contact. These notification templates are listed in the website settings page.

Alert – iService alerts monitor your queues and take automated actions. One of the actions is sending an email to a list of agents with details about the questions matching the alert. For example, you might create an alert to email managers at the end of every day for all questions that are more than 24 hours old.

Secure notification – when you answer a question using the secure response option, iService sends a notification to the customer letting them know an answer is available. That email uses a secure notification template.

There is an interaction type that is not a question or answer, and does not use a notification template. This is the Private Email interaction.

Private email – most incoming email received by an iService mailbox will become a customer email interaction type. These are

questions that are presented to agents within the message queues. However, there are a few scenarios where incoming email does not create a customer email. In these cases, a private email is created.

Agent response by email – agent notification templates can be designed to allow agents to answer questions by responding to the notification they receive in their personal mailbox. Agent Notification templates can be configured to allow agents to answer a question by responding to the notification they receive. When iService receives their email response, it knows the message is intended to be an answer and not a new question. iService will strip out the answer portion from the email and use it to compose an agent response. The email sent by the agent is labeled as a private email and is not sent to the customer.

Multiple responses by email – if a question has already been resolved, you don't want to send multiple answers to the customer. If an agent sends an answer using the agent notification email template, but the question has already been answered, the incoming email from the agent is marked as Private Email and not used. iService does not inform the agent that their answer was not used.

Notification statuses

Except for private email, which has a status of resolved, all notifications have the status of sent.

Created vs. resolved time

Every interaction has a created time and a resolved time. The created time is when the interaction is created by iService. When iService retrieves a customer email from a mailbox and converts it into an interaction, the created time is the moment the interaction is created in the database. When an answer is provided by an agent, the status of the

question is set to resolved and that becomes the resolved time. iService keeps track of these times for every interaction including answers.

When a question is assigned to an agent, either via get next or by a manager, an unsent response is created for you to begin composing your answer. The time that the assignment occurred will be the created time for your answer, and the time that you send your answer will be the resolved time for the answer.

This is a very important distinction because it affects the interactions included in your search results and reports. When you search for interactions, iService always looks at the created time rather than the resolved time. This is because most searches are for questions, and the most common way to look for a question is based on the date it arrived.

There are a few cases where the created and resolved time will be the same. This only occurs when you create an answer that is not from an assigned question. For example, if you use an action button from the contact summary page to send an agent email or create a note, there is no unsent response created. When you complete your action, the interaction is created immediately. You can see this in the example below for a private note created in the Customer Info section of iService.

Status Audit The Create and Resolve times for this private note are the same. ×

Time	Modifier	Status	Action	Assigned To	Topic
2020-02-04 09:19:38AM	Landlord Administrator	Unsent	Contact 1 -> Form Submit (webapp-api-custinfo) -> Create Note -> Create Private Note -> Create Composition		Segment1 -- All Topics
2020-02-04 09:19:38AM	Landlord Administrator	PrivateNote	Contact 1 -> Form Submit (webapp-api-custinfo) -> Create Note -> Create Private Note -> Note 26000		Segment1 -- All Topics

A private note with the same created and resolved time

View mode vs. action mode

When you view an interaction in customer history, search results, or the manage messages page, you're presented the view mode. The view mode shows you all of the details about the interaction and includes a set of common actions that you can take. However, you can't resolve a question or change its status from the view mode. Once a question has been resolved, the only mode available is the view mode.

View Mode

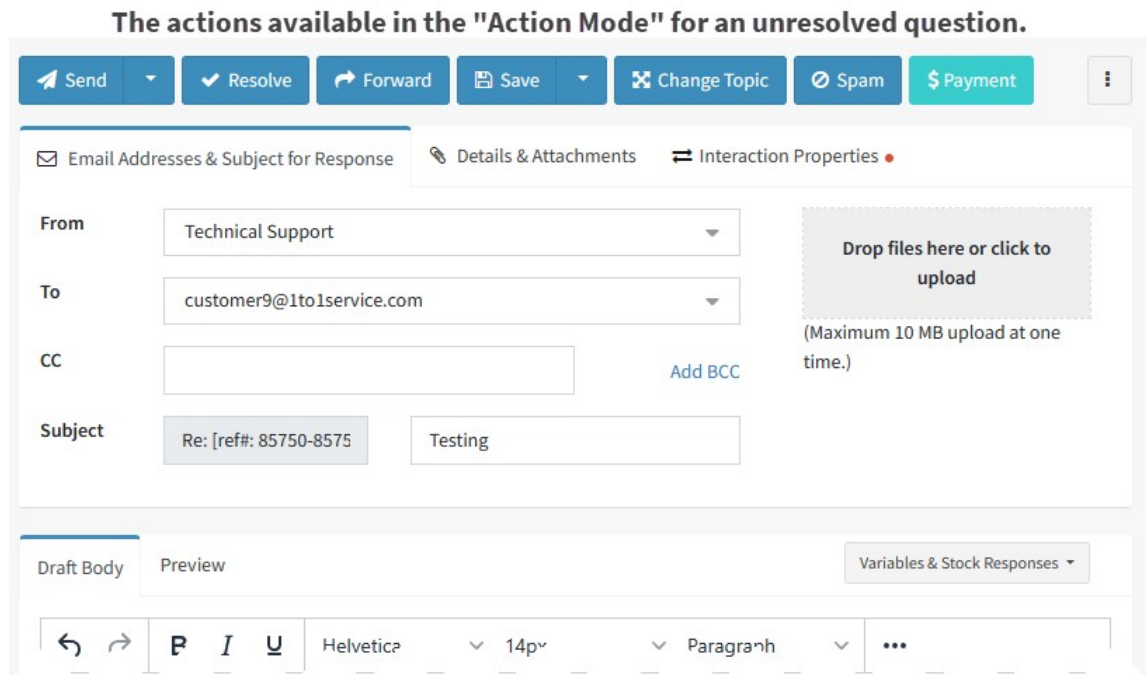
1. The view mode provides action buttons so you can create an agent email, note, ticket, accept payment, or forward a copy of the interaction to an email address. These actions become part of the case history for the interaction that you're viewing.
2. If you're a manager, unassigned questions will show a "Get This" button. You can click this button to assign the message to yourself, regardless of who it's currently assigned to. If the question is already assigned to you, you'll see an answer button here (regardless of your user type).
3. The more button offers four additional actions: [show status audit](#)¹²³, [show full case](#)¹²⁹, display plain text, and a print button.

The actions available in the "View Mode" for any interaction.

The View Mode of an interaction

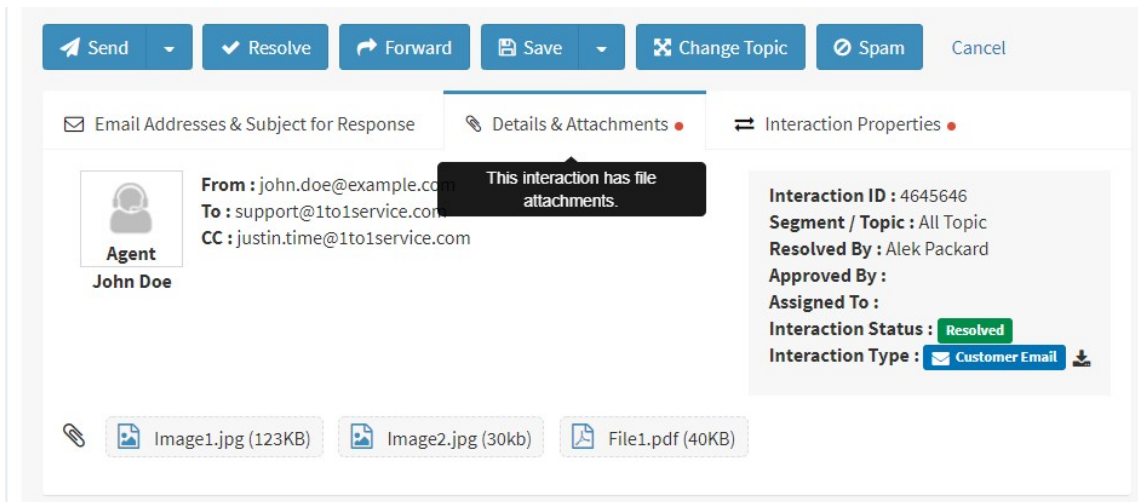
Action Mode

The action mode is displayed when you're composing an answer to a question. Type your response in the rich text editor and then select an action from the menu on the top of the page. The [My Message Inbox](#)¹⁹⁷ page only shows the action mode because it only displays questions that are already assigned to you. In all other pages that display questions (such as customer history, interaction search results, and the manage messages pages), you must use the "Get This" or "Answer" button to display the action mode.



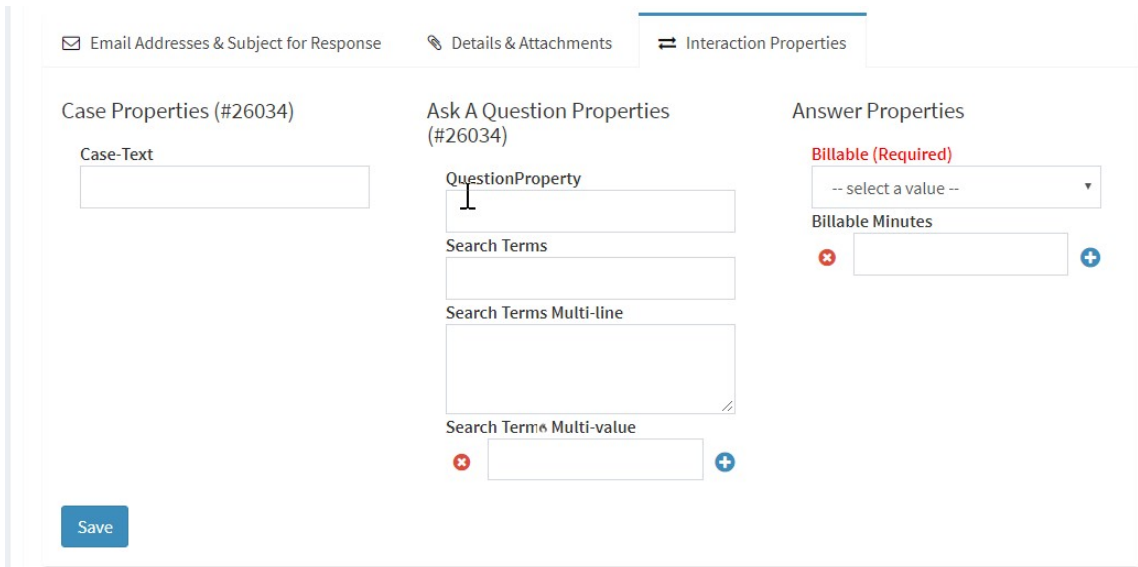
There are three tabs between the action buttons and the draft body. The default tab shows the header information for your response, and includes an option for adding file attachments. If the original question included addresses in the CC line, an icon will be presented next to that field.

The Details and Attachments tab shows the header information for the incoming question as well as details about its status. Any file attachments from the original question are shown in this tab. If the question has attachments, a red dot and a tooltip appears in the right corner of the tab.



The details and attachments tab

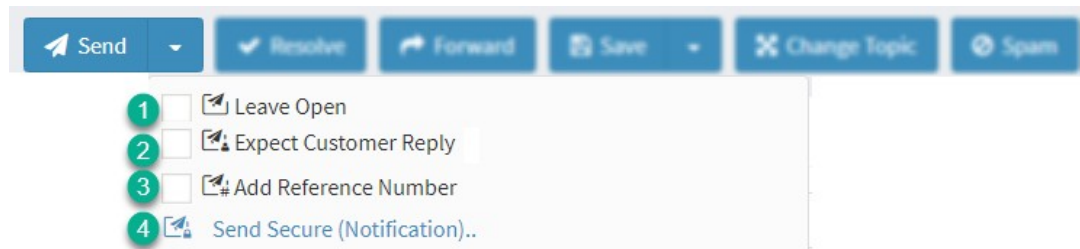
The interaction properties tab only appears if there are properties available for the interaction. If any values have been set for properties, a red dot and a tooltip appears in the right corner of the tab. Properties that are required have a red label, and must be entered before the interaction is resolved.



The interaction properties tab in the action mode

For an explanation of each action available, see the sections below.

Send actions



The SEND action buttons

Clicking the main Send button will send the answer back to the contact as a standard email. This will also mark the original question as resolved, removing it from the work queue pages. The response will become part of the contact's history.

Clicking the drop down provides four additional Send options.

1 -Leave Open

If you want to send a response but leave the original question open, check the Leave Open box and then click Send. This will convert your unsent response to an Agent Email that is part of the message thread, and will reload the original message.

2 - Expect Customer Reply

If you expect the customer to reply to you (e.g., when asking for additional details), you'll want to keep a copy of your reply that you can use for following up. Check the "Expect Customer Reply" box before sending your answer and a copy of your message will be stored in My Pending Messages. The answer will remain there until the customer responds to your request, at which time it will be automatically removed and the customer's response will be assigned to you and listed in your My Message Inbox list.

3 - Add Reference Number

By default, iService includes a reference number in the subject line. This is used to create message threads by linking related messages together. You can suppress this number from your response by

unchecking the "Add Reference Number" check box. When the reference number is removed, replies from the customer will create a new case.

4 - Send Secure

To send a secure message, click the Send Secure (Notification) link and pick a secure message template from the drop down menu. Then click on the Send Secure button to send the response (instead of the main SEND button).

This will send the customer a secure notification indicating a secure message is available for them. They must return to your iService website and login to read their message in a secure manner. This process requires [configuration](#)⁶⁷¹ by your administrator before it can be used.

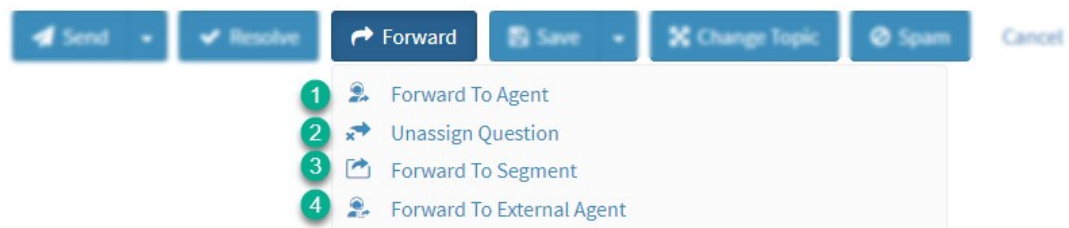
Resolve action



The Resolve action button

Sometimes questions don't need an answer. For example, your customer might thank you for your reply and there is no reason to respond to them. In those cases click the resolve button to mark the original question resolved and save a resolve note for the case history.

Forward actions



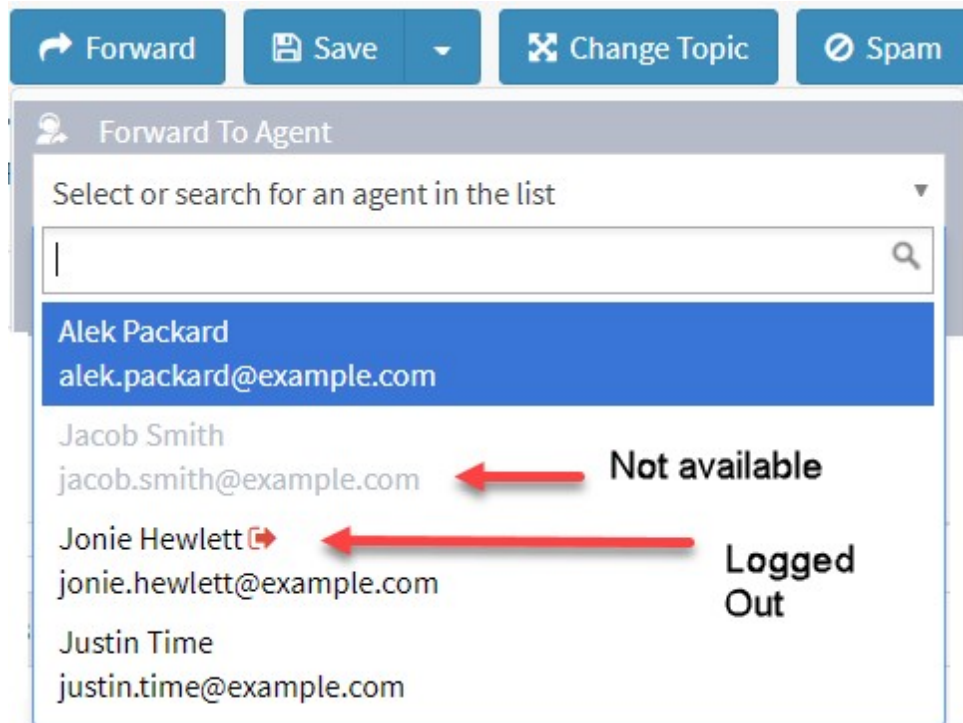
The Forward action buttons

The Forward button is used to change the question assignment. Options are to forward the message to another agent, remove the assignment, forward to a different iService segment, or forward to someone without an iService agent login (External Agent). Clicking on the Forward button reveals the following options.

1 - Forward to Agent

To assign the message to another agent, pick the agent from the drop down menu and click the Assign To Agent button. The agent listing can be filtered by typing into the filter box in the forward menu. The drop down menu will show the status of each agent and whether they are available for message assignment.

The Forward to Agent menu indicates whether agents are logged out of iService. Agents that have the "Empty inbox on Logout" setting are unavailable to receive questions when they're logged out, and are shown as disabled in the menu.





Managers have the ability to assign messages to any agent, regardless of their skills. CSRs are limited to assigning questions to agents that have all of the required skills.

2 - Unassigned Question

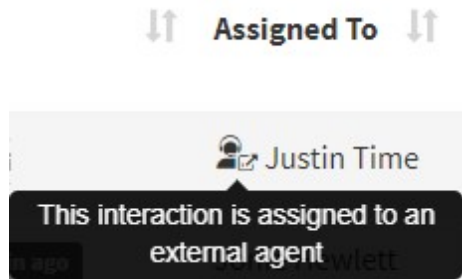
This changes the operator assignment to unassigned. This will trigger the sending of Agent Notifications for agents that have the skills to answer the question (for agents configured to receive notifications).

3 - Forward To Segment...

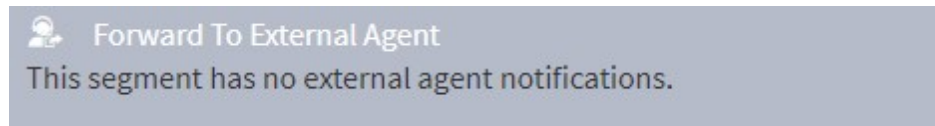
This allows the agent to reassign a request to a different segment for answering. This would be useful when an agent has been routed a request for something related to a different department within the organization (i.e., a request for a credit increase was sent to technical support instead of customer service). When you select this option, you must pick the mailbox to receive the question in the new segment. Filters associated with the mailbox you select will be run, and the topic will be determined by that mailbox. If you know the appropriate topic in the other segment, and the question doesn't need to be filtered, use the Change Topic action instead.

4 - Forward To External Agent...

This option forwards the question to someone outside of iService. An example of when this would be useful is when someone else in the company, who is not a user of iService, is best suited to provide the answer. Messages forwarded to an external agent are shown with a special icon in the Assigned To column (the email address to which the message was forwarded, or name if known). The message will remain assigned to the external email address until that user responds.

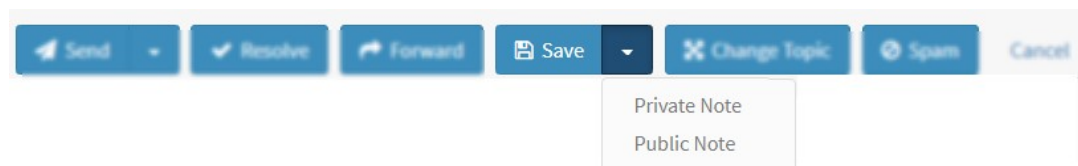


After clicking Forward to External Agent, select the appropriate template and enter the email address of the external agent. Then click Forward Now. The Forward Now link will not appear until you enter the email address and select your template. Your iService administrator must configure the external template before it can be selected. If your segment doesn't have any agent notifications configured for external agents, you will see the notice below when using this option.



See the [Segment Notifications](#)⁶⁷¹ section for details on creating Forward External templates.

Save actions



The Save action buttons

The default action for the save button is to save a draft of your response. There are two other options in the drop-down.

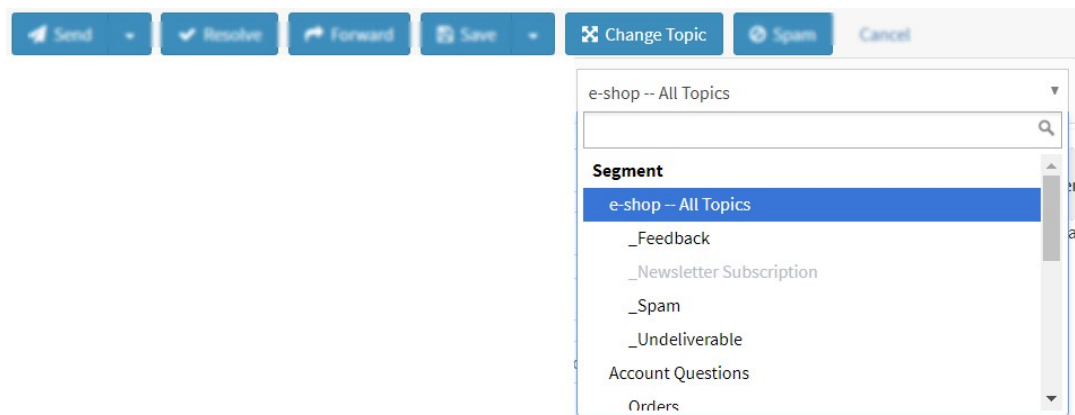
Private Note

This saves your draft as a Private Note. Private Notes are internal-use only notes which can be searched or referenced by other agents, but not by the contact or others outside of iService.

Public Note

This saves the message as a Public Note. Public Notes are available for internal use and are also viewable by the contact with whom it was associated. The note is viewable by the contact by logging into an iService customer portal.

Change topic



The Change Topic action

If you receive a question that is queued in the wrong topic, use the Change Topic menu to pick the correct topic. You can pick any topic in the tenant, but if you don't know the correct topic in the other segment use the Forward to Segment option.

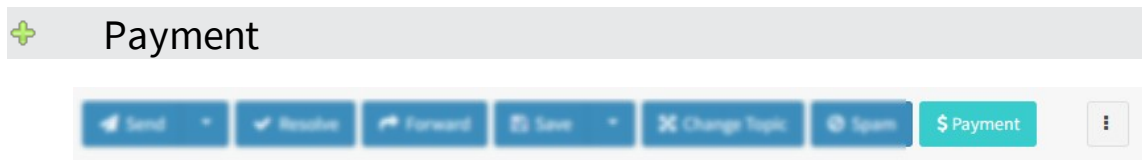
Mark as spam



The Mark As Spam action button

The SPAM button is a convenient way to handle SPAM that is not filtered out of the system. This button takes three actions when selected.

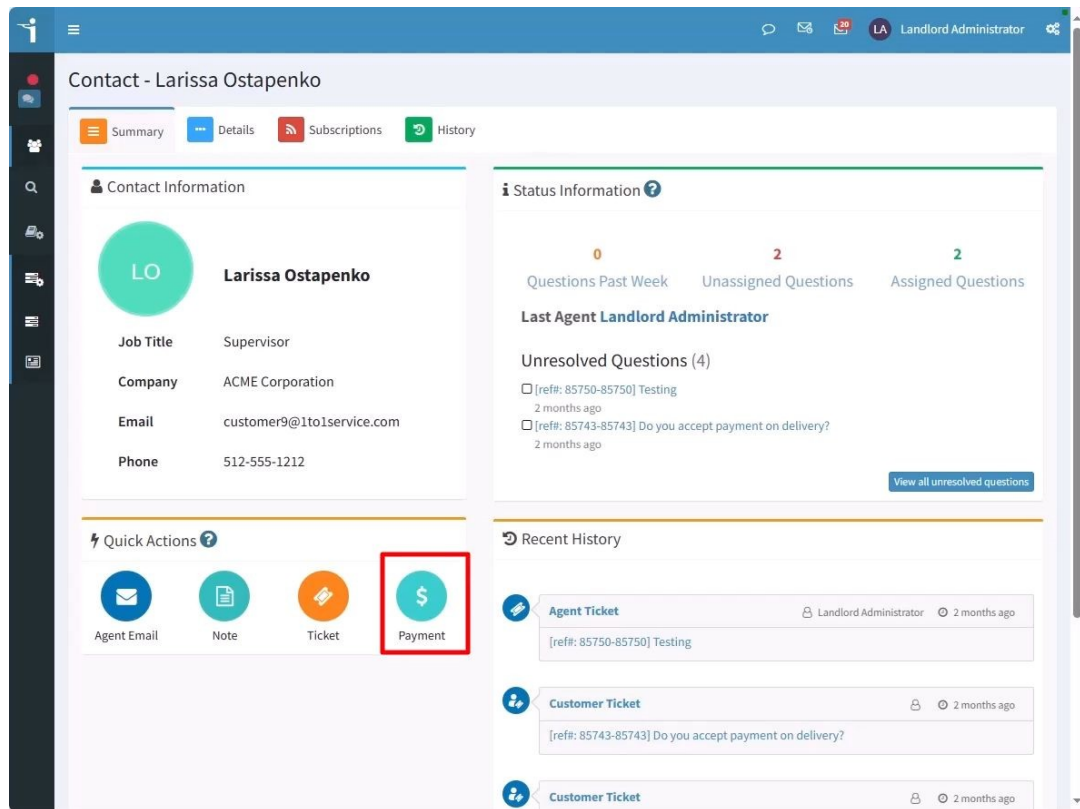
1. Changes the topic to _SPAM. This helps ensure the reports within iService are accurate.
2. Creates a resolve note for history and marks the question as resolved. This will eliminate the question from the message queue and keep a record of the actions taken by the agent.
3. Adds the Customer Type of SPAM to the contact that sent the message. This will help in the future when performing database maintenance, as these contacts can more easily be purged from the system, and filters can be created to deal with any new message from this user.



The Payment action button

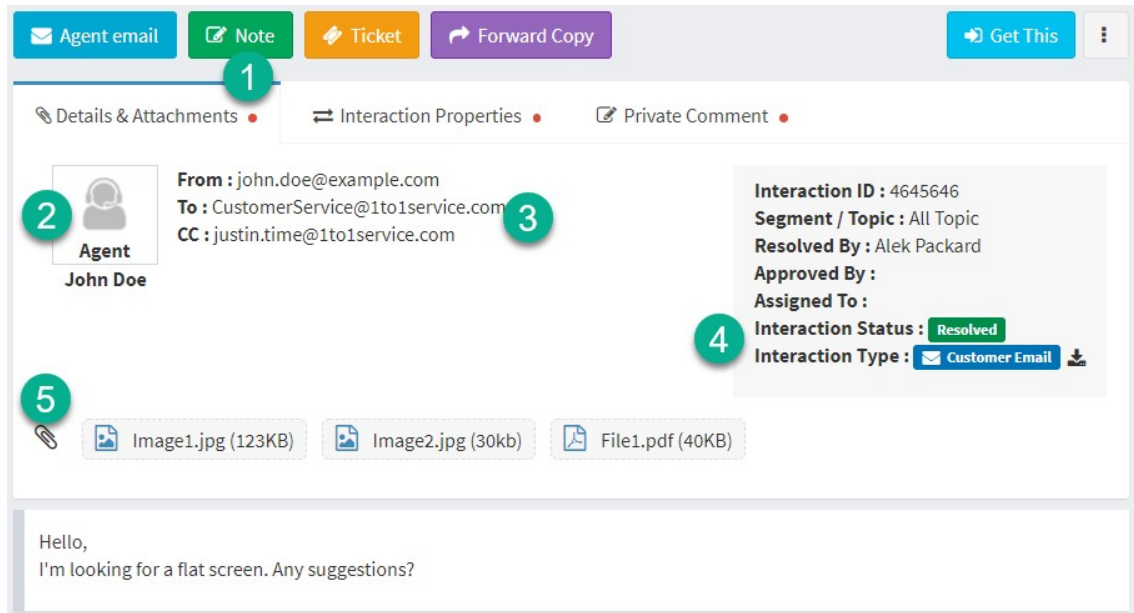
The Payment button is used to capture a customer payment. This button will only appear if you have configured the Embedded Payments settings in the External APIs page. Access to this button is also restricted to user types that have the payment access right. By default, access is only granted to administrators. You can add the access right to other user types, or make a new user type dedicated users that collect payments.

To collect a payment, click the payment button and enter the required details. The payment will be recorded similar to other interactions and will be part of the case in which the action was taken. Payments are also available from the interaction search page.

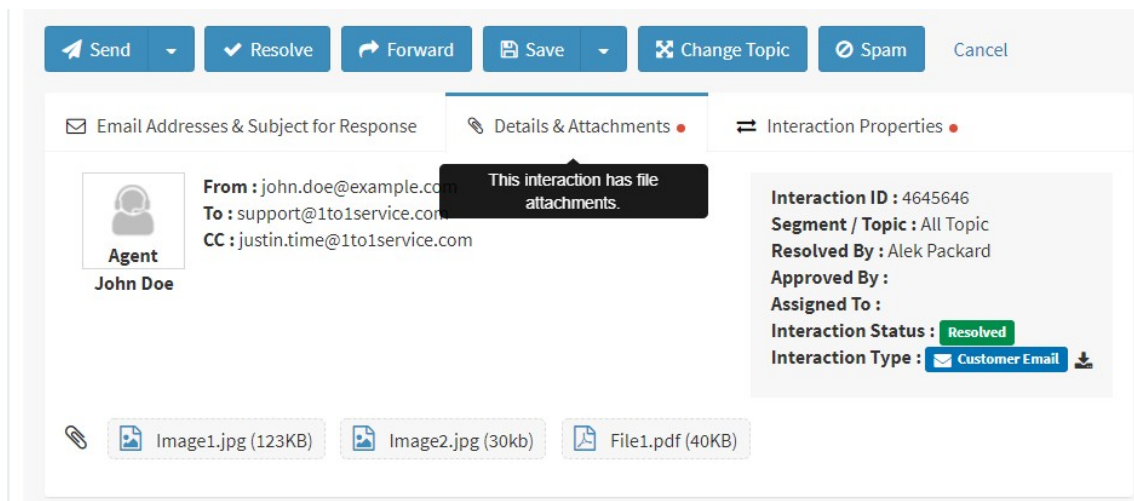


Details and attachments

Every interaction has a "Details and Attachments" section that lists information about the interaction. This information is available in the view mode and action mode.



The Details and Attachments section in the view mode



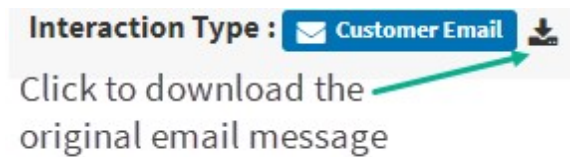
The Details and Attachments section in the action mode

1. It's important to know if an interaction has file attachments. a red dot is added to this tab when the interaction has attachments.
2. An icon is shown to differentiate between questions, answers, and system notifications. The name of the customer or agent will be shown directly below the icon.
3. The From and To email address details are shown here. Form submissions will show the topic instead of an email address.

4. Details about the interaction such as its ID, assignment, interaction type and status are shown here.
5. File attachments are listed here. Click one of the links to download the file to your computer.



There are times when you need to view the original email that was sent to iService. For example, you might need to view the message headers or HTML content that didn't convert properly in the Rich Text Editor. To download the original email, click the icon next to the Customer Email label.



Interaction properties

Interaction properties are used to capture additional information about an interaction. Every topic can have their own set of properties that are appropriate for its conversations. For instance, you might capture the browser type for technical support questions. Or, you could capture the reason for a product return request. The maximum size of input within an interaction property is 450 characters.

The interaction properties panel is shown in the View Mode as well as Action Mode. The interaction properties panel will only appear if the topic for the interaction has properties configured, or a value was set for a property from another topic. If there are values set for any property, a red dot and tooltip will appear in the tab as shown below.

The screenshot displays the 'Interaction Properties' tab in view mode. At the top, there are action buttons: 'Agent email', 'Note', 'Ticket', 'Forward Copy', and 'Get This'. Below these are three tabs: 'Details & Attachments', 'Interaction Properties' (selected), and 'Private Comment'. The main content area is divided into three columns: 'Case Properties', 'Question Properties', and 'Answer Properties'. In the 'Case Properties' column, 'Change Request Type (Required)' is highlighted in red, indicating it is a required field. Other fields include 'Delivery Date' and 'Detail'. The 'Question Properties' column has 'Quantity' and 'Team' fields, followed by three empty input fields with red 'x' icons. The 'Answer Properties' column has 'Priority' (set to 'High') and 'isOpen' (set to 'True'). A tooltip points to the 'Interaction Properties' tab with the text 'There are property values set for this interaction.' A 'Save' button is located at the bottom left of the form. Below the form, a message reads: 'Hello, I'm looking for a flat screen. Any suggestions?'.

The Interaction Properties tab in the view mode

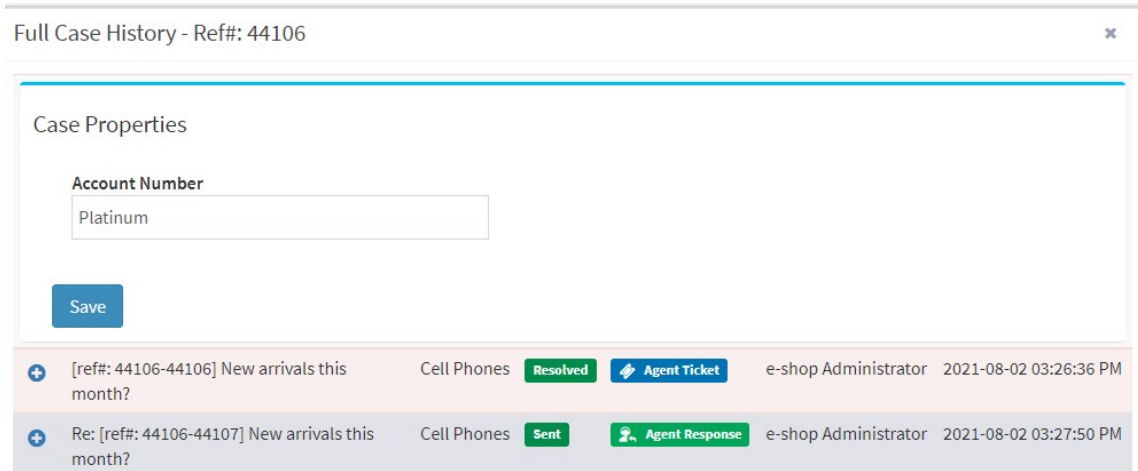
Some interaction properties are configured to be "Required." These are shown in red and must be populated before the interaction can be resolved. When a required interaction property is not set, the label on the Interaction Properties tab is displayed in a red font.

There are three types of interaction properties associated with conversations: case, question, and answer. The question and answer properties are displayed accordingly depending upon the type of interaction you are viewing. They have a single value that is directly associated with the individual interaction.

Case properties, on the other hand, are not associated with a single interaction in the case. They are used to describe the entire conversation and there is a single value in the database not associated with any specific interaction. When viewing the Full Case for an interaction, the case properties are shown above the list of interactions in the case. In addition to case properties created within a Segment, you can also create case properties inside a [workflow](#)⁴¹⁰. These

workflow interaction properties function like case properties but are only defined within the workflow.

For example, an order number or account number will not change during the conversation. A single value is used for all parts of the conversation.



The screenshot displays a web interface titled "Full Case History - Ref#: 44106". It features a "Case Properties" section with a text input field for "Account Number" containing the value "Platinum" and a "Save" button. Below this is a list of interactions:

Interaction ID	Subject	Channel	Status	Action	User	Timestamp
[ref#: 44106-44106]	New arrivals this month?	Cell Phones	Resolved	Agent Ticket	e-shop Administrator	2021-08-02 03:26:36 PM
Re: [ref#: 44106-44107]	New arrivals this month?	Cell Phones	Sent	Agent Response	e-shop Administrator	2021-08-02 03:27:50 PM

The Full Case view

To summarize, here are the scenarios for properties and how the properties tab is displayed in each.

There are no interaction properties available

When there are no interaction properties available, we do not display the tab at all.

There are interaction properties available, but no values set. None of the properties are required.

When there are interaction properties available, but no values are set, the tab is displayed with the standard label. This assumes there are no required properties.

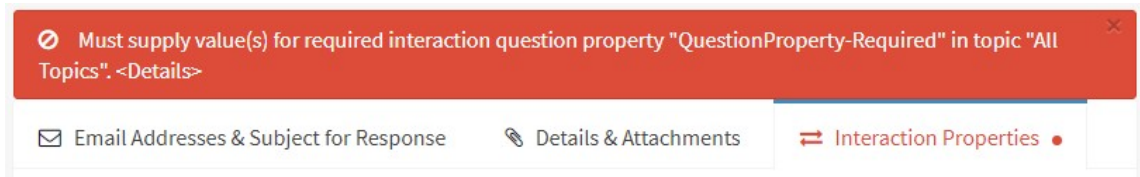
There are values set for an interaction property

Since the interaction properties tab is not shown by default, agents need to be alerted when there are values present. For example, the

customer may have indicated the priority of the question is urgent. When values are present, a red dot and tooltip is shown on the tab.

There are required interaction properties with no value set

When there are required interaction properties that haven't been set, the agent will not be able to resolve the interaction. In this scenario the label for the interaction properties tab is shown in a red font. Once a value is set for the required property, the label returns to the normal color. If you attempt to resolve the interaction without values for the required properties, the follow error will be displayed and the Interaction Properties tab will be selected so you can set the property.

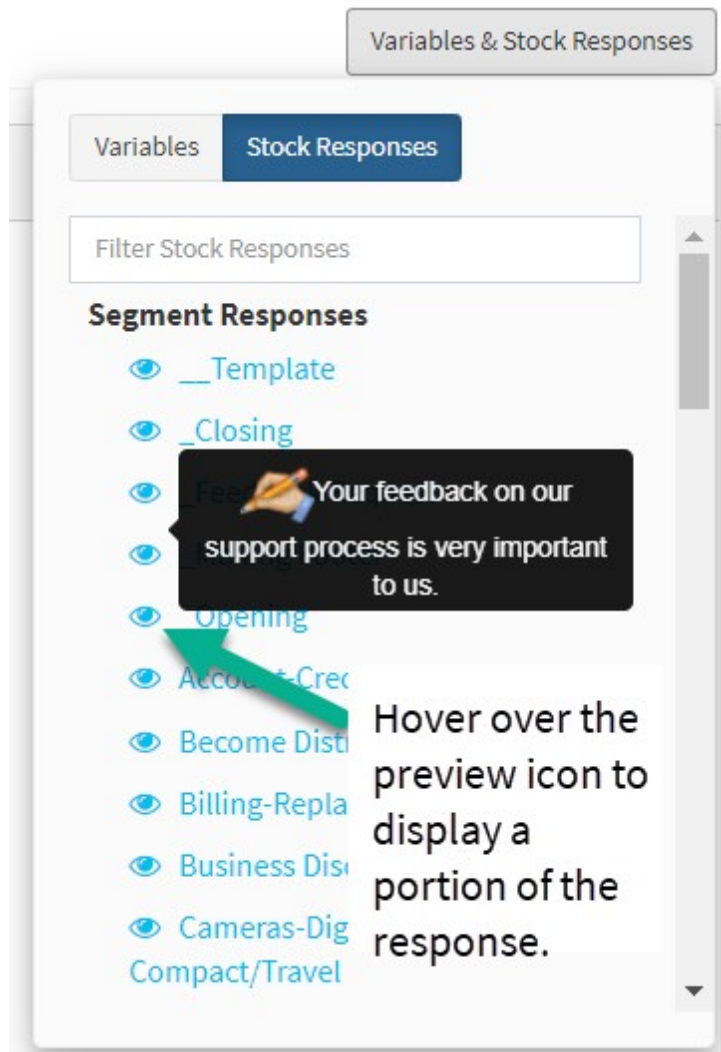


Error when attempting to resolve an interaction without setting required properties

You can learn more about interaction properties in the [configuring interaction properties](#)⁶⁴⁴ section.

Variables and stock responses

A Variables & Stock responses menu is available for most pages that include a rich text editor.



The Variables & Stock Responses menu

Variables are used to insert values into your composition. They include contact properties, answer properties, links, and a Today variable. You should preview your answer to ensure the expected result before sending a response with variables.

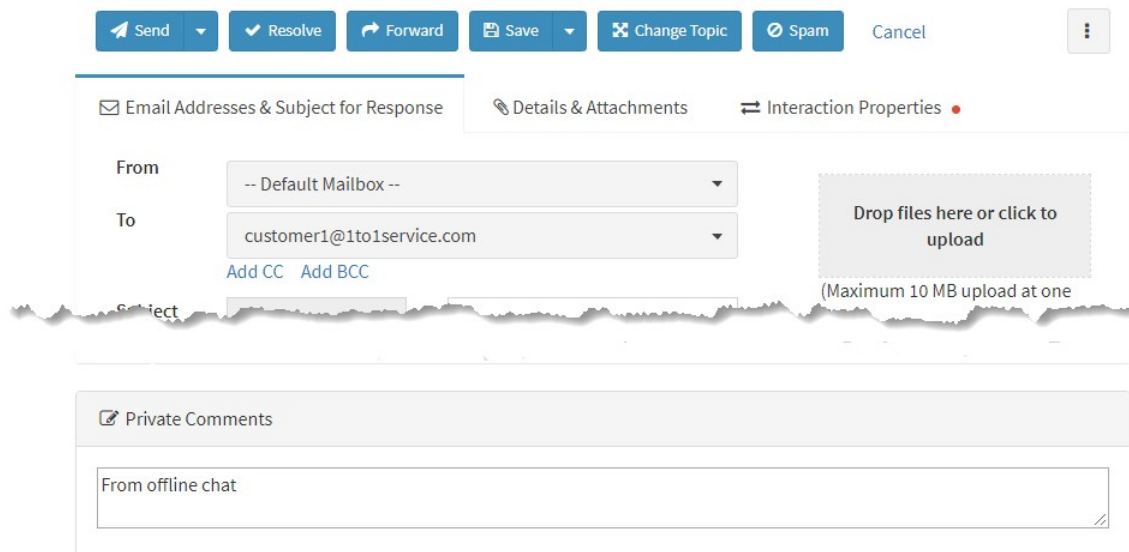
Stock Responses are pre-written text that can be quickly placed into an answer. There are two types of stock responses: segment and agent.

Segment stock responses are shown to all agents when composing answers. These can be created by a manager or above on behalf of agents (using the [Stock Response Settings](#) ⁶⁸⁹ page for your Segment).

You can also create your own agent stock responses that will only be displayed to you. Only responses associated with the segment of the interaction being edited, and your personal responses, are shown.

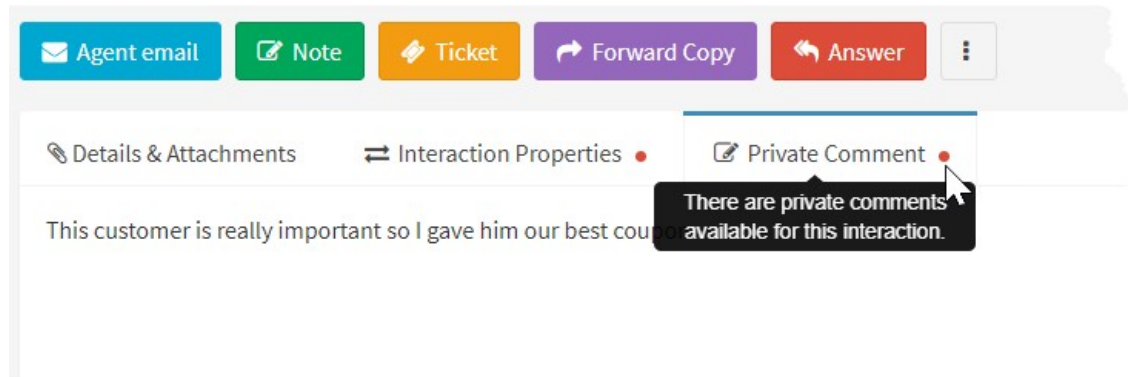
Private comments

Private comments are saved with your answer but are only viewable by other agents. The contact will not see your private comments. When composing an answer, the private comments panel is below your response body.



The Private Comments panel

Since most interactions don't have private comments, the private comments tab is only shown in view mode if comments exist. If comments exist for an interaction, they are displayed in a separate tab as shown below.



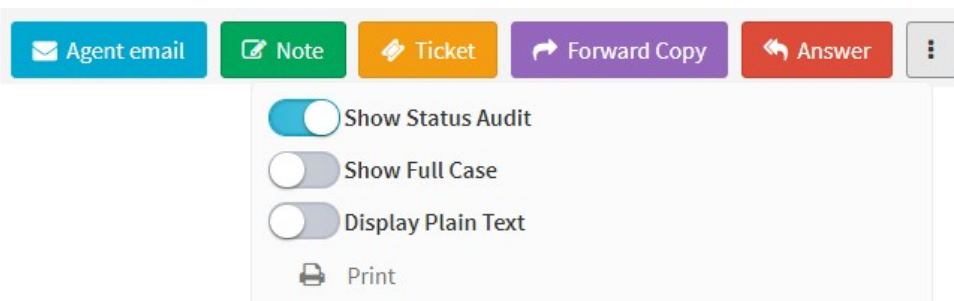
An interaction that has private comments

Status audit

iService keeps track of every status change for every interaction. Status changes include the following.

- Topic changes
- Changes to the assigned agent
- Status changes, such as going from queued to resolved

You can view the status audit for any interaction by toggling the panel from the more actions menu.



Let's take a look at a common scenario and how to interpret its status audit.

In our example, we create an Agent Ticket and assign it to an agent during creation. The original assigned agent is unable to answer the question, and unassigns it so it can be answered by someone else.

Finally, an agent takes the question and sends an Agent Response. The case view for this is below. It shows the question and the answer.

Full Case History - Ref#: 43042					
+	[ref#: 43042-43042] Lost order	Orders	Resolved	Agent Ticket	Michael Holt 2020-03-20 09:07:05 AM
+	Re: [ref#: 43042-43043] Lost order	Orders	Sent	Agent Response	Michael Holt 2020-03-20 09:12:18 AM

A simple case

Status audit for the question

The status audit for the Agent Ticket in this scenario is shown below

Status Audit ✕						
	Time	Modifier	Status	Action	Assigned To	Topic
1	2020-03-20 09:07:05AM	e-shop Administrator	Unassigned	Contact 55 -> [customerinfo#/search : CreateTicket] Form Submit (webapp-api- custinfo) -> Ticket/AAQ -> Create Ticket -> Create -> Create Composition	Carrie Rawling	e-shop -- All Topics -- Account Questions -- Orders
1	2020-03-20 09:07:06AM	e-shop Administrator	Queued	Contact 55 -> [customerinfo#/search : CreateTicket] Form Submit (webapp-api- custinfo) -> Ticket/AAQ -> Create Ticket -> Ticket 43042 -> Assign To 125	Carrie Rawling	e-shop -- All Topics -- Account Questions -- Orders
2	2020-03-20 09:08:59AM	Carrie Rawling	Unassigned	Contact 125 -> Form Submit (webapp-api-mq- myqueue) -> Unqueue -> Question 43042 -> Unqueue 43042		e-shop -- All Topics -- Account Questions -- Orders
3	2020-03-20 09:09:32AM	Michael Holt	Queued	Contact 126 -> [MyQueueGetNext] Form Submit (webapp-api-mq-myqueue) -> Get Next	Michael Holt	e-shop -- All Topics -- Account Questions -- Orders
4	2020-03-20 09:12:18AM	Michael Holt	Resolved	Contact 126 -> Form Submit (webapp-api-mq- myqueue) -> Send -> Question 43042 -> Resolve Question 43042 With 43043		e-shop -- All Topics -- Account Questions -- Orders

The status audit for a question

1. This row shows when the interaction was created. We can see that it was created by the e-Shop administrator in the Customer Info page. The agent selected the Orders topic for the question. The question was assigned to agent Carrie Rawlings (contact ID 125) by the e-Shop Administrator when he created the Agent Ticket. That assignment set the status to Queued.
2. This row shows that agent Carrie Rawling viewed the question in their My Message Inbox page (My Queue), and then used the Unassign Question action to remove themselves. This set the status to Unassigned and the Assigned To agent as blank. The ID of the question that was unassigned is shown (43042).
3. A new agent, Michael Holt, then retrieved the question using the Get Next button. If the question had been assigned to Michael by another

agent, that agent would be shown in the modifier column. This action set the status to Queued and the Assigned To agent as Michael.

4. Michael then sent an Agent Response using the Send button. The status audit shows that the ID of the answer is 43043. The status of the question was set to Resolved when the answer was sent.

Status audit for the answer

The agent response in the example above also has its own status audit. Agents can compose draft responses (Unsent Response), and save them for later or assign them to other agents for completion. Therefore, the answer has a life of its own just like the question. In this example, the status audit for the agent response is shown below.

Full Case History - Ref#: 43042 ✕

+	[ref#: 43042-43042] Lost order	Orders	Resolved	Agent Ticket	Michael Holt	2020-03-20 09:07:05 AM
-	Re: [ref#: 43042-43043] Lost order	Orders	Sent	Agent Response	Michael Holt	2020-03-20 09:12:18 AM

Agent email
Note
Ticket
Forward Copy
⋮

Status Audit ✕

Time	Modifier	Status	Action	Assigned To	Topic	
1	2020-03-20 09:08:31AM	Carrie Rawling	Unsent	Contact 125 -> [AutoSave] Form Submit (webapp-api-mq-myqueue) -> Save Draft -> Question 43042 -> Update Response -> Create -> Create Composition		e-shop -- All Topics -- Account Questions -- Orders
2	2020-03-20 09:12:18AM	Michael Holt	Sent	Contact 126 -> Form Submit (webapp-api-mq-myqueue) -> Send -> Question 43042 -> Resolve Answer 43043		e-shop -- All Topics -- Account Questions -- Orders

Details & Attachments
Private Comment

Agent
Michael Holt

From: "Customer Service" <demo-cc@1to1service.com>
To: customer1@1to1service.com

Interaction ID: 43043

Segment / Topic: e-shop / Orders

Resolved By: Michael Holt

Approved By:

Assigned To:

Interaction Status: Sent

Interaction Type: Agent Response

Hi John,

I located your order and it turns out it was waiting for one back ordered item. I've released the current items and we'll ship the back ordered item (PN 6539) next week.

If you have any additional questions, feel free to contact us.

Regards,

The eShop Customer Support Team
Tel:
[800-555-1212](tel:800-555-1212)

Your feedback on our support process is very important to us. If you can take a few seconds to complete our feedback form by clicking the url below we'd appreciate it very much.
<https://eshop.iservicecrm.com/f/54?ref=43042>

On 3/20/2020 9:07:05 AM, John Smith <customer1@1to1service.com> wrote:

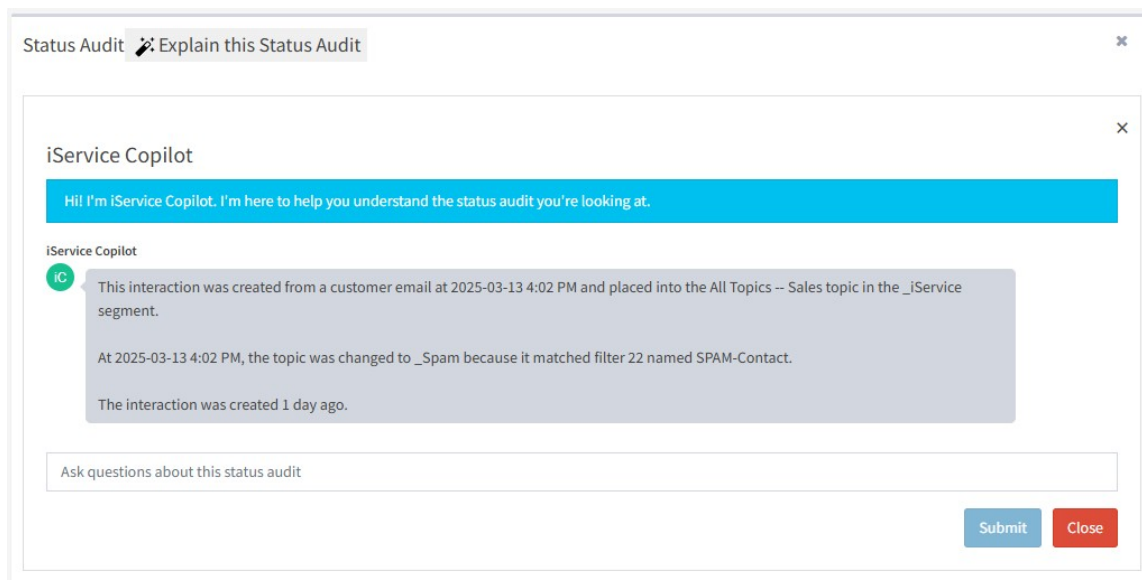
We're unable to locate the status of order #48767. It seems that it was partially filled but

1. The first row of the status audit shows when the composition for the answer was first created. In our example, the question was assigned to someone else (Carrie Rawling) before it was taken by Michael. The response was created when Carrie loaded it in the My Message Inbox at 9:08 AM. This occurred in step two of the question above. That action is shown in the status audit for the question and the answer.
2. The second row shows that Michael used the send button to create the agent response at 9:12 AM. The ID of the question (43042) that the answer was used to resolve is shown in the action details.

Although there are many actions and scenarios displayed in status audits, they all follow this pattern.

Explain This Status Audit

The **Explain this Status Audit** button will use AI to evaluate and explain the status audit in plain English. Click the button to generate a description of the actions. You can pose questions using the **Ask questions about this status audit** input.



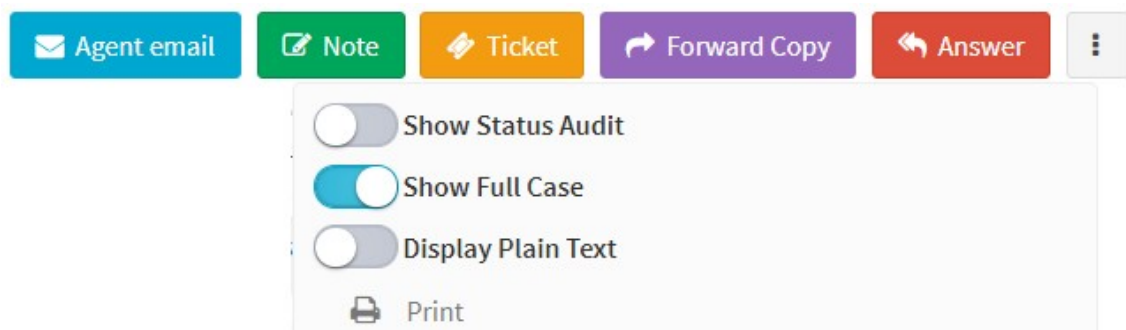
Interaction Activity

The Interaction Activity section provides a detailed explanation for the entire journey of the interaction. While the status audit shows changes to status, like a topic change or agent assignment, the activity section shows every process that evaluated the interaction regardless of whether changes were made. It includes every filter that was attempted and every notification that was considered. The activities that did not result in a change to the interaction can help you understand why filters or notifications were not used as intended.

Full case view

iService uses a message threading process to construct cases for your conversations. Questions, answers, and notifications are combined into a single view so you can better understand all aspects of the conversation. You can see a summary of all cases for a contact in their [contact history page](#)¹⁷¹.

You can also see the full case view for any interaction by toggling the panel from the More actions menu.



The Show Full Case toggle

Access control for interactions

Access to interactions is controlled at the segment level. Every interaction is associated with a topic, which is within a segment. Agents

are only allowed to view interactions in their assigned segments. Search Interaction results and Customer History will only display interactions that are in segments that an agent can access. Segment Access for agents is set in the [Agent Admin](#) ⁵⁴² page.

Interactions assigned to an agent are an exception to this business rule. Agents are allowed to view interactions in their My Message Inbox that have been directly assigned to them. This scenario can occur when an assigned message is moved by a manager to another segment. If the message is assigned prior to the segment change, the agent will still be able to view and act on the message.

If you need to keep interactions private, you should create a segment to contain them and grant access to agents as needed.

2.12 Assigning Interactions



There are three ways to assign questions in iService: you can assign a question to yourself, someone else can assign a question to you, or the system can assign a question to you. iService uses service levels to determine the priority of each question. This service level is used along with a skills-based routing process to deliver messages to the right agents at the right time.

Service levels & Skills



Service levels and skills determine the questions that will be routed to you. When service levels are not defined, the target response time is the same as the time the question was created. This means that you would always be assigned the oldest question that match your skills if you're not using service levels.

When service levels are used, the target response time for each question is adjusted accordingly. For example, your support topic might assign a one hour service level to all of its questions. But, an interaction property of "Urgent" might change some of the questions in that topic to 30 minutes.

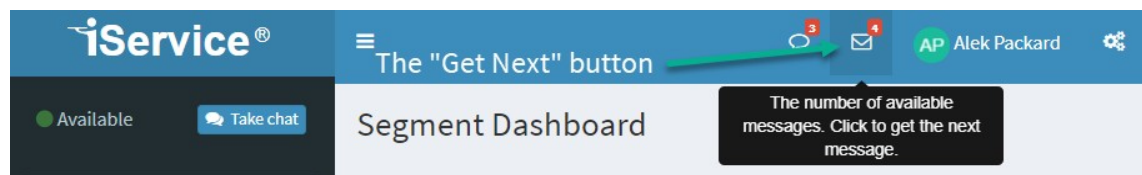
iService doesn't display the service levels for questions in the user interface. They are only used as part of the "Get Next" skills-based routing process. Similarly, skills determine the questions that will be automatically assigned to you when using "Get Next". But they have no effect on the questions that a manager can assigned to you.

Read the [Service Levels Setting](#)⁶⁰³ chapter to learn more.

Assigning questions to yourself

The "Get Next" button

All agents can request questions to work on using the Get Next button at the top of the page. The icon shows the number of questions that are unassigned that you have the skills to answer. When you click the button, the next message in the queue is assigned to you and loaded in your [My Message Inbox](#)¹⁹⁷ page. You can click the Get Next button multiple times to get multiple messages.

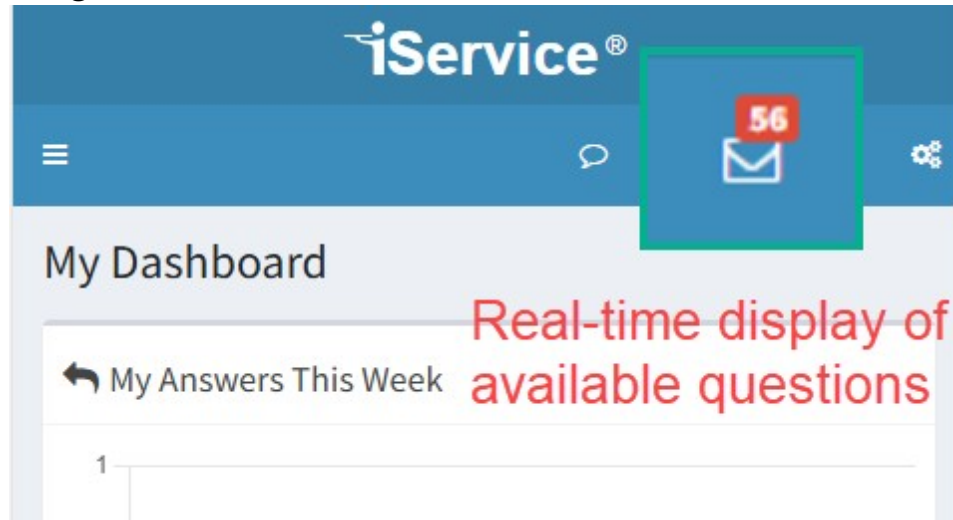


The Get Next button

If your segment is configured with "[Get All on Get Next](#)⁶⁴²", all unassigned messages from the customer with the oldest message will be assigned. For example, if the customer with the oldest message has five questions unassigned, you will get all five of their questions when you click "Get Next."

For agents without manager access, the Get Next button is the only way to assign themselves a message. Managers, however, have other options.

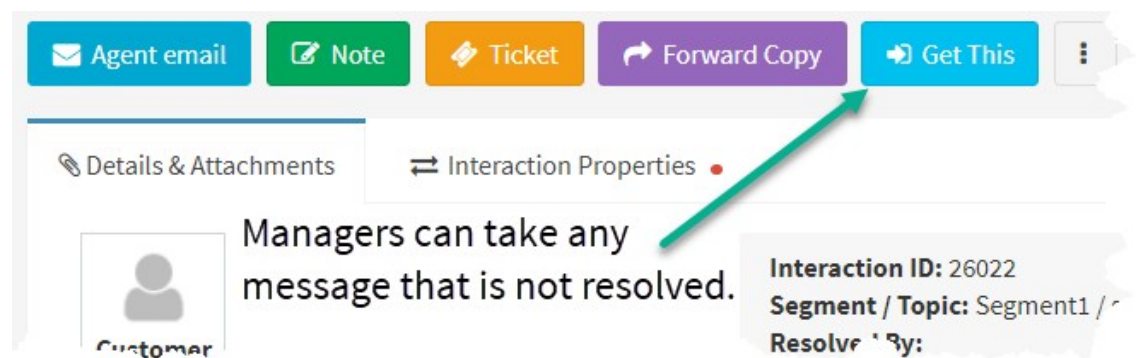
The number of questions waiting for you is displayed on top of the Get Next button. This number updates in real-time as questions are assigned, resolved, and created.



The number of available messages updates in real-time

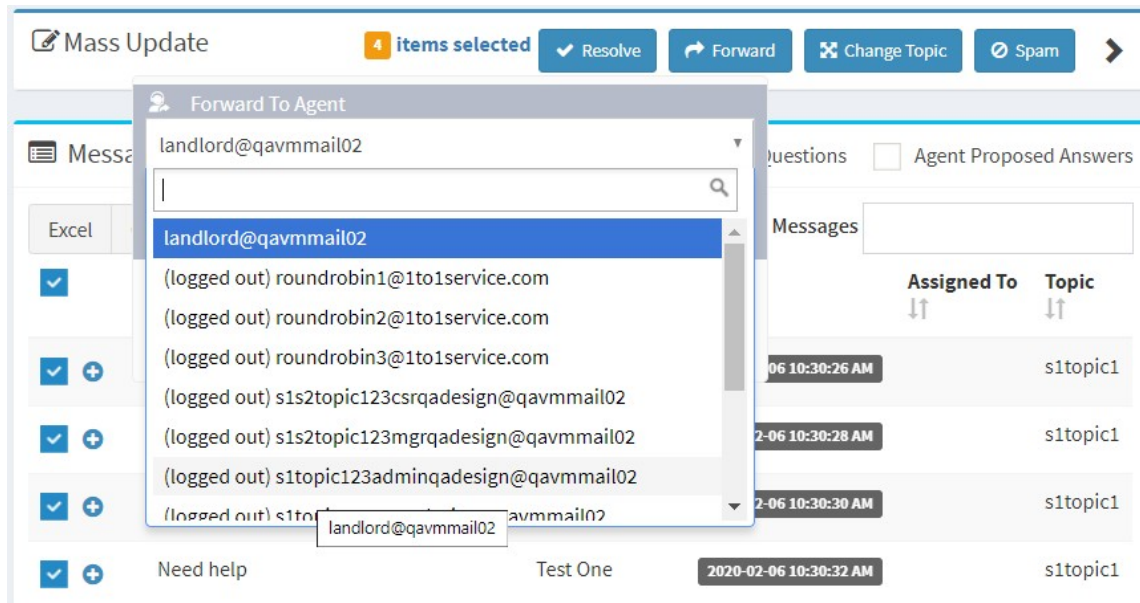
The "Get This" button

Managers can use the Get This button to assign any question to themselves that hasn't already been answered. This button is shown in the view mode for questions that are not resolved.



Assignment From Manage Messages

The Manage Messages page allows managers to assign multiple messages to themselves on time. first select all of the messages desired, then use the forward to agent menu and select yourself.



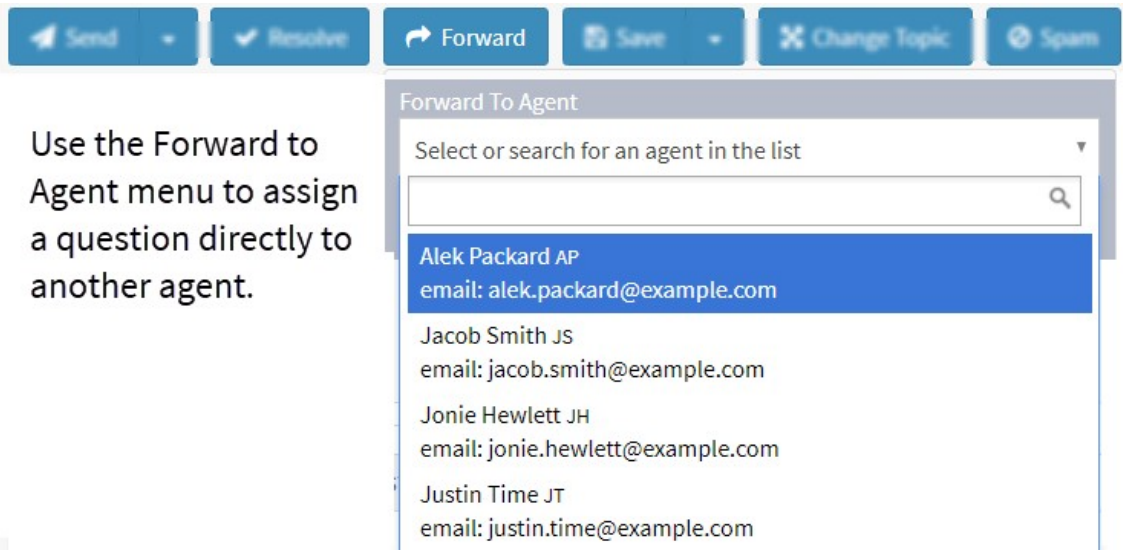
Select messages in the list and then use Forward to Agent to assign them to yourself.

Assigning messages from the mass update menu

Assigning questions to others

The Forward to Agent action

Usually forward to agent action to assign a message directly to another agent. Managers have the rights to assign messages to any agent that have segment access to the interaction. CSR users may only assign messages to agents that have segment access and all of the skills required for the question.

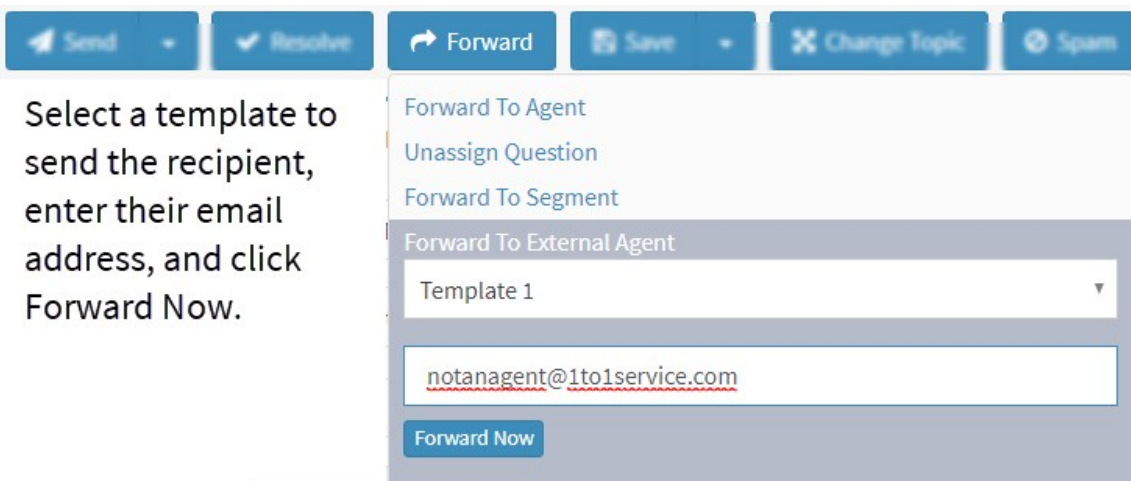


The Forward to Agent action

You can use the Forward to Agent action on multiple questions at once using the mass update panel in the Manage Messages pages.

The Forward to External Agent action

If your segment is configured to allow the Forward to External Agent action, you can assign the question to anyone with an email address. This section will send a notification to the email address you enter and set that address as the assigned agent. iService will track the question until the external agent provides an answer for you.



The Forward to External Agent action

Questions assigned by iService

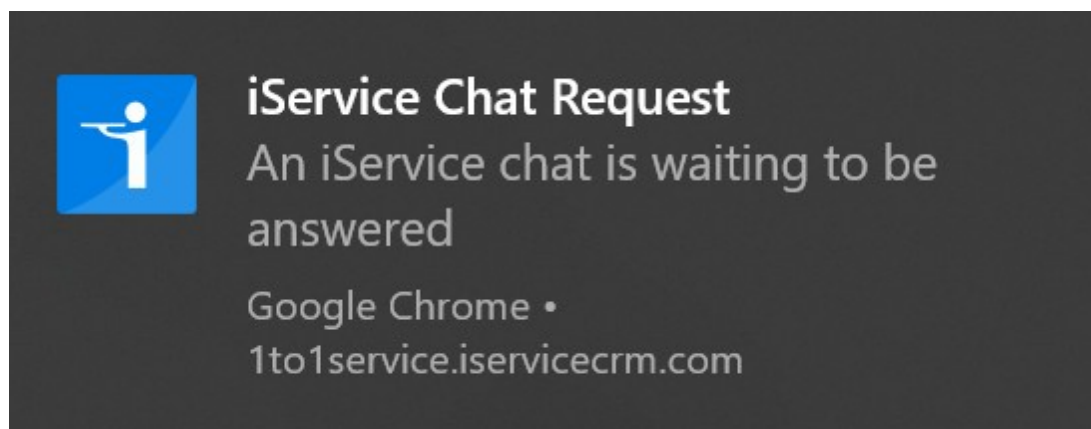
There are a few cases where iService will automatically assign a question to you. When you answer a question, you are set as the operator for that case. If the customer replies back to your answer the question will be automatically assigned to you. The only exception to this is if you have the "Empty Inbox on Logout" setting. In that case, the customer reply will only be assigned to you if you are logged into iService when the reply is received.

iService can also automatically assign questions using a [round-robin filter](#)⁶⁹⁹. This filter evenly distributes questions to available agents based on the last time you were assigned a question.

Assigning chats

Assigning chat requests to yourself

Since iService chats are real-time interactions, they are assigned differently from messages. When a new chat request arrives that you have the skills and segment access to handle, your browser will generate a notification like below.



A browser notification for an incoming iService chat request

The take chat buttons will also flash and your desktop will ring. You can click either of the take Buttons to assign the chat to yourself, similar to the way the Get Next button works.

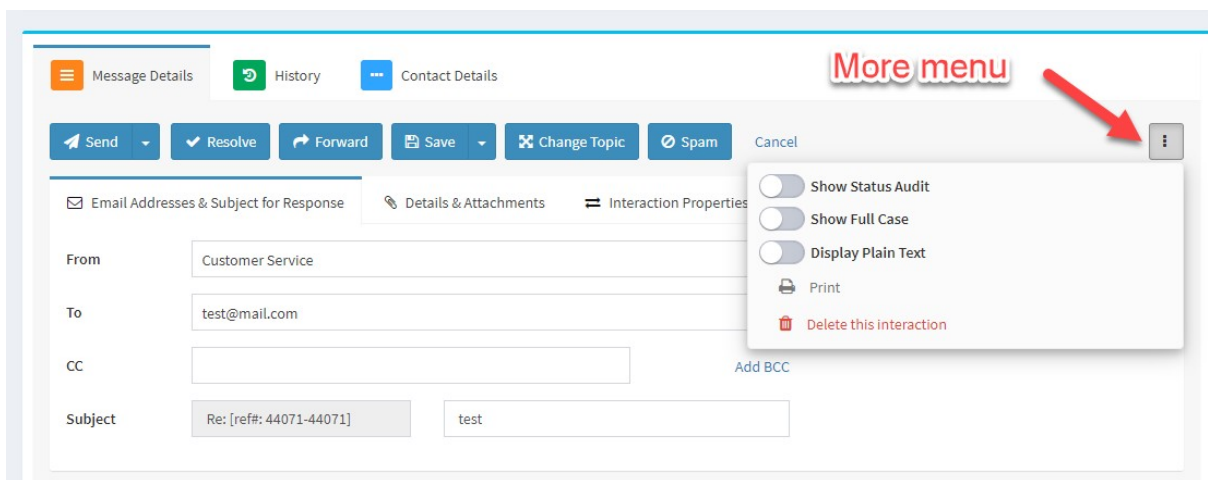
Assigning chat requests to others

You can assign chats to other agents from the Forward menu using the Assign to Agent action. You can do this with a chat that's assigned to you, or from the [Manage Chats](#)²²¹ page similar to the Manage Messages page.

To learn more about working with chats, see the [Agent Chat Interface](#)²⁵² chapter.

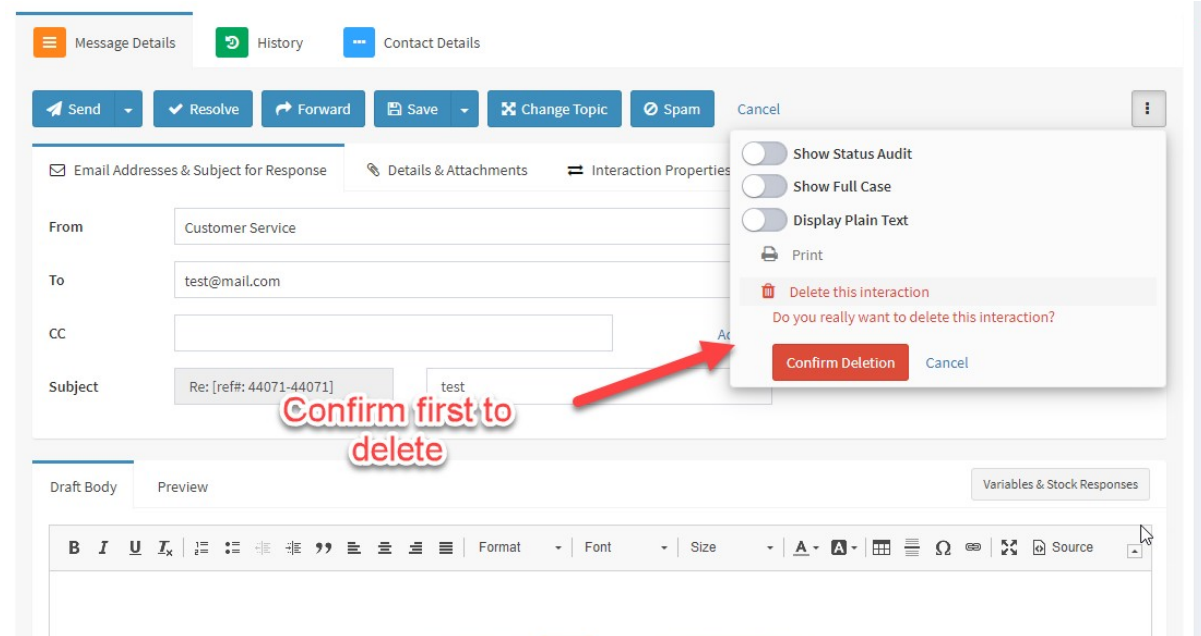
2.13 Deleting Interactions

The Delete Interaction Button lets administrators delete interactions from their tenant. You can delete interactions by simply opening the More menu and selecting the "Delete this interaction" button. The button is available in the More menu in both View Mode and Action Mode.



The More Actions menu contains the delete button

You will be asked to confirm the deletion as shown below.

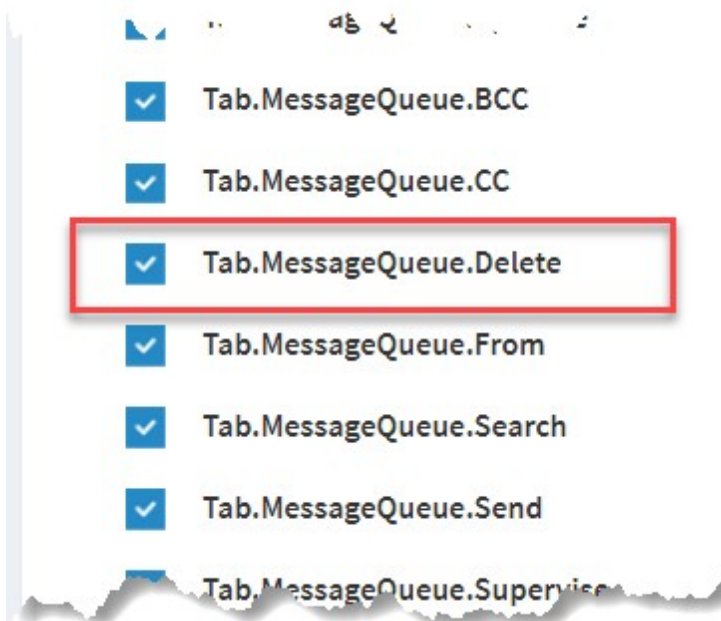


Confirming your deletion

If you are deleting an interaction because it contains credit card or other information, be aware that there may be other interactions within the case that contain the details. This includes agent responses, unsent responses, etc. You should review each interaction within the Full Case View to ensure all instances are removed.

Controlling Access to the Delete Button

By default, only administrators have access to the delete interaction button. This access right, `Tab.MessageQueue.Delete`, can be associated with other user types as needed to extend the feature to other agents. The access right is updated in the [User Types](#) ⁶¹⁵ setting page.



User Type Access Right for Delete Interaction

— Audit Trail For Deleted Interactions

Records of deleted interactions are stored in the DeletionAudit table. There is no user interface for this audit table, but an iService report is available to view these details by data range. The table layout is as follows.

```
id | timeStamp | modifierContactID | objectID | objectTyp
```

ID - table ID - primary key

timeStamp - DateTime2 field with the time the user did the delete

modifierContactID- contact ID that performed the delete

objectID - the ID of the object deleted

objectType - type of item deleted, like customer email or agent response

objectDescription - for interactions, this will be the subject line

description - the form action that was run (same as status audit)

Home Page

3 Home Page



Load your home page by clicking the iService logo in the top left corner of the iService website. Your home page provides quick access to information about your activity within iService, and links to other important information. The page is composed of multiple sections that display predefined, or custom content. In addition to the widgets described below, you can include custom forms or external website content (e.g., Google Calendar) prepared specifically for your tenant.

The home page is configured by your iService administrator from the Tenant Settings - [Websites](#)⁶²³ page.

The widgets currently available include the following.

My Recent Interactions

Sometimes you need to refer back to answers that you recently sent. You might need to send a follow-up clarification, or check in with the customer to determine status. The My Recent Interactions widget is a dedicated search result panel that lists all interactions that you've resolved during the specified time frame. You can set the number of days to display, and your settings will be saved for the next time you visit the page. The results panel has the same functionality as the [Search Interactions](#)¹⁷⁶ page.

Interaction searches are based on the date and time the interaction was created. You might need to expand your date range to find answers you sent today if you began composing them prior to today.

My Recent Interactions

Excel Column visibility Show 5 entries Show past 10 days Filter Interactions

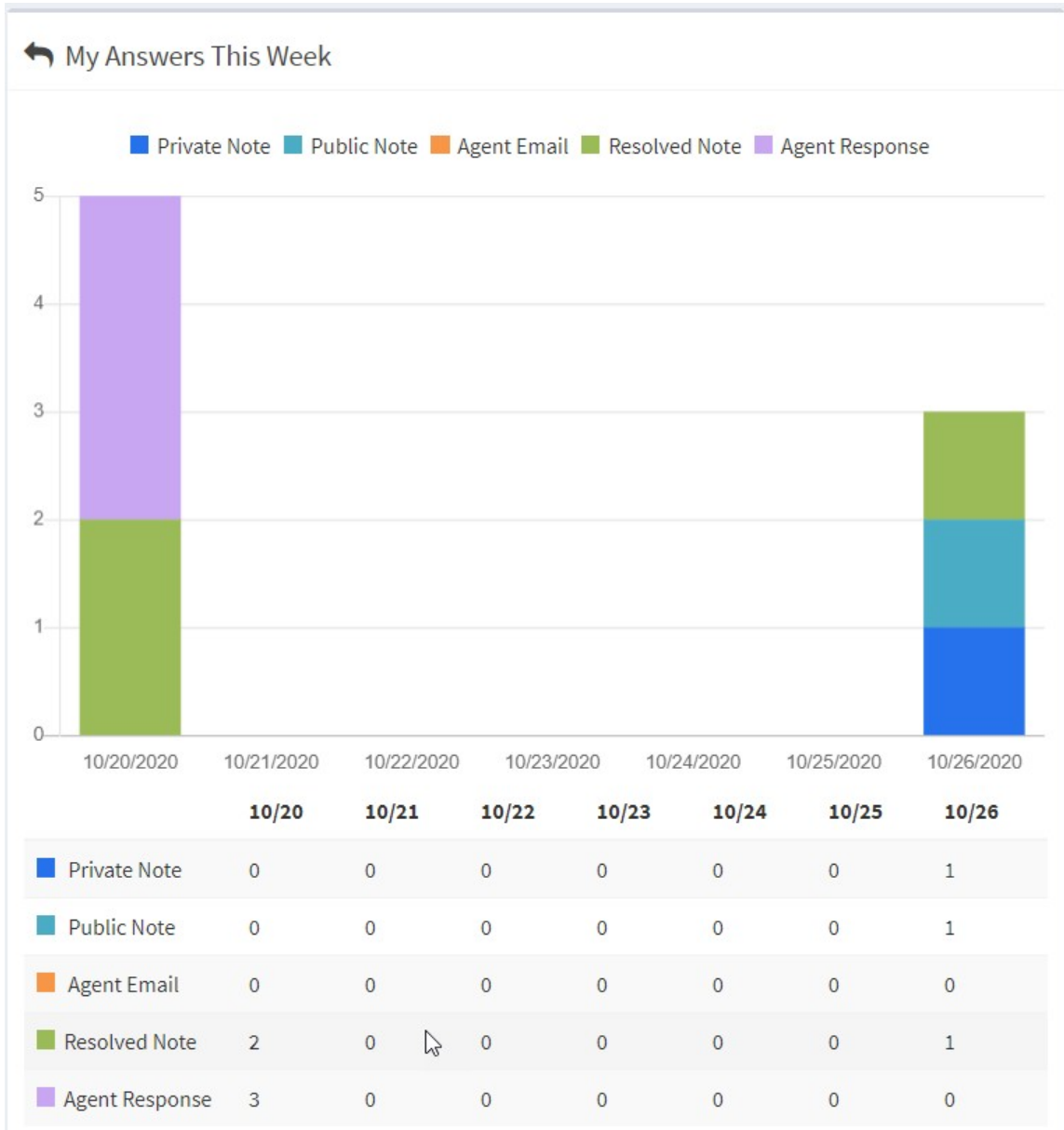
Interaction Type	Subject	Contact Email	Date
Agent Response	Re: [ref#: 43384-43388] Account status	customer2@1to1service.com	2020-10-26 07:59:29 PM
Chat	[ref#: 43386-43386] Requested Files	customer2@1to1service.com	2020-10-19 10:07:24 AM
Customer Ticket	[ref#: 43384-43384] Account status	customer2@1to1service.com	2020-10-19 10:06:59 AM
Resolve Note	Re: [ref#: 43367-43395] new quote	customer10@1to1service.com	2020-10-20 09:27:02 AM
Resolve Note	Re: [ref#: 43370-43394] Second quote request	customer10@1to1service.com	2020-10-20 09:26:46 AM

Showing 1 to 5 of 20 entries

Previous 1 2 3 4 Next

My Answers This Week

This chart provides a quick overview of your activity during the past week. This chart only counts answers that you composed during the past seven days. There are no inputs to select or parameters to set for this chart.



Get Support

This widget includes links to important product support information, and two forms for communicating directly with iService technical support.

 Get Support



Read The User Guides



Watch Training Videos



Submit A Bug Report



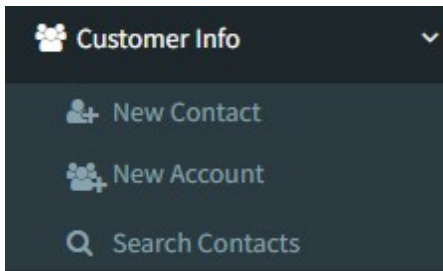
Submit An Enhancement Request

This page is intentionally left blank.
Remove this text from the manual
template if you want it completely blank.

Customer Info

4 Customer Info

The customer info section provides the ability to find, edit, and create contacts.



The Customer Info section

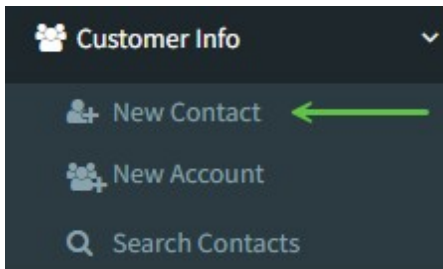
Learn about [creating new contacts](#) ¹⁴⁶

Learn about [creating new accounts](#) ¹⁴⁸

Learn about [finding contacts in iService](#) ¹⁵⁰

4.1 New Contact

To add a new contact, click on the **New Contact** button.



The New Contact button

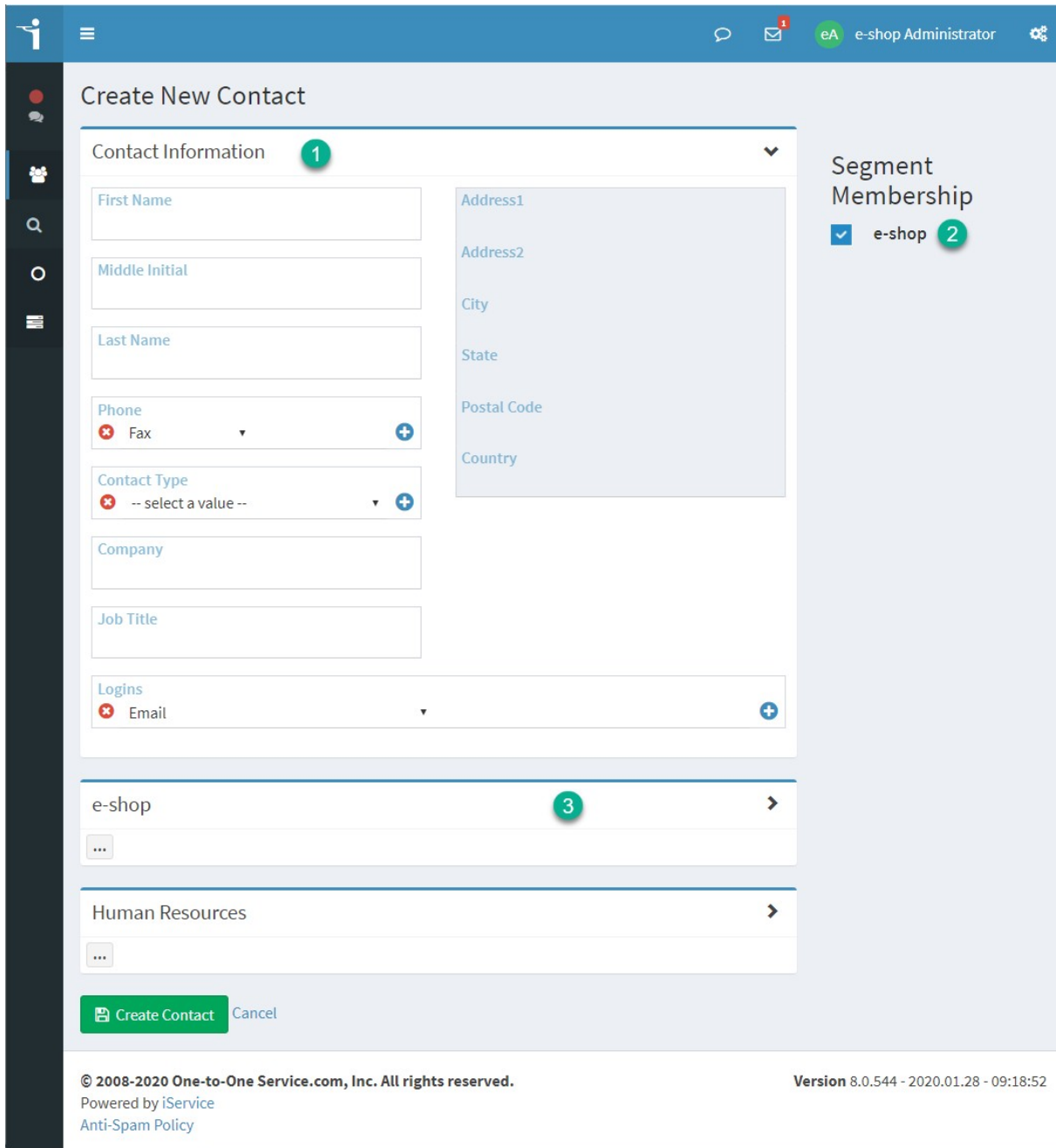
The new contact page will load as shown below.

- 1 – Every tenant has the same customer information section with fields for name, phone number, email address, etc.
- 2 – If your tenant has multiple segments, the new contact will be given the same segment membership as your user.
- 3 – If your tenant has custom contact properties they will be shown below the customer information section. You will only see properties for segments

that you have segment access to, or properties that are configured as shared.

You must enter at least one contact property value before you can save a new contact. If you attempt to save without specifying any values, you will receive the following error.

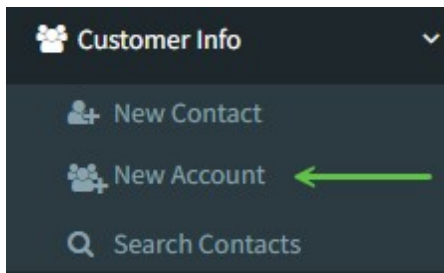
You must enter at least one contact property value before creating a contact.



The Create New Contact page

4.2 New Account

To add a new contact, click on the **New Account** button.



The New Account button

The New Account page will load as shown below. Accounts function identically to contacts and have similar requirements.

- 1 – Every tenant has the same customer information section with fields for Accounts.
- 2 – If your tenant has multiple segments, the new account will be given the same segment membership as your user.
- 3 – If your tenant has custom Account Properties they will be shown below the customer information section. You will only see properties for segments that you have segment access to, or properties that are configured as shared.

You must enter at least one account property value before you can save a new contact. If you attempt to save without specifying any values, you will receive the following error.

You must enter at least one account property value before creating a contact.

Create New Account ?

Account Information ▼

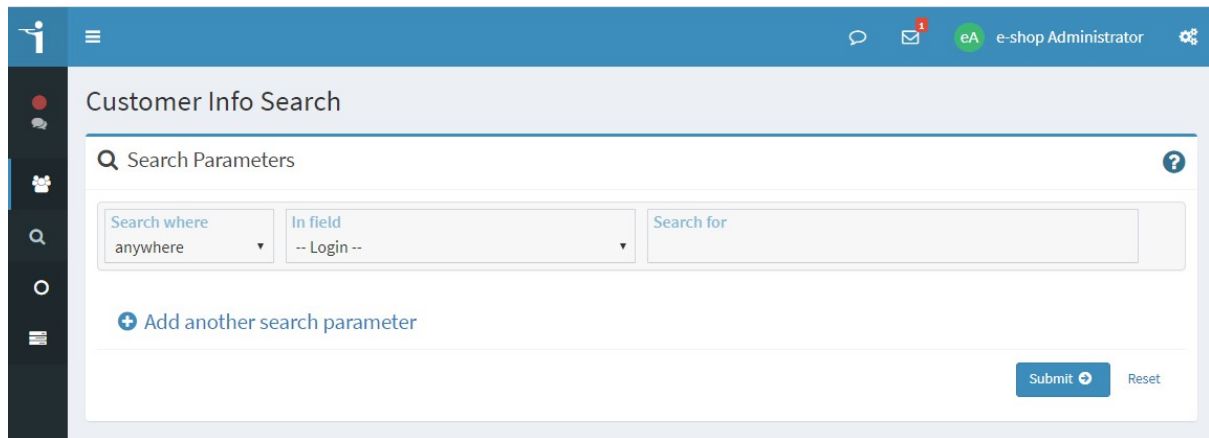
Account Name ACME Corp	Company The ACME Corporation
Phone ✖ Work ▼ 512-555-1212 +	Address1 501 N Main St
Customer Type ✖ -- Pick A Value -- ▼ +	Address2
Website https://example.com	City Round Rock
	State TX
	Postal Code 78681
	Country USA
Logins ✖ Email ▼ info@example.com +	

Create Account Reset

4.3 Searching For Contacts and Accounts

The first step in viewing a contact or account is to locate it within the iService. The default search criteria is --Login--, which is normally the contact's e-mail address. There are three drop-down boxes which can be configured for searching for records: . They are **Search Where**, **In Field**, and **Search For**.

To search on multiple fields, use the "Add Field" button. Leaving the "Search For" box blank will result in a "wildcard" search that returns any record with a value.













Customer search parameters

Search results are displayed in a panel below the search query. Clicking on the Contact Name will open the contact's details within the Contact Summary tab. Column headings (Name, Email, etc.) can be clicked to sort the results. Results can be filtered by typing into the **Filter Results** box.

You can take actions from the search results page by clicking the Expand icon next to each row. expanding the role reveals three action buttons: Agent email, Note, and Ticket. You can take these actions from within the search results without loading the contact page.

Search Results ?

Copy Excel PDF Column visibility Show 10 entries Filter Results

Name	First Name	Last Name	Email	Company	Phone (Work)
 Doe, John	John	Doe	customer1@1to1service.com	Example Company	(Work) 217-555-1212
 Fixers, Ralph	Ralph	Fixers	customer7@1to1service.com	eShop	(Work) 866-555-7847
 Four, Customer	Customer	Four	customer4@1to1service.com	ACME Corporation	
 Himald, Robert	Robert	Himald	customer10@1to1service.com		
 Jameson, Diana	Diana	Jameson	customer8@1to1service.com	ACME Corporation	(Work) 217-555-1212
 Molveena, Tatiana	Tatiana	Molveena	customer6@1to1service.com	Americo	(Home) 217-478-5555
 Ostapenko, Larissa	Larissa	Ostapenko	customer9@1to1service.com	ACME Corporation	
 Thornton, Billy	Billy	Thornton	customer3@1to1service.com	Smith & Wesson	(Work) 217-555-1245
 Waldon, Julie	Julie	Waldon	customer5@1to1service.com	Americo	(Work) 217-555-1213
 Williams, Billy	Billy	Williams	customer20@1to1service.com	ACME Corporation	


Showing 1 to 10 of 11 entries

Previous **1** 2 Next

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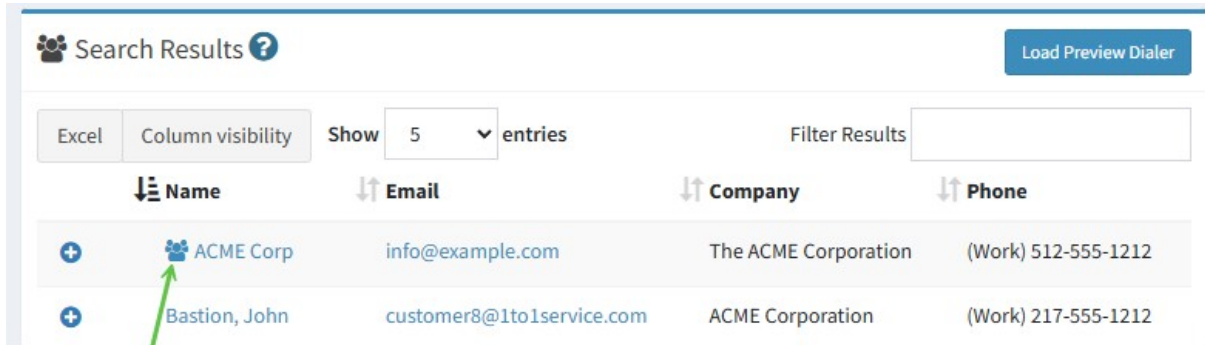
Version 8.0.544 - 2020.01.28 - 09:18:52

Taking actions from the contact search results panel

 Search results are limited to the Segment Access Rights granted to the agent. For example, an agent that is only granted access to Segment A will only see contacts in search results that are a member of Segment A.

Identifying Accounts in search results

The contact search page returns both contacts and accounts in the same search result. Account records are denoted by the account icon in front of the name.

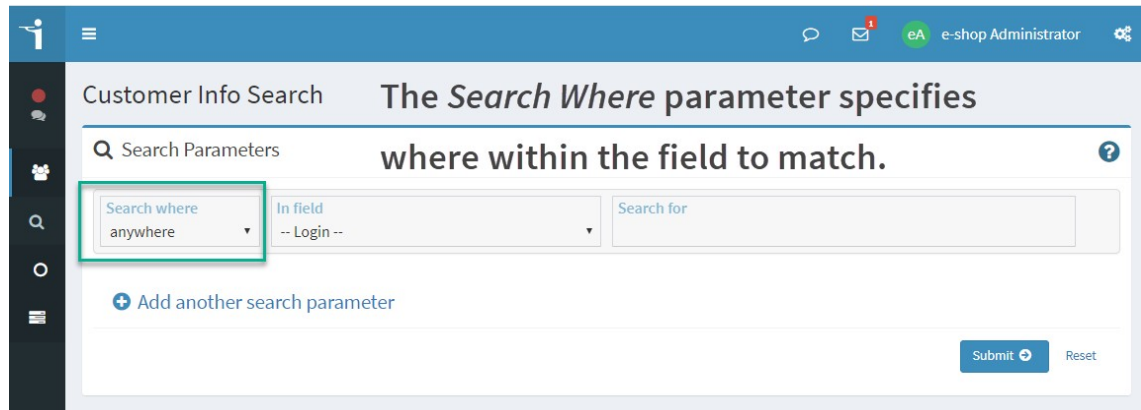


Accounts are denoted in search results with this icon.

Identifying accounts in contact search results

The Search Where parameters

This drop-down box allows the user to target how a match is made while searching. The default is 'anywhere' within a field.



The Search Where parameter

The following options are available:

Anywhere – This parameter will look for a match on the search term anyplace within the field. For instance, the search term 'ab' will return a match for 'absolute' and 'fabulous.'

Start – the start parameter will only look for matches at the beginning of the value. For instance, the search term 'ab' will return a match for 'absolute' but will not return 'fabulous.'

End – The end parameter will only look for matches at the end of the value. For instance, the search term ‘ute’ will return a match for ‘absolute’ and ‘salute.’

Entire – The entire parameter requires an exact match on the full term. For instance, the search term ‘absolut’ will not return a match for ‘absolute.’

The In Field parameters

This drop-down box shows all of the fields within the contact details tab. To limit the search to a specific field, select it from the **In Field** drop down menu. The default is ‘--Login--.’

The screenshot shows the 'Customer Info Search' interface. The main heading is 'The In Field parameter specifies the contact properties to search.' Below this, there is a search form with a search bar and a dropdown menu labeled 'In field' with the selected option '-- Login --'. The search bar contains the text 'Search for'. There are also buttons for 'Submit' and 'Reset'.

The In Field parameter of the contact search form

Many fields may be listed, but fields which all databases will have are shown below.

All - The All field will search all contact properties and logins.

ID - The ID field will search for a specific contact ID. It expects an integer value in the Search For field.

Login - The Login field will search within the contacts' logins field.

Login (Bounced) - The Login (Bounced) field will search for email addresses marked as bounced.

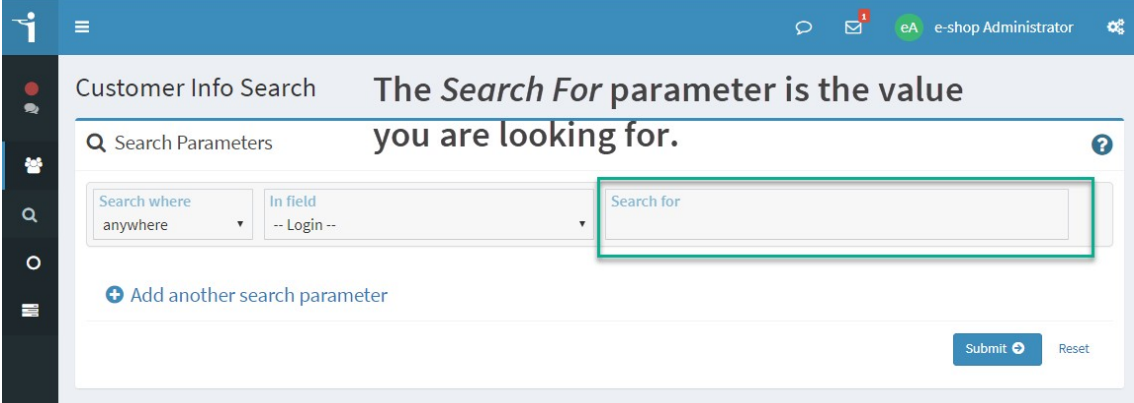
Segment Membership - The Segment Membership field will limit a search to contacts within the matching segment name.

Global Segment Values - Every iService tenant includes standard contact properties, such as First Name, Last Name, Company, etc.

In addition to these fields, every contact property in the tenant is available for searching.

The Search For parameters

Enter the search value that you are trying to match against. This field supports a wild card option by leaving the value blank, which causes it to return all records that have any value recorded for the field that was searched.

The screenshot shows a web application interface for searching customer information. At the top, there is a blue header bar with a user profile icon, a menu icon, and the text "eA e-shop Administrator". Below the header, the main content area has a title "Customer Info Search" and a subtitle "The Search For parameter is the value you are looking for." A search bar is present with the text "Search Parameters" and a question mark icon. Below the search bar, there are two dropdown menus: "Search where" with the value "anywhere" and "In field" with the value "-- Login --". To the right of these dropdowns is a text input field labeled "Search for" which is highlighted with a red border. Below the input field is a button labeled "+ Add another search parameter". At the bottom right of the search area are two buttons: "Submit" and "Reset".

The Search for parameter

Some fields are based on lists of values, such as the --In Topic-- field. When you select these fields, the Search Where parameter is removed and the Search For inputs are replaced with a drop-down menu.

Using the And/Or operators with multiple criteria


Click on **Add Field** to add additional search criteria to search on multiple fields. The search criteria are connected with "And" or "Or" to determine whether to expand the results (Or) or limit them (And). Once all the search criteria have been entered, click Search to execute the query. Click on Remove Field to remove a field.

You can use up to 10 search terms in your search query.

Customer Info Search

Q Search Parameters ?

Search where: anywhere | In field: -- Login -- | Search for: customer ✖

And  Limits results to records that match both criteria

Search where: anywhere | In field: Company | Search for: ACME ✖

+ Add another search parameter

Submit ↕ Reset

👤 Search Results ?

Copy | Excel | PDF | Column visibility | Show 10 entries | Filter Results

Name	First Name	Last Name	Email	Company	Phone (Work)
+ 2, Customer	Customer	2	customer2@qavmmail02	ACME Corporation	
+ One, Test	Test	One	customer1@1to1service.com	ACME Corporation	

Showing 1 to 2 of 2 entries

Previous 1 Next

Using the and operator to limit search results



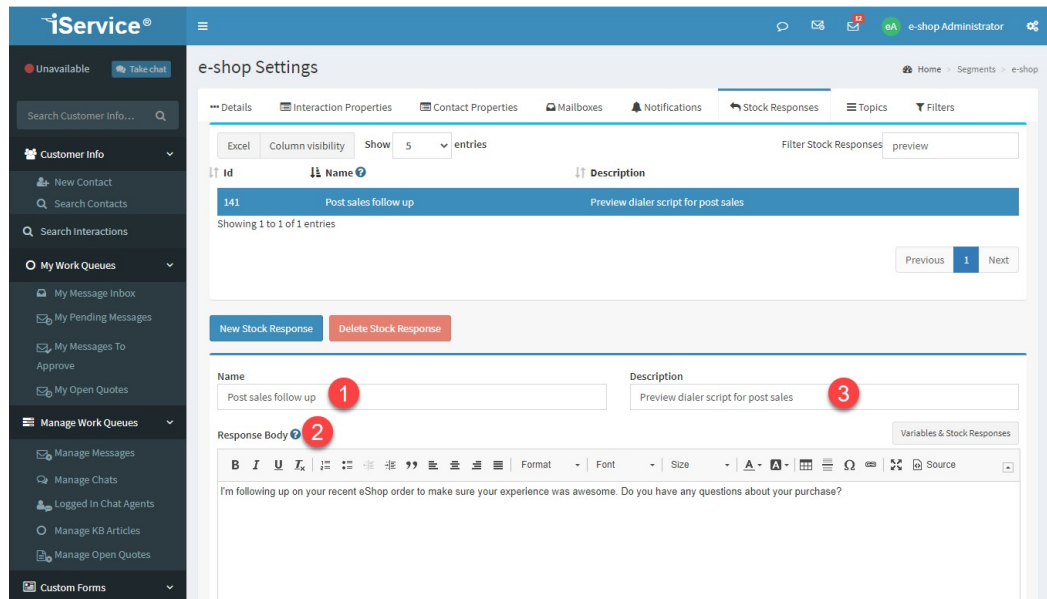
To limit your search results, be sure you use AND instead of OR when connecting search parameters.

Preview Dialer

The Preview Dialer makes it easy for agents to reach out to contacts who need a follow up call. With the Preview Dialer, you can search on any contact property to generate a list of contacts for follow up. The form loads one contact at a time and provides a quick view of their contact information, recent interactions, a script for the call, and a section for quickly adding call notes.

Creating call scripts for the Preview Dialer

Before you launch your calling campaign, you must choose a topic for call notes and the call script that you're going to follow. The call script is created as a stock response in your segment with the description "preview" to make it available in the stock response picker on the preview dialer form.



1 - **Name:** This should indicate the purpose of the call. For example, Post-sales follow up indicates that it is meant for customers who have made purchases recently.

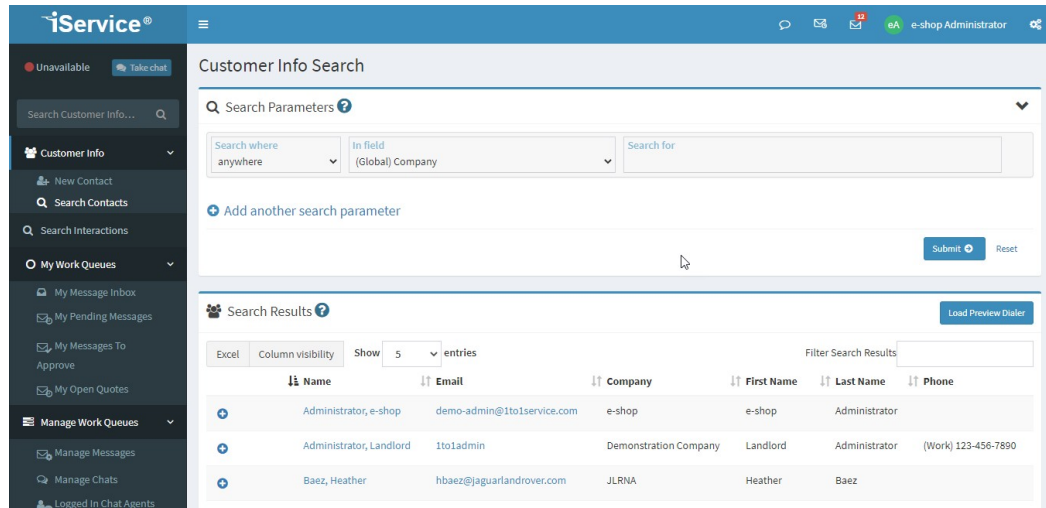
2 - **Response Body:** This is the script displayed to the agent for each contact.

3 - **Description:** A brief explanation of the script. The word "Preview" must be added to the text to distinguish it from other stock responses and make it available in the Preview Dialer. If the word "preview" is not included here, the script will not appear in the preview dialer menu.

How to generate your contact list

The Preview Dialer is launched from the existing Search Contacts page. You can search on any combination of contact properties

to gather your list of contact IDs to call. The most common approach is to create custom fields for labeling contacts that should be included in the calling campaign. As agents make calls, they can update those properties directly from the Preview Dialer page, if needed. The Preview Dialer button will appear with all search results.

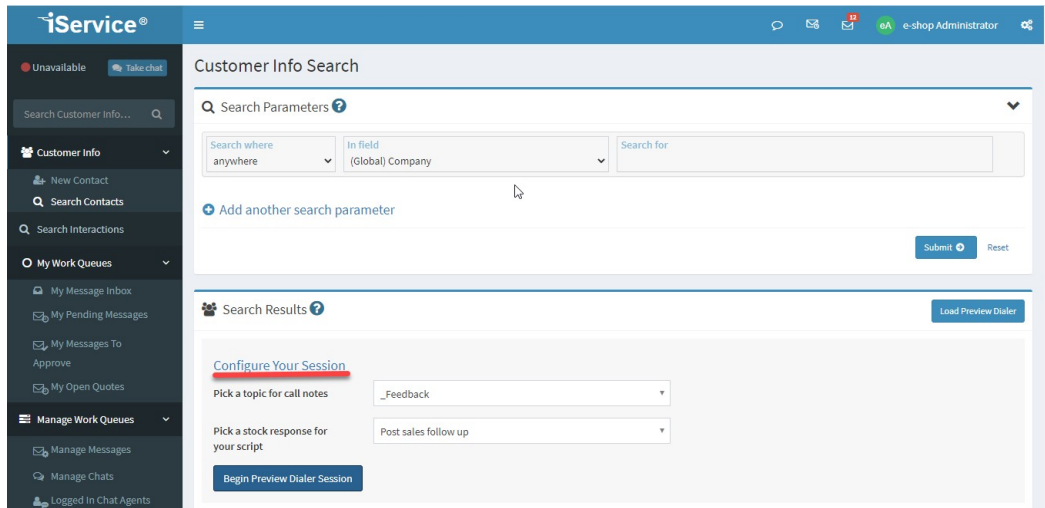


The screenshot displays the iService Customer Info Search interface. The search parameters are set to 'anywhere' for 'Search where' and '(Global) Company' for 'In field'. The search results table is as follows:

Name	Email	Company	First Name	Last Name	Phone
Administrator, e-shop	demo-admin@1to1service.com	e-shop	e-shop	Administrator	
Administrator, Landlord	1to1admin	Demonstration Company	Landlord	Administrator	(Work) 123-456-7890
Baez, Heather	hbaze@jaguarlandrover.com	JLRNA	Heather	Baez	

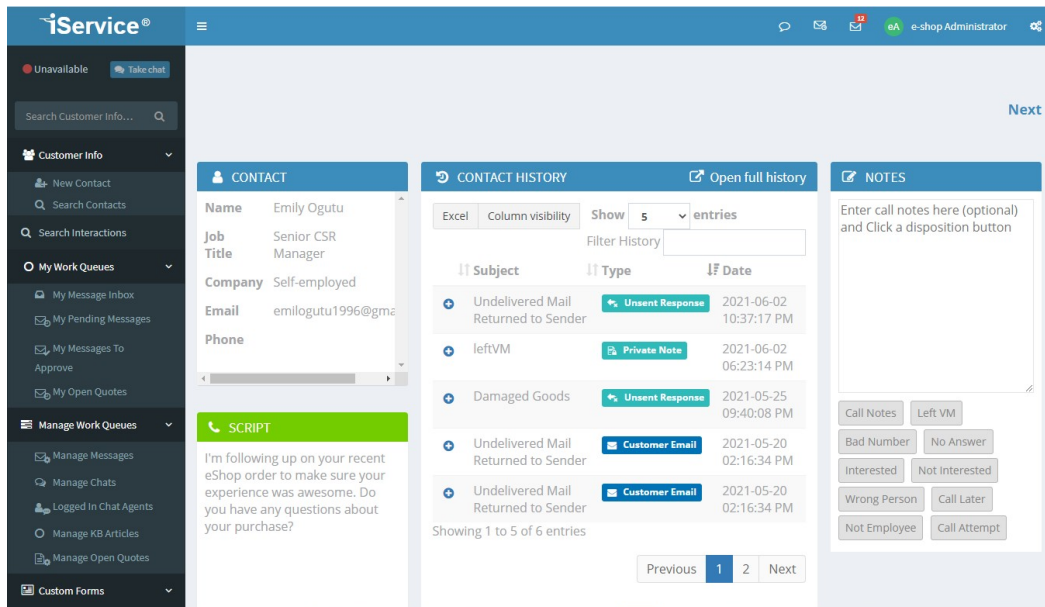
How to configure a call session

Clicking the “Load Preview Dialer” button expands the “Configure Your Session” menu. Start by picking a topic for call notes, and then selecting a script for the call. The stock response picker only appears after a topic is selected. Once the configuration is complete, you can start the preview dialer session.



How to use the Preview Dialer form

On the Preview Dialer page, you can view the details and interaction history of each contact before making the call. The stock response selected during configuration is used as the call script and you can add call notes using the Notes panel. When done, click the “Next” button to load the next contact on the list.



4.4 The Contact Page



When iService receives a customer email, chat request, or form submission from a customer it creates a contact record (if one doesn't already exist). All of the information you capture about a contact can be found in the contact page. The contact page has four sections: summary, details, subscriptions, and history. You can view contact information, all of your past conversations with the contact, and initiate interactions from this page.

[View Summary Information About the Contact](#)  160

[View or Edit Contact Details](#)  162

[View Past Interaction History](#)  166

[Update Subscription Information](#)  165

4.4.1 Contact Summary

The Summary tab provides a quick overview of a contact, and includes links for viewing information and taking actions.

The screenshot shows the 'Contact - John Doe' page in the iService interface. The page is divided into three main sections:

- Contact Information (1):** Displays basic details for John Doe, including a profile picture with initials 'JD', job title 'Purchasing Manager', company 'Example Company', email 'customer1@1to1service.com', and phone number '217-555-1212'.
- Quick Actions (3):** Provides three buttons for 'Agent Email', 'Note', and 'Ticket'.
- Status Information (2):** Shows communication metrics: 1 Unassigned Question, Service Manager as the Last Agent, and 0 Interactions Past Week. It also lists 1 Unresolved Question: '[ref#: 42998-42998] Travel camera' from 5 days ago, with a 'View all' button.

The 'Recent History' section shows a chronological list of interactions:

- Chat:** '[ref#: 43001-43001] Travel camera' from Service Manager, 5 days ago.
- Agent Response:** 'Re: [ref#: 42988-42997] Looking for a good camera' from e-shop Administrator, 3 months ago.
- Customer Email:** '[ref#: 42988-42988] Looking for a good camera' from e-shop Administrator, 3 months ago.

Buttons for 'View all history' and 'View all' are present at the bottom of the history and unresolved questions sections, respectively.

The Contact Summary page

1 – The **Contact Information** section displays basic information about the contact, such as their name, e-mail address, and phone number.

2 – The **Status Information** section displays details about communication with the contact. The first section provides a summary of the number of unassigned questions, the last agent that interacted with the contact, and the number of interactions with the contact during the past week.

The **Unresolved Questions** section shows questions from the contact that haven't been answered yet. Click the **View All** button to load a search page showing all unresolved questions for the contact.

The recent history section shows a timeline of the last few interactions with the contact. Clicking **View all History** will open the contact history tab in the chronological view mode.

3 – The action buttons are used to send the customer an email, add a note to their history, or create a ticket for assignment to an agent.



The layout and content of this page can be customized by your iService administrator by creating a new form and substituting it in the [Websites](#) page.

4.4.2 Contact Details

The Details tab lists all of the details for the contact, which includes standard contact information and custom properties defined for each segment.

The screenshot displays the 'Contact - John Doe' details page. At the top, there is a navigation bar with a menu icon, a chat icon, a notification icon with a red '1', and the user 'eA e-shop Administrator' with a settings icon. Below the navigation bar, the page title 'Contact - John Doe' is shown. The main content area has four tabs: 'Summary' (selected), 'Details', 'Subscriptions', and 'History'. The 'Details' tab is active, showing a form for contact information and a list of segment memberships. The contact information includes fields for First Name (John), Middle Initial, Last Name (Doe), Phone (Work: 217-555-1212), Contact Type (Vendor), Company (Example Company), Job Title (Purchasing Manager), and Logins (Email: customer1@1to1service.com). The segment membership section shows 'e-shop' with a checked checkbox. A green arrow points to the 'e-shop' segment membership section. To the right of the arrow, there is a text box that reads: 'Custom properties are shown by segment and access is limited to agents with access rights to the segment.' Below the segment membership section, there are sections for 'Human Resources' and a 'Save' button.

The Contact Details page

Contact Information and Custom Properties – The primary purpose of this page is to view and update contact property values for the selected contact. Every iService tenant has standard properties for contact

information, such as first name, phone numbers, email address, etc. The standard contact information can be viewed by any agent that has access to one of the contact's segments (shown as Segment Membership).

In this example, there are two additional segments defined that have additional contact properties. These properties are defined by your iService Administrator and can be in a variety of formats (input fields, drop down lists, dates, etc). Agents will see all properties within segments to which they have been granted [Segment Access](#)^[542] by their administrator. They will also see any contact properties from other segments that were designated as shared by the administrator.

For properties that allow multiple values (e.g., phone number), you can remove a field by clicking the delete button. To add another value, click the + button.



You can collapse any of the sections on this page using the expand/collapse accordion button in the heading of the section.

Segment Membership – Each contact must be a member of at least one segment, which determines the agents that can view their information. Contacts are created in one of two ways: by the contact or by an agent. When a new contact is created by an agent, the Segment Membership for the new contact is set to match the same membership as the agent's contact. When a contact interacts with iService by sending an e-mail, submitting a form, or initiating a chat request, iService creates a contact for them and they are added as a member of that segment automatically. For example, if a customer sends an email to a mailbox in the eShop segment they will be added as a member of that segment.



Segment membership is simply an indication of the segments that the contact does business with. This membership does NOT provide segment access to agents. Segment access for agents is defined separately within [Agent Settings](#)^[542] page.

You must save your changes before exiting the page using the **Save** button on the bottom of the screen.

4.4.3 Contact Subscriptions

The contact subscriptions page allows agent to see the contact's subscriptions to mailing lists, campaigns, and knowledge base articles. Agents can add or remove subscriptions directly on this page. (Read more about [Mailing Lists](#)^[271], [Campaigns](#)^[295], and the [Knowledge Base](#)^[184])

Contact - John Doe

Summary Details Subscriptions History

Mailing List Subscriptions

Name	Description	Member Of	Opted Out
Bounce Test		<input type="checkbox"/>	<input type="checkbox"/>
eShop Customers Announcements	General announcements for eShop customers.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monthly Coupons	Receive a monthly coupon for 5-15% off of your total order.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Online Specials	Receive notices about online specials.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Platinum Customers	Our best customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Campaign Subscriptions

Name	Description	Member Of	Opted Out
New Customer	New customer sign on	<input type="checkbox"/>	<input type="checkbox"/>
Photography tips and trick	Ongoing tips for getting the most out of your new camera.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Upsell campaign	Upsell reminder	<input type="checkbox"/>	<input type="checkbox"/>

Find Answer Article Subscriptions

Topic	Subject	Subscribed
e-shop -- All Topics -- Products -- Computers	Troubleshooting common iMac problems	<input checked="" type="checkbox"/>

[Save](#)

The Contact Subscriptions page

Mailing lists are used to send periodic mass mailing messages triggered by an agent. Campaigns are used to send a series of mass mailing messages at

predefined time periods. If the contact has subscribed to knowledge base articles, those articles will be listed here.

The **Member Of** column indicates whether the contact is a member of the list. The **Opt-Out** column indicates whether or not the contact has asked to be excluded from future mailings. Whether or not the contact is added back to the list, they will be excluded from mailings when this box is checked.

To remove a subscription, uncheck the **Member Of** box and click the save button.

4.4.4 Contact History

The History tab provides a summary of all interactions with the contact. This includes all email correspondence, live chats, mass mailings, notes entered by agents, etc. The contact history page has two modes: Chronological View and Case View.

Contact - John Doe

Summary Details Subscriptions History

History Show Notifications Chronological View Case View

Copy Excel PDF Column visibility Show 10 entries Filter History

Subject	Topic	Status	Type	Agent	Properties	Date
Travek camera	Cameras	Unsent	Unsent Response			2020-02-05 07:59:12 AM
[ref#: 43001-43001] Travek camera	Cameras	Resolved	Chat	Service Manager		2020-02-01 10:47:55 PM
New iService Message[ref#: 42998-43000] Travek camera	Cameras	Sent	Agent Notification			2020-02-01 10:46:43 PM
[ref#: 42998-42998] Travek camera	Cameras	Unassigned	Customer Ticket		Account Number : Platinum	2020-02-01 10:46:42 PM
Your product question[ref#: 42998-42998] Travek camera	Cameras	Sent	Auto Response			2020-02-01 10:46:42 PM
Re: [ref#: 42988-42997] Looking for a good camera	Cell Phones	Sent	Agent Response	e-shop Administrator		2019-11-13 12:10:47 PM
[ref#: 42988-42988] Looking for a good camera	Cell Phones	Resolved	Customer Email	e-shop Administrator	Account Number : Platinum	2019-11-13 10:34:16 AM
Message Acknowledgment[ref#: 42988-42988] Looking for a good camera	Cell Phones	Sent	Auto Response			2019-11-13 10:34:16 AM
New iService Message[ref#: 42988-42989] Looking for a good camera	Cell Phones	Sent	Agent Notification			2019-11-13 10:34:16 AM
Re: [ref#: 42912-42972] Best price on LG Plasma	_Spam	Sent	Agent Response	Landlord Administrator		2019-09-30 01:41:46 PM

Showing 1 to 10 of 1,000 entries

Previous 1 2 3 4 5 ... 100 Next

The Contact History page

- 1) **Show Notifications** – this toggle shows and hides notification messages (auto responses, agent notifications, etc.) from history. The default view is to not show notifications.
- 2) **Chronological view** – the chronological view displays all interactions with the contact in chronological descending order (newest messages first). This view is the same as you would see from the Search Interactions page. This can be a good way to find a specific interaction when you don't know which case it's in. You can sort the table or use the filter box to quickly locate a single interaction.
- 3) **Case view** – the case you displays all interactions grouped by reference number This is the best way to understand a conversation that took place because it groups all the questions and answers together related to the conversation. the filter history box only searches the displayed text on the page. Most cases begin with a customer question. This can make it more difficult to find a specific interaction, such as an agent response, that isn't displayed on the page.
- 4) **Exporting history** – you can export the history displayed with these buttons. All records will be displayed regardless of the pagination.
- 5) **Column visibility** – you can add and remove columns from the display using this menu.
- 6) **Pagination** – for contacts with a lot of interactions, you can increase the number of items shown per page.
- 7) **Filter history** – use the filter box to reduce the number of interactions shown. The filter will match the full history display regardless of pagination.
- 8) **Properties** – this column displays all of the properties associated with the interaction. *NOTE: Case properties are not shown in this view because they aren't tied to a specific interaction.*
- 9) **Display limits** – iService only displays the first 2,500 interactions for contact to avoid problems loading the page. If the contact has more than 2,500 interaction, the following alert is displayed.

The screenshot shows the 'History' tab selected in a navigation bar. Below the navigation bar, there are tabs for 'Chronological View' and 'Case View'. A prominent orange alert box states: 'Alert! You have reached the maximum number of interactions that can be displayed on this page. ...less'. Below the alert, there is a text box explaining: 'To view older records, go to the Search Interactions page and search your history using the Contact Email or Contact ID parameter. Specify a date range for records not displayed on this page.' At the bottom of the screenshot, a table header is visible with columns: Subject, Topic, Status, Type, Agent, Properties, and Date. The 'Show' dropdown is set to 5 entries.

Alert when there are more than 2,500 interactions



If you need to find an interaction on a contact with more than 2,500 interactions, use the [Search Interactions](#) page.

To learn more about interactions themselves, read the [Understanding Interactions](#) section.

Color coding by type

In contact history, interaction rows are color-coded based on their interaction type (system generated notifications, questions, answers that send email to a contact, and answers that do not send email). For a detailed listing of every interaction type and their statuses, visit <http://styleguide.iservice.info/pages/interaction-status-label.html>. The colors are as follows.

System generated notifications – white

Questions – red

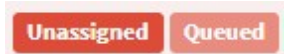
Answers that send email – darker gray

Answers that don't send email – lighter gray

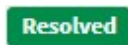
Interaction type and status labels

Each interaction type and status has a custom label. Visit <http://styleguide.iservice.info/pages/interaction-status-label.html> for a detailed listing of every type and status. Similar to the color coding for each row, the type and status labels also have special colors.

Statuses for unresolved questions (unassigned and queued) are considered most important and are red.



Once questions are resolved, they require less attention so the status for resolved is green.



Using the Chronological View

The chronological view of history provides a list of every interaction with the contact, and is sorted in descending order from the most recent interaction to the oldest. You can generate a similar page from the search interactions page using the following query.

The screenshot shows the 'Search Interactions' interface. The search parameters are: Search where: anywhere; In field: -- Contact Login (Email) --; Search for: customer1@1to1service.com. The search results table is as follows:

Subject	Topic	Contact Email	Date	Assigned To
Travek camera	Cameras	customer1@1to1service.com	2020-02-05 07:59:12 AM	
[ref#: 43001-43001] Travel camera	Cameras	customer1@1to1service.com	2020-02-01 10:47:55 PM	Service Manager
New iService Message[ref#: 42998-43000] Travek camera	Cameras	customer1@1to1service.com	2020-02-01 10:46:43 PM	

An interaction search that matches customer history

The chronological history page is a convenient way to view this information from inside the customer info page. The color coding makes it easier to find questions and answers, and the data table has most of the same features as the search results page. However, if you need to do detailed analysis or export specific properties we suggest using the **Search Interactions** page as shown above.

Using the Case view

The Case View of history contains the same details as the Chronological View, but interactions are grouped based on Ref#. These groupings of interactions are called a case.

A case can begin with any type of interaction (question from customer, agent action, or system generated event). Each case displays the following details.

Subject	Case Topic	Case Status	Case Type	Resolved By	Date
[ref#: 1-1] Test1	_Spam	Resolved	Customer Email	Landlord Administrator	2007-02-04 12:00:02 AM

The case view

1. The subject of the first interaction in the thread
2. The topic of the first interaction
3. The status of the case (**Status is shown as resolved only when all questions in the case are resolved**)
4. The type of interaction that started the case
5. The agent that resolved the last question of the case
6. The date of the interaction that began the thread

Expanding the case shows the details of the full history of the conversation, including any agent responses, system actions, and notes entered.

History **Viewing a case** Show Notifications Chronological View **Case View**

Copy Excel PDF Column visibility Show 10 entries Filter History

	Subject	Case Topic	Case Status	Case Type	Resolved By	Date
-	[ref#: 1-1] Test1					
1	[ref#: 1-1] Test1		Resolved	_Spam	Customer Email	Landlord Administrator 2007-02-04 12:07:42 AM
2	iServiceAssistant Account Created	s1topic1	Sent		Contact Creation	2007-02-04 12:07:42 AM
3	Autoresponse: [ref#: 1-1] Test1	s1topic1	Sent		Auto Response	2007-02-04 12:07:42 AM
4	Re: [ref#: 1-25247] Test1	_Spam	PublicNote		Resolve Note	Landlord Administrator 2019-10-18 08:26:58 AM
5	Re: [ref#: 1-26002] Autoresponse: [ref#: 1-1] Test1	s1topic1	PrivateNote		Private Note	Landlord Administrator 2020-02-04 09:23:08 AM
6	Re: [ref#: 1-26003] Autoresponse: [ref#: 1-1] Test1	s1topic1	PrivateNote		Private Note	Landlord Administrator 2020-02-04 09:23:35 AM
7	Re: [ref#: 1-26005] Re: [ref#: 1-26003] Autoresponse: [ref#: 1-1] Test1	s1topic1	PrivateNote		Private Note	Landlord Administrator 2020-02-05 07:40:10 AM

Viewing a full case history

In the figure above, the case history is expanded to show the interactions that have been threaded together to form a conversation. These interactions are as follows.

1. The case began with an incoming Customer Email from the contact.
2. Since the contact didn't exist, iService created a new contact and sent a notification describing the new account (contact creation).
3. An auto response was sent to the customer acknowledging their question was received.
4. The question was resolved by Landlord Administrator using a save and resolve note.
5. 6. 7. The landlord administrator then added three private notes to the case.

Each item within the history can be further expanded to view its details. For more information about working with interactions, see the [Understanding Interactions](#)⁹² section.

4.5 The Account Page



The Account page functions similarly to the Contact page. It displays a summary and details about the account selected. Accounts are saved in the iService database using the same structure as contacts, and have the same basic attributes. They can include a login/email and have their own history (for example, corresponding with an account at a generic address like support@example.com). Account properties are created and edited the same way as contact properties.

In a future release, you'll be able to associate your contacts with an account and see a summary of all interaction history for the account in one place. The account page in 9.13 has identical functionality to contacts.

The screenshot shows the 'Account - ACME Corp' page. At the top, there are tabs for 'Summary', 'Details', and 'History'. The 'Summary' tab is active. The page is divided into several sections:

- Company Information:** Features a green circular profile picture with 'AC' inside. Below it, the name 'ACME Corp' is displayed. Further down, the address '501 N Main St Round Rock, TX, 78681, USA', phone number '512-555-1212', and website 'https://example.com' are listed.
- Quick Actions:** A row of four icons: 'Agent Email' (envelope), 'Note' (document), 'Ticket' (tag), and 'Payment' (dollar sign).
- Status Information:** A section with three metrics: 'Questions Past Week' (0), 'Unassigned Questions' (0), and 'Assigned Questions' (0). Below this, it shows 'Last Agent N/A' and 'Unresolved Questions (0)' with a 'View all unresolved questions' button.
- Recent History:** A section with the text 'There are no interactions with this contact.'

The Account Summary Page

This page is intentionally left blank.
Remove this text from the manual
template if you want it completely blank.

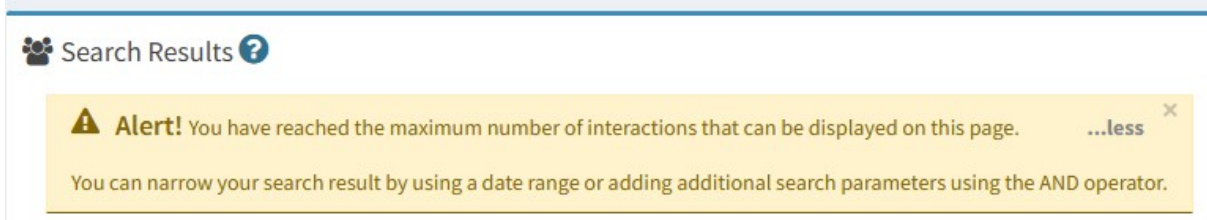
Searching Interactions

5 Searching Interactions



iService records every interaction with your contacts in the iService database. The [Contact History](#) page provides a convenient way to review your conversations with a particular contact. However, you may not always know which contact you're looking for or you might need to do a more detailed search than the history page supports. In those cases, use the Search Interactions page to locate the interaction. The Search Interactions page supports detailed criteria searches, a customizable search results table, and filtering of search results.

For performance purposes, the search only returns 2,500 interactions from the database. If your query returns more than 2,500 interactions the following alert will be displayed.



Note: There are cases where you might want to load the interaction by itself without the results table. if you know the ID of your interaction, you can use the /interaction page to load it directly. Use the format /app/interaction/ID to load it directly.

Using Search Parameters

The screenshot shows a 'Search Parameters' panel with the following elements:

- Search where:** A dropdown menu set to 'anywhere'.
- In field:** A dropdown menu set to '-- Subject --'.
- Search for:** A text input field containing the search term.
- And:** A section for additional criteria with a dropdown set to '-- Interaction Type --' and a search input field containing 'Customer Email'.
- Buttons:** '+ Add another search parameter', 'On or after' (with a calendar icon), 'On or before' (with a calendar icon), 'Limit results to the first interaction of the each case' (checkbox), 'Submit', and 'Reset'.

The Search Interactions parameters panel

Search Fields

There are three drop-down boxes which can be configured for searching interaction history. They are **Search Where**, **In Field**, and **Search For**.

This close-up shows the 'Search where' dropdown menu with 'anywhere' selected. The 'In field' dropdown is also visible, set to '-- Subject --'.

Search Where Options – This drop-down box allows the user to target how a match is made while searching. The default is anywhere within a field. The following options are available:

- a. Anywhere - This parameter will look for a match on the search term anyplace within the field. For instance, the search term ‘ab’ will return a match for ‘absolute’ and ‘fabulous.’
- b. Start - the start parameter will only look for matches at the beginning of the value. For instance, the search term ‘ab’ will return a match for ‘absolute’ but will not return ‘fabulous.’
- c. End - The end parameter will only look for matches at the end of the value. For instance, the search term ‘ute’ will return a match for ‘absolute’ and ‘salute.’

- d. **Entire** - The entire parameter requires an exact match on the full term. For instance, the search term 'absolut' will not return a match for 'absolute.'

In Field Options - The "In Field" parameter tells iService which fields you are searching. The default options are:

- a. **Subject** - Search among the subject lines of all interactions.
- b. **In Topic** - Will present a view of the topic tree, and the search will be limited to the topic selected.
- c. **All Properties** - Will search among all interaction properties that have been defined for the tenant, to which the agent has been granted access. In the example above, these would be Billable, Billable Minutes, and Use Code.
- d. **Interaction ID#** - Will search for a specific interaction based on its interaction ID.
- e. **Assigned To*** - Will search for interactions that are currently assigned to the agent selected. These parameters will return a list of agents within a drop down menu.
- f. **Resolved By*** - Will search for interactions that were resolved by the agent selected. These parameters will return a list of agents within a drop down menu.
- g. **In Segment** - Will search for interactions in the segment entered in the "Search For" box.
- h. **Agent Notes** - Will search within the Agent Notes area of interactions.
- i. **Interaction Status** - Will present a list of interaction statuses (Ignored, Private Note, Public Note, Queued, Resolved, etc.) and will search for interactions of a certain status.
- j. **Interaction Type** - Will present a list of interaction types (Agent Email, Agent Notification, Agent Response, Alert , etc.) and will search for interactions of a certain type.
- k. **Contact Login (email)** - You can search for history of a specific contact by entering their email or iService login in this field.
- l. **Interaction Body** - Will search within the interaction bodies.

In addition to the above standard search fields, all interaction properties are available for searching.

Search For Options - In this field, the desired alpha-numeric word or words can be queried for the selected criteria. If this is left blank, it will act as a wild card and return all interaction with any value for the In Field search criteria selected.

Limit By Date Options

The search can be limited to a date range by clicking in the boxes and setting the date desired. Interaction searches use the Created Date rather than the Resolved Date for interactions.

[Read more about interaction dates.](#)¹⁰²

Limit results to the first interaction of the each case

It's common to search subject lines for a reference number. However, a case may have dozens of interactions that are part of the case, including notifications and notes. Use this checkbox to return only the first interaction from the case. This search result gives you a list of cases instead of a list of all interactions.

Working with search results

Interaction search results are presented in a data table that you can modify, filter, and export.

Search Results

Excel Column visibility Show 10 entries Filter Results

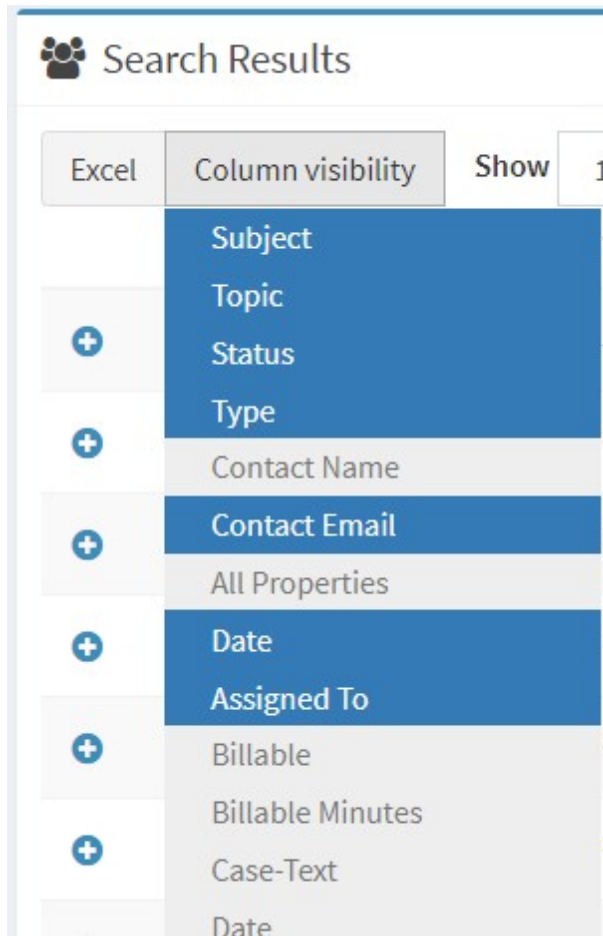
	Subject ↑↓	Topic ↑↓	Status ↓↑	Type ↑↓	Contact Email ↑↓	Date ↑↓	Assigned To ↑↓
+	[ref#: 1-1] Test1	_Spam	Resolved	Customer Email	customer1@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 37-37] Test10	s1topic2	Resolved	Customer Email	customer10@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 45-45] Test11	s1topic3	Resolved	Customer Email	customer1@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 47-47] Test12	s1topic2	Resolved	Customer Email	customer2@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 49-49] Test13	s1topic3	Resolved	Customer Email	customer3	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 51-51] Test14	s1topic3	Resolved	Customer Email	customer4@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 53-53] Test15	s1topic3	Resolved	Customer Email	customer5@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 21-21] Test16	_Spam	Resolved	Customer Email	customer6@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 24-24] Test17	s1topic1a	Resolved	Customer Email	customer7@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator
+	[ref#: 55-55] Test18	_Spam	Resolved	Customer Email	customer8@qavmmail02	2007-02-04 12:07:42 AM	Landlord Administrator

Showing 1 to 10 of 251 entries

iService interaction search results

Excel - you can export the search results table to an Excel file. Clicking this button will export the entire search result regardless of the pagination level you're using.

Column visibility - you can add or remove columns from the search results using this menu. The menu includes all custom interaction properties as well as the standard interaction properties.



Filter - Use the filter box to narrow the results displayed. The filter will match all rows in the search results regardless of the pagination level you're using.

Interactions in the results can be viewed by clicking on + to expand the interaction. When you expand a row, iService will display the [view mode](#) for the interaction.

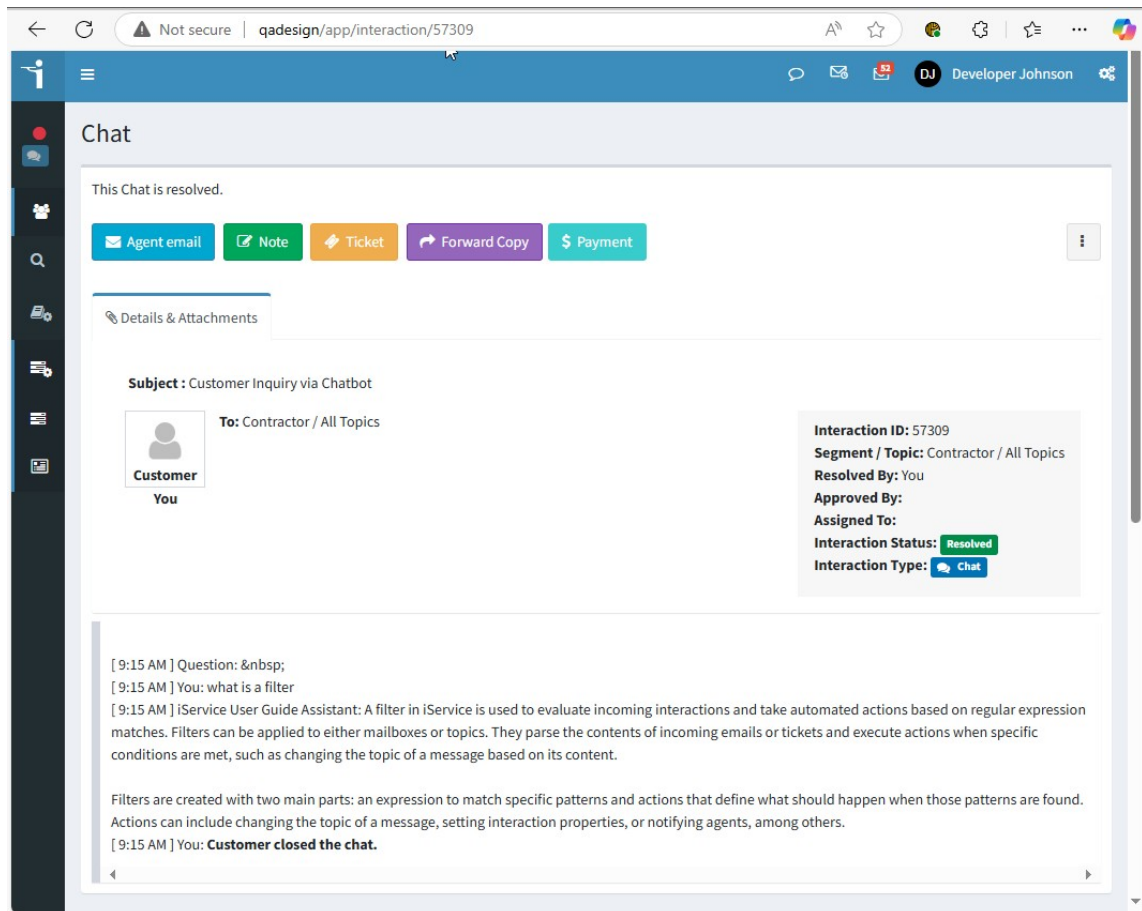
The options available will vary depending on the type of interaction and its status. Questions that are Unassigned will include a "Get This" link if you have the rights to take it. If the message is already assigned to you, an "Answer" button will appear instead of "Get This". Once a question is resolved, the only view available is the View Mode.

- Sharing a link to a single interaction

If you know the ID of an interaction that you want to share with another agent or administrator, you can use the /interaction page to share it. The page loads with the single interaction rather than the full search results table.

The format for loading interactions in the Interaction page is `app/interaction/###` where ### represents the ID of the interaction to share.

Here is an example.



Knowledge Base

6 Knowledge Base



iService includes a knowledge base that uses the topic tree structure for sharing articles to help customers find answers to frequently asked questions. Articles can be marked public or private to restrict visibility. Private articles are only viewable by agents while customers have access to public content. Users can subscribe to articles, similar to joining a mailing list. A notification can be sent to subscribers when changes are made. Users can also rate articles, which helps your content managers identify articles that need updating. Two built-in customer engagement centers can be used to integrate the KB content into your company website, or a separate support center (customerportal-treeview and customerportal-tabs).

Articles are created, edited, and deleted from the Knowledge Base page. This chapter describes how to use this page and is intended for knowledge base administrators. Your customers will not be using this page to access articles. They will use a customer portal that is branded for your enterprise.

Creating Articles

To create a new knowledge base article, click the add article button.



The new article panel will open as shown below. Enter your details and click the save button.

New Article

Subject: Shipping to Latvia 1 Access Level: Public 2

Choose Topic: Shipping 3

Attachments Article Properties Subscribers List Link Article

Drop files here or click to upload 4

📎 :
 🖼️ Image1.jpg (123KB) ✖
🖼️ Image2.jpg (30kb) ✖
📄 File1.pdf (40KB) ✖

Question

Draft Body Preview Variables & Stock Responses

B I U T_x |
 [List] [List] [List] [List] |
 [List] [List] [List] [List] |
 [List] [List] [List] [List] |
 [List] [List] [List] [List]

Format | Font | Size | A- | A+ | [Table] [List] [List] [List] | [List] [List] [List] [List] [List] [List] [List] [List] | Source

I'd like to get some appliances shipped to Latvia. Is it feasible to ship direct from your store to Latvia?

5

Answer

Draft Body Preview Variables & Stock Responses

B I U T_x |
 [List] [List] [List] [List] |
 [List] [List] [List] [List] |
 [List] [List] [List] [List] |
 [List] [List] [List] [List] |
 [List] [List] [List] [List]

Format | Font | Size | A- | A+ | [Table] [List] [List] [List] | [List] [List] [List] [List] | Source

It's not economical for us to ship direct to Latvia. But, we can provide free shipping to your US destination and you can package your items and do a direct shipment at a reasonable rate.

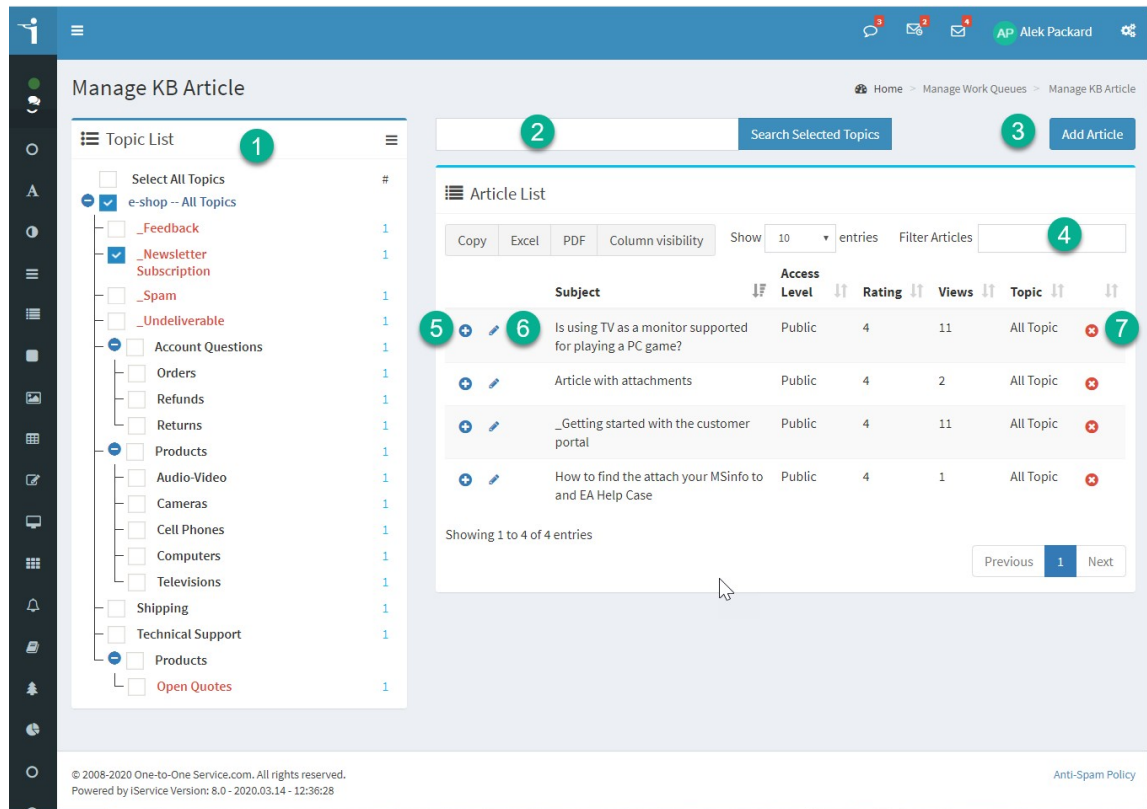
6

1. Enter a short description as the subject of the article.
2. Choose an access level for your article. Private articles can only be viewed by iService agents, while public articles can be viewed by customers and anonymous users.
3. Choose the topic for your article. Keep in mind that if you select a private topic, only agents will be able to view the article.
4. This section of the new article panel has three tabs: attachments, article properties, and link article. You can drag-and-drop file attachments or click to select them from your computer. Use the delete button to remove attachments. The article properties tab is used to categorize the information in your knowledge base to make it easier to find. The link article tab is used to link your article to related articles in the database.
5. Enter the details for the question portion of your article in this rich text editor.
6. Enter the details for the answer portion of your article in this rich text editor.
7. Click the save button to save your article.

Editing Articles

There are two ways to update existing KB articles: Quick update of summary information, and editing the article details. Use the quick edit pencil (6) to update the subject and access level of an article without expanding article details.

Use the Expand/Collapse icon (5) to edit the contents, change the topic, or attach files.



Editing an existing article

The page elements are as follows.

1. Articles are displayed in a similar format to the manage messages page. They are organized by topic and displayed when the topic is selected in the topic list. The hamburger icon in the top right of the topic list is used to expand and collapse the topic tree to provide additional space when working with articles.
2. You can search for articles to edit using the " search selected topics" box.
3. Use the add article button to add a new article to your knowledge base.
4. You can filter the list of articles using the filter box within the article list.
5. When you find the article that needs editing, click the + icon to expand the article. This opens the article details panel. See below for more details on full article editing.

- If you only need to edit the summary information (subject, access level, and topic), use the edit pencil next to the subject of the article. Clicking the pencil will toggle these three fields into edit mode. After you make your changes click the save button.



Editing the summary information for an article

- To delete an article, click the delete button to the right of the article information.

The Article Details Panel

When you expand an article, the article details panel is shown similar to the example below. Use this view to edit the full details of the article.

Checking order status public 0.0 831 Orders

Details & Attachments Subscribers List

1 Article ID : 10048 # Views : 831
Topic : Orders Article Creator : e-shop Administrator
Date Updated : 03/30/2011 4:40:38 PM

2 Drop files here or click to upload
(Maximum 10 MB upload at one time.)

3 Save

Question

Draft Body Preview 4 Stock Responses Close

B I U I_x | | | | | | | | | |

Format | Font | Size | | | | | | |

How do I check the status of my order?

5

Answer

Draft Body Preview 6 Stock Responses Close

B I U I_x | | | | | | | | | |

Format | Font | Size | | | | | | |

You can check the status of your order on our website at the following URL.

[Click here to check order.](#)

7

1. This section contains summary information and the topic for the article. You can change the topic by picking a new one and saving your changes.
2. You can drag and drop files here or select them from your computer by clicking this section.
3. Files that have been added are displayed below the file attachment section. To remove a file, click the delete button next to the file.
4. Use the stock response picker to insert pre-written text into the Question. If you have text that is commonly used within your articles, use this process to save time when creating or editing articles.
5. Create the question portion of the article in this rich text editor.
6. Same as 4 above, except your selections will be pasted into the answer portion of the article.
7. Create the answer portion of the article in this rich text editor window.

Using the Stock Response Picker

Stock responses provide a convenient way to insert frequently used content into your KB articles. For example, if you often use a table of information in your articles, you can create a table with a standard design and save it as a stock response. This saves you time when you're creating articles that use that content. To learn more about creating stock responses, visit the Stock Responses section of this user guide.

Using the stock response picker

There are two available sections to KB articles, a question and an answer. Each editor has its own stock responses picker, but the content is the same. Place your cursor inside the editor where you want to insert your content, then select the stock response from the picker. The content is inserted at the cursor location.

Limitations

The knowledge base doesn't support the use of iService variables, so do not insert variables into your predefined stock responses designed for use in the knowledge base. Also, the picker only presents stock responses that are within the article's segment.

Alert Message

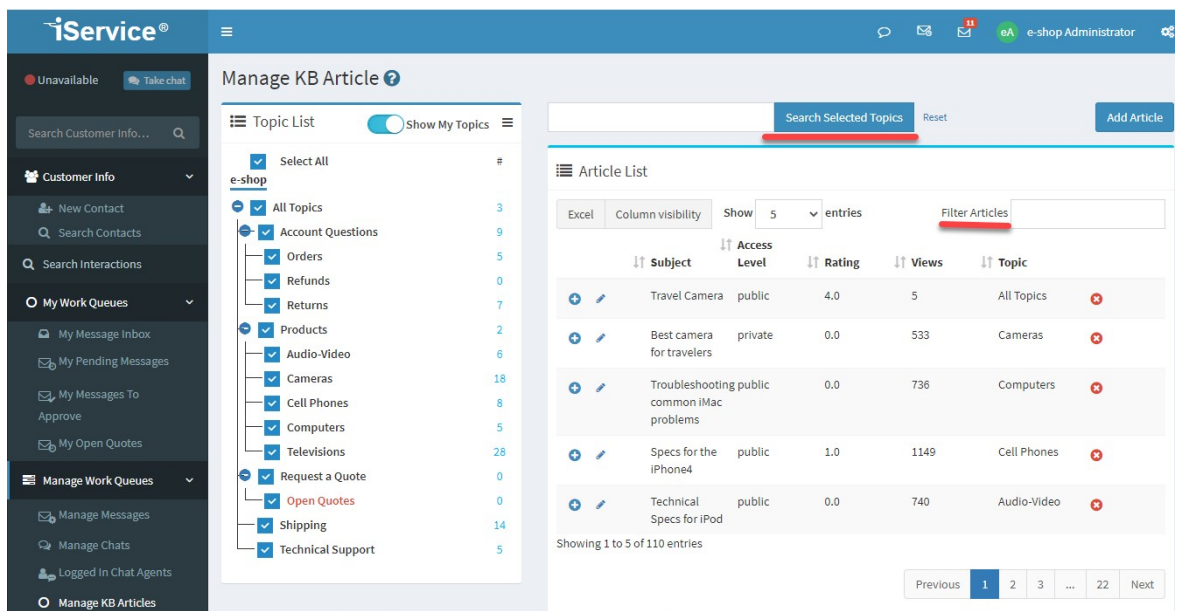
You must select a topic for your article before the stock response picker can be used. This is because responses are limited to an article's segment, and the segment isn't known until you assign a topic. You will see the notice below indicating a topic must be chosen when your article doesn't have a topic selected.



Alert message when a topic is not selected

Searching Articles

Use the search bar on top of the Manage KB Articles page to find articles. You can search the entire knowledge base, or limit your results based the topics selected. Matching articles are displayed within the Articles List. You can filter the article list using the filter box at the top of the list. As you type into the filter box, only matching articles are displayed.



— Displaying KB Properties in Columns

You can extend the view of your knowledge base by adding custom [knowledge base interaction properties](#)⁶⁴⁴. These properties allow you to view articles across any branch of the topic tree.

For example, consider a knowledge base that is organized around these topics:

1. Consumer Issues
2. Merchant Issues
3. Bank Issues

You might have relevant content for each audience within these topics. But, what if you need to classify that same content based on the stage of on-boarding such as Phase 1, Phase 2, and Phase 3? In this example, the content for all three topics could be viewed by the phase description. Instead of making subtopics for the phases, you can create a KB property named Phase that has value options of Phase 1, Phase 2, and Phase 3. Then you can associated that value with any article regardless of the audience. By sorting or filtering on that property, you could see all the Phase 1 issues regardless of their topic.

To display KB property values, use the Column Visibility button to choose the properties to display.

Select a property from Column Visibility to display it

ID	Subject	Access Level	Rating	Views	Topic	Date	Segment1	KB Property - Important
					s1topic1	2 years ago		False
					s1topic1	2 years ago		True
20536	Numbered	0			s1topic1	2 years		True

Displaying KB properties

This page is intentionally left blank.
Remove this text from the manual
template if you want it completely blank.

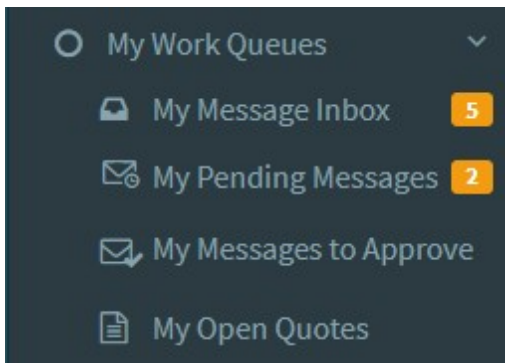
My Work Queues

7 My Work Queues



The My Work Queues section of iService contains all of your work in progress. The links shown in this section will depend on how your tenant is configured, but will always include these pages: [My Message Inbox](#)¹⁹⁷ and [My Pending Messages](#)¹⁹⁸. The My Messages to Approve link is only provided to managers that have the quality assurance function. The My Open Quotes page is only available if your segment has the iService [Quote and Follow-up process configured](#)³⁹⁹.

When these pages have interactions in their lists, a badge is displayed showing the number of items. If you have no work in the page, the badge is not displayed.



7.1 My Message Inbox

iService® Landlord Administrator

My Message Inbox

Message List

Copy Excel PDF Column visibility Show 10 entries Filter Inbox

Contact Name	Date	Subject	Segment	Topic
John Smith	24 minutes ago	[ref#: 26034-26034] Looking for huge tv	Segment1	s1topic1
John Smith	4 days ago	[ref#: 26019-26019] Need help	Segment1	s1topic1
John Smith	4 days ago	[ref#: 26016-26016] Need help	Segment1	s1topic1

Showing 1 to 3 of 3 entries

Previous 1 Next

Message Details History Contact Details

Send Resolve Forward Save Change Topic Spam Cancel

Email Addresses & Subject for Response Details & Attachments Interaction Properties

From: -- Default Mailbox --

To: customer1@1to1service.com

Subject: Re: [ref#: 26034-26037] Looking for huge tv

Drop files here or click to upload (Maximum 10 MB upload at one time.)

Draft Body Preview Variables & Stock Responses

B I U X | [List Icons] | Format | Font | Size | [Color Icons]

On 2/10/2020 8:05:05 PM, John Smith <customer1@1to1service.com> wrote:
I'm looking for the largest screen possible. I'm thinking drive-in theatre size. You got that?

Private Comments

1. The My Message Inbox provides a list of all questions that are assigned to you. You can collapse and expand the list of assigned questions by clicking on the chevron icon.
2. The message list is in a standard [data table](#)^[58]. You can export the list, add and remove columns, and filter the list to find a specific question. Click on one of the questions to open the message details panel and compose an answer.
3. The message details panel uses the action mode layout for composing your answer. See the [Understanding Interactions](#)^[105] chapter for an explanation of the actions and how to use this panel.
4. The history for the contact that you're responding to is shown in this tab. It is identical to the history shown in the [Contact History](#)^[166] page.
5. The contact details for the contact that you're responding to is shown in this tab. It is identical to the [Contact Details](#)^[162] page.



Never paste rich text from MS Word directly into the rich text editor, because it will include custom formatting that only displays properly in Word.

7.2 My Pending Messages

When you check the Expect Customer Reply option in your response, a copy of your answer is placed in this list. You can send follow-up requests from this page, and your requests will quote your original answer. When the contact replies to your agent response, their question will be automatically assigned to you and your pending message will be removed from the list.

The page looks and functions identically to the My Message Inbox, except it is a list of your answers instead of customer questions.

The screenshot displays the iService user interface for managing pending messages. On the left is a dark sidebar with navigation options like 'Customer Info', 'My Work Queues', and 'Manage Work Queues'. The main content area is titled 'My Pending Messages' and features a 'Message List' table with one entry: 'Developer tetsting' from '15 days ago' with subject 'Testing Quick Agent email'. Below the list is a detailed view of the selected message, showing fields for 'From', 'To', and 'Subject', along with action buttons like 'Send', 'Resolve', and 'Forward'. At the bottom is a rich text editor for drafting a response, containing a preview of the incoming message and a 'Private Comments' section.

7.3 My Messages To Approve



Some customer service organizations like to review the work of a new service representative before they're allowed to send email messages to customers. iService includes a special user type that removes a CSR's ability to send messages directly to customers. These CSRs are provided a Submit button instead of a Send button. Their answers are set to a Pending status waiting for manager approval. iService routes these proposed answers to QA Managers for review and approval or rejection. The QA manager functionality is granted by a special [User Type](#)^[615] access right.

The QA CSR Interface

The interface for QA CSRs is identical to other CSRs, except for the submit button. Questions are [assigned](#)^[130] to the QA CSR agent just like any other CSR. The difference for this user type is that the Send button is removed and replaced with a Submit button. The submit button saves the proposed answer and sets the question status to Pending.

The submit button does not include advanced options such as secure messaging, suppressing reference number, or expect customer reply. Those actions are added by the manager when approving the answer.

The screenshot displays the QA Manager interface for composing a message. At the top, there are tabs for 'Message Details', 'History', and 'Contact Details'. Below these are action buttons: 'Submit' (highlighted with a green box), 'Forward', 'Save', 'Change Topic', 'Spam', and 'Cancel'. The message form includes fields for 'From' (set to '--Default Mailbox--'), 'To' (Jacob.Smith@1to1Service.Com), 'CC' (with an 'Add BCC' link), and 'Subject' (containing a reference number and the text 'looking for low cost tv'). A file upload area is present on the right with the text 'Drop files here or click to upload' and a note '(Maximum 10 MB upload at one time.)'. Below the form, there are tabs for 'Draft Body' and 'Preview', and a 'Variables & Stock Responses' button. A rich text editor toolbar is visible, and the draft body contains the text 'Hello, I'm looking for s small TV for our bedroom, but don't want to spend more than \$100. Do you have any option for me to'.

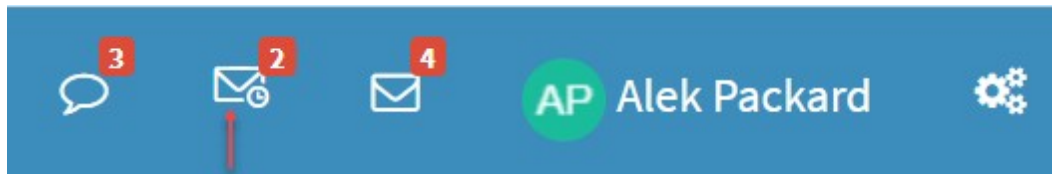
The submit button for QA CSRs

The QA Manager Interface

Answers that have been submitted by a QA CSR are routed and managed similar to customer questions. They're queued within their topic and assigned to QA Managers using the Get Next QA button, or with the Mass Update action from the Manage Messages page.

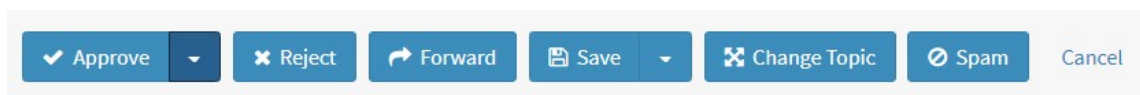
The Get Next QA Button

QA Managers can retrieve and review proposed answers by clicking the Get Next QA button.



The Get Next QA button

When the get next QA button is clicked, the proposed answer will be displayed within the “My Messages to Approve” page, and will contain Approve and Reject buttons.

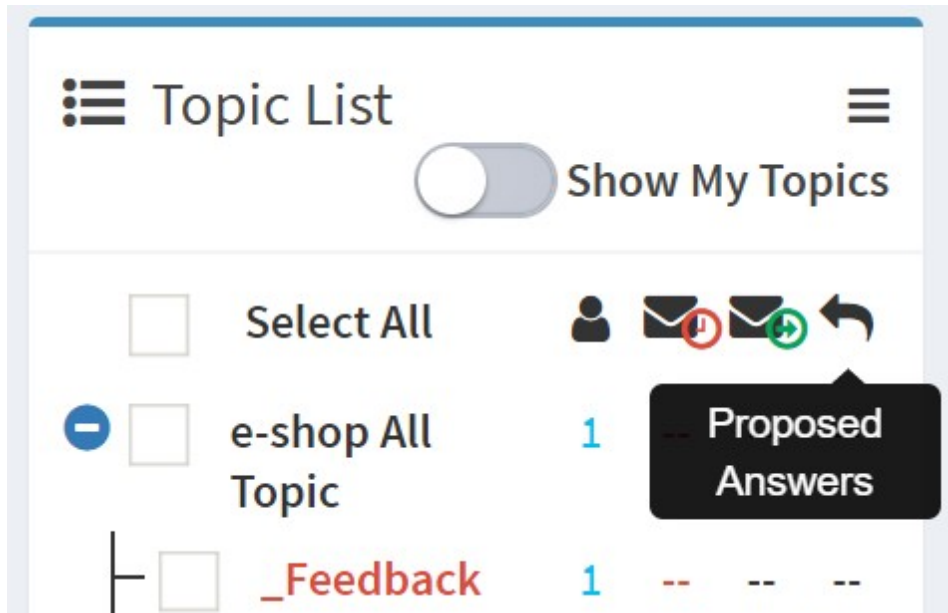


The Approve action buttons for QA

The manager can approve the message and allow it to be delivered to the customer, or they can reject the message and it will be returned to the QA CSR for correction. Comments for the agent can be entered into the private comments area. The “Approve” button works identically to the Send button for the manager. Answers that are sent to customers using the QA process will show the QA CSR as the assigned agent, and the QA manager as the approver.

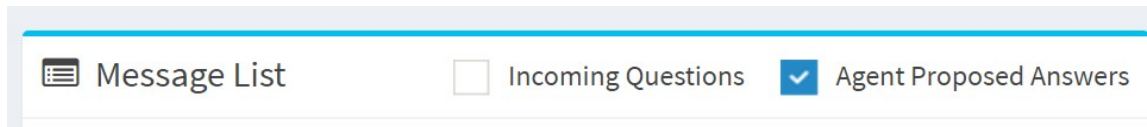
Approving Answers in Manage Messages

QA managers will see an additional column in their manage messages topic tree that displays the number of answers waiting for approval.



The proposed answers column in the topic list

Managers can toggle their message list using the Agent Proposed Answers checkbox to display these messages.



The proposed answer toggle

Managers can use the mass update actions to approve multiple messages at one time.

7.4 My Open Quotes



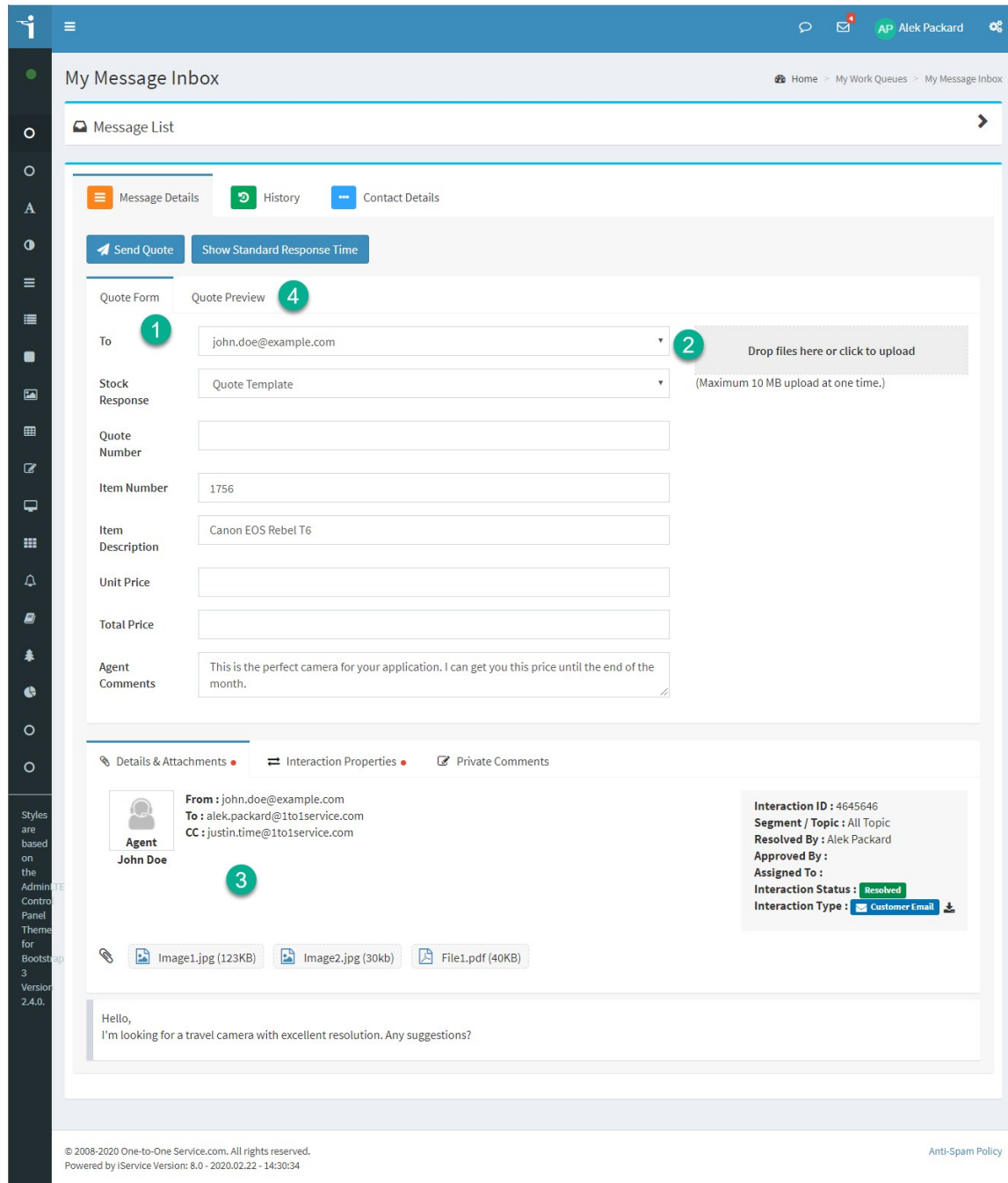
When your segment is configured for the quote and follow-up process, iService will present a different interface for quote requests and regular questions. Instead of composing an answer in the rich text editor, a special quote form is substituted to gather all the inputs and select a quote template. Your organization can prepare an unlimited number of quote templates to suite the lines of business that you quote. Your quote configuration will designate special topics designed for quote requests. Any question that you receive in one of these topics will use the quote form for your answer.

Your iService administrator can create an unlimited number of quote topics dedicated to each type of quote that you send. The inputs required for the quote are customizable for each topic.

After you preview and send your quote, a copy of your quote is moved into your My Open Quotes page. You can use your My Open Quotes page to track your quotes that are waiting for customer acceptance. Actions are built into the quote ticket to send quick follow up emails and document call notes.

Your quotes will be aggregated with quotes from other agents and displayed to managers in the [Manage Open Quotes](#)²²⁵ page. See the [Quote Admin](#)³⁹⁹ page for details on creating quote configurations.

Preparing and sending a quote



Composing a quote in the My Message Inbox page

1. **Quote Form** - When you open a question in one of your quote topics, your message details panel will be replaced with a special quote form. The quote form will include inputs for all of the information needed to create your quote. Pick the appropriate stock response and then enter the required values for your quote. If the customer

entered details about the request into a customer ticket form, that information will be pre-populated for you in this page.

2. **Attachments** - If you need to add attachments to your quote, you can drag and drop them here. Or, click this area to select them from your computer.
3. **Original Question** - The original question is shown below the quote form.
4. **Preview Quote** - After you've entered all of the inputs for your quote, click the quote preview tab to view the quote before you send it. An example of what your quote might look like is shown below.

My Message Inbox

Home > My Work Queues > My Message Inbox

Message List
>

Message Details
History
Contact Details

Send Quote
Show Standard Response Time

Quote Form

Quote Preview

e-shop

the shop best place for shopping

Your eShop product quote is below

Thanks for requesting a price quote from eShop. All quotes are valid for 30 days, unless otherwise stated in the quotation. If you have any questions please contact us at [217-555-5555](tel:217-555-5555) during business hours (7am – 7pm ET), or reply to this email with your question. You can also chat with one of our sales specialists during normal business hours by [clicking here](#).

Quote Number: 3250	Quote Total: \$ 423.75
Quote Date: 2/12/2019	

Qty.	Item No.	Desc.	Unit Price	Total Price
1	1756	Canon EOS Rebel T6	\$ 399	\$ 423.75

Agent Comments

This is the best price we will have on this camera all year.

Please Note

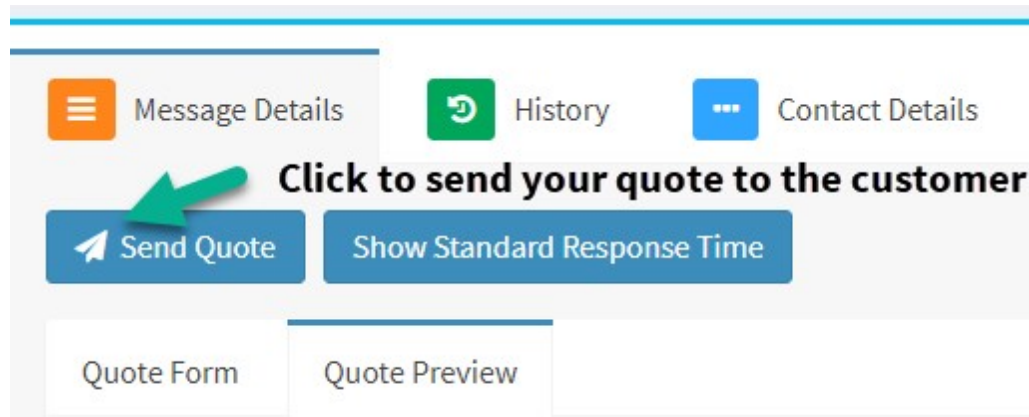
- We accept credit cards (Mastercard, VISA, American Express, Discover, and Diners Club International), PayPal, and Bitcoin payment methods.
- A delivery date will be established after payment is confirmed.
- Configuration changes to the product quoted will require a new price quote.
- We guarantee the lowest price on any product we sell. Period.

YOUR FEEDBACK IS IMPORTANT TO US

Let us know how we're doing.

Styles are based on the AdminTE Control Panel Theme for Bootstrap 3 Version 2.4.0.

After you have previewed your quote and are ready to send it, click the Send Quote button.



Using the My Open Quotes page

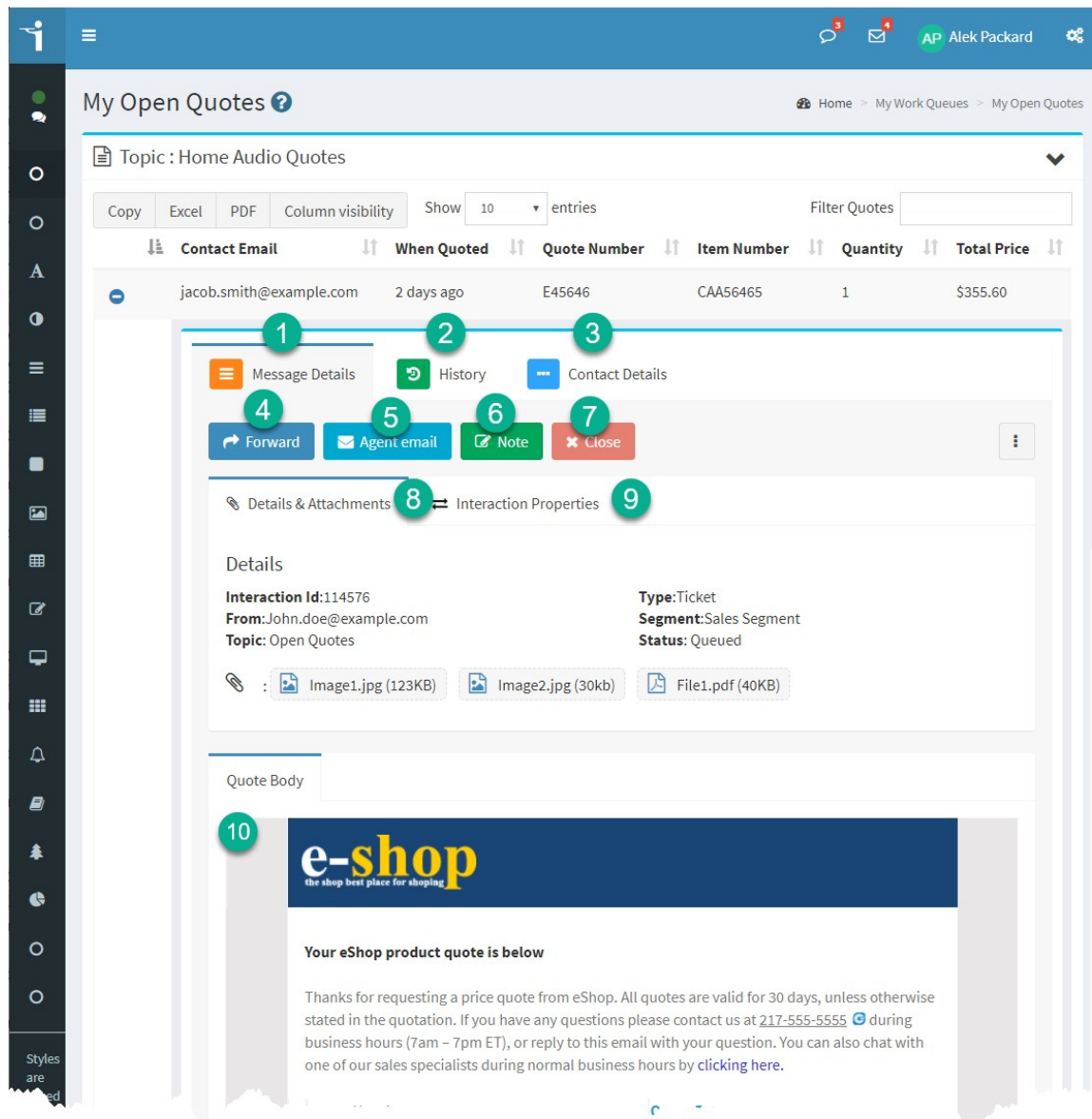
When you send a quote to your customer, iService resolves their original request. It's important to track every quote that you send and follow-up with the customer to get a decision. To facilitate that process, iService creates a new ticket for tracking your quote response. The ticket is placed into a topic designated for following up on quotes.

The screenshot displays the 'My Open Quotes' interface. At the top, there's a navigation bar with a user profile 'Alek Packard'. Below it, the page title 'My Open Quotes' is followed by a breadcrumb trail: 'Home > My Work Queues > My Open Quotes'. The main content area is divided into two sections, each representing a different quote topic. The first section is titled 'Topic : Home Audio Quotes' and contains a table with two rows of quotes. The first row is expanded, showing a plus sign in the 'Contact Email' column. The second section is titled 'Topic : Electronics Quotes' and also contains a table with two rows of quotes. Both tables have columns for 'Contact Email', 'When Quoted', 'Quote Number', 'Item Number', 'Quantity', and 'Total Price'. The page includes navigation controls like 'Previous', '1', and 'Next' buttons.

The My Open Quotes page with two quote topics

1. In the example above, the agent has sent quotes for two topics. A separate panel is displayed for each topic because the inputs for quotes are typically different for each topic.
2. To view a follow up ticket, click the + to expand the row.

Working with follow up tickets



Working with a follow-up ticket

Follow-up tickets are designed to make it easy to keep track of your efforts. They provide access to important customer information, forms to document your follow-up inquiries, and actions for sending follow up emails. All actions are includes within the quote request case.

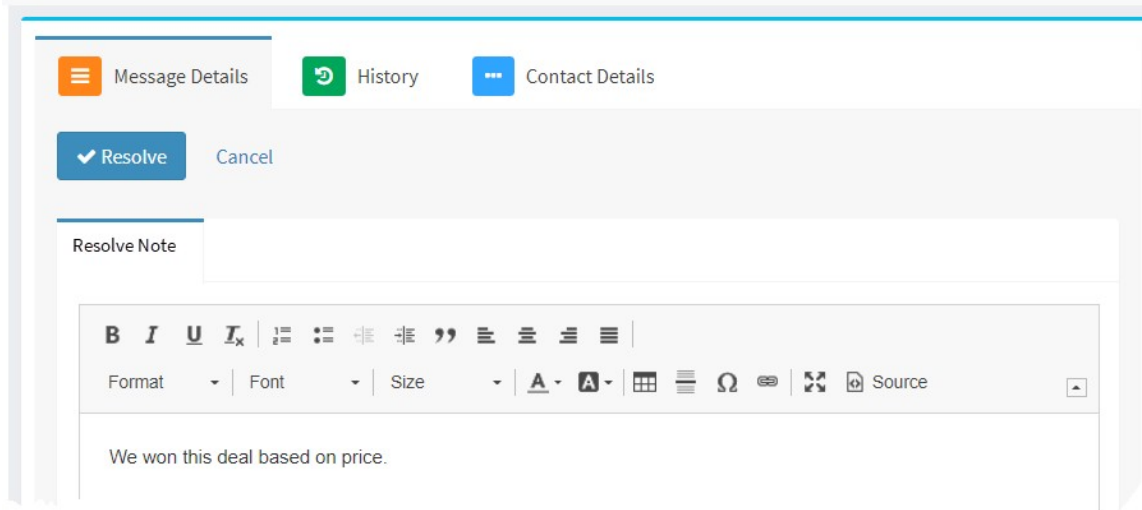
Follow-up tickets have the following sections.

1. **Message details** – this section includes details about your quote and links to follow-up actions.

2. **History** – this tab provides the complete history for all of your interactions with this contact. This includes conversations for other topics besides the quote.
3. **Contact details** – you can use the contact details section to find the customer's phone number or other contact details. This is the same form as the contact details from the customer info section.
4. **Forward** – use the forward button to change the assignment of the follow-up ticket. If you unassign the ticket from yourself, it will be removed from your my open quotes page.
5. **Agent email** – use this action to send a quick email to the customer.
6. **Note** – use the note action to document your call notes when making follow-up calls.
7. **Close** – use the close button when the quote has been won or lost. This button opens a new panel where you can document the resolution for your quote.
8. **Details and attachments** – this section provides details about the tracking ticket and copies of attachments from the quote.
9. **Interaction properties** – this is the standard interaction properties tab that you see on any question. This will include all of the quote inputs and any other custom properties that were associated with this quote queue.
10. **Quote body** – this is a copy of the quote that you sent to the customer.

Closing your follow-up ticket

Your quote will eventually be either accepted or rejected. When that happens you will want to close the follow-up ticket and document the resolution. When you click the Close button in the tracking ticket, a resolve panel will open and give you an opportunity to document the final resolution. You can set a tracking code (e.g., "Won" or "Lost") to provide detailed metrics on your quote success.



Closing a tracking quote

Managing Work Queues

8 Managing Work Queues



The Manage Work Queues section of iService includes pages for managing the work of other people. These pages allow you to see the status of work that is in progress, and agents that are logged in to iService. The functionality of these pages is similar to the My Work Queue pages, but in most cases you can perform actions on multiple interactions at one time.

Access to these menus is typically restricted to the CSR Manager user types, because they allow agents to work on questions out of order. This presents the risk of agents "cherry picking" the easiest questions and leaving the more difficult questions for others. However, there are cases where it can be more efficient to do work using these pages directly.

When answering questions or taking chats in these pages, agents should use care when they take questions that are already assigned to another agent. That agent's work can be lost if the interaction is taken before the changes are saved. This is less of a risk with iService chat, because you can see the ongoing conversation in real time and the need for saving work is minimal.

8.1 Manage Messages



The Manage Messages page lists the unresolved questions and proposed answers waiting for approval for all the segments that you can access. It includes a mass update panel that allows you to take actions on multiple messages at once. The page shows all topics in a topic tree in the left side of the page for every segment that you've been granted segment access. Select the topics that you need to monitor from the Topic List to display their messages in the message list to the right.

The page updates in real-time as changes occur (new messages arrive, messages are answered, messages are assigned, etc.), so there is no need to reload the page to see changes. If your tenant has color coding configured for service levels, the date column will change color to show messages that are beginning to exceed your specified time frames.

NOTE: If your tenant is receiving a high volume of incoming questions (new question every 60 seconds) you may notice your answer panel moving as you are trying to compose your response when using the "Get This" button. This is because new rows are being added above your selected message. There are two workarounds for this scenario. You can sort the message list in ascending order instead of the default descending order. This will cause new messages to appear below your selected interaction. The other option is to use the mass update panel to compose your response.

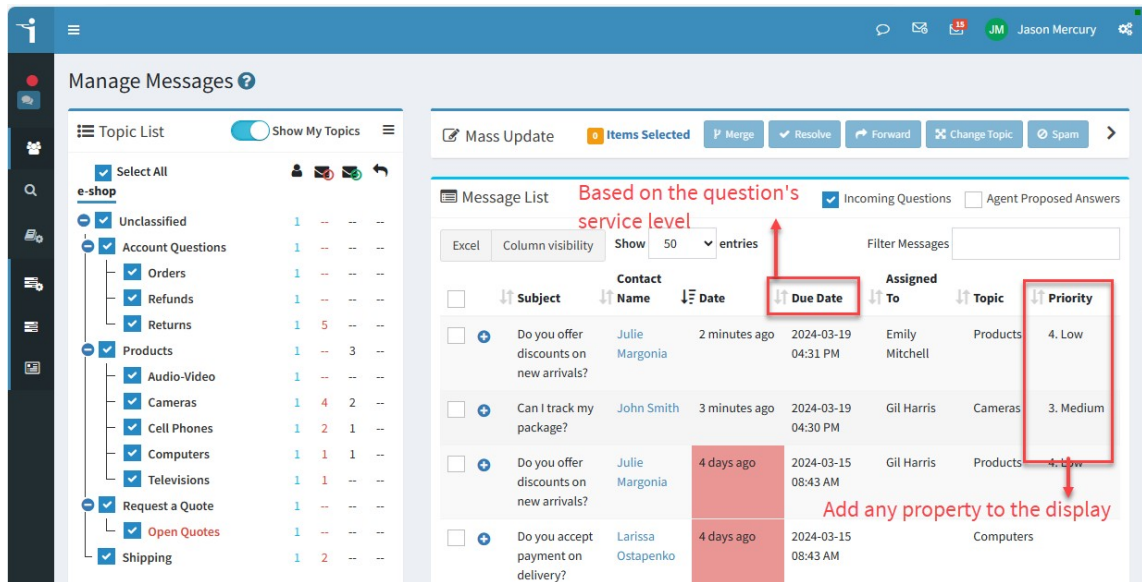
The manage messages page is a customized search result. You can reproduce the same lists as the manage messages page using the [Search Interactions](#)¹⁷⁶ page. The searches used to select messages are shown below.

The questions shown in the manage messages pages are selected using the following Search Interactions query: `[interaction type = customer email OR customer ticket OR agent ticket]AND[interaction status = unassigned OR queued]`

The proposed answers shown in the manage messages page are selected using the following search.

```
[interaction type = agent response OR agent email]AND
[interaction status = pending]
```

The Manage Messages Page Layout

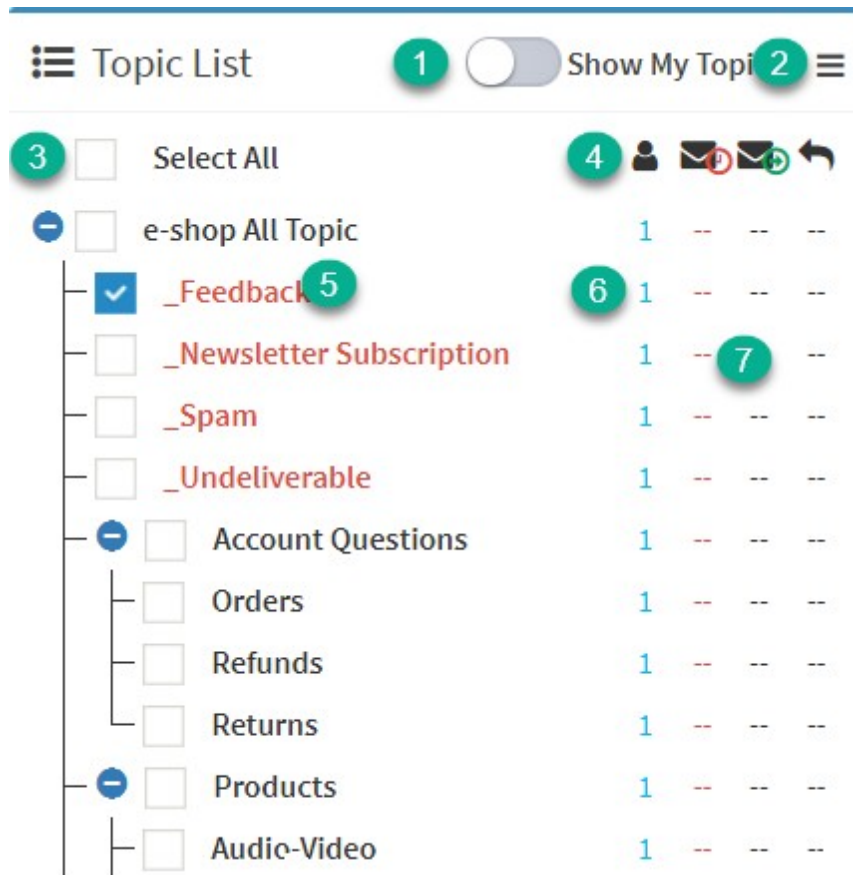


The Manage Messages page

The manage messages page has three sections: the topic list, the mass update panel, and the message list. The mass update panel is described in the section below. Selecting a topic on the left will show a listing of all unanswered questions in the Message List panel to the right.

Using the topic tree

The topic tree is designed to provide a quick view of the status of your message queues.

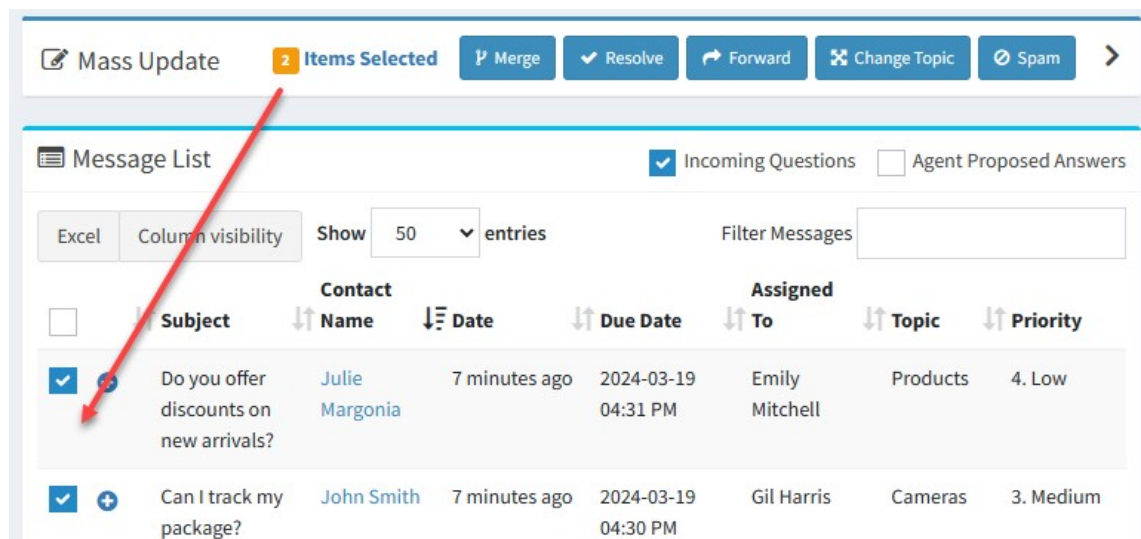


1. By default, the Show My Topics switch is turned on, which limits the display of topics to those that match your skills. You can see all topics in all segment that you can access by turning off this switch.
2. Sometimes you need more room when composing answers. Click the hamburger button at the top of the topic list to collapse this panel to the left. On mobile display, the panel will collapse up instead of to the left.
3. Click the topics that you want to monitor. Or, use the Select All check box to choose every topic.
4. There are four columns listed for each topic. These columns tell you the number of agents available with the appropriate skills, questions that have not been assigned, questions that are assigned, and proposed answers waiting for review.
5. Private topics are shown in red. These topics are only viewable by agents. Questions and answers in these topics are not viewable by the customer.

6. If you hover over the number of agents, iService will display the names of all agents logged in for this queue in a tooltip.
7. The number of unassigned questions is shown in red, while the other columns use the standard color.

Using the mass update panel

The Mass Update panel displays the actions from the [Action Mode](#)¹⁰⁵ split into two panels. The actions that can be used without composing a response are shown separately in the panel heading. These actions have been pulled out separately so that you can perform mass updates without needing to expand the panel. The number of items you've selected for mass update are shown in the panel.



The collapsed mass update panel

If you need to compose a response, first select your messages and then expand the composition panel as shown below. The action buttons are disabled until an interaction is selected.

To learn more about actions, see the [Understanding Interactions](#)¹⁰⁷ chapter.

Mass Update 2 items selected Resolve Forward Change Topic Spam

Send Private Note Public Note Save Draft

Email Addresses & Subject **Interaction Properties**

From -- Default Mailbox --

To

Add CC Add BCC

Subject

Drop files here or click to upload
(Maximum 10 MB upload at one time.)

Draft Body **Preview** Variables & Stock Responses

B I U T_x | **¶** **☰** **☰** **☰** **☰** **☰** **☰** **☰** |

Format | Font | Size | **A** **A** | **☰** **☰** **☰** **☰** **☰** **☰** | **Ω** **☰** **☰** **☰** **☰** **☰** | **Source**

Type your answer here and a custom response will be sent to each recipient. iService will insert the quoted body of the question below your answer. Each recipient will receive their own response.

Private Comments

Message List Incoming Questions Agent Proposed Answers

Excel Column visibility Show entries Filter Messages

Subject ↑↓ **Contact Name** **Date** ↓↑ **Assigned To** ↑↓ **Topic** ↑↓

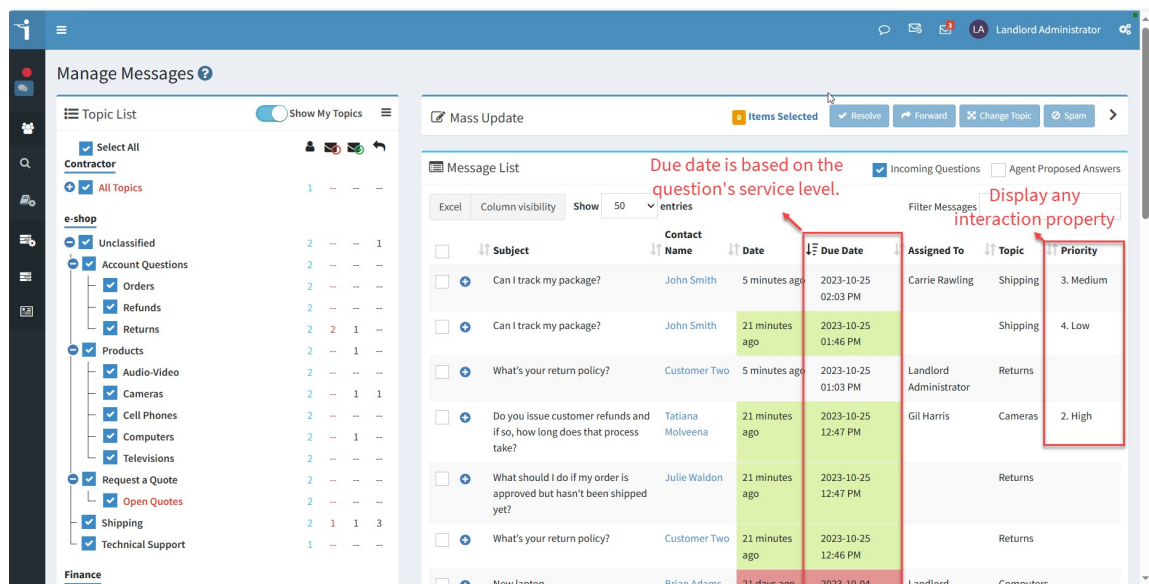
Working with the message list

The message list shows all of the unresolved questions for the topics that you've selected. The list uses a datatable that you can be sorted, filtered, and altered as needed. See the [Working With Datatables](#)⁵⁸ chapter for information on datatable features.

Use the Column Visibility button to select the columns to display. You can include any interaction property, like Priority, as a column in the message list. A special value, Due Date, can also be added to your view. The Due date is the creation time of the question plus the lowest [service level](#)⁶⁰³ to that is relevant for the question.

When you expand a row in the message list, iService displays the view mode of the question.

Learn more about working with the [View Mode](#)¹⁰⁴.



Viewing the manage messages page

Color coding for service levels

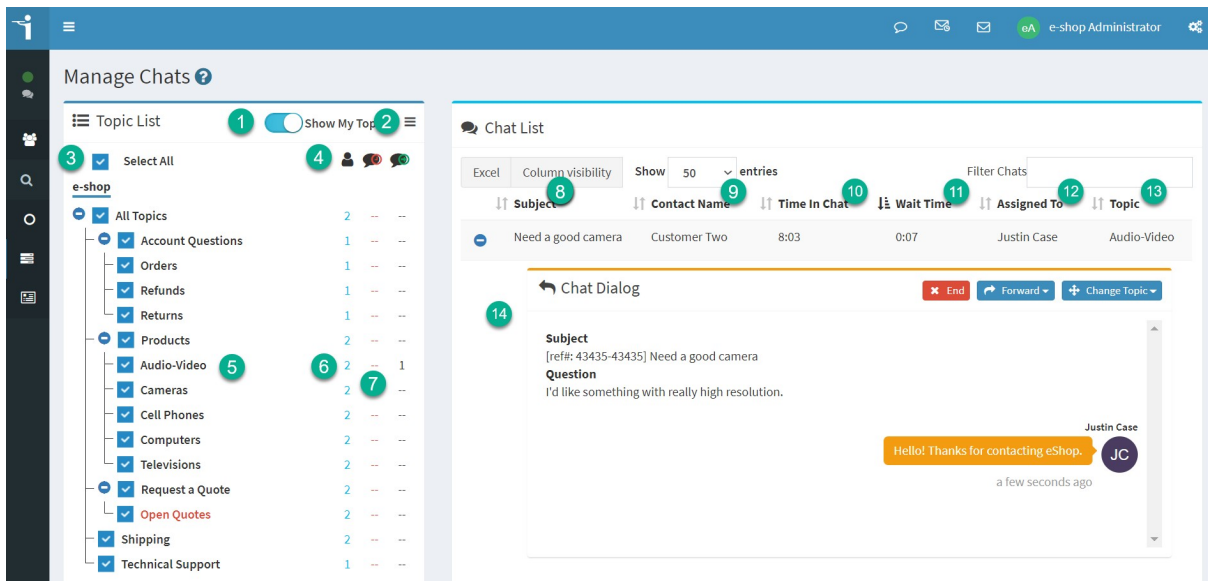
You can set custom colors and time frames for tracking your service levels in the [Agent Interfaces](#) settings page. The colors specified for each time bucket are used to color the Date column.

The screenshot shows a 'Message List' interface with a table of messages. The table has columns for Subject, Contact Name, Date, Assigned To, and Topic. The Date column is color-coded based on the time elapsed since the message was received. The interface also includes a search filter, a 'Show 50 entries' dropdown, and checkboxes for 'Incoming Questions' and 'Agent Proposed Answers'.

Subject	Contact Name	Date	Assigned To	Topic
Need help	John Doe	9 days ago	Landlord Administrator	s1topic1a
Looking for huge tv	John Doe	5 days ago	Landlord Administrator	s1topic1
Where's my refund!	John Doe	3 days ago		s1topic1
Update my preferences please	Customer 5	21 minutes ago		s1topic1
Job openings	Customer 9	18 minutes ago		All Topics
Where's my shipment	Customer 8	3 minutes ago		s1topic12

8.2 Manage Chats

The Manage Chats page lists all waiting and assigned chats, as well as all chat agents available for each topic. The manage chats page is similar to the Manage Messages page, except the actions and view of chats are designed for chat interactions. Agents that have the Chat.Supervise access right in their user type can view the Manage Chats page.



The Manage Chats page

Topic List

You can see the status of all of your chat queues in the topic list. Select the topics that you want to monitor, and a list of their chats will be displayed in the chat list to the right.

1. **Show My Topics:** By default, the Show My Topics switch is turned on, which limits the display of topics to those that match your skills. You can see all topics in all segment that you can access by turning off this switch.
2. **Collapse Topic List Panel:** Sometimes you need more room when viewing chats. Click the hamburger button at the top of the topic list to collapse this panel to the left. On mobile display, the panel will collapse up instead of to the left.
3. **Select All:** Click the topics that you want to monitor. Or, use the Select All check box to choose every topic displayed.
4. **Topic Status:** There are three columns listed for each topic. These columns tell you the number of agents available to chat that have the required skills, number of chats that are waiting for an agent, and the number of chats in progress.
5. **Selected Topic:** When you select a topic, the waiting and active chats will be displayed in the Chat List to the right.

6. **Available Agents:** If you hover over the number of agents, iService will display the names of all agents logged in for this queue in a tooltip.
7. **Waiting Chats:** The number of waiting chats is shown in red, while the active chats use the standard color.

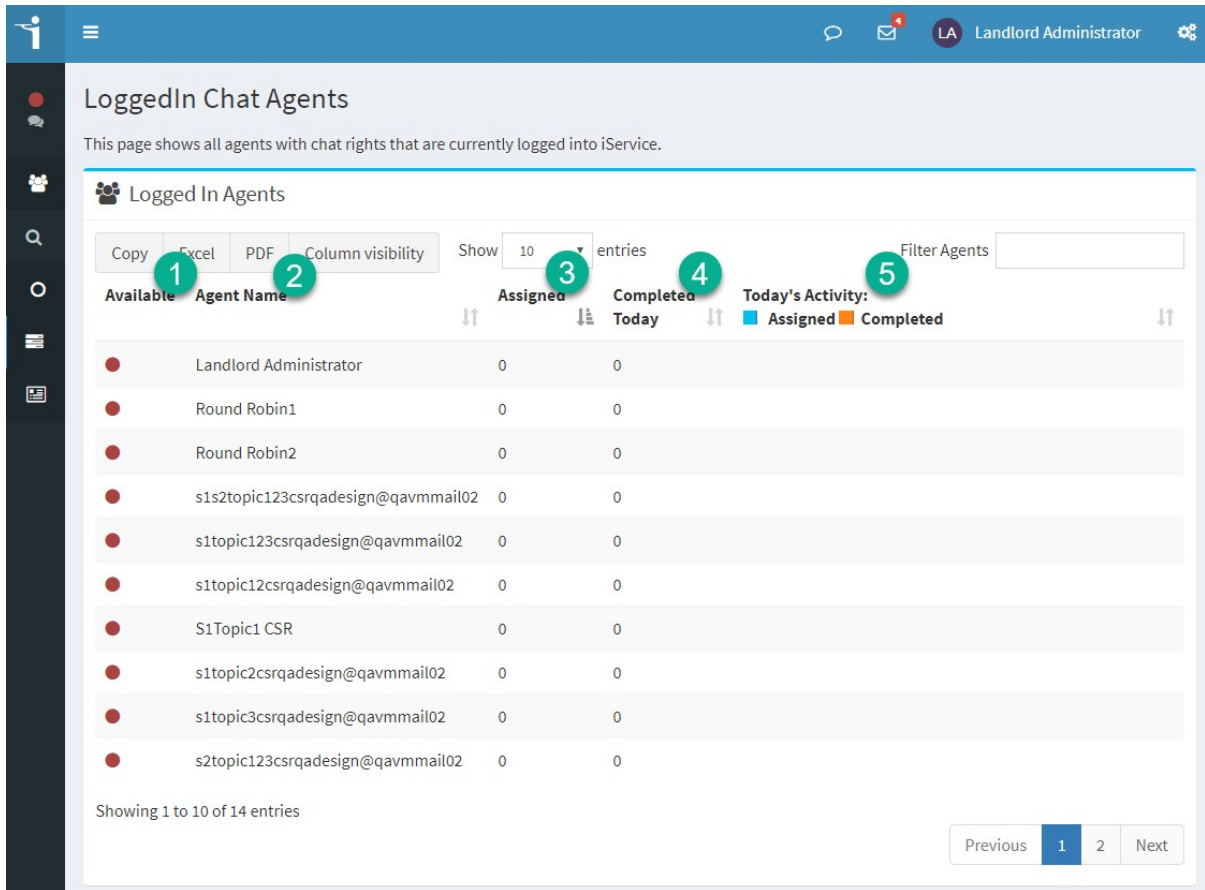
Chat List

8. **Subject:** The subject of the chat entered by the customer or selected from a menu in the customer chat window.
9. **Contact Name:** The name of the customer that is chatting.
10. **Time in Chat:** The time since the initial operator accepted the chat. This is updated in real-time on the chat supervise page.
11. **Wait Time:** The time the customer waited before their chat request was accepted. This is updated in real-time until the chat is assigned.
12. **Assigned To:** The iService Agent currently assigned to the chat.
13. **Topic:** The topic of the chat.
14. **Chat details:** You can monitor the chat in real-time from this view. You will see comments is there entered by the customer and the agent. You can take all of the same actions inside the chat, or you can use the mass update actions for multiple chats.

8.3 Logged In Chat Agents

It's important to know how many agents are available to handle customer chat requests. While the Manage Chats page provides details on the number of agents available per topic, it does not indicate how many agents are unavailable that could come online for helping with chats. The Logged in Chat Agents page shows allow agent with the chat access right, regardless of their current availability status. It also provides an overview of the number of active and historical chats they've handled since the beginning of the day (i.e., midnight).

The Logged in Agents page lists all iService agents that have the Chat.Answer right that are logged into iService.



The Logged In Chat Agents page

- 1) Available:** This column shows the status of all chat agents that are logged in. Available agents are shown in green, and agents that have set their status to unavailable are shown in red.
- 2) Agent Name:** The display name for the agent.
- 3) Assigned:** The number of chats that are currently assigned to the agent.
- 4) Completed Today:** The number of chats the agent has completed today (since midnight).
- 5) Today's Activity:** This is a graphical representation of the assigned and completed to date columns.

8.4 Manage Open Quotes



When your segment is configured for the quote and follow-up process, iService will present a different interface for quote requests than regular questions. Instead of composing an answer in the rich text editor, a special quote form is substituted to gather all the inputs and select a quote template. Your quote configuration will designate special topics designed for quote requests. Any question that you receive in one of these topics will use the quote form for your answer.

When a quote is prepared and sent, a special tracking ticket is created for the open quote. This tracking ticket is used to streamline the follow up process and document the final resolution of the quote. Agents can see their own quote follow up ticket in their [My Open Quotes](#)²⁰⁴ page.

The Manage Open Quotes page provides a summary of all tracking tickets created by every agent in your segment. A separate panel is shown for each follow-up topic in your segments. The panel is identical to the My Open Quotes page, except the assigned agent is shown.

Manage Open Quotes ? These panels are identical to the My Open Quotes page, except they show the Assigned To agent.

Home > Manage Work Queues > Manage Open Quotes

Topic : Home Audio Quotes

Copy Excel PDF Column visibility Show 10 entries Filter Quotes

Contact Email	When Quoted	Assigned To	Quote Number	Item Number	Quantity	Total Price
robert.williams@example.net	4 Days ago	alek.packard@1to1Service.com	D45646	AAA56465	1	\$255.60
howard.smith@example.net	2 days ago	jacob.smith@1to1Service.com	E45646	A56465	1	\$355.60
john.doe@example.com	3 Days ago	jacob.smith@1to1Service.com	E45646	CAA56465	1	\$355.60

Showing 1 to 3 of 3 entries

Previous 1 Next

Topic : Electronics Quotes

Copy Excel PDF Column visibility Show 10 entries Filter Quotes

Contact Email	When Quoted	Assigned To	Quote Number	Item Number	Quantity	Total Price
julie.persuavia@example.com	2 days ago	jacob.smith@1to1Service.com	A45646	AA56465	1	\$355.60
howard.smith@example.net	3 Days ago	stacey.muffilson@1to1Service.com	E45646	CAA56465	1	\$355.60

Showing 1 to 2 of 2 entries

Previous 1 Next

The Manage Open Quotes page

Your iService administrator can create an unlimited number of quote topics dedicated to each type of quote that you send. The inputs required for the quote are customizable for each topic. See the [Quote Admin](#) page for details on creating quote configurations.

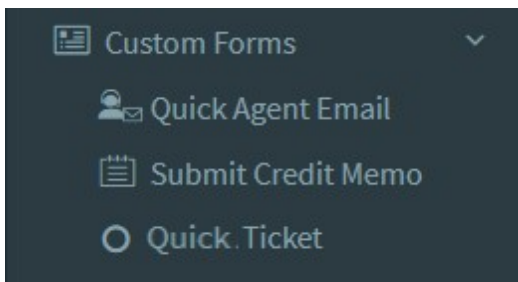
Custom Forms

9 Custom Forms



iService includes a form building component for creating custom forms to support your workflow. In addition to your own custom forms, there are several built-in forms that you can configure for sending agent emails, submitting credit memo requests, and generating quotes. Links to these customized forms are shown in the custom forms menu after they are configured.

After you configure the built-in forms, a link is automatically added to this custom forms menu. To add your own custom forms to the menu, you must create a separate form that contains the URLs to your forms. This custom menu form is then included in the left navigation menu after you select it in the Websites tab. *Read more about adding your own links to the Custom Forms menu.*



The Custom Forms menu

In the example here, the tenant has two built-in forms and a custom form configured. The quick agent email and submit a credit memo links were automatically added when those built-in forms were configured. The quick ticket link was added to the menu manually by creating a separate form with a link to that custom form. You can select icons for your custom forms menu from the iService style guide at <http://styleguide.iservice.info/pages/icons.html>. Although the process for including these links is simple, we suggest that you contact your iService account manager for guidance when implementing your own forms.

9.1 Quick Agent Email

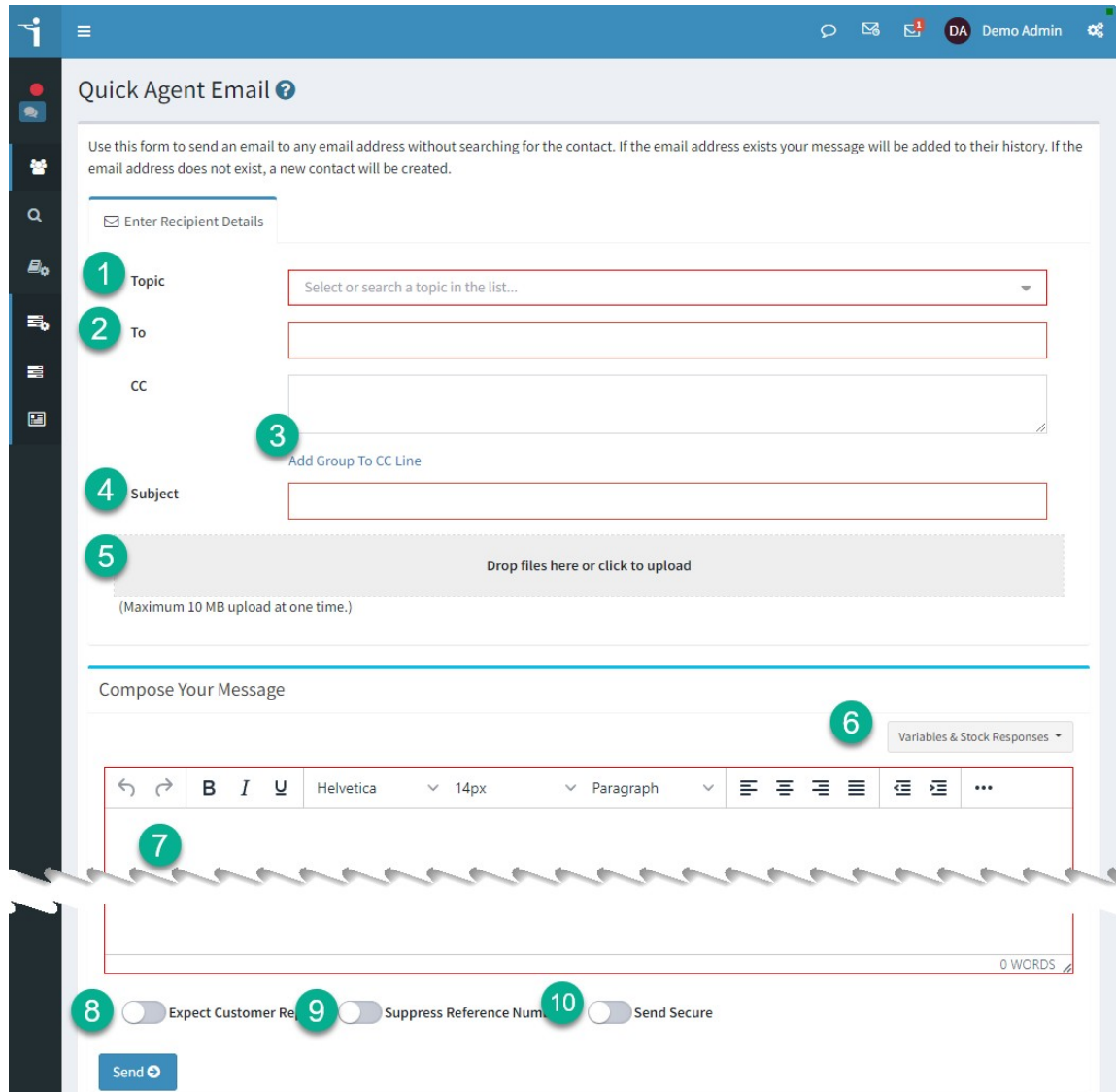


If you need to send an email and know the recipient's address, you can use the quick agent email page without searching for the contact. Type the email address of the recipient and use the mailing list picker to populate a CC line if needed. If the email address doesn't exist in iService, a new contact will be created. If the email address already exists for a contact in iService, your email will be added to the contact's history. The group lists are administered from a separate menu in the Custom Forms Admin section of iService ([Manage Agent Email](#))⁴⁰⁵.



The Quick Agent Email page won't work until it's been configured by your iService administrator.

Using the quick agent email form



The Quick Agent Email form

1. Select a topic for your email. The topic menu displays the full topic tree for all segments that the agent can access.
2. Enter the recipient's email address. The email addresses you used previously on your computer will be presented when you click in the TO field. You can remove addresses by clicking the red x.

Quick Agent Email ?

Use this form to send an email to any email address without searching for the contact. If the email address exists your message will be added to their history. If the email address does not exist, a new contact will be created.

Enter Recipient Details

Topic

To
 jsmith@example.com ✖
 mary.jordan@example.com ✖

CC

[Add Group To CC Line](#)

BCC

Subject

Addresses used in the To input are saved to the user's local storage.

The list of TO addresses in quick agent email

- If you need to send the message to more than one person, put the additional recipients in the cc line. You can use the cc line address book to paste a preconfigured list of addresses into the cc line. Select a list in the dropdown, or search for one using the filter box.

Add Group To CC Line

Subject

Distribution Team
 Customer Service Team

Filtering the Add Group to CC Line list

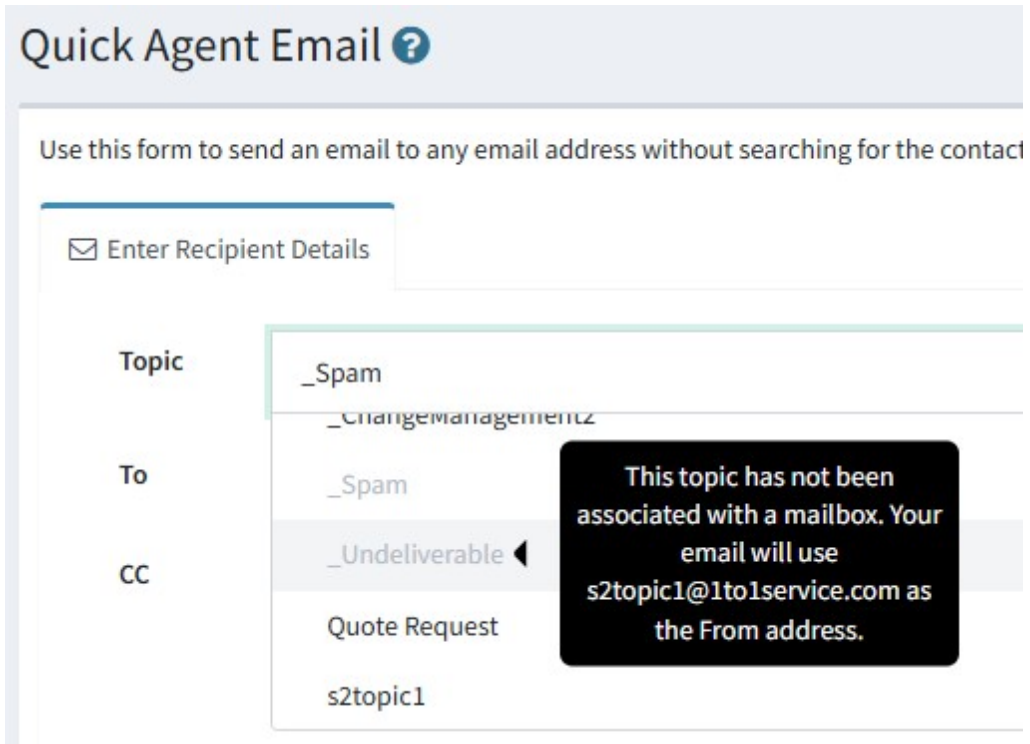
- Enter the subject line for the message.
- You can drag-and-drop file attachments here, or click the button to navigate and select them from your computer.
- The standard variable and stock response panel is available for your agent email.

7. Use the rich text editor to compose the body of your message.
8. The default value for the Expected Customer Reply setting is configured by your iService administrator. Turn the switch on to have a copy of your answer placed in your My Pending Messages list.
9. Turn on Suppress Reference Number to remove the reference number from the subject line of the email.
10. Turn on Send Secure to convert your email to a Secure Agent Email. This will send a template notification to the recipients letting them now they must login to view the answer.

Selecting Topics

One of the features of the quick agent email form is a mapping of the topic to a specific mailbox. Since there are more topics than mailboxes in a tenant, your administrator must specify the mailbox to send from when you choose a topic. When the topic is mapped to a mailbox, you do not need to choose the from address and the proper email address will be used.

Topics that have not been associated with a mailbox are grayed out, but can still be used. If you send from a topic that is not mapped, the default mailbox for the segment will be used. The email address will be shown in a tool tip like below.



An unconfigured topic in the agent email panel

Configuring the quick agent email form

The quick agent email form must be configured from the custom forms admin page. That page includes links to all of the built-in forms that you can configure for the section. Access to the admin page is limited to CSR managers or other user types that have the XYZ access right.

To learn more about configuring the quick agent email form, see the [Manage Agent Email Form](#)⁴⁰⁵ chapter.

9.2 Approve Credit Memo



If you're using the iService credit memo approval process, you might receive an approval request via email. The request will be customized for your organization, but will include a link to an approval form. The link will include the interaction ID of the request, which will be passed into the approval form. The approval form includes buttons for "Approve Credit" and "Reject Credit". To accept the request, just click the Approve Credit button. To reject the request, click the "Reject Credit" button and enter a short explanation for your denial.

An example credit memo approval page

If you receive a request to approve a credit memo, the credit memo ticket has been assigned to you. The approval form will only accept approval from the iService agent that is assigned to the request. In most cases, clicking the link will load the form with the appropriate buttons. There are scenarios, however, where you may not be able to approve or reject the request. These are described below.

Ticket assigned to someone else

To load a request in the approval form, the ticket must be assigned to you. It's possible for the request to be reassigned to another agent, either on purpose or by mistake. When you load the approval form for a ticket that is not assigned to you, you will receive a message indicating it's assigned to someone else.

Workaround - credit memos can be approved from the standard iService interface by agents that have the appropriate access rights. You can locate the credit memo request in the manage messages page, and use the Get This button to assign it to yourself. Or, you can have another iService agent that has appropriate access rights update the assignment for you.

Ticket not assigned to anyone

This is similar to the scenario above, but occurs when the ticket is unassigned. If you received an email requesting you approve a credit memo, the ticket was originally assigned to you. There are several ways, however, for a ticket to be unassigned. If you load the approval form for a ticket that is not assigned to any agent, you will see this message.

```
The credit memo is not assigned to anyone currently.
```

Workaround - if you're certain that the credit memo is appropriate for you to approve, you can locate it within iService by [searching](#)¹⁷⁶ for the interaction ID or finding it in the manage messages page. The ID of the interaction is shown in the URL of the approval form.

```
https://tenantname/f/credit-memo-approve?id=20434810
```

The interaction ID is the number shown at the end of the URL above.

Ticket already resolved

Credit memo requests can only be approved once. If someone else has approved the credit memo, or you already approved it and are loading the page for a second time, you will receive a message that the credit memo has already been resolved.

Workaround – If the request was resolved by mistake, you may need to submit a new request with an updated order number.

Ticket isn't a credit memo

You will generally load the approve credit memo page by clicking a link within your notification email. That link will include the interaction ID of the request. If that ID is not loaded properly in the URL, iService might attempt to load a different interaction that is not marked as a credit memo. In those cases you will receive a message that the ticket isn't a credit memo.

Workaround – you should double check the interaction ID loaded in the URL of your browser when this occurs. You can find the interaction ID using the iService search page.

```
https://tenantname/f/credit-memo-approve?id=20434810
```

The interaction ID is the number shown at the end of the URL above.

9.3 External Answer Page

iService provides an external answer page where anyone can answer questions assigned to them by an iService agent. When an agent assigns a question using the Forward to External action, iService sends a notification template with a link to the answer page. The page uses a Globally Unique Identifier (GUID) to identify the question, and allows anyone with the link to

answer the question without logging into iService. The recipient can simply click the link to open the external answer page, read the question, and submit a response. The response is sent to the contact, and the person submitting the answer is recorded as the agent regardless of whether they have an iService login.

The External Answer Page Layout

An example of the external answer form displayed to an anonymous user is shown below.

External Answer Page

Enter your details so we know who provided the answer

Email (Required)

First Name (Optional)

Last Name (Optional)

Topic : Technical Support

You must enter your email address before using the change topic button.

[Change Topic](#)

Details about the contact and their question

From

To

CC [Add BCC](#)

Subject

Interaction Type : [Customer Email](#)

Assigned To :

Attachments sent with the question

- Image1.jpg (123KB)
- Image2.jpg (30kb)
- File1.pdf (40KB)

Additional information about the question and your answer (Interaction Properties)

Search Term

Search Term Multi Line

Team [+](#)

[+](#)

Compose your response below

[Draft Body](#) [Preview](#)

Hello,

I'm looking for a small TV for our bedroom, but don't want to spend more than \$100. Do you have any option for me to consider?

Regards,

John Doe

Attach files to your response

Drop files here or click to upload

(Maximum 10 MB upload at one time.)

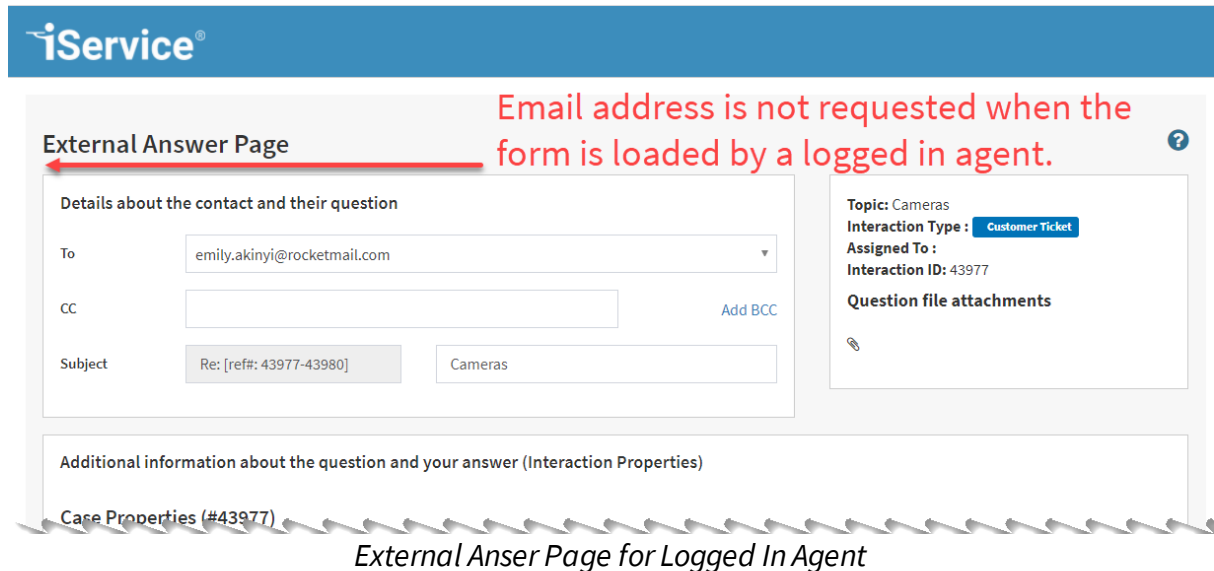
- Invoice 1456549.pdf(20 KB)
- order_details_45875034.pdf(30 KB)
- product_image-full-size-58476098.jpg(120 KB)

[Submit Answer And Resolve](#)

[Send Email and Leave Open](#)

[Resolve Without Sending](#)

If you load a question in the external answer page while logged in as an agent, your email address is not requested. iService already knows who you are and will record you as the operator that provided the answer.



Creating the Forward to External Agent Notification template

The Forward to External Agent action requires an Agent Notification template that includes the \$value -forwardexternal(url)\$ variable, which generates the URL for accessing the answer page. This notification is emailed to the address entered by the iService agent. The template may contain any desired text, but must include the \$value -forwardexternal(url)\$ to appear in the list of notifications presented to the iService agent and provide a link for accessing the question.

In addition to the URL parameter, you can also include the following in your notification template.

Agentname parameter

```
$value -forwardexternal(agentname)$
```

This parameter inserts the name of the agent that assigned the question.

Agentemail parameter

```
$value -forwardexternal(agentemail)$
```

This parameter inserts the email address of the agent that assigned the question

Agentcomments parameter

```
$value -forwardexternal(agentcomments)$
```

This parameter inserts the notes provided by the agent in the Private Comments section of the question that was assigned.

An example notification template might look like the following.

```
An iService agent has invited you to answer a question.
```

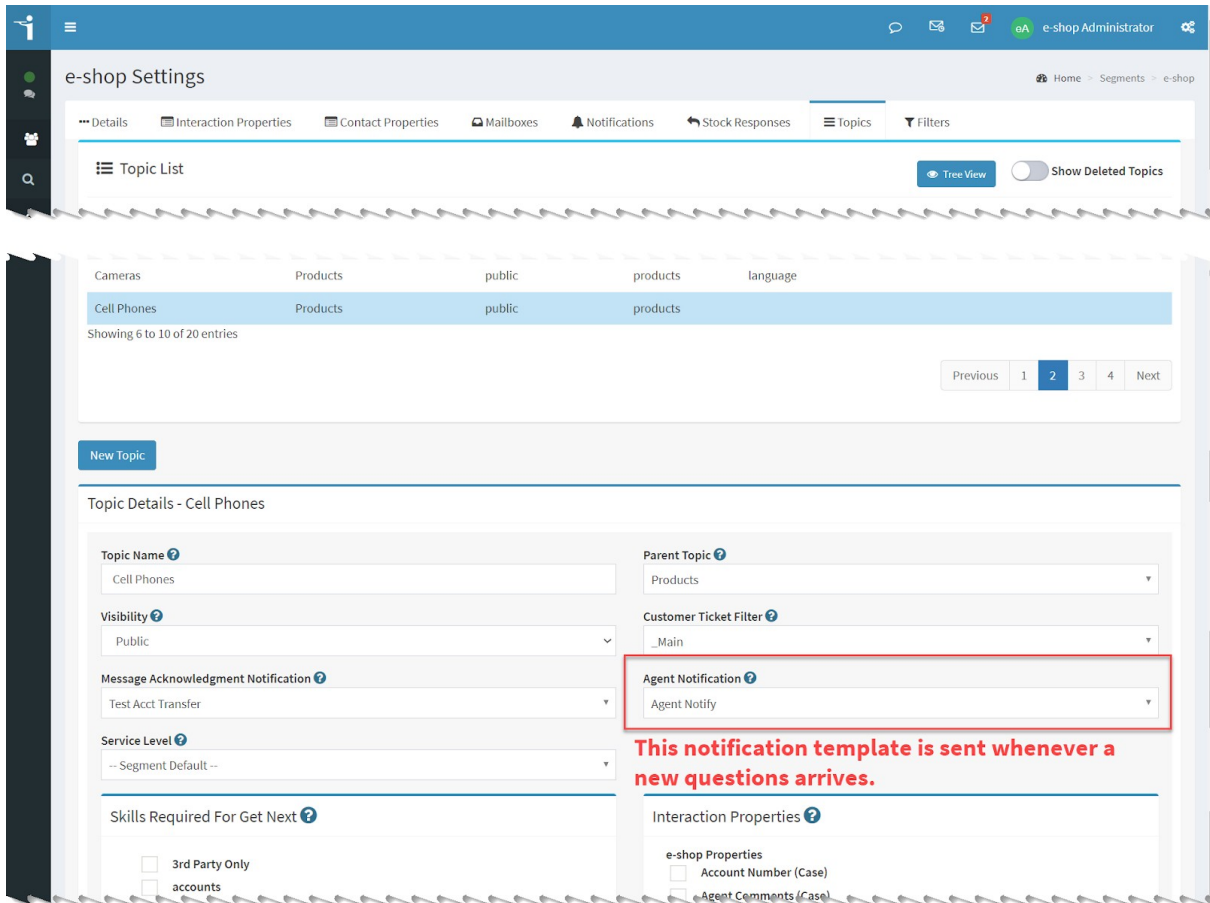
```
Name of the agent that assigned you the question: $value -forwardexternal(agentname)$
Email of the agent that assigned you the question: $value -forwardexternal(agentemail)$
Comments from the agent that assigned you the question: $value -forwardexternal(agentcomments)$
```

```
To provide your answer, click the link below to load the iService
$value -forwardexternal(url)$
```


Forward to External Action vs. System Generated Agent Notifications

The Forward to External Agent action is designed to allow people that are not iService agents to answer questions. It requires an iService agent to manually assign a question using the Forward menu shown above.

The external answer page, however, can also be used by licensed iService agents with system generated agent notifications. System generated agent notifications notify iService agents whenever a question that matches their skills arrives. In that scenario, the question is not assigned to anyone and no manual action is required to generate the notification. iService agent notifications are configured by topic, as shown below.



Setting an Agent Notification on a Topic

Agent notifications are only sent to agents if they have the [skills](#)⁶¹¹ required to handle the question, [Receive Notification](#) is turned on in their [agent settings](#)⁵⁴², and the topic has an agent notification template assigned (as shown above).

Both of the templates (i.e., used by the Forward to External action and the system generated notification set for topics) are created in the segment's [Notification settings](#)⁶⁷¹ page. The difference comes in the parameters available. The Agent Notification does not support the agentname, agentemail, or agentcomments parameters because it is not created by an agent.

Limitations

The forward to external page does not support the Stock Response picker. Therefore, you should not use the form with questions that require a stock response, such as the Quote Form.

Error Messages

The GUID generated for the external answer page remains valid until the question is resolved. iService will only send one answer to a question, so when the question is resolved you will receive the following errors. The question may be resolved before you load it, or after you load it.

When trying to load the page for a resolve question

iService

Sorry, but that question is already resolved.

The question you tried to load has already been resolved, so you can't provide an answer.
Details about the answer sent are below.

Date Answered: 2021-07-02 09:10 AM
Answering Agent: john.doe@example.com

This message is shown when the question is answered before you load it within the external answer page.

© 2008-2021 One-to-One Service.com, Inc. All rights reserved. Version 8.5.0037 - 2021.07.02 - 08:56:18
Powered by iService
[Anti-Spam Policy](#)

Error when trying to load a resolved question

When trying to submit answer but question is resolved

In this scenario, you may have composed a question but another agent answered it before you clicked the submit button. When that occurs, the submit button is removed and the following error is shown.

Attach files to your response

Drop files here or click to upload

(Maximum 10 MB upload at one time.)

This message is shown when the question is answered after you load it within the external answer page, and you try to submit a response..

Sorry, but the question is already resolved.

The question you were answering has already been resolved, so you can't provide a response. We only send one answer to a question. Details about the answer that was sent to the contact are below .

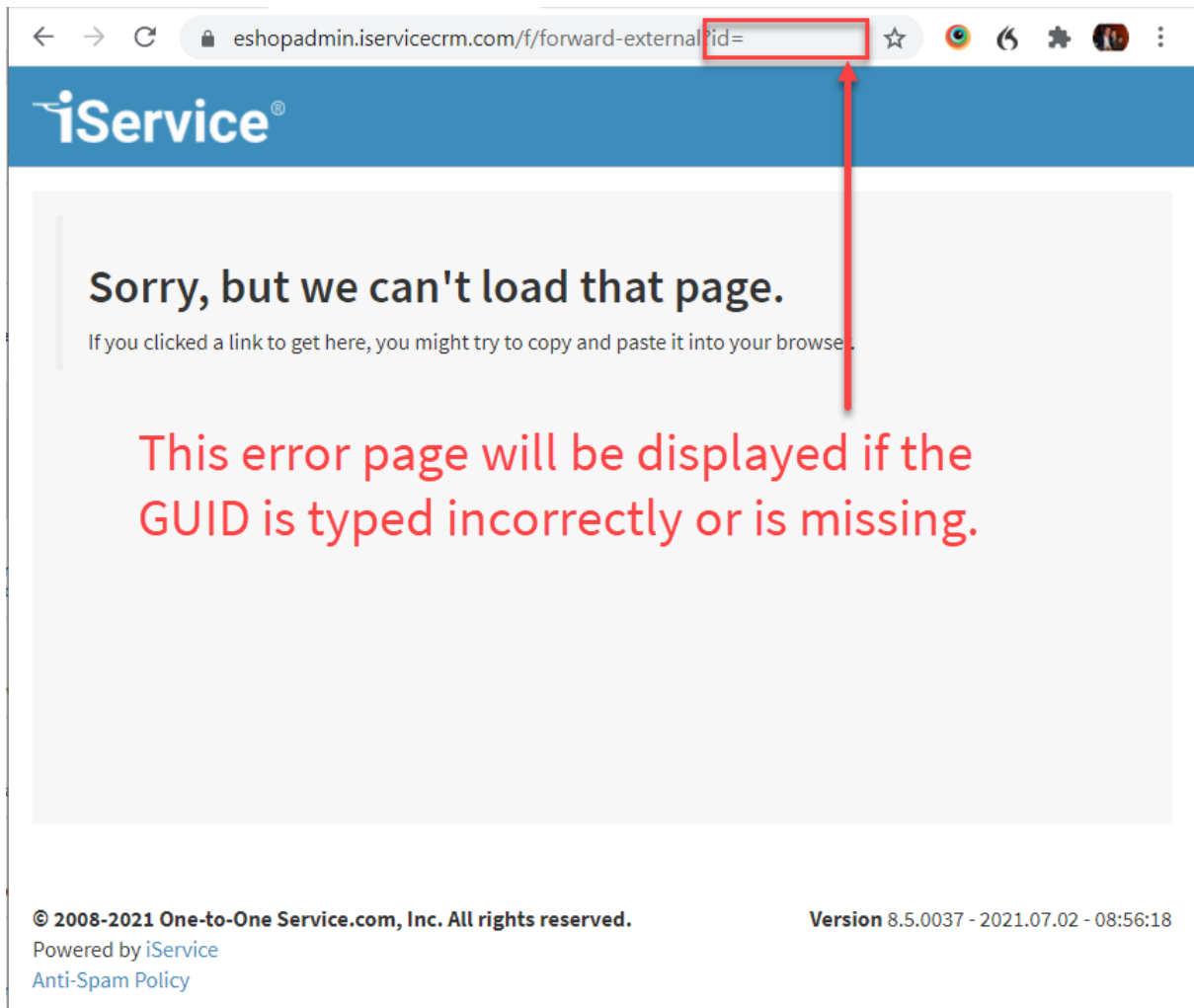
Date Answered: 2021-07-02 09:10 AM

Answering Agent: john.doe@example.com

Error when trying to submit answer to resolved question

When the GUID is incorrect or missing

If the GUID is missing or doesn't get loaded correctly, the question can't be displayed. That scenario will result in the following error message.



Error when GUID is not valid

When the contact has a bounced email address

If the contact has an invalid email address (i.e., marked as bounced), the question can't be answered. The status of the email address can only be updated in the iService UI. In these cases the following message is displayed.



Sorry, but the contact's email address is not valid.

The question assigned to you is from a contact with an invalid email address (customer8@1to1service.com). Sometimes this happens because they complete a contact form and type their address incorrectly. Or, their mailbox might be full or unavailable.

Error when a contact has an invalid email address

9.4 Submit Credit Memo



iService has a set of built-in forms that can be configured to submit and approve credit memo requests. The process begins by submitting a request for a credit memo, which triggers an email to the requested approver. The approval email includes a link to an "Approve Credit Memo" form that presents Accept / Reject buttons.

This form can be configured according to your organization's needs. An example of this form is shown below. For details on configuring this form, talk to your local iService administrator or your One-to-One Service.com account manager.

An example of a credit memo submission form


In most cases, the form will be self-explanatory and you will simply complete and submit the request. There are some scenarios, however, where you might receive an error during submission. Those are described below.

Specified email address is bounced.

When you submit your credit memo request, iService will send a notification to the approver with the link to the approval form. If the

email address for the approver has been marked as undeliverable (i.e., bounced), the system will not be able to deliver the approval email to that user.

In those situations you will either need to select a different approver, or correct the email address within iService associated with the approver. Keep in mind that you can only update the login details for agents that are at a lower level than your user type. In most cases you will need to contact your local iService administrator to correct the email address for the approver.

To update the login details for the approver, search for their email address in the [contact search](#)  pages.

Order number already exists

The Submit Credit Memo form allows you to enter multiple orders in one request. The order number (e.g., invoice #, order #, waybill#, pro#, etc.) is used by your finance department to locate the transaction that requires credit. This number must be unique for each credit memo request. If it has already been used in a credit memo, whether or not it was approved, you will receive a message that the number exists.

In these cases, you should double check to determine whether you are requesting a duplicate credit. If you need to resubmit a request, your administrator might require you to append a value to the original number.

You should determine the proper protocol for these scenarios from your iService administrator responsible for handling credit memo requests.

No Segment Access

The Submit Credit Memo form performs a search on the credit memo Order Number to see if it exists. These properties are attached to prior credit memo requests in the segment used by your Finance

organization. Because of this, all users that submit credit memos must have access to search the Finance segment to determine if the credit memo has already been submitted.

If the user doesn't have access to the segment in which credit memos are created, the following error will be displayed.

You don't have the required segment access to submit this form. Please check with your iService administrator if you think you should have access to this page.

Agent Chat Interface

10 Agent Chat Interface

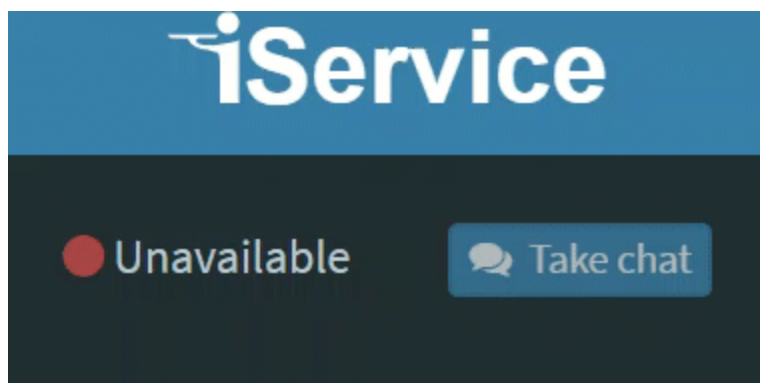
iService Chat allows you to engage in real-time dialogue with customers. Chat uses your existing iService configuration, such as business segments, topics, skills, etc. You will only be presented chats that match your skills and segment access.

When the customer begins a chat, a chat interaction record is recorded in iService and a cookie is recorded on the customer's computer. This cookie allows the chat session to be reopened if the customer closes their browser or loses their internet connection. If the iService web server is unable to contact the customer's browser for 5 minutes, the chat will be automatically resolved and recorded to history.

Making Yourself Available for Chat

"Chat with us" buttons and live chat request forms are only presented to customers when there are iService agents available. Agents are only considered available if they have the segment access and skills associated with the topic selected by the customer, and their status is set to "Available".

To set your status to available, click the "Go Available" button as shown below.

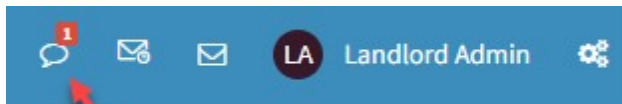


Clicking the go available button

This button will toggle between "Available" and "Unavailable" depending on your current status.

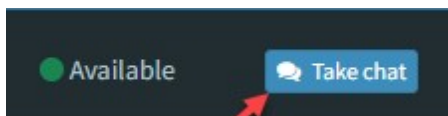
Accepting Incoming Chats

When an incoming chat request is submitted that matches your segment access and skills, the **Accept Chat** buttons will illuminate and flash indicating a customer is waiting for an agent. The take chat button in the top banner shows the number of waiting chats that match your skills.



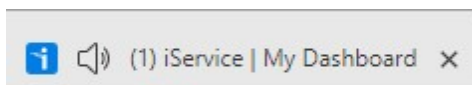
Indicates one chat is waiting that matches your segments and skills

The chat status section in the top left corner also includes a Take Chat button. This button is enabled in the same way as the top banner button.



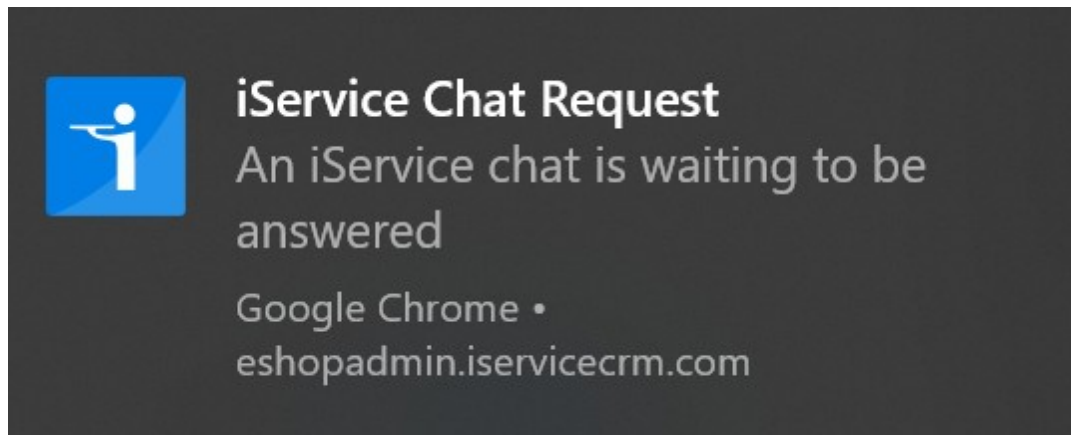
Button is activated when chats are waiting for you

If you are working in another browser tab besides iService, you can see the number of waiting chats in the page title of the iService browser tab.



Number of waiting chats

If you've enabled browser notifications for iService, you'll receive a desktop notification as shown below when a new chat request matches your skills. You can click this notification to take the chat



The iService chat browser notification

Once you accept the incoming chat, the Agent Chat Interface will open within your browser where you can begin your chat with the customer.

– Troubleshooting Browser Notifications

In most cases, the first time you go available for chat your browser will ask you to accept browser notifications. After you accept the notifications they should appear automatically when new incoming chats arrive.

In some cases, however, your notifications might be blocked. Check these settings to ensure they are properly enabled.

Notifications & actions

Quick actions

You can add, remove, or rearrange your quick actions directly in action center.

[Edit your quick actions](#)

Notifications

Get notifications from apps and other senders

On

Enable notifications for apps and other senders

To control times when you do or don't get notifications, try Focus assist.






[Focus assist settings](#)

- Show notifications on the lock screen
- Show reminders and incoming VoIP calls on the lock screen
- Allow notifications to play sounds
- Show me the Windows welcome experience after updates and occasionally when I sign in to highlight what's new and suggested
- Suggest ways I can finish setting up my device to get the most out of Windows
- Get tips, tricks, and suggestions as you use Windows

Get notifications from these senders

Select a sender to see more settings. Some senders might also have their own notification settings. If so, open the sender to change them.

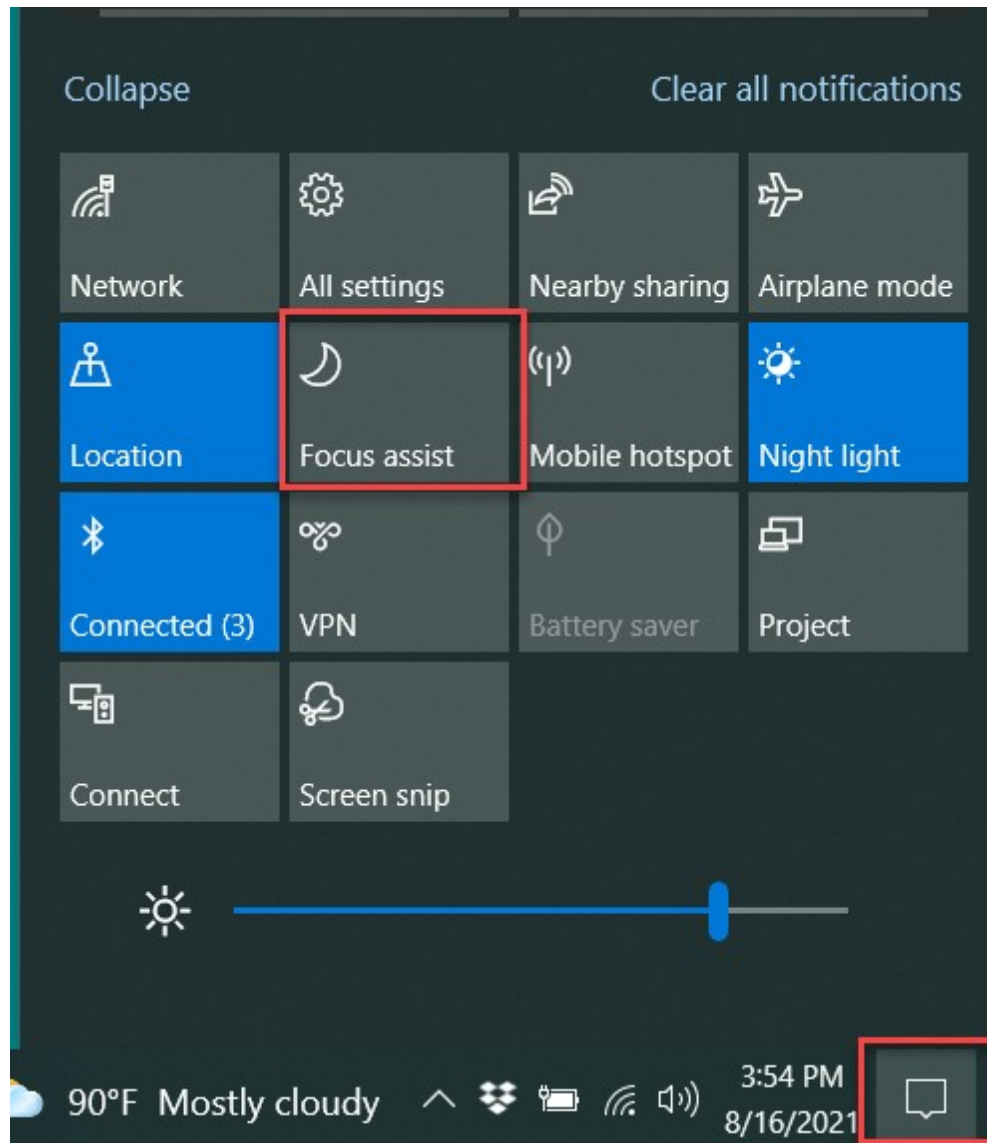
Sort by: Most recent ▾

-  EPOS Connect On
On: Banners, Sounds
-  Suggested On
On: Banners, Sounds
-  Dropbox On
On: Banners, Sounds
-  Google Chrome On
On: Banners, Sounds
-  Microsoft Edge On
On: Banners, Sounds

Enable notifications for the browser you use

If you are using Focus Assist, your notification settings might be overridden in certain conditions. You can check the status of Focus Assist in the notifications section of your system tray. It should be turned off as shown below.

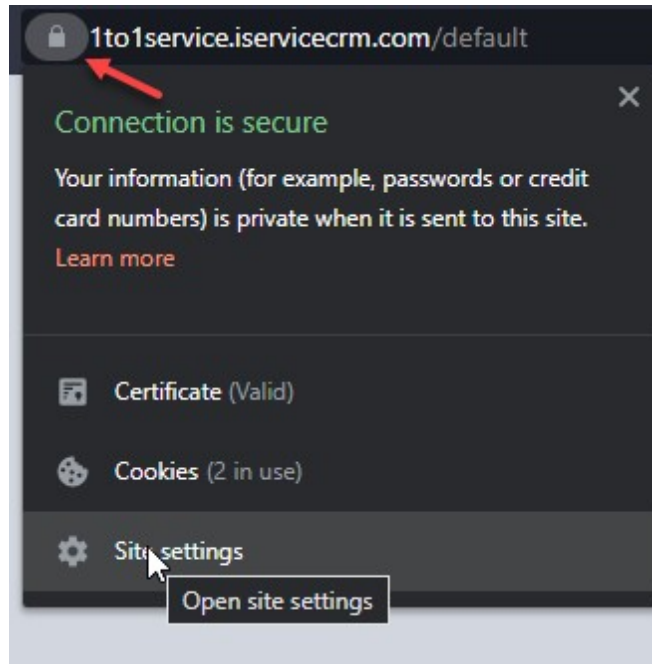
You can learn more about Focus Assist at <https://support.microsoft.com/en-us/windows/focus-assist-automatic-activation-settings-81ed1b25-809b-741d-549c-7696474d15d3>.



Focus Assist should be turned off

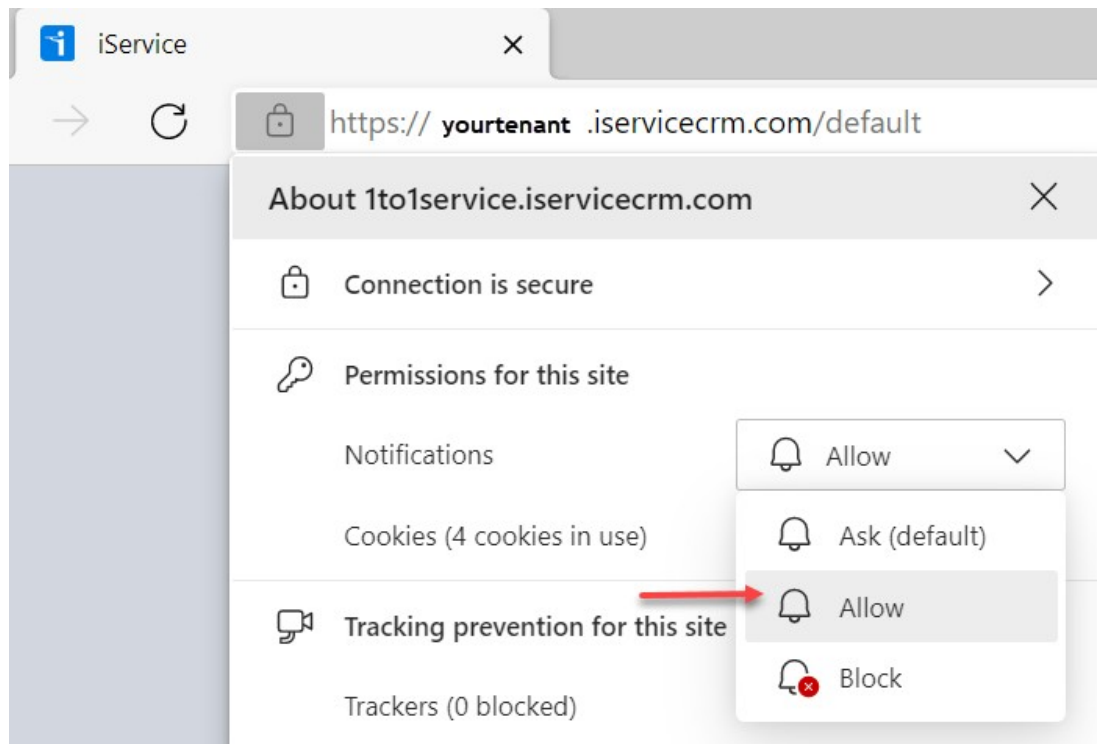
Also being sure that you haven't disabled browser notifications for the website in your browser. The process is slightly different for every browser, but for Chrome (and by extension, Edge):

Click the lock icon in the url location bar, and site settings/permissions:



Check your browser for your specific iService tenant URL

Confirm Notifications are set to either Ask or Allow, and not Blocked.



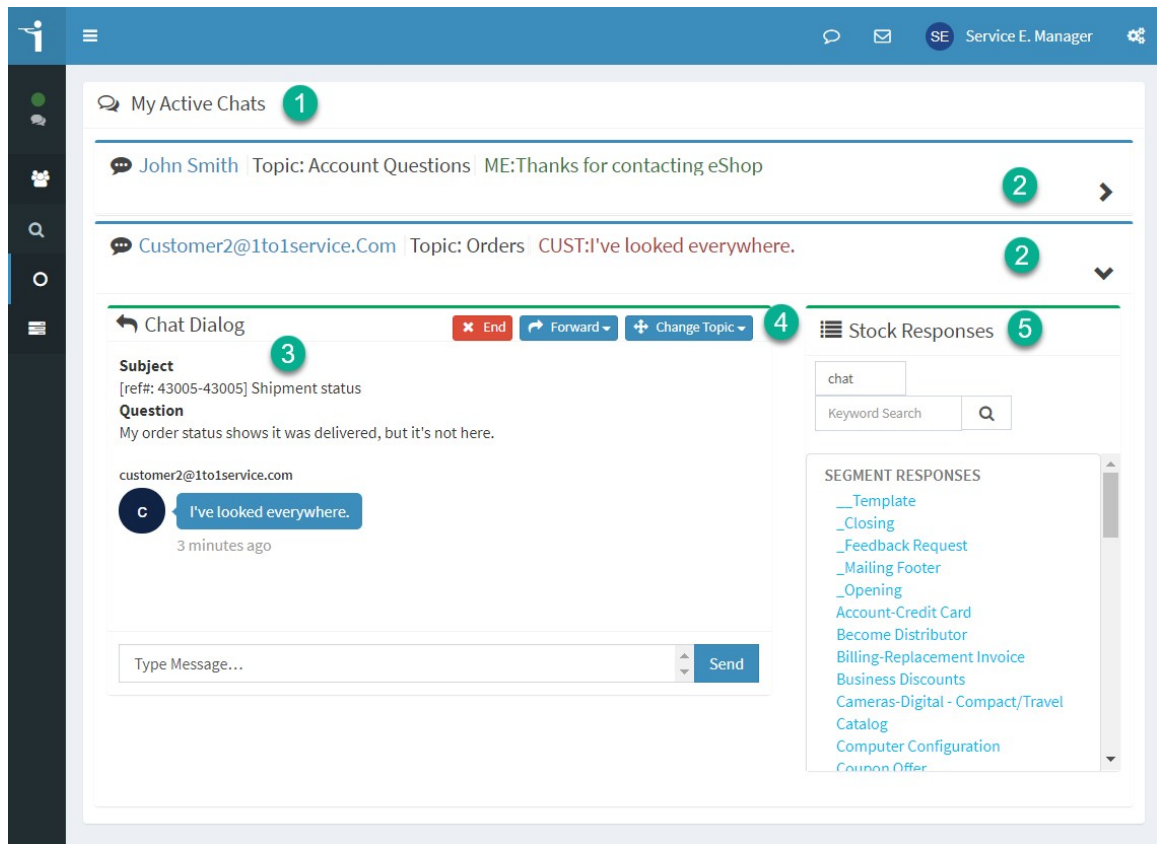
Be sure your site allows notifications

In summary, any of the following can stop notifications from coming from iService

1. Notification permissions disabled globally (or temporarily suppressed by focus assist/silent mode) in the OS
2. Notification permissions for the browser disabled in the OS
3. Notification permissions disabled for the iService tenant website in the browser

The Agent Chat Interface

After you accept an incoming chat, a My Active Chats panel populates the top of your iService screen. This panel will remain on every iService page until all of your chats have ended. You can chat with multiple contacts at one time. When you have more than one live chat assigned, they will be stacked inside the my active chats window with an expand/collapse icon. You can minimize a chat panel by collapsing the accordion.



The My Active Chats panel

The agent chat interface is comprised of the following sections.

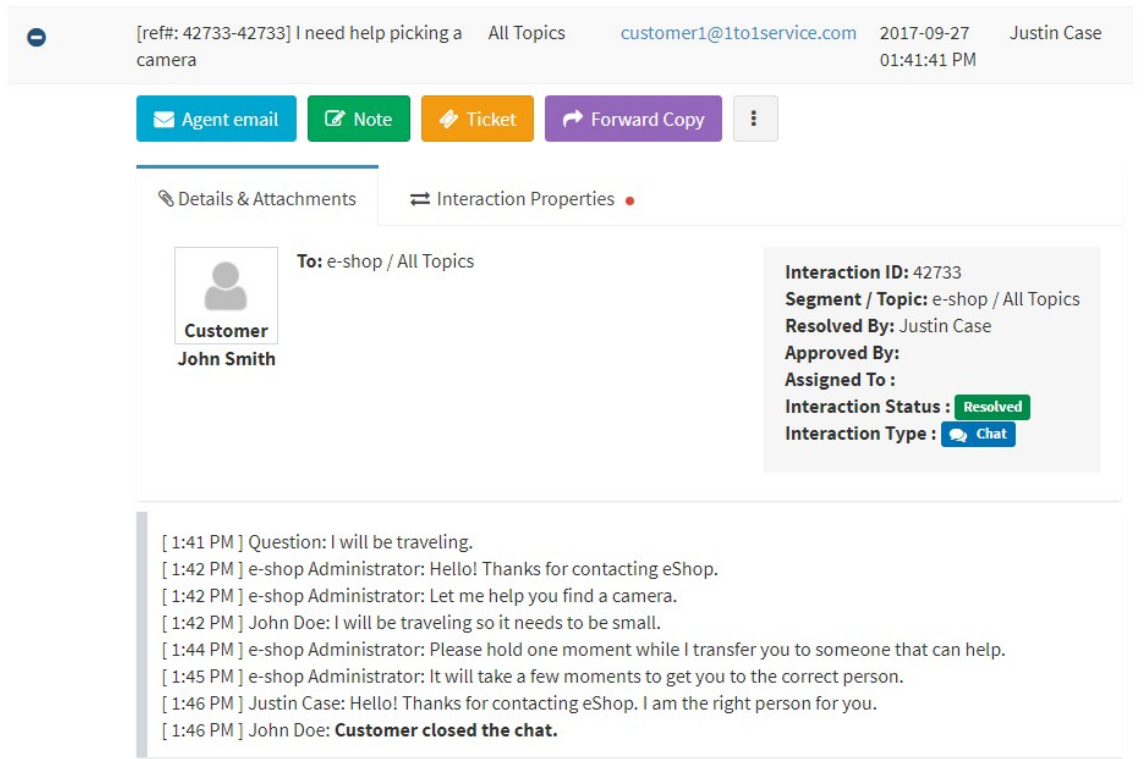
1. **My Active Chats panel** - provides a list of chats that are assigned to the agent. Expand or collapse the active chat windows as needed.
2. **Active Chat Panel Summary** - each individual chat is contained within an active chat panel. The panel includes summary information that's displayed when the panel is collapsed. This includes the contact name, the topic of the chat, and the last text that was entered. The contact name is a hyperlink to their contact details. When the last comment was from the customer, the text snippet in the summary is shown in red. This alerts you to the fact that the customer is waiting for their reply.
3. **Chat Dialogue** – is where you type your responses and view messages from the customer. When the initial chat request is assigned, the chat dialogue includes the subject and question from

the customer so you know something about the question before you begin the discussion.

4. **Action Buttons** - the End, Forward, and Change Topic buttons function similarly to the buttons within the MyQueue page for emails.
 - END** - Ends the chat and sends the message "Agent closed the chat." to the customer's chat window. The chat will remain visible to the agent for 10 seconds before it is removed from the list of assigned chats.
 - FORWARD** - This button include two options: Remove From Queue and Assign to Agent. Remove from queue will put the chat back into the queue for the next agent. The Assign to Agent option displays a list of agents that are online AND have their chat status set to Available.
 - CHANGE TOPIC** - This button provides the full list of topics that can accept chats. Only topics that have available agents with the corresponding skills are available for selection.
5. **Stock Responses** - this panel is used to paste frequently used phrases into the chat conversation. The response picker has two text boxes. The first is used to filter the response list, normally to limit the responses to those that were specifically intended for chat interactions. The second text box allows you to search for specific responses, and narrows the list as you type.

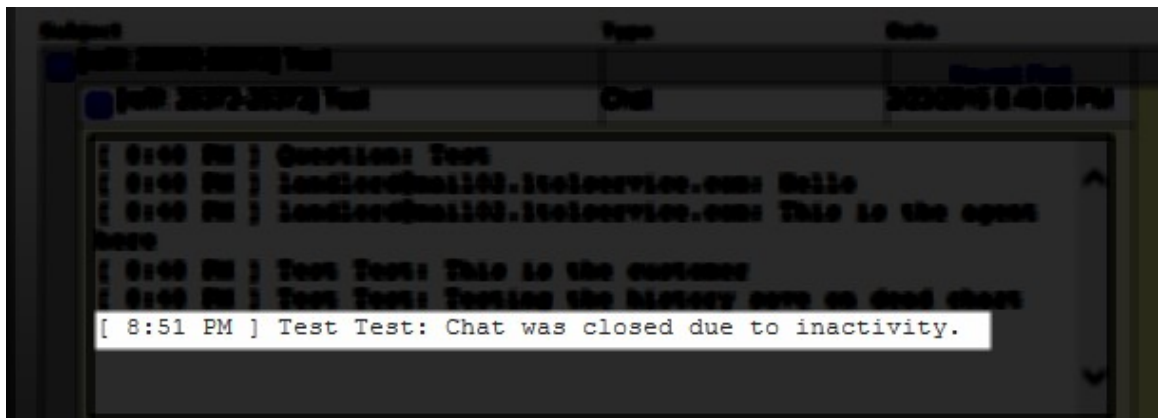
Chat Transcripts / History

When a chat is resolved, the complete history is archived into the iService database. You can view this history from the contact's Customer Info - History tab. The customer can also view this history from their My Account - History tab.



An example of a chat history

When a customer closes their chat window without ending the chat, iService will close the chat for inactivity after approximately two minutes. When this happens, the final entry in the chat history will indicate the chat was closed for inactivity.



This only occurs when the chat window is disconnected by the customer ... either the browser is closed or the customer loses their internet connection. The customer may remain idle for an indefinite amount of

time and continue in the chat so long as their internet connection to the iService site is maintained.

Managing Chats and Chat Agents

While the agent chat interface is integrated into all of the iService pages, tools for managing chats and chat agents are located in the Managing Work Queues section. The [Manage Chats](#)²²¹ page provides a real-time view of active chats, and the [Logged in Chat Agents](#)²²³ page provides a list of chat agents and their status.

To learn more about configuring chat for your tenant, read the [Configuring Chat](#)³⁵⁵ chapters.

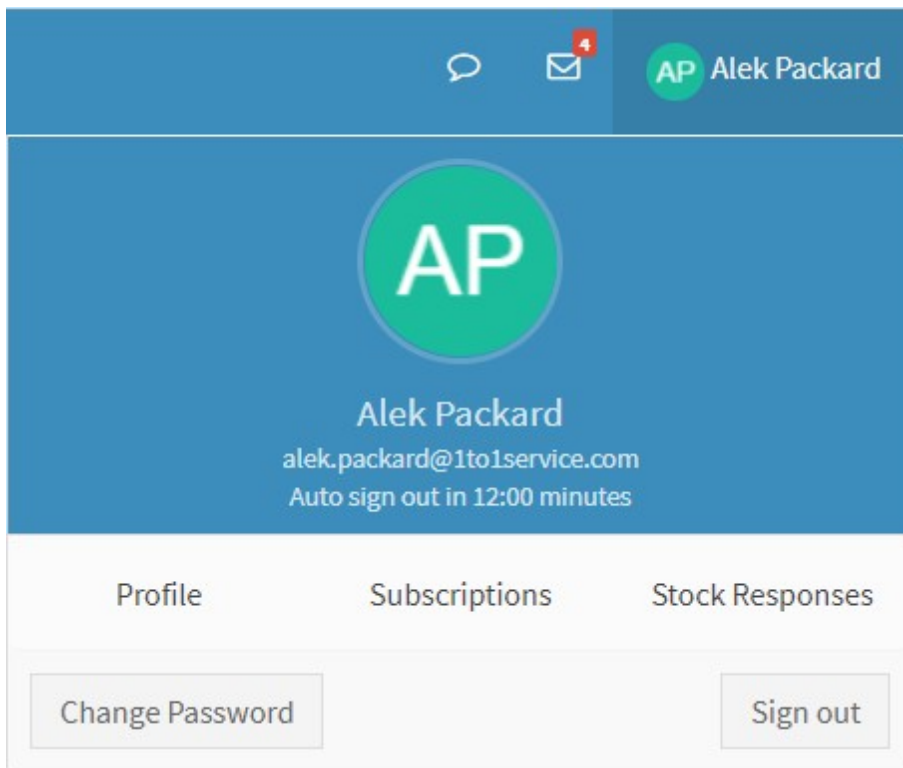
This page is intentionally left blank.
Remove this text from the manual
template if you want it completely blank.

My Account Tab

11 My Account Tab

Click on your login name in the upper right corner of the page to open the my account panel. This provides access to your profile (contact details), subscriptions, and agent stock responses. You can also change your password here or log out of iService.

iService includes an inactivity logout function that will automatically log you out of the system after a specified amount of time. The default inactivity logout time is 90 minutes, but this can be modified on an agent by agent basis in the [Agent Admin](#) page. The time until you are automatically signed out for inactivity is displayed in this menu under your email address. Every time you load a page or click a button in iService the timer is reset.

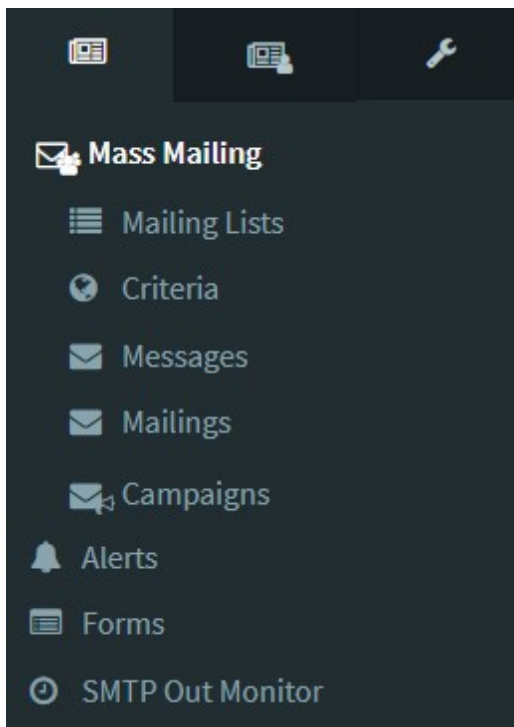


The My Account panel

Tools Menu

12 Tools Menu

The Tools menu is accessed from the gears icon in the top right corner of every page, and is only accessible to agents that have at least the CSR Manager access rights in their User Type. This section includes the Mass Mailing menus, Alerts, Forms , and Server Process Management.



The Tools Menu

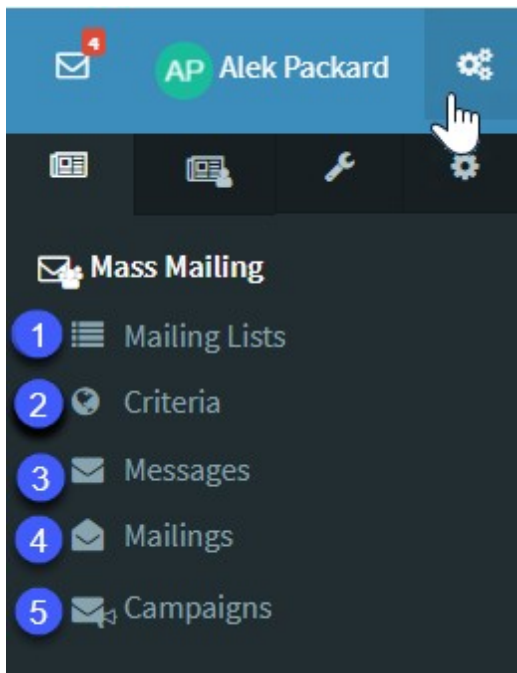
12.1 Mass Mailing



iService includes an integrated outbound email management system. The process is simple: select a message, send it to a list of recipients, and optionally use criteria to limit the recipients. The recipients on mailing lists are contacts within the iService database.

Several aspects of the mailing functionality can be controlled via UserTypes. For instance, an organization might provide the marketing team access to the Messages tab but limit access to the Mailings tab to IT staff to control distribution. See the [User Types](#)⁶¹⁵ chapter for details on configuring this access.

Mass Mailing Menu



The Mass Mailing menu

1) [Mailing Lists Tab](#)²⁷¹ - Lists contain contacts that will receive your messages. For instance, you might create a list named Press Releases to

distribute news to people that are interested in following your company. List management (subscribing and unsubscribing from lists) is managed by iService using unsubscribe links and email preferences portals.

2) [Criteria tab](#)²⁸¹ - When a mailing is executed, you might want to deliver your message to a subset of the contacts on the list. For instance, you might want to send a test message before delivering a mailing to the full list. In this case, you could use a “Criteria” such as “Test Mailing Accounts” that limits the delivery to your internal and external test email accounts. Criteria can also be used for limiting messages to Contacts located in certain geographic regions, for instance. You can use any contact property within your criteria.

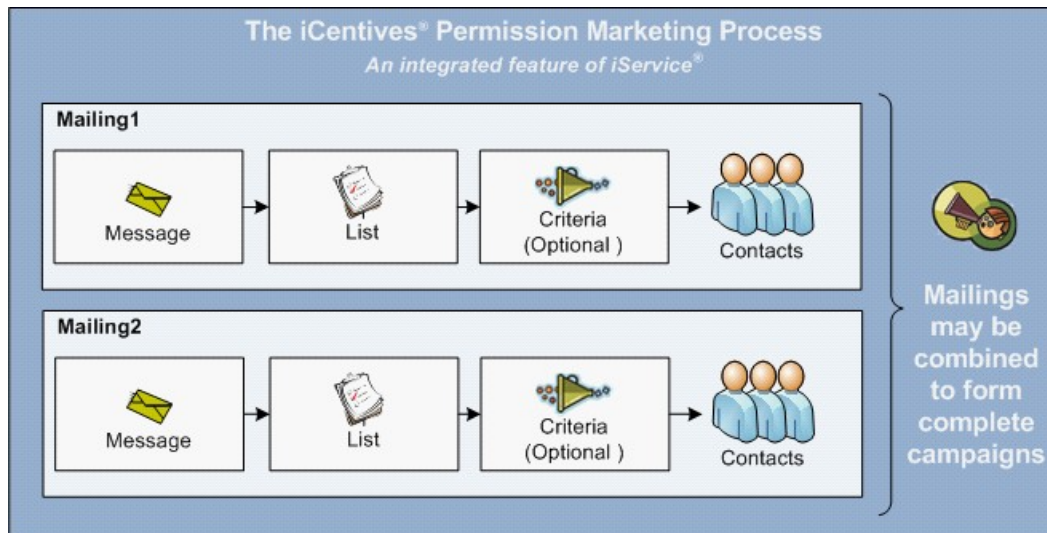
3) [Messages Tab](#)²⁸³ - Create your messages in the Messages tab. iService supports multi-part email, with a plain text and a rich text version.

4) [Mailings Tab](#)²⁹¹ - The mailings tab is used to send messages to lists.

5) [Campaigns Tab](#)²⁹⁵ - Campaigns allow you to group together a series of mailings that execute automatically on a schedule. This is especially useful when you need to send a series of messages at regular intervals. For example, you might begin with a new customer welcome message sent on day 0, and then include a follow up with a “helpful tips” message on day 7 and 14. Campaigns have their own lists and list management features.

The Elements of an Outbound Campaign

The relationship among these elements is shown in the diagram below.



12.1.1 Mailing Lists



The first step in sending a mailing is to create a list and add contacts. Contacts may be added to lists in one of two ways: by an agent, or by the contact themselves through a list management page (if the list is designated as “Shown in My Account”). A standard list management page is included in the customer portal (/f/customerportal-treeview) in the profile section. List management pages can also be created using iService forms (see the Forms User Guide for more information on custom subscription pages).

List Details

The screenshot displays the 'Mailing Lists' management interface. At the top, there's a navigation bar with the user's name 'AP Alek Packard'. Below that, the 'Mailing Lists' section features a table with columns: List Name, Description, Segments, Shown In My Account, Subscribers, Unsubscribes, and Last Mailing. Three lists are shown: 'Customer Notices', 'Employee', and 'Sales Prospecting'. Below the table are 'New Mailing Lists' and 'Delete Mailing Lists...' buttons. The 'Lists Details' form below includes fields for Name, Description, a 'Shown In My Account' toggle, and a list of segments (Customer Service, Human Resources, QA3 - Third Segment, Sales) to be selected. Numbered callouts (1-6) highlight these key elements.

The Mailing List Tab Contains Subscriber Details

The Mailing List details tab provides a description of the list, indicates whether it is viewable by the contact, and specifies the segments in which it can be used. A description of the screen is shown below.

1. All lists are displayed at the top of the screen, similar to other admin tabs. The Segment column indicates the segments for which the list is available, and the public column indicates whether the list is publicly available to contacts in their My Account > Subscriptions page.
2. These buttons are used to create a new list or delete an existing list.
3. The name of the list is used for display on all internal and external pages. Since your customers may see this name, it's important to use a name that is descriptive and appropriate for public viewing.
4. The description is displayed within the My Account > Subscriptions page and optionally on custom subscription management pages. We recommend that the description be short enough to accommodate use on customized list management pages.

5. Selecting the “Shown in My Account” box will make the list viewable by contacts in the customer portal. The list will appear as an available list to all contacts on the selected segments within their My Account > Subscriptions page. As shown below, the only Mailing List that is displayed is Press Releases, because the other list (Coupons and Promotions) is not public.

The screenshot displays the 'My Subscriptions' page in a customer portal. At the top right, a user profile 'Hello John Doe' is visible. Below it, a navigation bar contains 'FIND ANSWERS', 'ASK QUESTIONS', and 'MY INBOX'. A dropdown menu is open, showing 'User Profile', 'My Subscriptions' (highlighted with a red arrow), and 'Logout'. The main content area is divided into several sections:

- My Details**: A section with a plus icon.
- My Subscriptions**: A section with a minus icon.
- Mailing Lists**: A table with columns 'List Name', 'Description', and 'Member Of'.

List Name	Description	Member Of
Customer News	Important news items for current customers.	✓
eShop Customers Announcements	General announcements for eShop customers.	✓
Monthly Coupons	Receive a monthly coupon for 5-15% off of your total order.	✓
Online Specials	Receive notices about online specials.	✓
- Campaigns**: A table with columns 'Name', 'Description', and 'Member Of'.

Name	Description	Member Of
Photography tips and trick	Ongoing tips for getting the most out of your new camera.	✓
- Subscribed Articles**: A table with columns 'Topic', 'Subject', and 'Stay Subscribed'.

Topic	Subject	Stay Subscribed
e-shop -- All Topics -- Products -- Computers	Troubleshooting common iMac problems	✓

A blue 'Save Subscriptions' button is located at the bottom left of the page.

Editing Mailing List preferences in the customer portal

6. The Segments box indicates the segments in which the list will appear. It will also limit access to iService administrators that have corresponding segment access. For instance, if the List is marked as Segment 1 only, then contacts that only do business with Segment 2 will NOT see it in their My Account page.

Subscribers

Once you create your list, you need to add contacts that will receive mailings. Contacts can be added by an iService agent, or contacts can add themselves from a list management page such as My Account > Subscriptions (above). The details of all subscribers that have joined the list are displayed on the Mailing Lists > Subscribers page.

An example of the Subscribers page is shown below. This page shows that there are five contacts subscribed to the list, and the details of those members are displayed. This display will only show the first 1000 contacts for performance purposes. Clicking on a contact name will open the corresponding Customer Info > Contacts page with the Subscriptions tab highlighted.

... Lists Details, Subscribers, Unsubscribes

Number of contacts subscribed to this list : **1234** [Add Contacts](#) [Remove Contacts](#)

Copy Excel PDF Column visibility Show 10 entries Filter Subscribers example.com

Name	First Name	Last Name	Email	Company	Phone (Work)
Albert Metricman	Albert	Metricman	albert.metricman@example.com	Example Company, Inc.	312-555-5555
Howard Smith	Howard	Smith	howard.smith@example.com	Example Network	487-555-5222
John Doe	John	Doe	john.doe@example.com	Example Company, Inc.	312-555-5555
Julie Persuavia	Julie	Persuavia	julie.persuavia@example.com	Example Company, Inc.	312-555-5555
Robert Williams	Robert	Williams	robert.williams@example.com	Example Network	487-555-5222

Showing 1 to 5 of 5 entries

Previous 1 Next

The subscribed tab within a mailing list

Agent Options for Adding Subscribers

Agents can add subscribers in several ways: from the Maling Lists page, using the contact import process, or from the Customer Info > Contacts > Subscriptions page.

▣ Subscribing Contacts in Bulk

The most common way to add subscribers that are already in the iService database is using the Mailing Lists > Subscribers page. This page allows the agent to identify the contacts using detailed search parameters. In the example below, the agent searched for contacts with the value “example” in their login. When the search results are returned, the agent can add all matching contacts by clicking **Subscribe All**. Or, they can select individual contact by checking the box next to their name and clicking **Subscribe Selected**.

The screenshot displays a contact management interface. At the top, there are tabs for 'Lists Details', 'Subscribers', and 'Unsubscribes'. Below the tabs, it indicates 'Number of contacts subscribed to this list : 1234' and a 'Back To Current Contacts' button. A search bar is present with the text 'Search For Contacts To Add To This Lists'. Below the search bar, there are dropdown menus for 'Search where' (set to 'anywhere'), 'In field' (set to '-- Login --'), and 'Search options' (set to 'Contains'). A search input field contains 'example'. There is a '+ Add another search parameter' link and 'Search' and 'Reset' buttons. Below the search bar, the 'Search Results' section shows a table with columns: Name, First Name, Last Name, Email, Company, and Phone (Work). The table contains 5 entries, all of which are selected. Below the table, there are 'Subscribe Selected' and 'Subscribe All' buttons. The 'Subscribe Selected' button has a tooltip that says 'Add only selected contacts to the mailing list.' The 'Subscribe All' button has a tooltip that says 'Add all (1234) contacts from this search to this mailing list.'

Adding subscribers to a mailing list

You can remove subscribers from a list using the remove contacts button. The process for removing subscribers is identical to adding subscribers. Perform a search to locate the contacts on the list, and then click the unsubscribe button.




When you remove subscribers from the list they can be added back. This is different from when a contact unsubscribes themselves. When a contact unsubscribes using an unsubscribe link, they are added to the opt out list. Contacts on the Opt Out list are excluded from mailings.

Importing Contacts from a CSV File

You can use the iService batch utility to import a file of contacts to iService and add them to lists and campaigns. This process works whether or not the contacts are already in iService.

For additional information on using the batch utility to import contacts, see the following resources.

Creating a form to [import your contacts and add them to a list or campaign](#)

Using the batch utility import process to [add your contacts to the form created in the step above](#)

Subscribing Contacts Individually From Customer Info

The second way to add contacts to a list is through the Customer Info > Contacts > **Subscriptions** page. Simply search for the contact, and open the Subscriptions page where you will see a summary of the available lists.

The screenshot shows the iService interface for a contact named John Doe. The left sidebar contains navigation options like 'Customer Info', 'Quick Agent Email', 'New Contact', 'Search Contacts', 'Search Interactions', 'My Work Queues', 'My Message Inbox', 'My Pending Messages', 'My Messages To Approve', 'Manage Work Queues', 'Manage Messages', 'Manage Chats', 'Logged In Chat Agents', and 'Manage Open Quotes'. The main content area is titled 'Contact - John Doe' and has tabs for 'Summary', 'Details', 'Subscriptions', and 'History'. The 'Subscriptions' tab is active, showing three sections:

- Mailing List Subscriptions:** A table with columns 'Name', 'Description', 'Member Of', and 'Opted Out'. It lists 'Bounce Test', 'eShop Customers Announcements', 'Monthly Coupons', 'Online Specials', and 'Platinum Customers'. The 'Member Of' column has checkboxes, some of which are checked (indicated by a blue checkmark).
- Campaign Subscriptions:** A table with columns 'Name', 'Description', 'Member Of', and 'Opted Out'. It lists 'New Customer', 'Photography tips and trick', and 'Upsell campaign'. The 'Member Of' column has checkboxes, with 'Photography tips and trick' checked.
- Find Answer Article Subscriptions:** A table with columns 'Topic', 'Subject', and 'Subscribed'. It lists 'e-shop -- All Topics -- Products -- Computers' with the subject 'Troubleshooting common iMac problems'. The 'Subscribed' column has a checked checkbox.

At the bottom of the page, there is a 'Save' button and a footer with copyright information: '© 2008-2020 One-to-One Service.com, Inc. All rights reserved. Powered by iService Anti-Spam Policy' and 'Version 8.0.566 - 2020.02.05 - 07:59:22'.

Adding subscriptions in the contact page

1. This column indicates whether the contact is a member of the list. To add the contact to a mailing list, click the Member Of box for the desired list.
2. The “Opt Out” column indicates whether or not the contact has asked to be excluded from future mailings. Whether or not the contact is added back to the list, they will be excluded from mailings to the list when this box is checked.
3. Campaign subscriptions are shown below the mailing lists, and function identically to mailing lists.
4. If the contact has subscribed to Find Answers articles, those articles will be listed here. To remove this article subscription, uncheck this box and click the Save button.

Contact Options for Subscribing Themselves

Contacts can manage their subscriptions from the [Customer Portal](#)³²⁹. They can subscribe to three types of lists: standard mailing lists, campaigns, and Find Answers article subscriptions. A summary of all of these subscriptions is shown in the contact's My Subscriptions screen below.

The screenshot displays the 'My Subscriptions' page in a customer portal. At the top right, a user profile dropdown menu is open, showing 'Hello John Doe' and options for 'User Profile', 'My Subscriptions' (highlighted with a red arrow), and 'Logout'. Below the navigation bar, the page is divided into three main sections: 'Mailing Lists', 'Campaigns', and 'Subscribed Articles'. Each section contains a table with columns for 'List Name', 'Description', and 'Member Of'. A 'Save Subscriptions' button is located at the bottom left of the page.

List Name	Description	Member Of
Customer News	Important news items for current customers.	✓
eShop Customers Announcements	General announcements for eShop customers.	✓
Monthly Coupons	Receive a monthly coupon for 5-15% off of your total order.	✓
Online Specials	Receive notices about online specials.	✓

Name	Description	Member Of
Photography tips and trick	Ongoing tips for getting the most out of your new camera.	✓

Topic	Subject	Stay Subscribed
e-shop -- All Topics -- Products -- Computers	Troubleshooting common iMac problems	✓

Customers can add themselves to lists in the customer portal

Making a basic registration page

With iService forms you can create custom pages for customers to subscribe to your mailing lists and campaigns. If you have multiple lists or use the iService knowledge base, you can also create an email preferences page where the user can manage all of their subscriptions.

We suggest you speak with your iService account manager for help designing and constructing custom email preference pages.

Unsubscribes

When a contact does not want to receive further mailings from a list, you are obligated by law to honor that request (except for certain types of account correspondence that are transactional rather than marketing related). These contacts are referred to as Opted Out and are shown within the Mailing Lists > Unsubscribes page.

Number of contacts unsubscribed to this list : 2

Name	First Name	Last Name	Email	Company	Phone (Work)
Peter Parker	Peter	Parker	peter.parker@example.com	Example Company, Inc.	312-555-5555
Robert Doe	Robert	Doe	robert.doe@example.com	Example Company, Inc.	312-555-5555

Showing 1 to 2 of 2 entries

Contacts that have opted out of future mailings

- There are several ways that a contact may be opted out of a list.
- Unsubscribe via link in email** – Your message may contain an Unsubscribe link to automate the contacts unsubscribe request. The recipient will click this link, which will load a URL that specifies the Contact ID, MSG ID, and List ID. This page will then set the Opted Out value to True for the contact, and a record of when the property was updated will be recorded in the contact property history. The page will refresh to either a standard iService Successful Unsubscribe page or a customizable message specified in the message. For

additional information on the unsubscribe link, see the Link Variables section.

- b. **Customer Portal > My Account > Subscriptions page** - A contact can remove themselves in the same way that they add themselves to a list.
- c. **Customer Info > Contacts > Subscriptions** - Agents can remove subscriptions from the contact page, and can add those contacts to the Opt Out list.

12.1.2 Criteria

There are times when a message should be delivered to a subset of list members. For instance, you might only want to deliver your message to contacts that live in a certain location or use a specific product of yours. Criteria are used to select a subset of list members, and are based on the same search options as found in the [Search Contacts](#)¹⁵⁰ page. These predefined searches are saved and used within the mailing process.

The screenshot displays the 'Mailing Criteria' page. At the top, there is a navigation bar with a menu icon, a chat icon, an email icon with a red notification badge, the user name 'AP Alek Packard', and a settings icon. Below the navigation bar, the page title 'Mailing Criteria' is shown with a help icon. A breadcrumb trail indicates the path: Home > Mass Mailing > Mailing Criteria.

The main content area is divided into two sections. The first section, titled 'Criteria', features a toolbar with options for 'Copy', 'Excel', 'PDF', and 'Column visibility'. It also includes a 'Show' dropdown set to '10' entries and a 'Filter Criteria' search box. Below this is a table with columns for 'Name', 'Description', and 'Segments'. The table contains two entries: 'Internal Only' with description 'Internal Company Email Addresses Only' and segments 'Customers Service, Human Resource'; and 'Test List' with description 'Limit Mailing To Our Test Email Accounts' and segment 'Customers Service'. A pagination control shows 'Showing 1 to 2 of 2 entries' and 'Previous 1 Next'.

The second section, titled 'Criteria Configuration', is for editing the 'Internal Only' criteria. It has two input fields: 'Criteria Name' (containing 'Internal Only') and 'Criteria Description' (containing 'internal company email addresses only'). Below these is a section 'Segments That Can Use This Criteria' with a list of checkboxes: 'Customer Service' (checked), 'Human Resources' (checked), 'Human Resources' (unchecked), 'QA3 - Third Segment' (unchecked), and 'Sales' (unchecked). 'Save' and 'Cancel' buttons are at the bottom of this section.

The third section, 'Search Parameters For Criteria', contains a search interface. It has four dropdown menus: 'Search where' (set to 'anywhere'), 'In field' (set to '-- Login --'), 'Search options' (set to 'Contains'), and 'Search for' (set to '1to1service.com'). A '+ Add another search parameter' link is below the search fields. 'Search' and 'Reset' buttons are at the bottom right.

The Mailing Criteria page

In the example above, this criteria would limit the recipients of a mailing to those contacts that have an email address that contains 1to1service.com.

12.1.3 Mass Mailing Messages



One of the most important aspects of sending a mailing is the message itself. Messages are created in the Mass Mailing > **Messages** tab and are comprised of the elements describe below. These messages are delivered through mailings and campaigns executed on the Mass Mailing > **Mailings or Campaigns** page.

The message list

The screenshot shows the 'Mailing Messages' interface. At the top, there is a navigation bar with a home icon, a breadcrumb trail 'Home > Mass Mailing > Mailing Messages', and a user profile 'AP Alek Packard'. Below the navigation bar, the page title is 'Mailing Messages' with a help icon. A 'Messages' tab is active, indicated by a green circle with the number '1'. The main content area displays a table of messages with columns: Name, Description, Topic, Subject Line, Include Ref#, and Last Mailing. Two messages are listed: 'Free Shipping Offer' and 'Monthly Discount'. The 'Monthly Discount' message is highlighted in blue. Below the table, there are 'Showing 1 to 2 of 2 entries' and pagination controls for 'Previous', '1', and 'Next'. At the bottom of the interface, there are two buttons: 'New Message' and 'Delete Message...', with a green circle and the number '2' next to the 'Delete Message...' button.

1 - This is a list of all messages that are available to the agent for editing. Users of this page can only see messages in the Segments to which they have been granted access. The message's segment is determined by its topic.

2 - Use these buttons to create new messages or delete existing messages. When deleting a message, iService will display the Campaigns and Mailings in which the message is used, and prompt for confirmation. If the message is used in a Campaign or Mailing, they must first be removed before the message can be deleted.

Message configuration

The screenshot displays the 'Mailing Message Configuration' interface. It is divided into three main sections: 'Mailing Message Configuration', 'Plain Text Message', and 'Rich Text Message'. The 'Mailing Message Configuration' section includes fields for 'Message Name' (1) with the value 'Monthly discount', 'Description' (2) with 'Announcement for this month's discount', 'Subject Line' (3) with 'New discounts are available!', and a 'Topic' dropdown (4) set to 'Sales'. There is also a toggle for 'Include Ref Number In Subject Line' (5) which is currently off. A 'Save' button is located in the top right of this section. The 'Plain Text Message' section (6) features a large text area and a 'Variables & Stock Responses' button. The 'Rich Text Message' section (7) includes a rich text editor with a toolbar (8) containing various formatting options like bold, italic, underline, and font color. It also has a 'Variables & Stock Responses' button. At the bottom of the interface are 'Save' and 'Cancel' buttons.

Configuring a mailing message

1. **Name** - The name is a label that is displayed in the Message List and in other iService screens.
2. **Description** - This description is used to explain the purpose of the message.

3. **Subject Line** - This is the subject line of the message that will be viewed by the recipient.
4. **Topic**. All interactions within iService must have an assigned topic. This topic determines the Segment in which the message resides, which then determines agents that will have access to the message.
5. **Include Ref# in Subject Line** - This option will include the standard iService reference number in the subject line of the message. In some cases, the sender may not want the Ref# displayed in the subject line, especially if the message is personal or is not intended to receive a reply. The Ref# is used by iService to link any responses from the contact with the original outbound email. This association creates a message thread within interaction history that makes it easier to view the overall conversation with the contact.
6. **Plain text message** - Mailings are delivered as multi-part messages that include a text body and a rich text (HTML) body. This ensures that regardless of the recipient's email client (cell phone, Outlook, etc.), the message will be rendered properly. The plain text body may include stock responses and variables, similar to composing responses from the Message Queue page. All of the contact properties to which the agent has access may be used as variables when composing a message. Variables are inserted where the cursor is placed in the text box by clicking the variable name. Although listed in the Variable quick pick list, you can also type them directly such as `$ContactProperty-'Job Title'$. Be sure to use a single quote around the actual property name instead of double quotes.`
7. **Rich text message** - The HTML body section of the page functions the same as the Plain Text Body which is described above. The same variables and stock responses may be used in both areas, and the preview panel will display using your properties. The most common method for constructing the HTML body is to use an HTML editor. For simple messages that include only basic markup, like font styles (e.g., bold, underline, etc.), use the built in [Rich Text Editor](#)⁶⁰.
8. **Variables & Stock Responses** - To include variables in the message body, select them from this panel and they will be pasted into the message at the cursor location. The list of variables displayed is

limited to the agent's segment access. That is, if the agent would not normally see the contact properties in the [Contacts>Details tab](#), they will not be displayed here. All of the stock responses available to the agent are displayed in this tab. To insert the stock response, click the stock response name.

Link Variables

Variables and message personalization are an important part of the outbound email process. The Link command is a special class of these variables, and has special syntax for tracking message views, unsubscribe requests, and URL clickthroughs (trackable URLs). The Link command utilizes the iService Link.aspx page, which records the action and performs the requested function.

There are three versions of this command: Link, Linka, and Linking. The Link command is primarily used for plain text messages, while Linka and Linking are used for HTML messages. The syntax for each version of the command is as follows.

The Link command

\$Link [name]\$ - name is used to differentiate the links in a message and for reporting.

Optional Parameters: [-URL] [-VALUE] [-DEF] – -URL specifies the landing page for the link, -VALUE records a corresponding value in the database, and -DEF makes the link a definition that can be reused throughout the message.

The Link command generates a URL that is based on the website and link.aspx page. It is primarily used to generate trackable URLs that redirect the contact to a specified page. The optional parameters of URL and VALUE are always followed by text included within quotes (e.g., "something here") that specify the action.

The name is required and is used to identify the link for reporting purposes. Any name can be used, such as “OurWebsite”, but the name cannot contain spaces or special characters. The name Unsub is reserved and is described in the table below.

Parameter	Example
<p>Link Unsub</p>	<p>The word UNSUB is a reserved name and is used to generate an unsubscribe link. This name does not require any of the optional parameters if the standard unsubscribe landing page is desired. When clicked, the link will remove the contact’s email address from the list used in the mailing.</p> <p>For example, \$Link Unsub\$ will generate a link that looks like https://1to1service.iServiceCRM.com/link.aspx?id=25&contact=16&value=&hash=aert4323342</p> <p>When clicked, the above link will remove the contact from the list used for the mailing and refresh to a similar URL that displays standard verbiage indicating the contact has been unsubscribed from the list.</p> <p>To refresh to a customized page, add the –URL parameter and specify the desired landing page.</p>
<p>Link Unsub – URL ‘foo’</p>	<p>The –URL parameter can be used along with the Unsub name to specify a customized landing page for unsubscribe requests.</p> <p>For example, \$Link Unsub –URL ‘http://www.website.com/sorry.html’\$ would redirect the contact to the sorry.html page after the</p>

unsubscribe request is completed. The actual url must be enclosed in single quotation marks. NOTE: do not use double quotes.

Link {name} – URL ‘foo’

This is the standard format for creating a trackable URL. The URL that is included within the quotes will be the landing page.

For example, \$Link OurWebsite –URL ‘http://www.website.com’\$ will generate a link that looks like
<https://1to1service.iServiceCRM.com/link.aspx?id=25&contact=16&value=&hash=aert4323342>.

When clicked, this link will record the event and refresh to the www.website.com page specified by the –URL parameter. The name used in this example, OurWebsite, will display on reports and within history to indicate the specific link that was clicked by the contact.

Link {name} – URL ‘foo’ – value ‘bar’

The –Value parameter can be added to store a specified value associated with the link. This is useful for including simple surveys, asking for approval, etc. The text associated with the –Value parameter is stored by iService and available for reporting.

For example, \$Link Survey –URL ‘http://www.website.com/thanks.asp’ –Value ‘Yes’\$ will generate a link that looks like
<https://1to1service.iServiceCRM.com/link.aspx?id=25&contact=16&value=Yes&hash=aert4323342>.

When clicked, this link will record 1) when it was clicked and 2) the value associated with the click.

In the example above, the contact would be refreshed to the www.website.com page and the value of Yes would be associated with their click.

Link {name} – URL ‘foo’ –DEF The –DEF parameter converts the link into a definition. It will not display anything where created, but is available for use as often as desired within the message. If you have a link that is used in many places, the definition can save you some time.

For example, `$Link OurWebsite –URL ‘http://www.website.com’ –DEF$` creates a definition of the name `OurWebsite`. To insert this link in various places, you could simply use the following.

To visit our website, click the link below.
`$Link OurWebsite$`

In addition, if you have a set of links that are used often, you can format them as stock responses and insert them at the beginning of your message. Then you can simply use the definition wherever desired.

For example, you might add this text at the beginning or end of all of your plain text messages.

```
$Link OurWebsite –URL ‘http://www.website.com’  
–DEF$  
$Link Unsub –URL  
‘http://website.com/sorryurleaving.asp’ –DEF$
```

```
$Link Survey1 -URL
'http://website.com/thanks4voting.asp' -VALUE
'Yes' -DEF$
$Link Survey2 -URL
'http://website.com/thanks4voting.asp' -VALUE
'No' -DEF$
```

The Linka command

\$Linka [name]\$

Optional Parameters: [-URL] [-TEXT] [-VALUE] [-DEF]

The Linka command is identical to the Link command, except that it automatically generates the necessary HTML A tag to make the generated link a true hyperlink. That is, instead of seeing the link `http://1to1service.iServiceCRM.com/Link.aspx?id=...` the command will generate a hyper link that looks like [click here](#). The text that is displayed in the message (e.g., click here) is generated by the `-Text` parameter, which is required.

For example, the Linka command below

```
$Linka Unsub -TEXT 'click here to unsubscribe'$
```

will generate and an unsubscribe link that looks like this: [click here to unsubscribe](#).

Other than generating the required HTML instead of a plain link, the Linka command functions identical to the Link command.

The Linking command

\$Linking Viewed\$

This command will insert an image in the HTML portion of the message. When the email is opened and the images are displayed, this action is tracked by iService and provides a reliable indication that the message has been viewed. However, if the user does not accept the images or reads the text version of the message, this attribute will not be updated.

The Linking command generates an image tag that looks like the following.

```
.
```

The link page redirects to a standard blank gif image stored on the iService website.

NOTE: for the Linking Viewed tag to work properly, the iService website URL must be externally accessible.

12.1.4 Sending Mailings



The Mailings tab provides the ability to create a mailing that specifies the following items.

- a. The List to which the message will be sent.
- b. The message that will be sent to the list.
- c. Criteria for the delivery of the message

Essentially, the mailings page allows the user to pick a message and send it to a list. A unique mailing ID is used to track the effectiveness of each mailing. The contents of the Mailings > Mailing page are described below.

The list of mailings

The screenshot shows the 'Mailings' section of a user interface. At the top, there's a breadcrumb trail: Home > Mass Mailing > Mailings. Below that, a 'Mailing Lists' header is highlighted with a red circle '1'. Underneath, there are options to 'Copy', 'Excel', 'PDF', and 'Column visibility', along with a 'Show 10 entries' dropdown and a 'Filter Mailing Lists' search box. A table lists mailings with columns for ID, Mailing Name, Description, Topic, List, Message, Mailbox, and Last Emailed. Two entries are visible: ID 12 (Coupon Delivery) and ID 14 (Employee Policy). At the bottom, there are 'New Mailing' and 'Delete Mailing...' buttons, with the latter highlighted by a red circle '2'. A pagination control shows 'Previous', '1', and 'Next'.

ID	Mailing Name	Description	Topic	List	Message	Mailbox	Last Emailed
12	Coupon Delivery	Used To Deliver Coupons To Customers	Sales	Customer Notices	Co Please say that again Available	Sales	2019-04-12 12:45 PM
14	Employee Policy	For Sending Policy Updates To All Staff	HR Notices	Human Resources	New Policies	HR	2019-04-15 11:40 PM

The Mass Mailings list

1. **Mailings List** - This is a list of all mailings that are available to the agent for editing. The list of mailings is limited to the Segments for which the agent has been granted access. The mailing's segment is determined by the topic of its message.
2. **New Mailing / Delete Mailing** - Use these buttons to create new mailings or delete existing mailings. When deleting a mailing, iService will prompt for confirmation.

Configuring a mailing

The screenshot shows the 'Mailing Configuration' interface. It is divided into two main sections: 'Setup Your Mailing' on the left and 'Send Your Mailing' on the right. The 'Setup Your Mailing' section includes fields for 'Mailing Name' (1) with the value 'Coupon delivery', 'Description' (2) with the value 'Used to deliver coupons to customers', 'Select Your Mailing List' (3) with the value 'Customer Notice', 'Select Your Message' (4) with the value 'Free Shipping Offer', 'Message Topic' (5) with the value 'Customer Service - All Topic', and 'From Mailbox' (6) with the value '--Default MailBox--'. A 'Save Setup' button (7) is at the bottom of this section. The 'Send Your Mailing' section includes a 'Limit Your Recipients' field with a 'Please say that again' error message, a 'Select A Criteria' dropdown with the value 'Test list', and a 'Send Your Message' section with a 'Send Mailing' button.

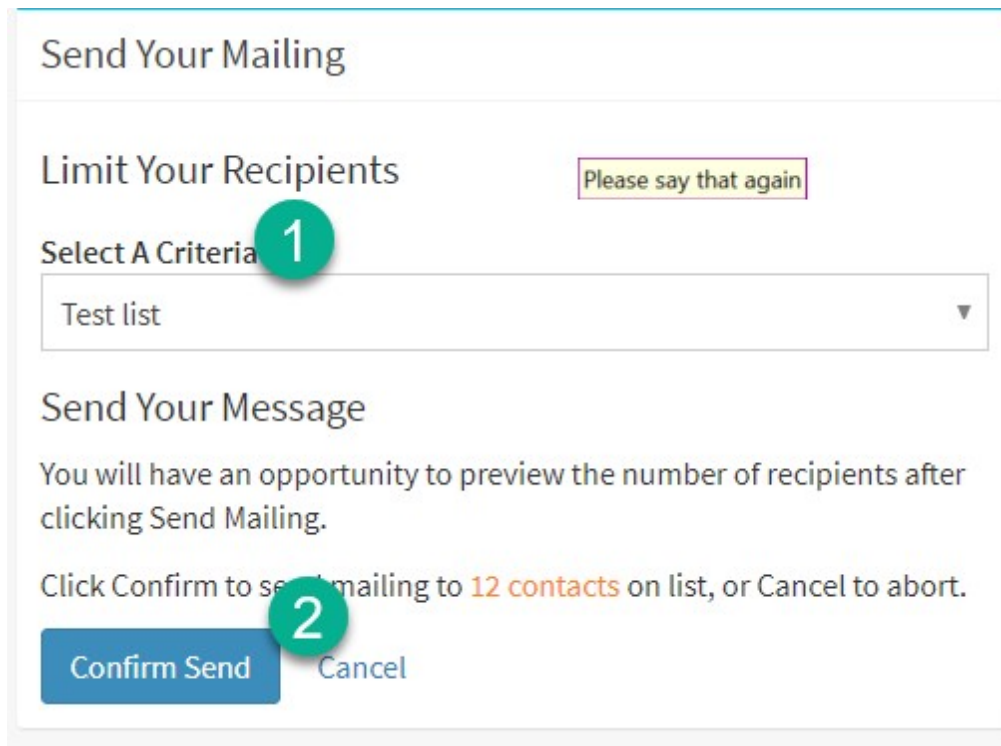
Configuring a mass mailing

1. **Name** - The name is a label that is displayed in the Mailing List at the top of the page and in other iService screens.
2. **Description** - This description is used to explain the purpose of the mailing.
3. **Mailing List** - Select the list of recipients from the Mailing List drop down. The lists available to the agent are limited to the segments for which the agent has been granted access.
4. **Mailing Message** - Select the message to send from the Mailing Message drop down. The list of messages will be limited to those that are in topics to which the agent has been granted segment access.
5. **Topic** - When the Mailing Message is selected, the corresponding topic of that message will be displayed. This topic is display only on the Mailings page and cannot be edited.
6. **From Mailbox** - The topic of the message defines the segment in which the mailing will be sent. The corresponding list of segment

mailboxes is displayed and the From mailbox must be selected from the drop down menu.

7. **Save** - Click the Save button to save the changes to the mailing before sending or leaving the page.

Sending a mailing



Executing a mass mailing

1. **Criteria** - If you only want to send the message to a subset of the contacts on a list, select a criteria using the drop down menu. [Criteria](#)²⁸¹ are based on iService contact search, and can include multiple search terms using And/Or logic. The criteria label is used within iService mass mailing reports.
2. **Send Mailing** - The Send Mailing button will prompt for confirmation before delivering the messages, and will indicate the number of contacts included in the mailing. Access to this button is limited based on UserType configuration, and is granted to all UserTypes that have “Tab.Mailings.Mailings.Send” enabled. By default, only Administrators have access to the Send button.

Once a mailing is executed, message delivery begins immediately.

12.1.5 Mailing Campaigns



A campaign is a series of mailings that are scheduled for delivery according to a predetermined schedule. This simplifies the mailing process when you have a recurring schedule for delivering various messages to the same contact.

For example, you might send a series of training messages as part of an on-boarding process. Or, you might use campaigns to to send drip messages or nurture marketing messages for prospects.

The message delivery date is an offset from the date the contact is added to the Campaign. A unique schedule is used for every contact added to the Campaign based on the date and time they were added.

The campaigns list

Mailing Campaigns ? Home > Mass Mailing > Mailing Campaigns

Mailing Campaigns 1

Copy Excel PDF Column visibility Show 10 entries Filter Campaigns

Name	Description	Segments	Shown In My Account
New Customers	Series Of Mailing To New Customers	Customer Service	<input checked="" type="checkbox"/>
New Employee	Weekly Company Info Sent To New Employees	Human Resource	<input type="checkbox"/>

Showing 1 to 2 of 2 entries

Previous 1 Next

New Campaign Delete Campaign... 2

The Mailing Campaigns list

1. **Campaigns List** - This is a list of all campaigns that are available to the agent for editing. The list of campaigns is limited to the Segments for which the agent has been granted access. The campaign's segment is defined for each campaign in the details tab.
2. **New Campaign / Delete Campaign** - Use these buttons to create new mailings or delete existing campaigns. When deleting a campaign, iService will prompt for confirmation.

Campaign settings

The settings for a campaign

1. **Name** - The name is a label that is displayed in the Campaigns List at the top of the page and in other iService screens.
2. **Description** - This description is used to explain the purpose of the campaign. This description is also displayed on all pages of iService where agents and contacts interact with subscriptions.
3. **Shown in my account** – Since Campaigns are essentially another type of mailing list, this name is also displayed on all pages of iService where agents and contacts interact with subscriptions. When this switch is on, the campaign will appear in the subscription pages for agents and contacts that are members of the segments specified (see 4).

4. **Waiting period before sending** - This is the number of days since the contact was added to the campaign until the message is sent. An offset of 0 indicates the message will be sent when the contact is added to the campaign.
5. **Message to send** – this is the message that will be sent to the contacts.
6. **Mailbox to send from** – the message will be sent to the contact from this mailbox.
7. **Edit / Delete** - click the pencil to edit the row. The delete link will remove the message from the campaign. There is no confirmation prior to removal, but the changes to the campaign are not saved until the Save button is clicked. If you remove a message by mistake, reload the campaign and the changes will not be saved.
8. **Add Message** - To add another message to the campaign, click the Add Message link and fill in the corresponding information.

The Campaigns > Subscribers and Unsubscribes Page Elements

Campaigns retain their own mailing lists of recipients. These lists are developed and maintained identically to the standard Mailing Lists within iService. For details on managing campaign contact lists, see the “[Mailing Lists](#)²⁷¹” section above.

12.2 Alerts



Alerts monitor your iService tenant and take automated actions when questions are not resolved within a specified time frame. Alerts run on a predefined schedule, such as once a day or once an hour. Alerts are configured to monitor specified topics, and can take a variety of actions on questions that match the alert criteria. Actions include change topic, resolve interaction, round robin assign the question to an agent, send a report of unanswered questions to various agents via email, set an interaction property, and run a webhook.

Like other settings pages, the Alerts page includes a list of alerts that have been defined and options to enable or disable them as needed. You can find more details about the actions supported in the [Filters](#) ⁶⁹⁹ page.

The alert list

The screenshot shows the Alerts management page. At the top, there's a search bar and a 'Filter Alerts' input. Below that, a table lists four alerts. The table has columns for Alert Name, Frequency, Age, Topics, Action Steps, and Enabled. The 'Unfinished HR Hire Requests' alert is highlighted in blue. At the bottom, there are 'New Alert' and 'Delete Alert' buttons.

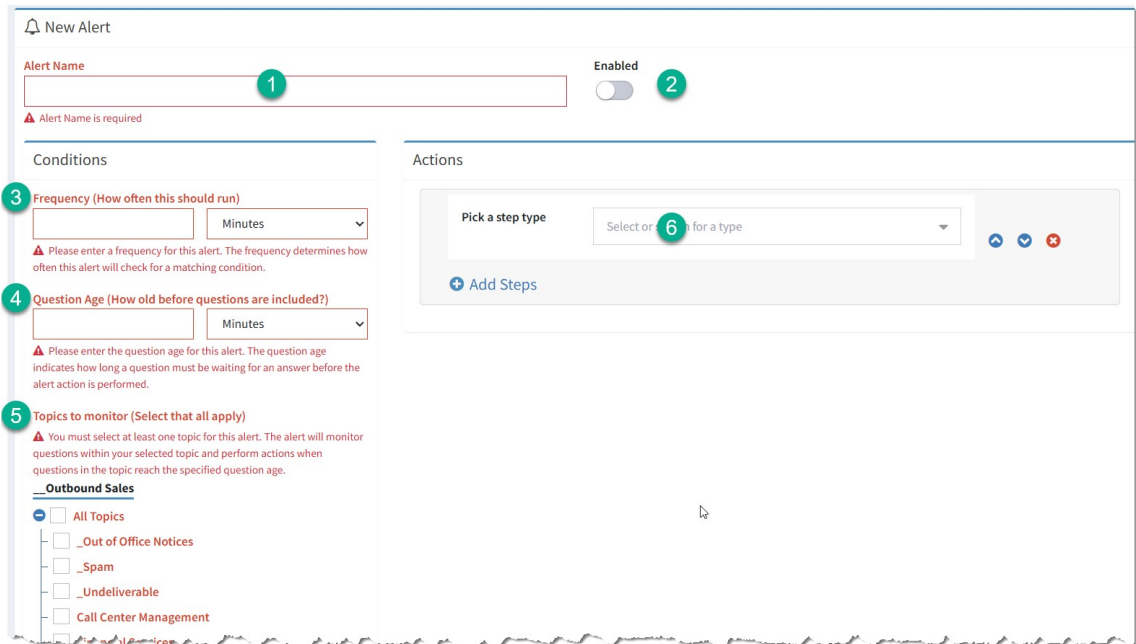
Alert Name	Frequency	Age	Topics	Action Steps	Enabled
IT Compliance Events	1440	2880	Technical Support	selectAgents, sendAutoResponse	<input type="checkbox"/>
Unfinished HR Hire Requests	1440	1440	Account Questions	selectAgents, sendAutoResponse	<input checked="" type="checkbox"/>
Abandoned Lead	240	240	_3rd Party Assistance	stepType, segmentID, topicID	<input type="checkbox"/>
Questions > 30 minutes old	1	30	Account Questions	stepType, agentIDs, stepType, segmentID, autoResponseID, mailboxID	<input type="checkbox"/>

The list of alerts

Column Name	Description
Alert Name	The alert name is used for display and can be inserted into agent notifications.
Frequency	The alert will check the topics selected based on the frequency specified.
Question Age	The alert will included questions that are at least as old as the question age specified.
Topics	The alert will only monitor the topics included in the alert.
Action Steps	When the alert identifies matching questions, the specified action steps will be run.
Enabled	The alert only runs when enabled.
New Alert / Delete Alert	Use these buttons to create a new alert or delete the selected alert.

Configuring an alert

There are six sections within an alert that need to be configured.



#	Setting to Configure	Description
1	Alert Name	This is the name that appears in the Alert list. It will also be used in the Status Audit for interactions created or updated by the alert.
2	Enabled	To enable the alert, turn on the switch.
3	Frequency	The frequency defines how often the alert will check for the age of messages in the selected topics. For example, an alert with a frequency of 1 day will check for the conditions and perform the specified action once per day. Keep in mind that if your action sends an email notification frequent checking of the condition could generate many notices.
4	Question Age	The question age defines how old question must be before the alert takes an action. This age is based on the original creation time of

#	Setting to Configure	Description
		the message and only unresolved questions are evaluated by Alerts. For example, if the condition is 30 minutes every question in the chosen topic that are unresolved and over 30 minutes old will be included in the action.
5	Topics	Select the topics to monitor. The Alert will only run actions for unresolved questions that are in the selected topics. You can select as many topics as desired.
6	Actions	When the Alert runs it will identify every interaction in the selected topics that match the Question Age. The action will be applied to all of those matching questions. Most of the actions are run separately for each interaction. However, the Send Agent Notification action will group all of the matching interactions into a single email sent to the selected agent.


A note about actions.

The actions available to the alert are identical to the filter actions that are used when processing incoming email or tickets. The difference is that Filters only run when a message arrives, while Alerts run on a schedule after the question is already created. See the [Filters](#)⁷⁰³ chapter for details on how to configure the actions in your Alert.


12.3 Forms

The iService Forms interface is used to build web applications that leverage the iService web services. These can be as simple as a form to capture a customer question, or as detailed as an entire customer support portal or workflow application.

There are several customizable forms that can be used to enhance your agent or customer experience. These forms require modification for your business requirements before they can be used.

[Customer Portal](#)  - The customer portal allows your customers to find answers to the questions in a knowledge base, submit questions, read answers in view past conversations, manage mailing list subscriptions, and edit their contact information and custom properties. The form supports adding custom headers and footers, but will function without any modification.

Assigned Messages - The assigned messages form provides a summary of all agents that have messages assigned along with the age of the oldest message in their queue.

[Quote and follow-up forms](#)  - iService includes a complete workflow for sending quotes, tracking the status

To learn more about the forms interface, see the [iService Forms User Guide](#).

Form variables

iService has parameters for retrieving and saving values from and to the database. These parameters are called iService variables, and their usage format is described using the regular expression patterns shown below.

Variable Name	Description	Pattern

loginname	<pre>[\$(loginname) (+((-customhtml) (-id *'([^\']+)'))) *[\$]</pre>
loginpassword	<pre>[\$(loginpassword) (+((-customhtml) (-id *'([^\']+)'))) *[\$]</pre>
input	<pre>[\$(input) (+((-id *'([^\']+)') (-customhtml) (-confirm *'([^\']+)') (-required) (-textarea) (-group *'([^\']+)') (-contactProperty *(\d+) *('([^\']+)')) (-interactionProperty *(\d+) *('([^\']+)')) (-password) (-firstname) (-lastname) (-email *(\(((self)))\))?) (-description *'([^\']+)') (-topics *(\(((^\])\))\))?) (-addtolist *(\d+) *('([^\']+)')) (-addtocampaign *(\d+) *('([^\']+)')) (-myaccount *(\(((list campaign article))) *[\$]</pre>
fileupload	<pre>[\$(fileupload) (+((-nameprefix *'([^\']+)') (-group *'([^\']+)'))) *[\$]</pre>
if	<pre>[\$(if) ((if) (+((-more) (-checked) (-myaccountlists) (-myaccountcampaigns) (-myaccountarticles) (-ispostback) (-submitsuccess) (-beforeaction) (-lasteval) (-loggedin) (-topic tree *(\(((findanswer)))\)) (-openid *(\(((any google azure)))\)) (-fieldregex *'([^\']+) '*=? *'([^\']*)' (-articlelist *(\(((topic search)))\)) (-Ppagenum *'([^\']+)') (-Pperpage *'</pre>

		<pre> (-article) (-Pid *'([^\']+)') (-(question answer interaction)) *(\((((-chat *(\(((available))\))) (-Ptopic * (-domainuser)))*)) [\$] </pre>
else		<code>[\$] ((else)) [\$]</code>
endif		<code>[\$] ((endif)) [\$]</code>
repeat		<pre> [\$] ((repeat) (+((-prefix *'([^\']+)') (-myaccountlists) (-myaccountcampaigns) (-myaccountarticles) (-diag *(\(((regex builtinforms inputs)) (-topics *(\(((findanswer admin mqsuper (-topictree *(\(((findanswer))\))) (-articlelist *(\(((topic search))\))) (-Ppagenum *'([^\']+)') (-Pperpage *' (-messagesearch) (-Ppagenum *'([^\']+)') (-contactsearch) (-Pfields *'([^\']+)') (-history *(\(((threads children mythrea (-inbox *(\(((myqueue pending approve))\ (-messagesearchfields *(\(((properties s (-contactsearchfields *(\(((properties)) (-(question answer interaction)) *(\((((-alertitems) (-segments *(\(((admin))\))) (-forms *(\(((admin))\))) (-websites *(\(((admin))\))) (-agents *(\(((admin chat))\))) (-servicelevels *(\(((admin))\))) (-intproperties *(\(((admin))\))) (-contactproperties *(\(((admin))\))) (-mailboxes *(\(((admin segment forward (-filters *(\(((admin))\))) (-departments *(\(((admin))\))) (-skills *(\(((admin))\))) (-autoresponses *(\(((admin externalnot (-usertypes *(\(((admin))\))) (-supervise *(\(((chat))\))) (-stockresponses *(\(((segment agent))\ (-lists *(\(((admin))\))) (-masslists *(\(((admin))\))) (-massmessages *(\(((admin))\))) (-massmailings *(\(((admin))\))) (-masscriterias *(\(((admin))\))) (-masscampaigns *(\(((admin))\))) </pre>

		<pre> (-userchat *(\(((lines))\))) (-Pguid *' (-reassignagents *(\(((chat interaction))*))[\$] </pre>
endrepeat		<pre> [\$]((endrepeat))[\$] </pre>
include		<pre> [\$](((include)(+((-formID *'([^\']+)') (-indent *'([^\']+)') (-placeholder *'([^\']+)')))*))[\$] </pre>
stock		<pre> [\$](((stock)(+((-id *'([^\']+)') (-name *'([^\']+)') (-indent *'([^\']+)')))*))[\$] </pre>
value		<pre> [\$](((value)(+((-formid) (-rootpath) (-version) (-urlencode) (-repeat *(\(((prefix index count))\))) (-loggedin *(\(((name contactid sessionid numcanapprove))\))) (-myaccount *(\(((details))\))) (-myaccountlist *(\(((id name description (-myaccountcampaign *(\(((id name description (-myaccountarticle *(\(((id subject topicID (-topic *(\(((id parentid name messagecount approvecount answerproperties questionID (-articlelist *(\(((id subject date topicID (-article *(\(((id subject date questionID rating myrating creatorname url isSubmitted (-attachment *(\(((id name ownerid))\))) (-messagesearch *(\(((resultcount))\))) (-messagesearchfield contactsearchfield (-diagregex *(\(((name pattern))\))) (-diaginput *(\(((name value))\))) (-tenant *(\(((id name))\))) (-today) (-now) (-customer *(\(((id name company phone address myaccountproperties custinfoproperties (-((question answer interaction)) *(\(((mailbox fromemail toaddress cc bcc date customername topicID topicname segmentID quotedbody note rating viewcount assignedby modifiedbyname approvedbyname attach </pre>

		<pre> inboxproperties))\))) (-Pid *'([^\']+) (-((customer question answer interaction (-readonly) (-nodescription) (-texton (-passwordreset *(\(((url guid ipaddress (-alert *(\(((name count))\))) (-alertitem *(\(((id agent name email su (-forwardexternal *(\(((url id guid ager (-notifyresponse *(\(((id body bodyatsta (-segment *(\(((id name description pare responseIDCreate responseIDNotify res (-servicelevel *(\(((id name minutes int contactPropertyValue)\))) (-Pid *'((-agent *(\(((id firstname lastname full allsegments isloggedin isavailable dc skillnames segments segmentnames last agentsmaxchat)\))) (-intproperty *(\(((id name shared isrec allowmultiple hasdescription ismulti (-contactproperty *(\(((id name isdate segmentname)\))) (-mailbox *(\(((id name segmentID segmen useSSL displayName replyTo smtpServe smtpAuthPassword useIMAP userErrors)) (-filter *(\(((id name segmentID segment (-department *(\(((id name description s (-skill *(\(((id name intpropertyID prop (-stockresponse *(\(((id name descriptio (-autoresponse *(\(((id name description segmentID segmentname issecurenotific (-usertype *(\(((id name rightIDs count) (-form *(\(((id name description redirec deleteeffects)\))) (-Pid *'([^\']+)') (-website *(\(((id name style alsoUseDe segmentnames passwordResetMailboxID p (-list *(\(((id name description values) (-masslist *(\(((id name description seg (-massmessage *(\(((id name description (-massmailing *(\(((id name description (-masscriteria *(\(((id name description (-masscampaign *(\(((id name description (-accessrights) (-supervisechat *(\(((elapsedWaitMs elap (-userchat *(\(((id topicID isAnswered l linedatetime linedatetetimeiso linename)\))) (-Pguid *'([^\']+)') (-Pid *'([^\ (-myqueuedetails *(\(((id type status th questionHtml attachments properties c</pre>
--	--	--

		<pre> reCC topicID topicname segmentID segmentName responseFinalHtml responseFinalPlain (-openid *(\(((googleclientid azureclientid -Pjs) (-Pnolimit) (-isoutc)))*)*)[\$] </pre>
result		<pre> [\$]((result)(+((-id *'([^']+)')))*)*)[\$] </pre>
json		<pre> [\$]((json)(+((-loginloggedin)))*)*)[\$] </pre>
header		<pre> [\$]header(+((-filetype *(\(((css js json))\))) (-allowframe(same all))))*)[\$] </pre>
error message		<pre> [\$]errormessage(+((-Pjs) (-details)))*)[\$] </pre>
form		<pre> [\$]form(+((-id *(' &#39;)([^&]+)(' &#39;)) (-Pjs) (-cleanID) (-Purl) (-Ppath) (-isHtml Phtml))))*)[\$] </pre>
result		<pre> [\$]result(+((-id *(' &#39;)([^&]+)(' &#39;))))*)[\$] </pre>

Using forms with utilities

iService utilities read CSV files and process them against forms. [Read more about utilities here](#)⁷²⁸.

12.4 Server Process Management

These pages are used by system administrators to manage various aspects your iService tenant.

The [Agent Inactivity](#)³⁰⁸ tab controls whether agents are logged out for inactivity. The inactivity check should only be disabled if you have a specific use case that makes automated logout undesirable.

The [interaction purge](#)³⁰⁹ settings will permanently delete interactions that match the age specified. Use these settings with care because deleted interactions cannot be recovered.

The [SMTP Out Monitor](#)³¹¹ provides a list of outgoing email messages that could not be delivered to the recipient. iService will retry sending, but in most cases these messages will not be delivered because of an issue with the recipients address.

12.4.1 Agent Inactivity

iService logs users out when they have been inactive longer than the inactivity threshold specified for their user account. This value is set in the [Agent Admin](#)⁵⁴² page, and can be viewed by agents in their My Profile page. The inactivity check occurs every 30 seconds.

Superusers will see all tenants in the iService installation, while administrators granted access to this page will only see their tenant.

Server Process Management ?

Agent Inactivity Interaction Purge SMTP Out Monitor

iService logs users out when they have been inactive longer than the inactivity threshold specified for their user account. The inactivity check occurs every 30 seconds. The Message column shows the results for the last check: the number of agents that were logged out, and the number of agents that remain logged in after the check.

1 Status	2 Tenant	3 Last Process Time	4 Message
<input checked="" type="checkbox"/>	Qamain.Qamainclean	2022-10-27 08:43:13 PM (17 seconds ago)	Completed: Logged Out 0, Pinged 0
<input checked="" type="checkbox"/>	Qamain.Qamaintest	2022-10-27 08:43:13 PM (16 seconds ago)	Completed: Logged Out 0, Pinged 4
<input checked="" type="checkbox"/>	Qamain.Qadesign	2022-10-27 08:43:14 PM (16 seconds ago)	Completed: Logged Out 0, Pinged 1
<input checked="" type="checkbox"/>	Qamain.Qaftb	2022-10-27 08:43:14 PM (16 seconds ago)	Completed: Logged Out 0, Pinged 0

- 1 - When the switch is on, the activity check will run.
- 2 - The name of the tenant being controlled.
- 3 - The last time the inactivity check searched for agents to log out.

4- The Message column shows the results for the last check: the number of agents that were logged out, and the number of agents that remain logged in after the check.

12.4.2 Interaction Purge

The interaction purge process deletes interactions (of all types except for KB articles) that are older than the date specified in the Purge > Days column. The process runs every minute to minimize the impact on performance. Interactions deleted by this process cannot be recovered. If you have extensive archival requirements (e.g., retain messages for seven years), you can arrange for long-term backups to be saved for your tenant.

Superusers will see all tenants in the iService installation, while administrators granted access to this page will only see their tenant.

Server Process Management [?](#)

Agent Inactivity Interaction Purge SMTP Out Monitor

The interaction purge process deletes interactions that are older than the date specified in the Purge > Days column. The process runs every minute to minimize the impact on performance. Interactions deleted by this process cannot be recovered.

Status 1	Tenant 2	Purge > Days 3	Interactions Found 4	Files Found 5	Last Deleted Time 6	Configure 7
<input type="radio"/> Off	Qamain.Qamainclean	0	0	0		
<input type="radio"/> Off	Qamain.Qamaintest	0	0	0		
<input checked="" type="radio"/> On	Qamain.Qadesign	180	0	0	4 seconds ago	
<input type="radio"/> Off	Qamain.Qaafb	0	0	0		

The Interaction Purge page

1 - This column indicates whether or not the purge process is activated. This is not a switch, because the number of days to retain messages must be specified before the process can be enabled. The configuration button (7) is used to turn the process on and off.

2 - The tenant that is being purged.

3 - The number of days to retain interactions. This is set from the configure menu.

4 - The number of interactions that will be purged. This value updates every minute based on a search of interactions older than the retention period.

5 - The number of files associated with interactions scheduled for purge.

6 - The last time an interaction was deleted.

7 - Use this button to configure the purge settings. When you click this button, you'll see the menu below. You can disable the purge process, or set a number of days for retention and click Enable to turn it on. The number of days must be at least 180.



Enter # of Days (180 minimum) Enable Disable
[Cancel](#)

Automatic Deletion of _SPAM and _Undeliverable

When the interaction purge process is enabled, interactions in topics named _SPAM and _Undeliverable will be deleted after 45 days. iService will locate every topic that has that exact name, and there are no settings or options for changing the topic or timeframe. This process is only triggered when the interaction purge is On.

Audit log for deleted items

The interaction purge process creates an audit trail

- A tenant level table named `dbo.InteractionsPurgeAudit` stores the audit trail.
- This table is written to during every minute loop to show the purge time stamp, count of interactions purged, and count of remaining to be purged.
- At midnight, the previous day's purged minute logs are rolled up and written to the table and those minute logs are purged from table. The day log also includes the start time column and end time column to show time range (e.g. 2022-04-01 00:00:00 and 2022-04-01 23:59:59). The minute logs leave these columns NULL.
- Daily logs are not automatically purged.
- Date columns use `datetime2` and count columns use `int` data types.
- The table has a standard ID column as primary key for clustered index.
- No foreign keys are used.

12.4.3 SMTP Out Monitor

When you send an email from iService, the email is created and stored in a table awaiting delivery to your SMTP server. The message is typically delivered within a few seconds, but if there is a problem with delivery you can view the pending message from the Admin Tools – SMTP out tab. Message will appear here, for instance, if the recipient email address is malformed or rejected by the mail server.

As shown below, messages with errors are displayed on this page with various details about the interaction.

Server Process Management

Agent Inactivity | Interaction Purge | SMTP Out Monitor

Outgoing email messages that can't be delivered to the specified mail server are listed on this page. iService will retry sending, and the number of attempts is shown in the Errors column.

Excel | Column visibility | Show 5 entries | Filter SMTP Out:

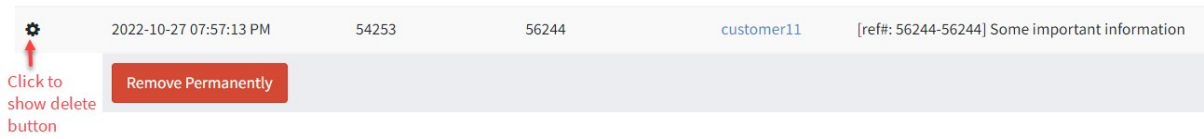
Send Time	Message ID	Interaction ID	To	Subject	Errors
2022-10-27 07:57:13 PM	54253	56244	customer11	[ref#: 56244-56244] Some important information	

Showing 1 to 1 of 1 entries

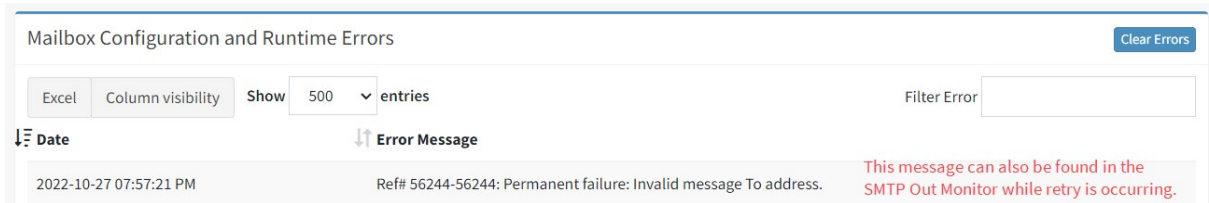
The SMTP Out Monitor page

- 1 - The date and time of the first message delivery attempt.
- 2 - The message ID is a database reference.
- 3 - The interaction ID can be used to search for the interaction in the [Search Interactions](#) page.
- 4 - The TO email address that was used for the email.
- 5 - The subject line of the email.
- 6 - The number of times iService failed delivery.

In some cases the message will never be delivered because of a problem with the email address. In the example below, the address is not formed properly. In those cases you can Remove the message from retry by clicking the gears icon and selecting Remove Permanently. This is option because the message will be automatically removed from the page when iService determines it can't be delivered.



The mail server error is also shown in the [Segment - Mailboxes](#) ⁶⁵⁵ page. The error details will remain in the mailbox configuration page until cleared.



Custom Forms Admin Menu

13 Custom Forms Admin Menu



You can customize various aspects of your iService tenant to meet your unique business requirements. iService includes some built-in forms that you can configure to add functionality. Before these forms are available for agents, they must be configured for your tenant. The built-in forms that require configuration are shown in the Custom Forms Admin menu. You can also create an unlimited number of custom web forms that leverage the power of iService's APIs. Customer forms are explained in the [iService Forms Developer Guide](#).

[Agent Interface](#)³¹⁵ - Configure the answer panel, color coding, dashboard settings, and agent login panel.

[Customer Portals](#)³²⁹ - Customize the features and styling of your customer portals.

[Customer Chat Forms](#)³⁵⁵ - Create chatbots and live chat forms for your tenant.

Manage Calendars -

Credit Memo Admin - This is an example form that includes a complete workflow for submitting items for approval.

[Quote Admin](#)³⁹⁹ - Create a special workflow for sending and tracking quotes.

[Configure Agent Email](#)⁴⁰⁵ - Update the settings for the Quick Agent Email panel.

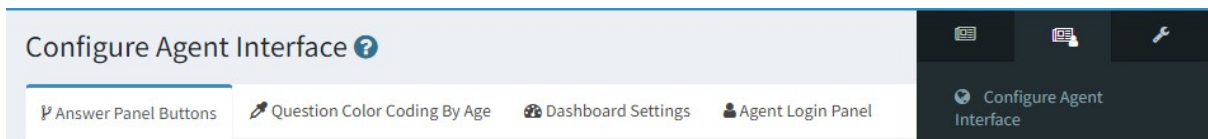
[Workflows](#)⁴¹⁰ - Create custom pages for your iService tenant including customer submit forms, agent submit form, customized answer panels, and more.

13.1 Agent Interface



You can customize the behavior of various agent pages using the menus in the Configure Agent Interface settings. This includes the answer panel, which is the set of action buttons presented when answering a question. If you primarily use secure messaging for interacting with customers, select that answer panel in the Answer Panel Buttons tab. The Question Color Coding menu is used to set the time buckets and color of questions based on how long the question has been unresolved. The Dashboard Settings tab provides tools to customize the iService home page, which is loaded when you click the iService logo. The Agent Login Panel provides an option to redirect customers that open the agent login panel by mistake.

Open the Configure Agent Interface menu from the settings menu in the top right corner of iService.



Answer Panel Buttons

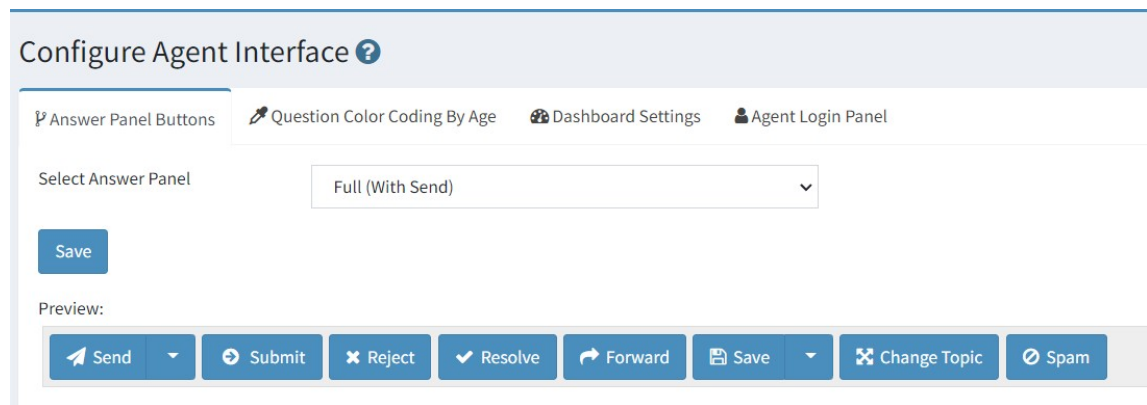
There are two primary views of interactions within iService: the [View Mode](#)^[104] and the [Action Mode](#)^[105]. The action mode includes the answer panel with buttons for sending an agent response, resolving the interaction, forwarding, etc. The answer panel can be customized to take different actions based on how you interact. iService includes different versions of the answer panel that you select from the Answer Panel Buttons menu.

The page provides a drop down menu for selecting the answer panel you want to use. When you select an option, the buttons included are shown. Click the Save button, and the panel will be immediately

implemented. You can click the buttons to view the associated sub-menus.

Full (With Send)

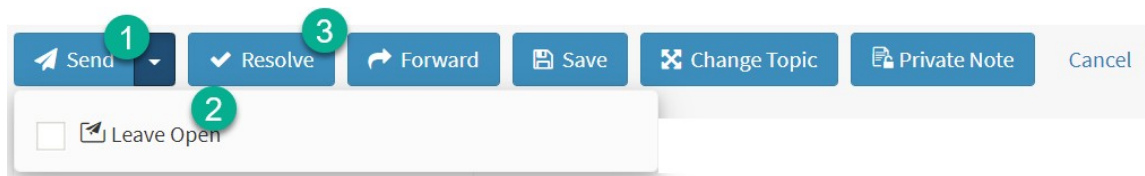
This is the default menu for answering questions that is explained in [Understanding Interactions](#)^[105] chapter.



The Answer Panel Buttons page

Secure Messaging Portal (No Notifications)

This answer panel is designed for a secure messaging configuration that does not allow email in our out of the system. All interactions between contacts and agents are via tickets and notes that must be read by the contact within a portal. This answer panel creates different types of interactions than the default panel when answering questions.



The Secure Message Portal Answer Panel

- 1 - The `Send` button creates a Resolve Note instead of an Agent Response. The Resolve Note will mark the question as resolved, and contact can read the response in a portal.
- 2 - The `Leave Open` check box creates a Public Note when Send is clicked (the default panel action for this is to send an Agent Email). This leaves the original question unresolved but adds a note to the conversation for the contact to read in a portal.
- 3 - The `Resolve` button creates a Resolve Note, just like the default answer panel. But, it sets the `DoNotReply` interaction property to `TRUE` so the note is not shown to the customer.

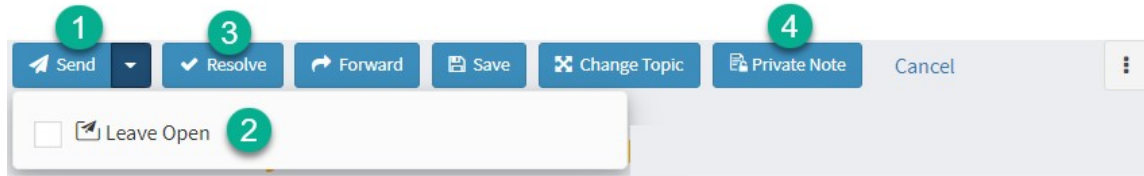
This version of the answer panel doesn't have a Public Note button, because the `Send - Leave Open` option already creates a Public Note. It also doesn't have a `Spam` button because this answer panel is used when there are no emails in the configuration.

The other action buttons are identical to the Default answer actions.

Secure Messaging Portal (With Notification)

The notifications version of the secure message portal sends your customer a secure notification each time you provide an answer. The agent interface functions similarly to the secure notification panel without notification, but different interaction types are used for the `Send` and `Send - Leave Open` actions.

The secure notification answer panel functions similarly to the standard answer panel. The differences are illustrated below.



The secure answer panel with notifications

1 - The SEND button generates a Secure Response that the customer must log in to read. Similar to an Agent Response, the Secure Response resolves the customer question. The SEND button also sends the contact a Secure Notification email that informs them the answer is available. The interaction properties used for controlling display in the message portal are all set to False, meaning the answer will appear as unread in the message center Inbox of the customer.

2. The SEND - Leave Open button generates a Secure Email, which does not resolve the customer's question. A Secure Notification template is emailed to the customer so they know that an answer is available to their question. Similar to the Secure Response, the customer must log in to the message portal to read the Secure Email.

3. The Resolve button create a Resolve Note that is only available for agents to view. It resolves the customer question and the DoNotReply and Deleted interaction properties will be set to True for the answer. This prevents it from being displayed to the customer in the message portal.

4. The Private Note action is identical to the action in the standard interface. It creates a Private Note that is not viewable by the customer in the message portal. Since the secure message portal does not have a SPAM button, the Private Note button was moved from the SAVE split button to its own button here.

To use the notifications version of secure messaging, you must first create a [Secure Notification](#)⁶⁷¹ that will be sent to the customer informing them their answer is available.

The secure notification process requires every segment using the notifications answer panel to have a Secure Notification defined within the segment. You should only create one Secure Notification template for each segment. The content within your notification template should explain to the customer that an answer is available, and provide instructions for how to login and read the answer. There are no required variables for the notification template, but the standard variables for name, etc. function similar to other notifications.

— Question Color Coding by Age

The [Manage Messages](#)²¹⁵ page provides a real-time view of all questions that are unresolved in your tenant. You can configure custom colors for highlighting the age of questions to make it easier to monitor your service levels. The Question Color Coding by Age page is explained below.


Configure Agent Interface ?

[Answer Panel Buttons](#)
[Question Color Coding By Age](#)
[Dashboard Settings](#)
[Agent Login Panel](#)

The colors chosen will be shown for questions in the Manage Messages page that have reached the specified age.

Choose Time Slot & Color

Question Age	Color	
<input type="text" value="5"/>	<input type="text" value="#edf5e0"/>	5 minutes ago
<input type="text" value="10"/>	<input type="text" value="#e1f99d"/>	10 minutes ago
<input type="text" value="15"/>	<input type="text" value="#FEF2C0"/>	15 minutes ago
<input type="text" value="100"/>	<input type="text" value="#7FDEDE"/>	100 minutes ago
<input type="text" value="240"/>	<input type="text" value="#BFD4F2"/>	240 minutes ago
<input type="text" value="480"/>	<input type="text" value="#f7e0dc"/>	480 minutes ago
<input type="text" value="1440"/>	<input type="text" value="#E99695"/>	1440 minutes ago

#	Name	Description
1	Question Age	Set the age in minutes at which the color will be applied. In this example, color is not added until the question is 5 minutes old. That color will remain until the question is 10 minutes old.
2	Color	This is the HEX color code applied to messages within the age range. You can enter any HEX color, or click in the input field for a sample of colors. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <input type="text" value="#edf5e0"/> <p>Choose from default colors:</p>  </div>

#	Name	Description
3	Sample	An example off the color with the text that will appear in the manage messages page is shown for each color selected.
4	Add Another	Click the plus sign to add another row. The time buckets will be sorted when you save the page.

Dashboard Settings



The iService home page (click the iService logo in the top left corner) includes a dashboard with various widgets. These widgets are built-in forms that can be rearranged or removed from the page. You can also create your own custom widgets and add them to the page as HTML. The standard widgets for the dashboard are explained below.

1 My Recent Interactions

Interaction Type	Subject	Contact Email	Date
Public Note	Re: [Jeff: 799632-799632] B2B Lead Generation	jeff.carter@businessofbusiness.com	2022-10-31 09:38:48 AEST
Public Note	Re: [Jeff: 799632-799632] Agency Service ***	jeff@799632@gmail.com	2022-10-31 09:38:29 AEST
Customer Email	[Jeff: 799632-799632] Agency Service ***	jeff@799632@gmail.com	2022-10-31 09:38:52 AEST
Customer Email	[Jeff: 799632-799632] B2B Lead Generation	jeff.carter@businessofbusiness.com	2022-10-31 09:23:52 AEST

2 My Answers This Week

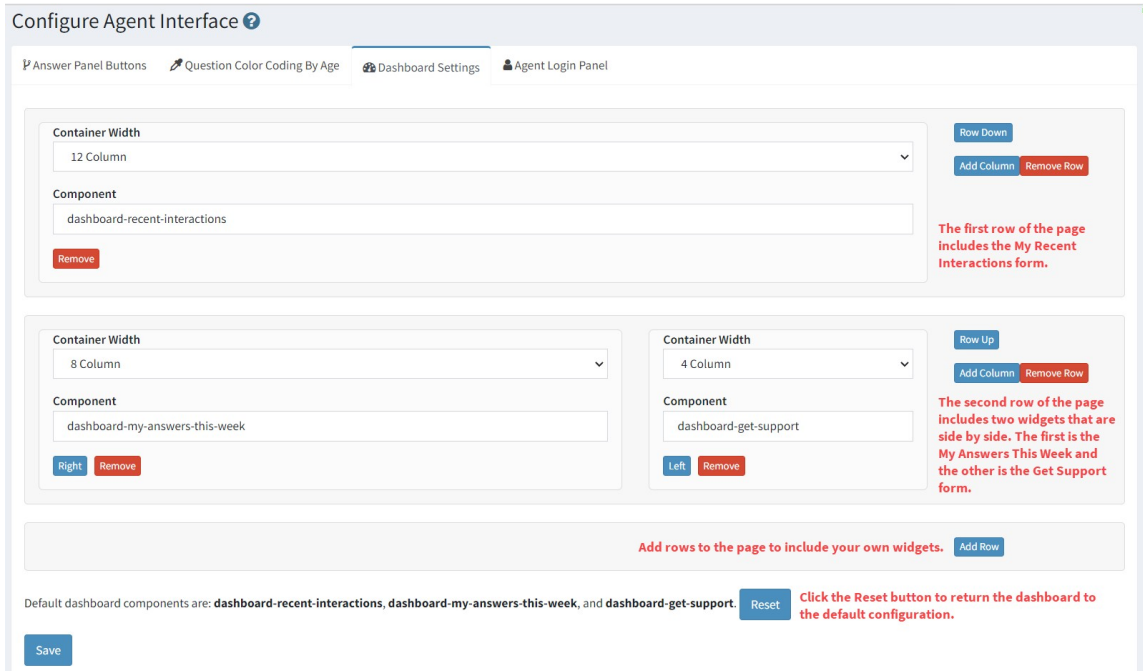
Interaction Type	10/25/2022	10/26/2022	10/27/2022	10/28/2022	10/29/2022	10/30/2022	10/31/2022
Private Note	0	0	0	0	0	0	0
Public Note	0	0	1	0	0	0	0
Agent Email	0	0	0	1	0	0	0
Resolved	0	0	9	0	0	0	30
Agent Response	0	0	1	2	0	0	2

3 Get Support

- Read The User Guides
- Watch Training Videos
- Submit A Bug Report
- Submit An Enhancement Request

#	Name	Description
1	My Recent Interactions	The <code>My Recent Interactions</code> form is a search result that includes interactions where you were the operator. This is a quick way to locate answers you've sent or questions you've recently resolved. You can filter the results and expand rows using the same process as an Interaction Search result.
2	My Answers This Week	The <code>My Answers This Week</code> form provides a summary of the answers you created (agent responses, save and resolve, agent emails, and notes) during the prior seven days. This provides a quick view of your productivity.
3	Get Support	The <code>Get Support</code> form includes links to iService user guides, online training, and forms for submitting issues or enhancement requests.

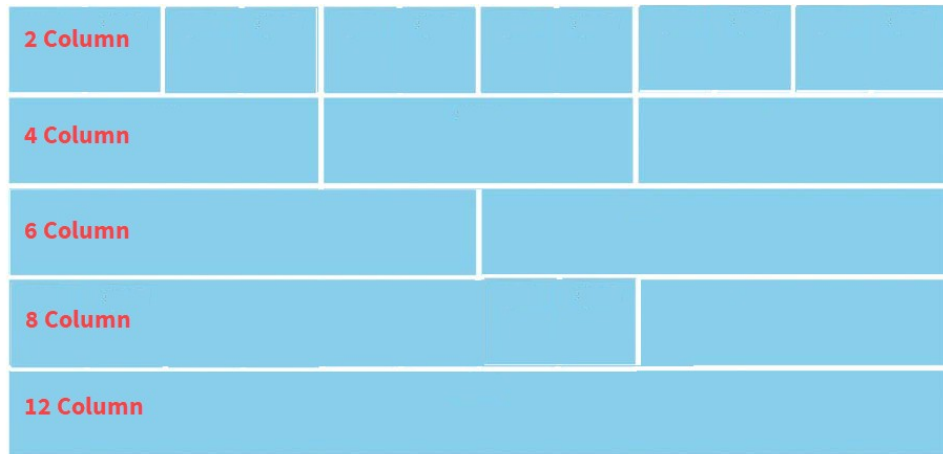
These forms can be moved to a new location on the page or removed, and new forms can be added using the Dashboard Settings page shown below. The example above was generated from the configuration below.



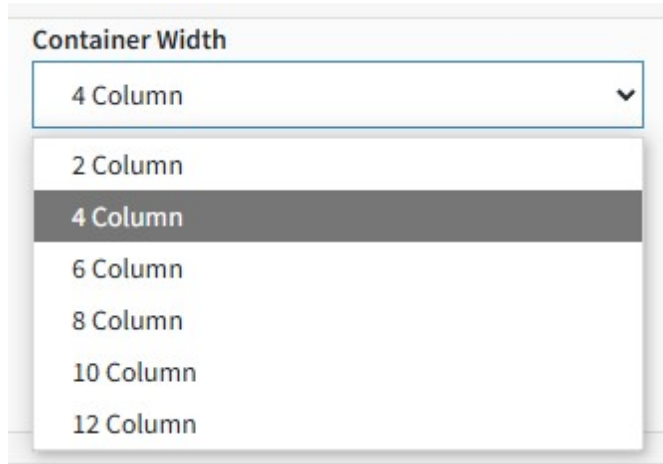
The Dashboard Settings Page

Modifying the dashboard layout

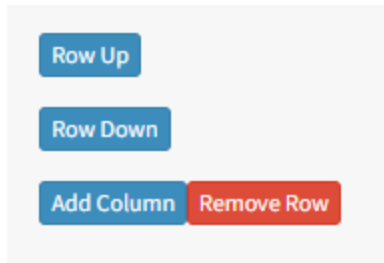
You can create your own customized layout for your dashboard. Choose between the built-in components, or add your own HTML. The dashboard is configured using a WYSIWYG (what you see is what you get) type of interface. The page is laid out as a 12 column grid (Bootstrap).



Select the width of your widget using the Container Width drop down.



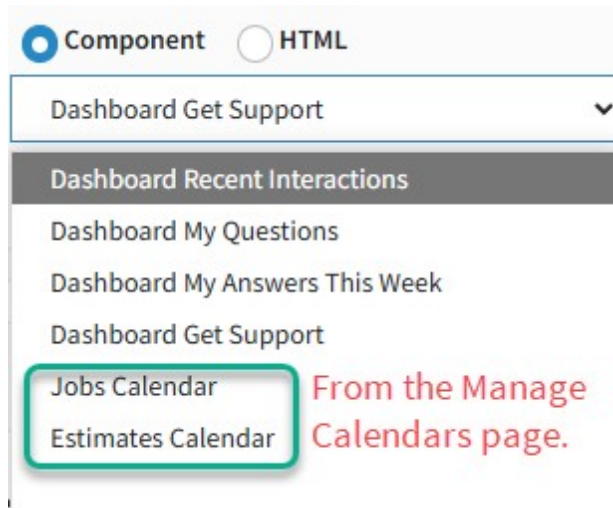
The page is comprised of rows that can be inserted, removed, or moved up and down in the list of rows.



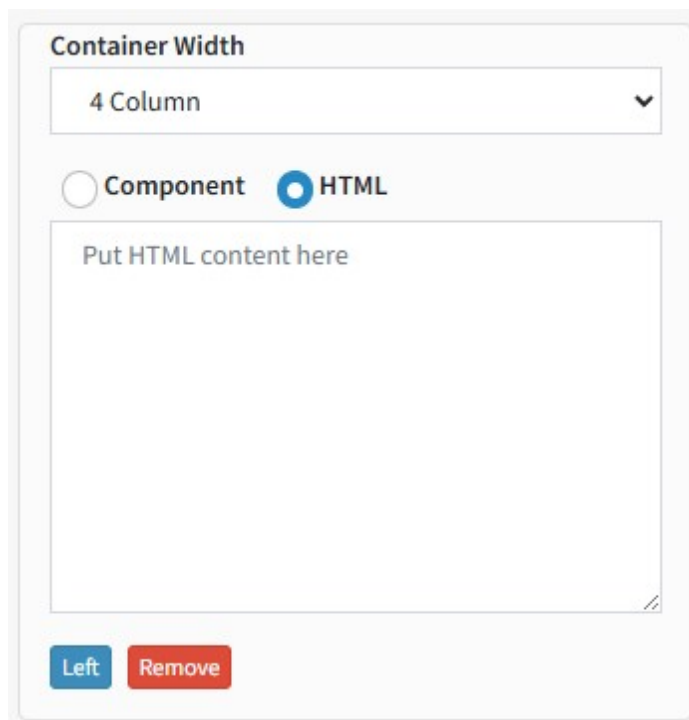
Inserting Components and Custom HTML

There are two types of objects you can insert into your dashboard: built-in components and custom HTML.

Use the **Component vs. HTML** radio button to designate the widget you are including on the page. If you select Component, a list of built-ins forms is presented. In addition to the built-in forms, calendars configured in [Manage Calendars](#)³⁹¹ will also be listed.



When HTML is selected, a text box is provided for the raw HTML.



— Creating Calendars for the Dashboard

Adding a Google Calendar to your dashboard requires four steps.

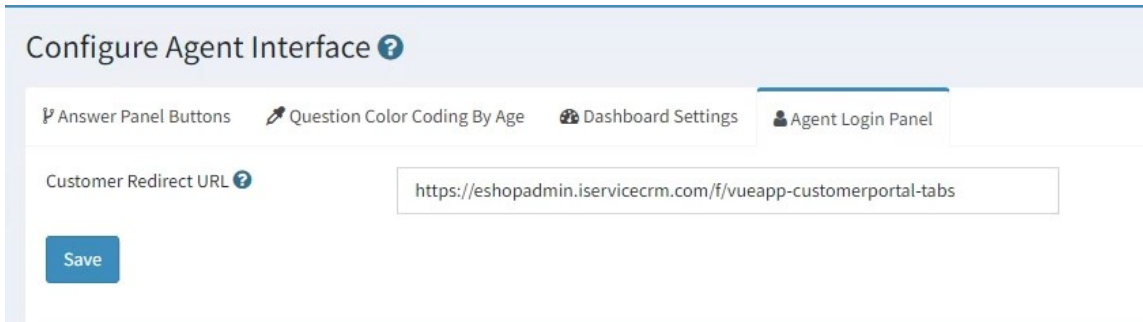
Step	Name	Details
1	Create Keys	The first step is to create your Google Calendar Service Account Key (Json). You will need that before you can begin any configuration within iService. Learn more ⁵⁸⁹ .
2	Update API	Once you have your key, load it into the External APIs page ⁵⁸⁸ .
3	Create Calendar	After you save your key, you can create new calendars on the Manage Calendars ³⁹¹ page.
4	Use Calendar	Your calendars will appear within the list of Components in the drop down menu on the Dashboard ³²⁴ page. You can also use your calendars in workflows to display tickets on the calendar based on custom properties.

— Agent Login Panel

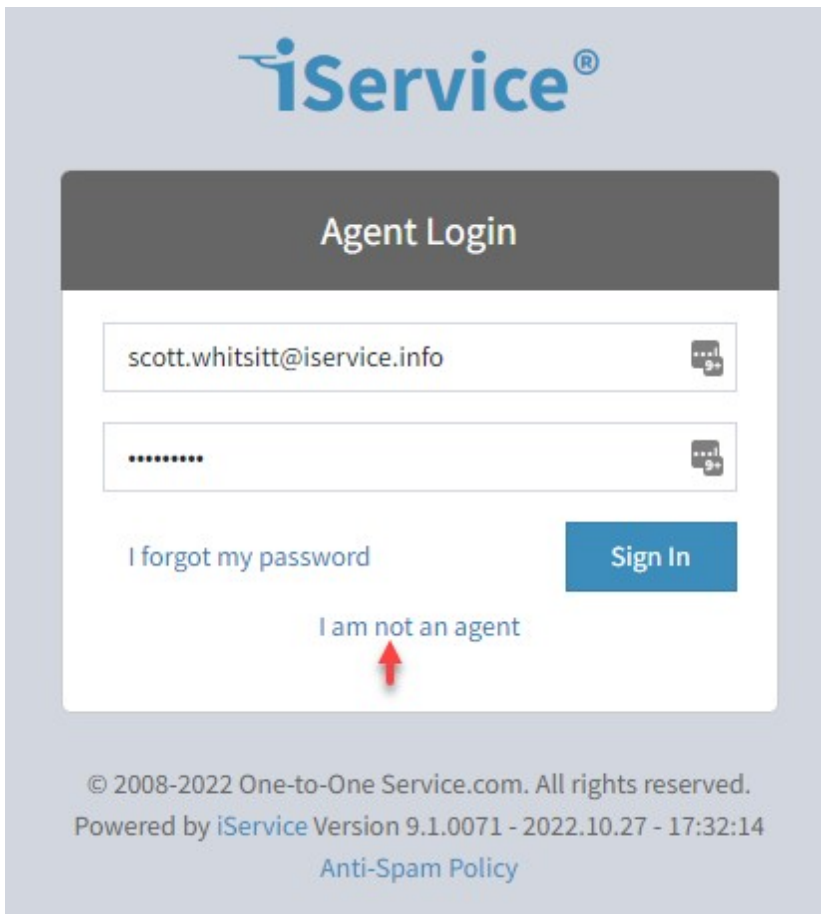
The agent login panel is designed for use by agent only. The login directs users to /app, which contains agent pages and is not designed for use by non-agent contacts. Customer portals and custom forms for use by other contacts use the /f structure.

If a customer attempts to log into your agent interface, they will get a message indicating they are in the wrong place. You can add a link to the agent login form to redirect customers that make their way to the agent login panel by setting a value. This value is not set by default, but can be any URL desired (your company website, an iService portal, etc.). When a value is set, a link will appear that says `I am not an agent`.

In the example below, a customer portal is used for the redirect.



When a value is set, the login panel includes the link shown below.



Answer with AI Prompts

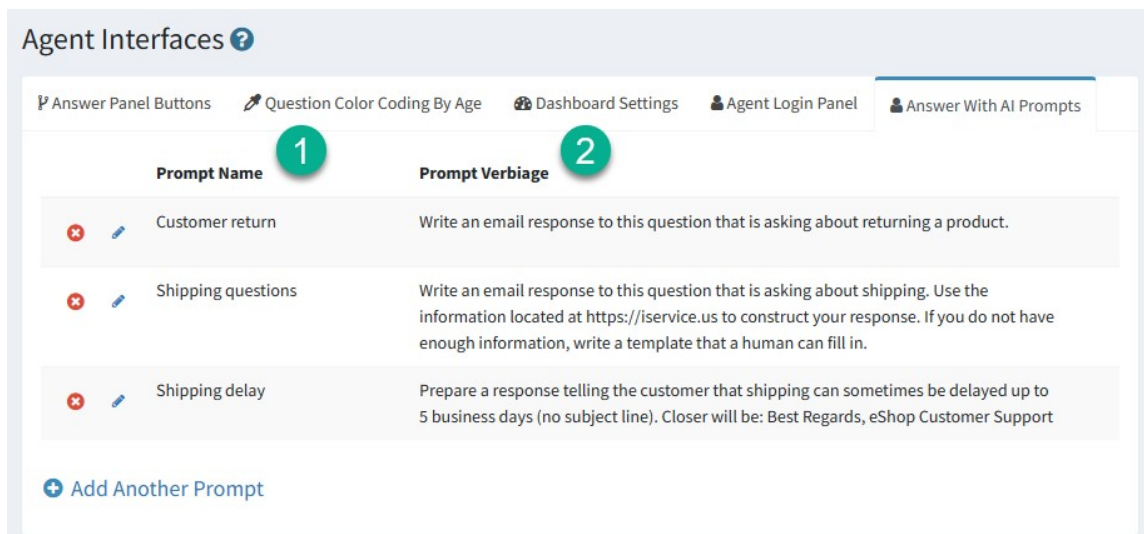
The [iService Copilot](#) feature includes an option for providing agents access to custom prompts. Those prompts are create on the **Answer with AI Prompts** settings page. iService will combine the prompt you

write with the body of the question, and submit it to OpenAI. The generated response can then be inserted into the answer by the agent.

To create a new prompt, click Add New Prompt and enter a short name and the full prompt. Be sure to follow the [OpenAI best practices for prompt engineering](#) when writing your prompts. There are two parts to your entry.

1 - **Prompt Name** - this is the label shown in the rich text editor AI Prompts menu.

2 - **Prompt Verbiage** - this is the prompt that will be sent to OpenAI along with the system prompt integrated by iService.



Creating AI Prompts

13.2 Customer Portals

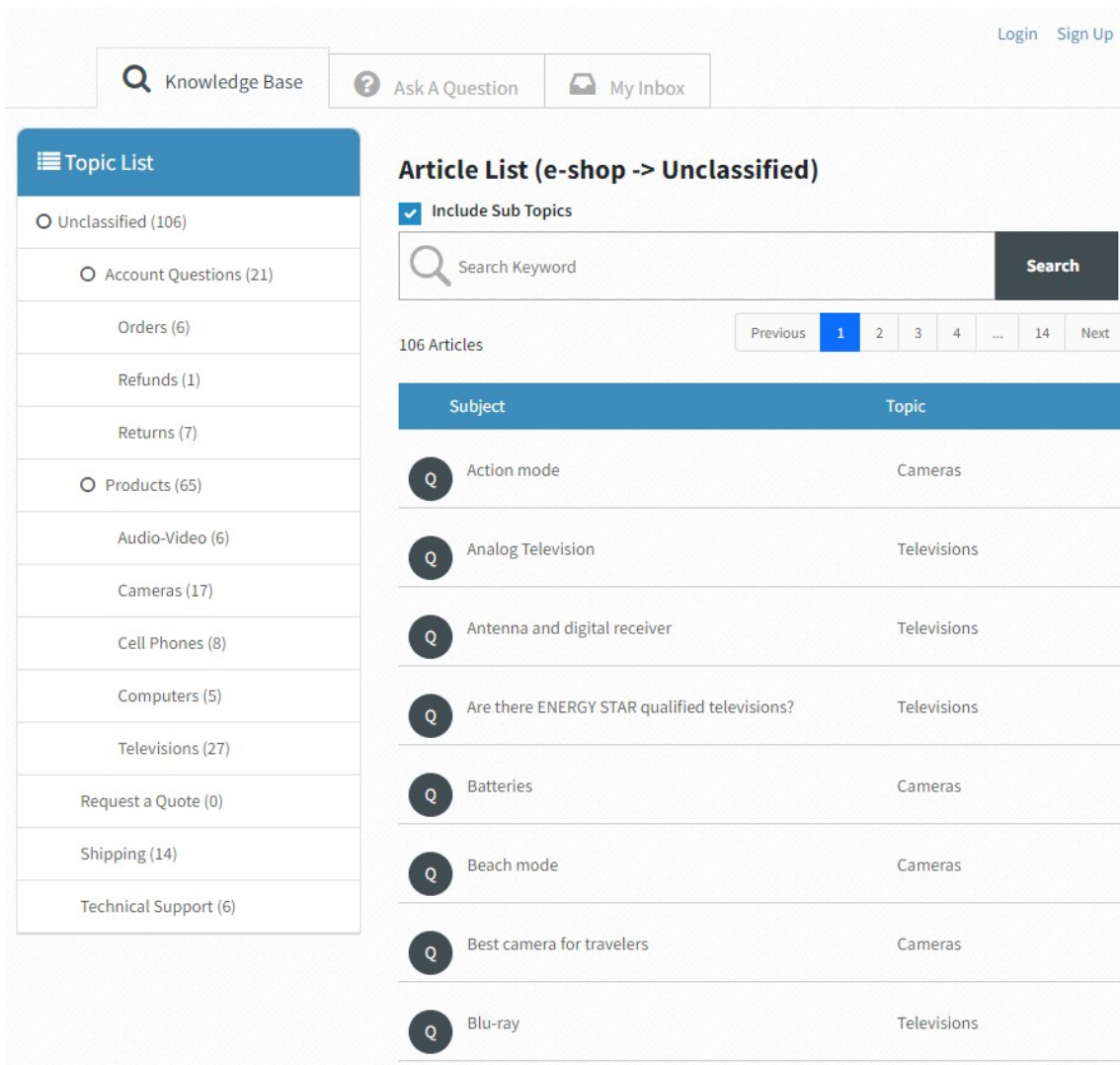


iService includes two customer engagement centers that have different designs. The forms can be customized using the Configure Customer Portals page. The Treeview Portal emphasizes the knowledge base, and displays articles using the hierarchical topic tree within your business segments. The Tabs Portal provides a completely customizable support home page as the primary focus. The knowledge base articles are included within tabs with the same level of emphasis as the other sections of the portal. Examples of each portal type are shown below. You can modify them using the Configuration Options explained in this chapter.

In addition to the builtin portals, you can also create your own customer engagement center using any of the concepts from these examples. For guidance on building a custom portal, contact your iService account manager.

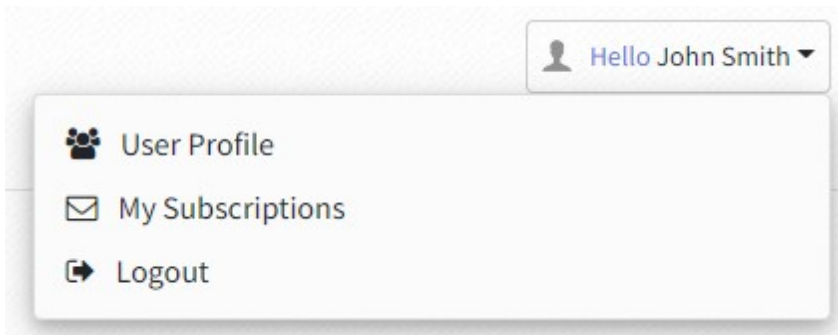
— Treeview Example

The Treeview portal presents your knowledge base using the topic trees that are part of your [website](#)⁶²³. The landing page emphasizes the organization of articles by topic and presents a list of articles as the primary focus of the site. The forms for question submission and history are included in tabs next to the knowledge base (Ask a Question and My Inbox). The My Details and Subscriptions content is accessed from the My Account / login menu.



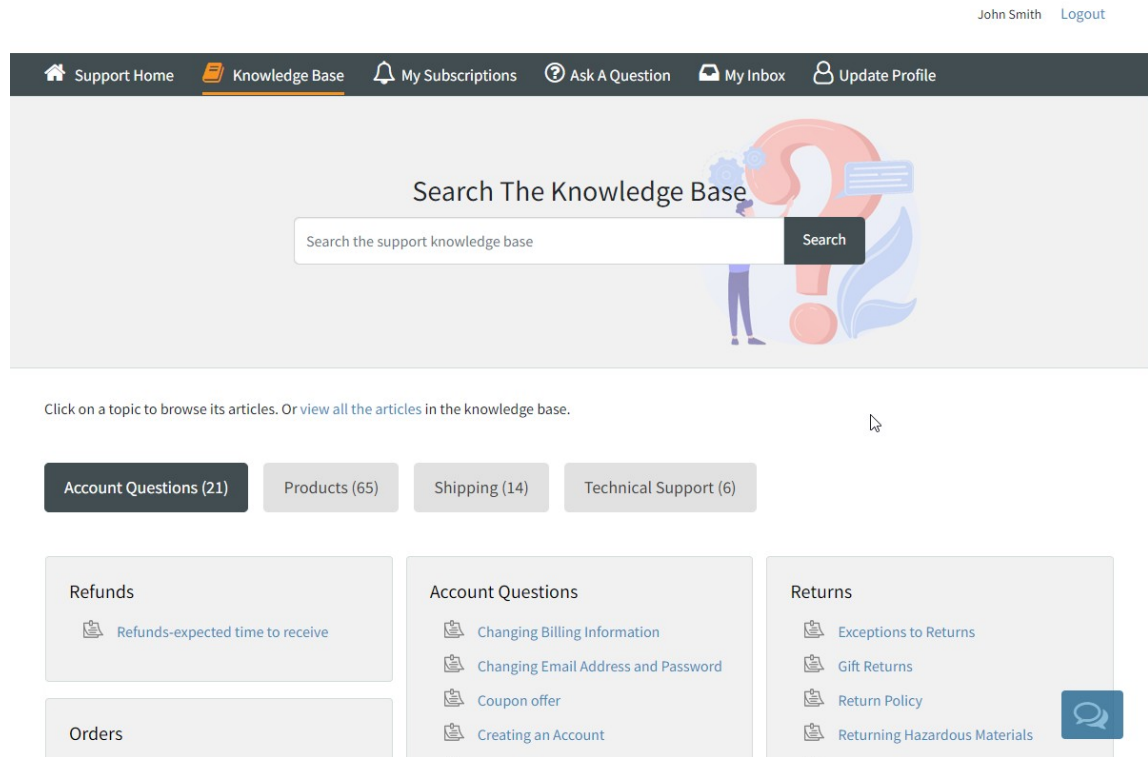
An example of the Treeview portal

The contact details and subscriptions are presented as part of the login panel after the user authenticates.



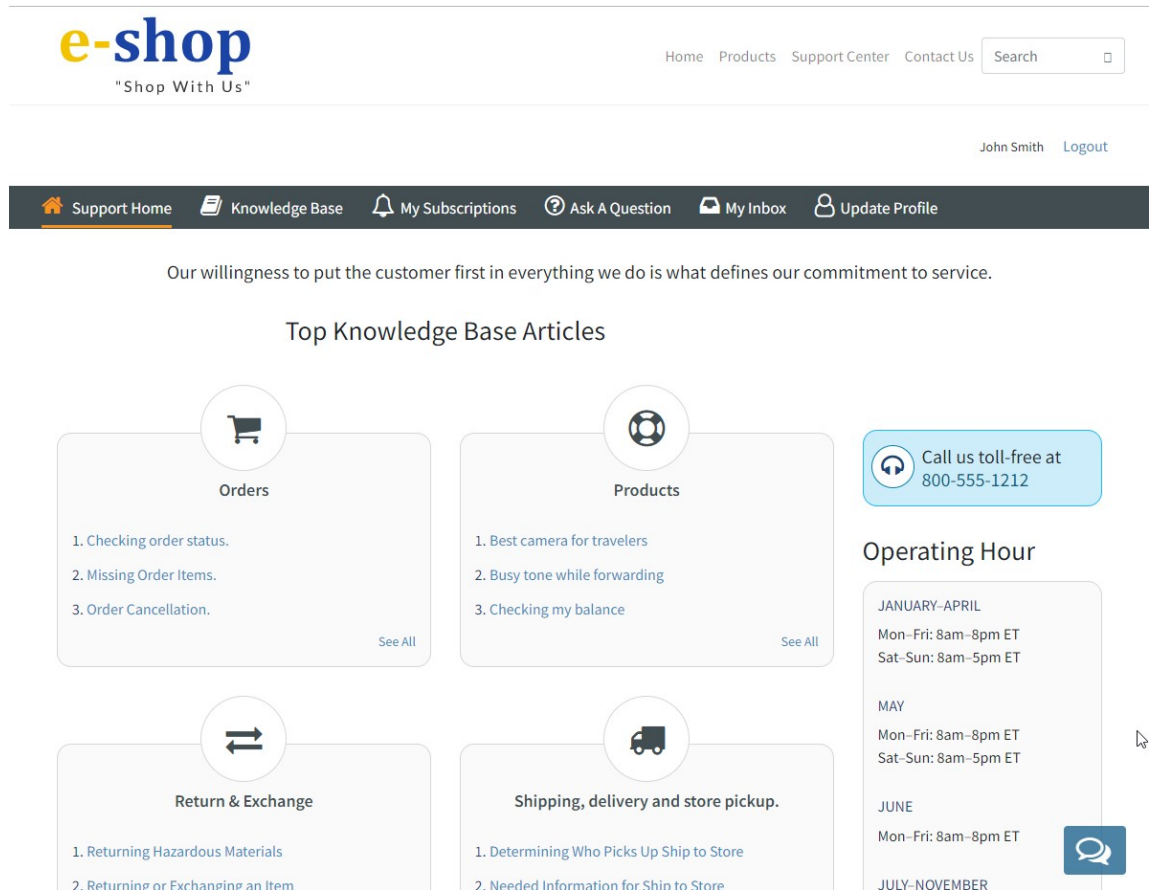
— Tabs Example

The Tabs portal presents your knowledge base using a tabbed interface that places articles within separate tabs by topic. In this example, all of the content is shown as part of the same horizontal menu structure.



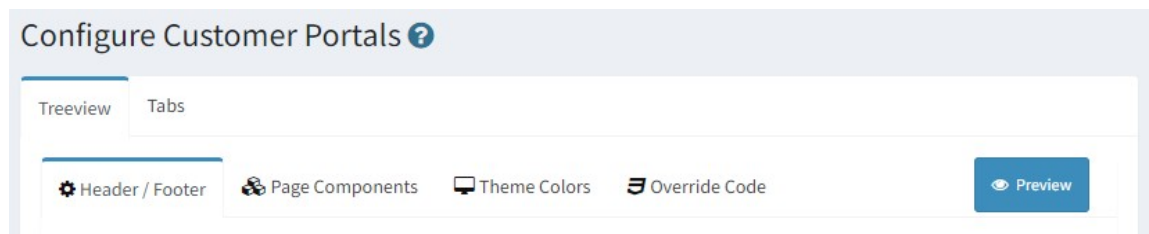
Example of the Tabs Portal

The Tabs version of the portal includes a Support Home tab where you can create your own content. An example support home page is below.



The Support Home page in the Tabs Portal

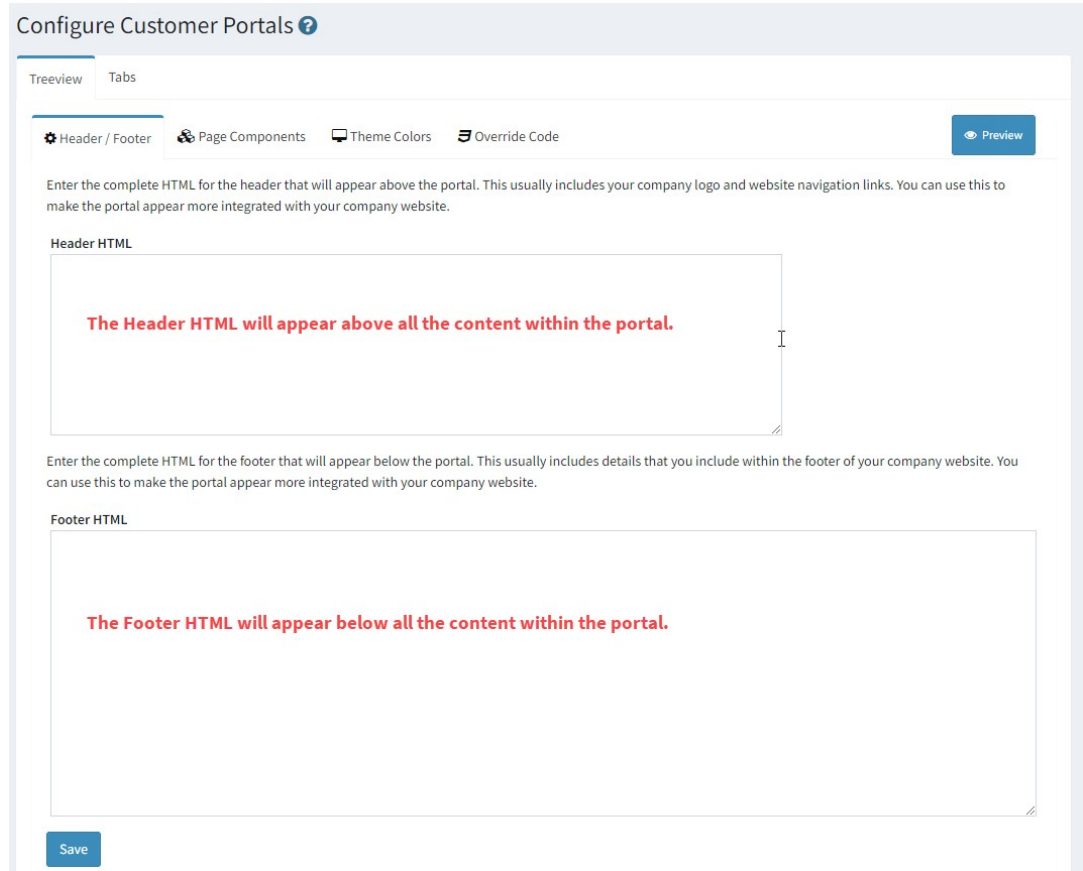
Configuration Options



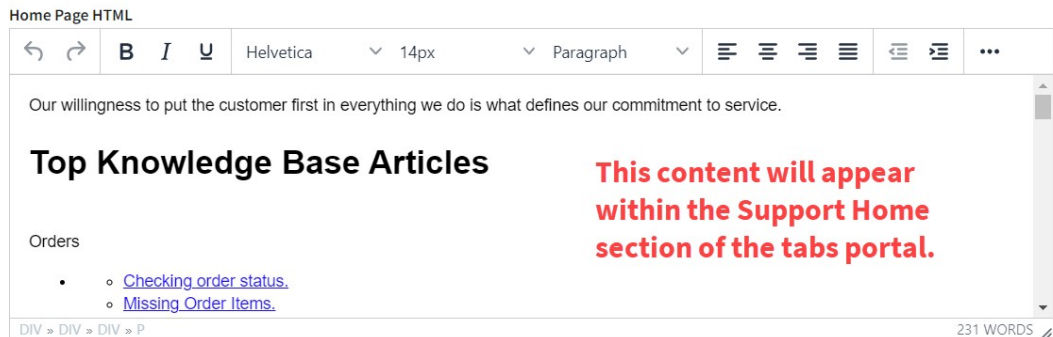
You can customize the portals to match your company branding and enable various features. Both portals have a similar set of styling options that are explained in the sections below.

Header / Footer and Page Content

This tab is used to add custom content into the support portal, such as your website header and footer. You can paste HTML directly into the text areas for insertion into the appropriate part of the portal.

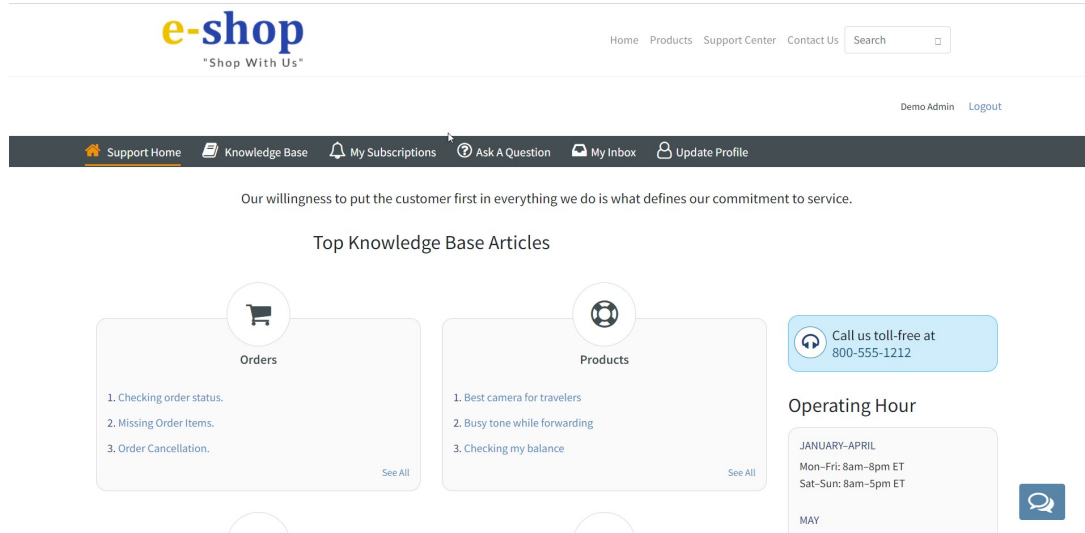


The Tabs portal has an additional text area for adding content to the Support Home landing page.



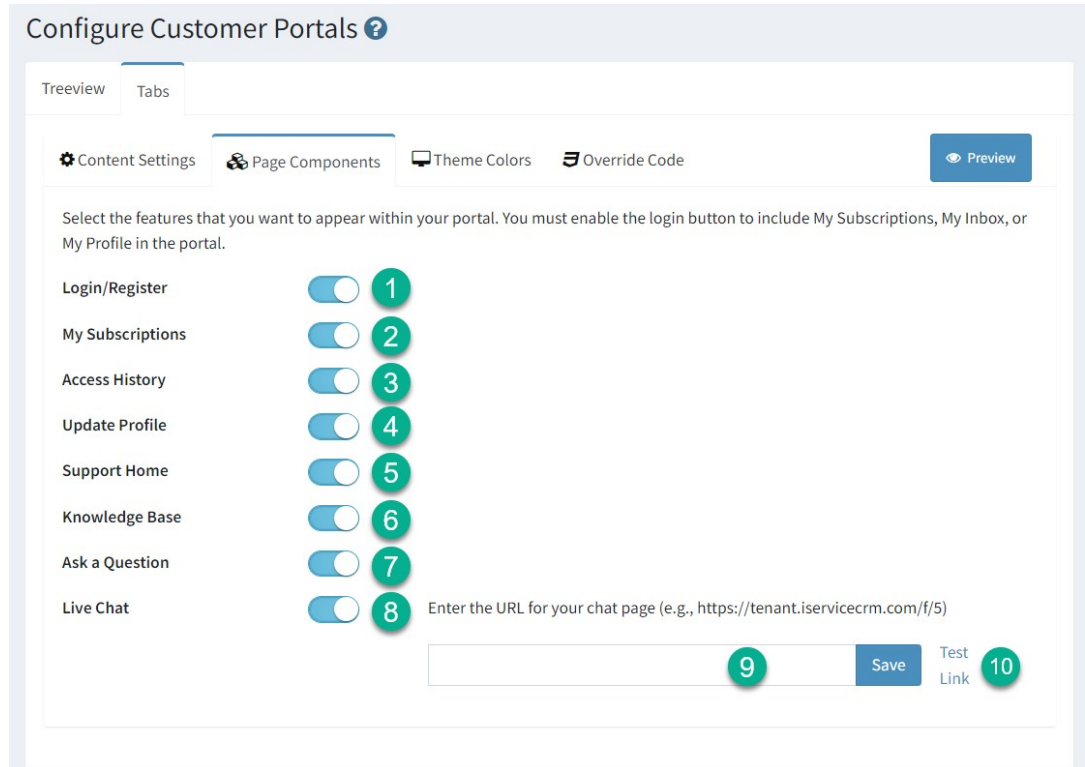
Adding Support Home page Content

The content appears under the menu banner of the tabs portal, as shown below.



An example of a Support Home page

Page Components



Selecting the components for your portal

1 - Login / Register - The login panel is required if you want your customers to access their mailing subscriptions, history or profile information. Disabling the login panel will also disable those three switches.

2 - My Subscriptions - If you enable login, you can include your subscription panel within the portal. This include mailing lists, mailing campaigns, and KB articles to which the customer has subscribed.

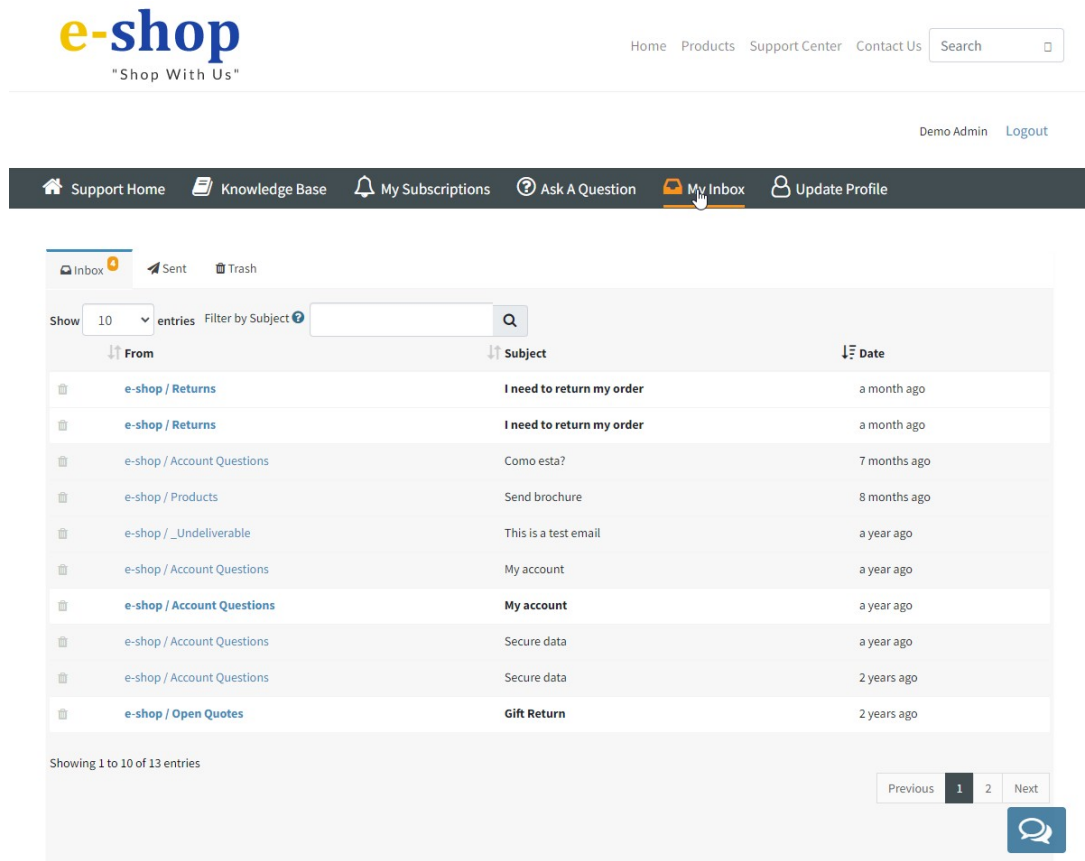
The screenshot shows the 'My Subscriptions' page in the e-shop admin interface. The page is divided into three main sections: Mailing List, Campaigns, and Subscribed Articles. Each section has a table with columns for Name/Topic, Description, and Member Of/Stay Subscribed. The 'Mailing List' table has three rows: 'eShop Customers Announcements', 'Monthly Coupons', and 'Online Specials'. The 'Campaigns' table has two rows: 'Photography tips and trick' and 'test'. The 'Subscribed Articles' table has three rows: 'e-shop -- Unclassified -- Products -- Televisions' with subject 'Impact of digital TV', 'e-shop -- Unclassified -- Technical Support' with subject 'Retrieving Your Customer Number', and 'e-shop -- Unclassified -- Products -- Televisions' with subject 'Speaker cables'. All 'Stay Subscribed' checkboxes are checked. A 'Save Subscriptions' button is located at the bottom left, and a chat icon is at the bottom right.

List Name	Description	Member Of
eShop Customers Announcements	General announcements for eShop customers.	<input type="checkbox"/>
Monthly Coupons	Receive a monthly coupon for 5-15% off of your total order.	<input type="checkbox"/>
Online Specials	Receive notices about online specials.	<input type="checkbox"/>

Name	Description	Member Of
Photography tips and trick	Ongoing tips for getting the most out of your new camera.	<input type="checkbox"/>
test		<input type="checkbox"/>

Topic	Subject	Stay Subscribed
e-shop -- Unclassified -- Products -- Televisions	Impact of digital TV	<input checked="" type="checkbox"/>
e-shop -- Unclassified -- Technical Support	Retrieving Your Customer Number	<input checked="" type="checkbox"/>
e-shop -- Unclassified -- Products -- Televisions	Speaker cables	<input checked="" type="checkbox"/>

3 - Access History - If you enable login, you can include interaction history within the portal. This provides a My Inbox tab for the customer where they can view all of their interaction.



4 - Update Profile - If you enable login, you can include a My Profile section in the portal where customers can access their contact information. They will only see contact properties that are customer viewable. They will only be able to edit or delete properties that are both customer viewable and customer editable. The viewable and editable settings are configured in the [Contact Properties Settings](#) ⁶⁵¹ page.

5 - Support Home - This is only available in the Tabs portal. This adds a home page to the portal as the first tab that can include custom content. The content for this tab is added within the [Header / Footer Content settings tab](#). ³³³

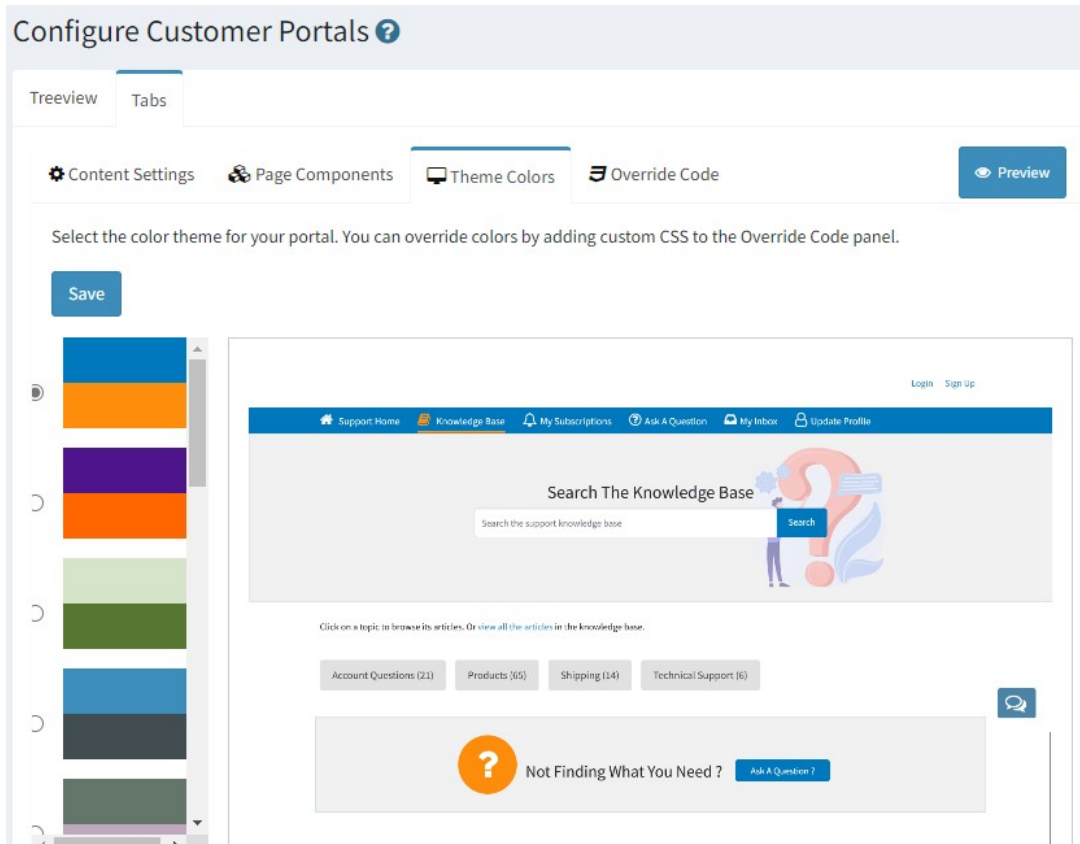
6 - Knowledge Base - You can display [knowledge base](#) ¹⁸⁴ articles in the portal. If you are not using the knowledge base, turning of this switch will remove that section of the portal.

7 - **Ask a Question** - The Ask a Question form is a special contact us form that integrates all of your topics, interaction properties, and knowledge base articles into a single form. Users are presented a list of topics automatically generated from your topic tree based on their access rights (public, private, segment). When a topic is chosen, associated interaction properties are presented and required properties must be completed before entered. In the Tabs portal, the form will also present a list of potential answers from articles associated with the selected topic.

8 - **Live Chat** - Enable this switch to add a chat button to your portal. By default, the builtin chat form is used. You can use a custom iService chat form by entering the URL for the chat window here.

Theme Colors

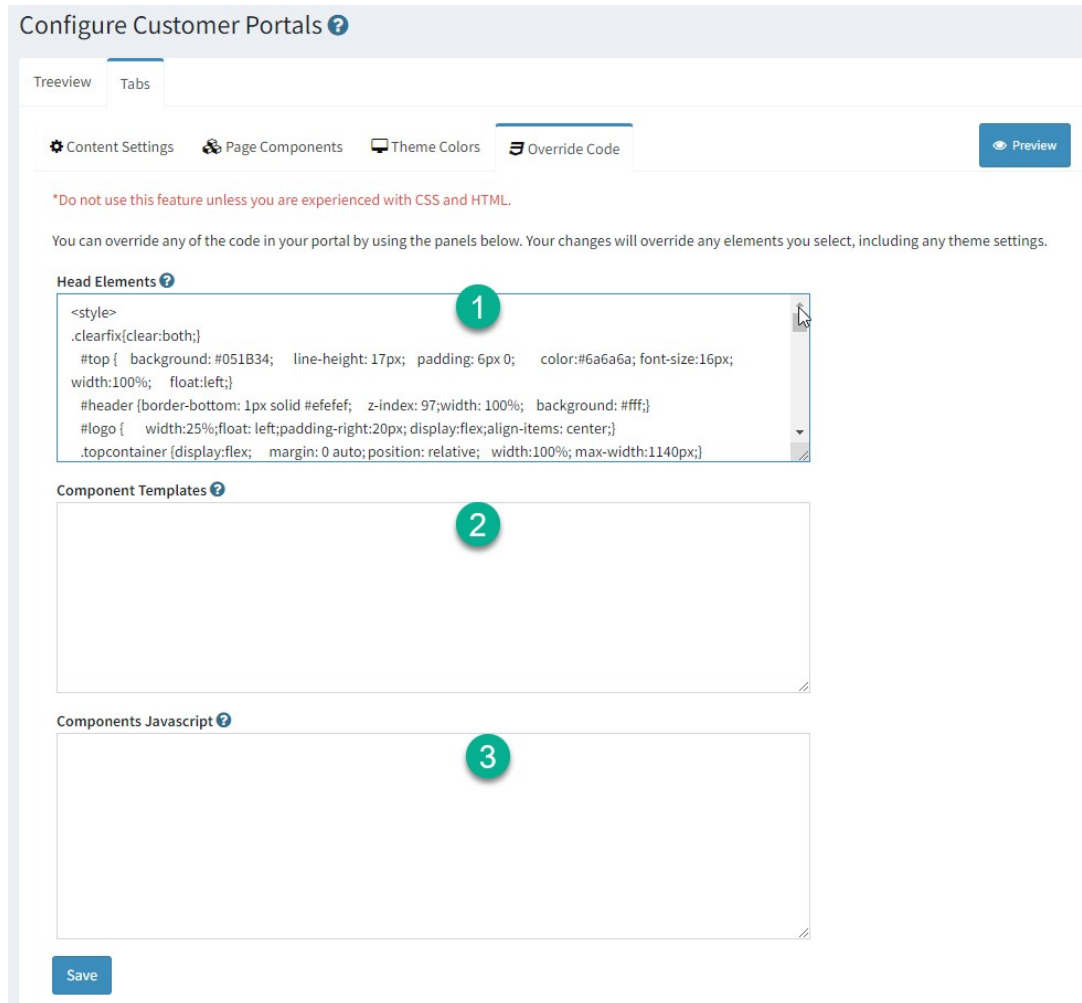
Each portal has color themes you can select to match your company branding. A preview is shown for each theme when selected. Click the Save button after you select the desired theme colors.



Choosing a Theme

— Override Code

You can override any aspect of the portal using override code. For example, if the theme colors are not appropriate you can set the CSS for any element in the portal here.



Use the Override Page to fully customize a portal

1 - You can add your own code to the HEAD section of the portals page. Be sure to surround your changes with the proper tags, such as <style>, <title>, etc.

2 - You can override the Vue.js code that comprises the customer portal by pasting your updates here.

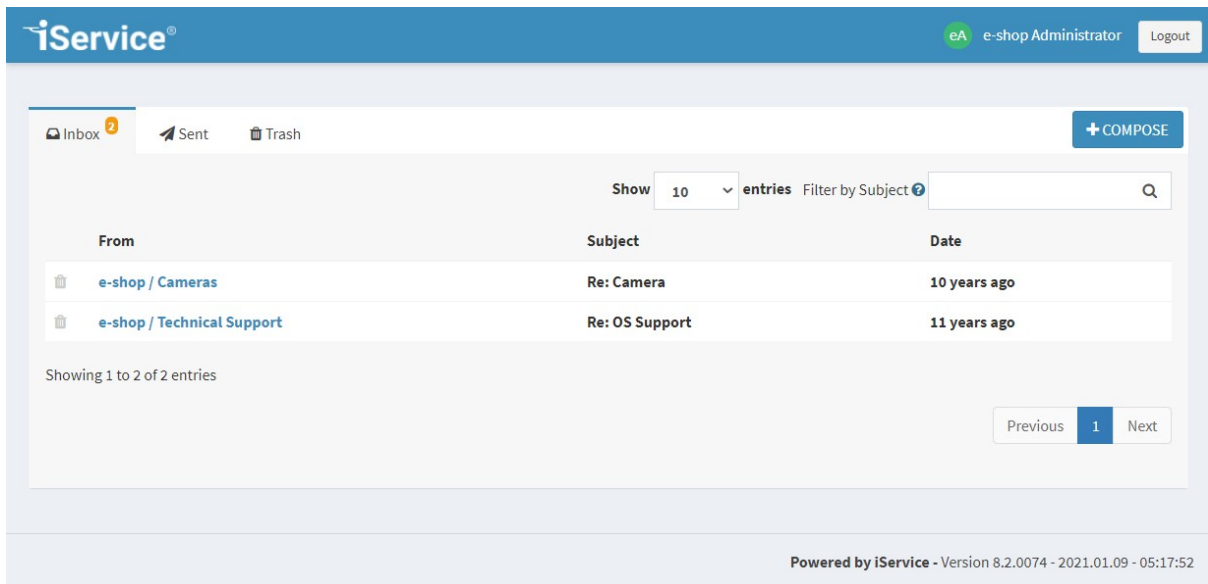
3 - You can insert your own JavaScript into the customer portal using the section below. Either enclose your JS within script tags or reference a CDN version of the JS.

13.2.1 Secure Message Portal



iService includes a message portal (/f/message-portal) where customers can securely access their message history with you, submit new questions, and chat with your team. The portal is designed to match the most common layout for messaging systems, including an Inbox, Sent box, and Trash folder. This layout is also used the /f/customerportal-tabs customer engagement center.

The portal uses the existing login function, so customers login using the same email or login that they use for any other forms within iService. The portal can be used with minimal styling, or updated to match your brand identity. The portal requires some basic setup to ensure interactions are properly displayed, and is designed to be used with a custom answer panel that automates the setting of interaction properties used to control message display.



The Secure Message Portal Inbox

Required Setup - Interaction Properties

The message portal uses interaction properties to determine when and how to display content. You must create the following four interaction

properties before using the portal. They can be created within any segment of your tenant and marked as shared, but should be associated with any topic displayed in your message center.

Property Name Property Type Shared Description

ArchivedAnswer Boolean True This property is used to indicate an interaction was marked by the customer as Trash. This causes the interaction to display in the Trash folder. When the customer clicks the Delete button in the portal, this property is set to TRUE.

HasBeenAnswerRead Boolean True This property is used to indicate whether the customer has read the answer. This only applies to answers in the Inbox. When a question is read in the portal, the action that fetches the question details for display sets this property. If you do not create this property, the following error will be displayed when a message in the inbox is read because the property can't be updated.

Customer status Interaction property not found. HasBeenRead: Contact 4 - [SetRead] Form Submit (webpage-api-myaccount) - Set Customer Status - Details

Error when HasBeenRead properties is not setup

Deleted Answer Boolean True This property is used to indicate an interaction was marked by the customer as Deleted. This causes the interaction to NOT display in the portal. When the customer clicks the delete button in the Trash folder, this value is set. Clicking the Resolve button in the Secure Answer Panel sets this property to TRUE so the answer is not shown to the customer.

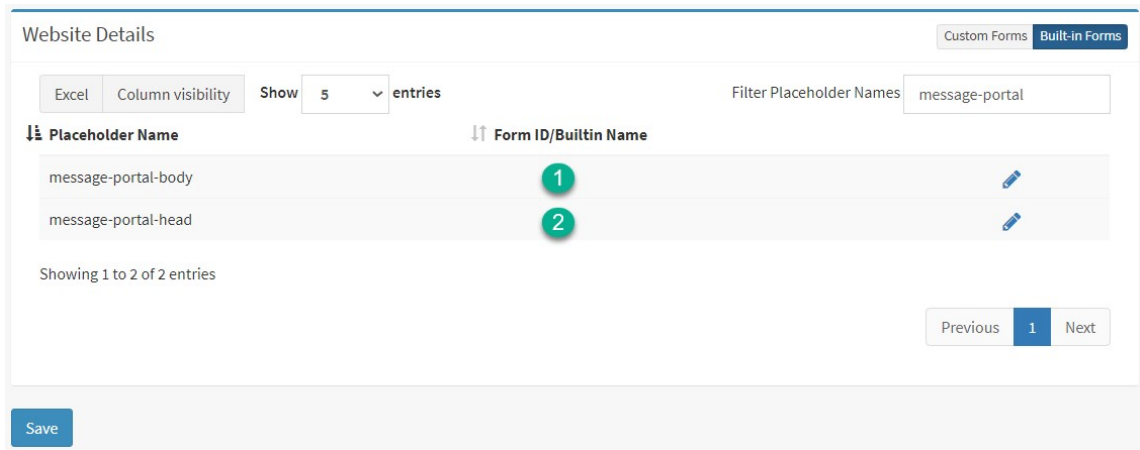
DoNotReply Boolean True This property is used to indicate whether an agent answer should be displayed in

the customer's Inbox. Clicking the Resolve button in the Secure Answer Panel sets this property to TRUE so the answer is not shown to the customer.

Customizing the Message Portal

There are five aspects of the portal that can be customized. Customizations are done within two separate forms: changes to the form HEAD section, and changes to the form BODY section. Create custom forms for these two placeholders and set them in the Websites page as shown below.

- 1 - Updates to the BODY section of the form (HTML, code snippets, etc.) are added to the form referenced here.
- 2 - Updates to the HEAD section of the form (CSS, etc.) are added to the form referenced here.



Update these placeholders with your custom forms

Branding and Styling the Message Portal

The user interface can be branded to match the colors and styles of each tenant's business.

The primary sections are:

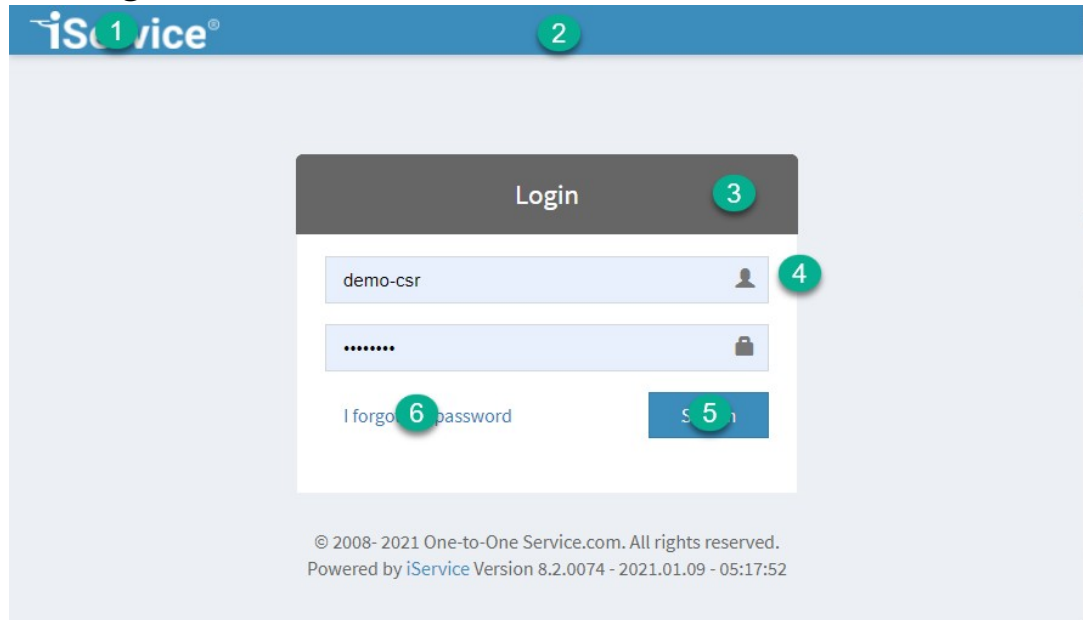
1. The Login Panel
2. The Inbox / Sent Tabs
3. Reading Messages
4. The Trash Tab

The elements that can be styled using the `message-portal-head` and `message-portal-body` custom forms are shown below. Contact your iService administrator or account manager for details on updating these elements.

To change the image used for the logo, add the following to the `message-portal-head` form.

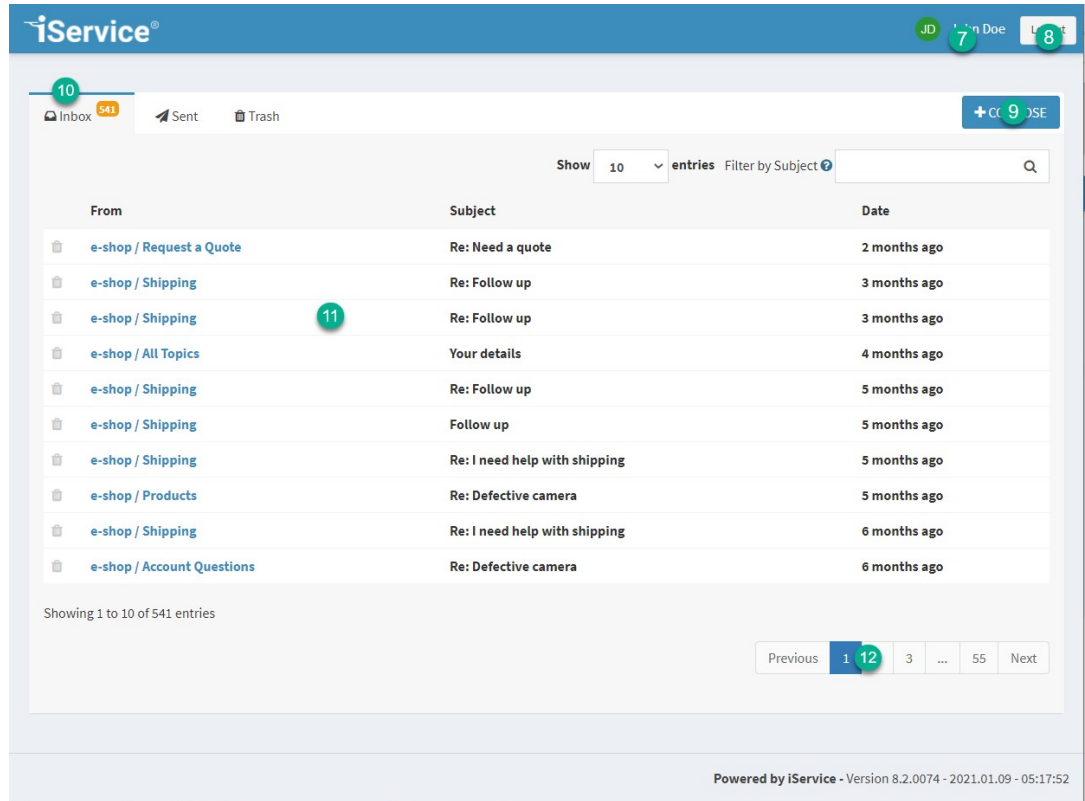
```
<script>
  var logoURL = 'https://yourlogo.png';
  var displayLoginName = true;
  var displayLogout = true;
</script>
```

The Login Panel



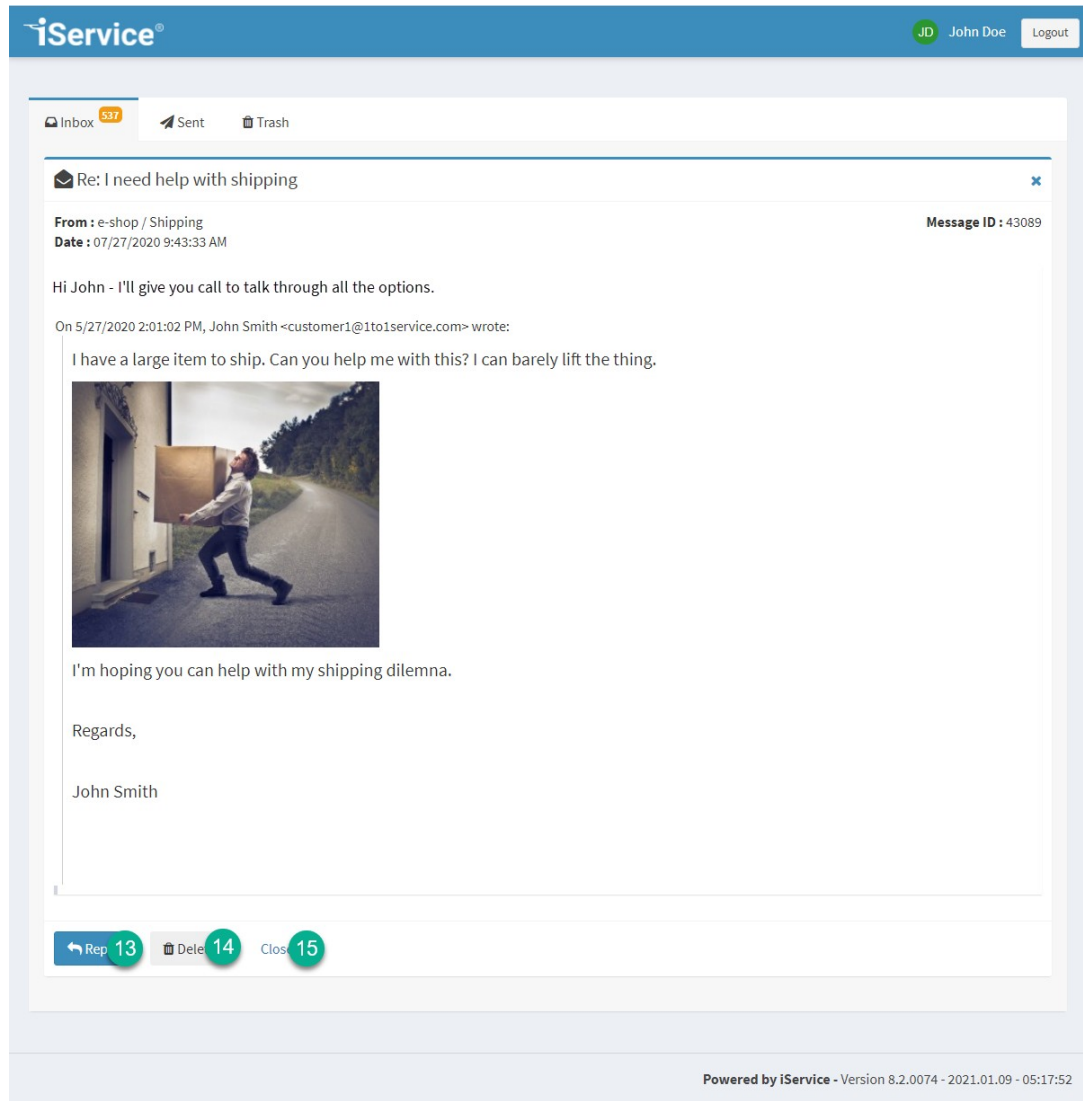
Elements to customize in the login panel

The Inbox and Sent Tabs



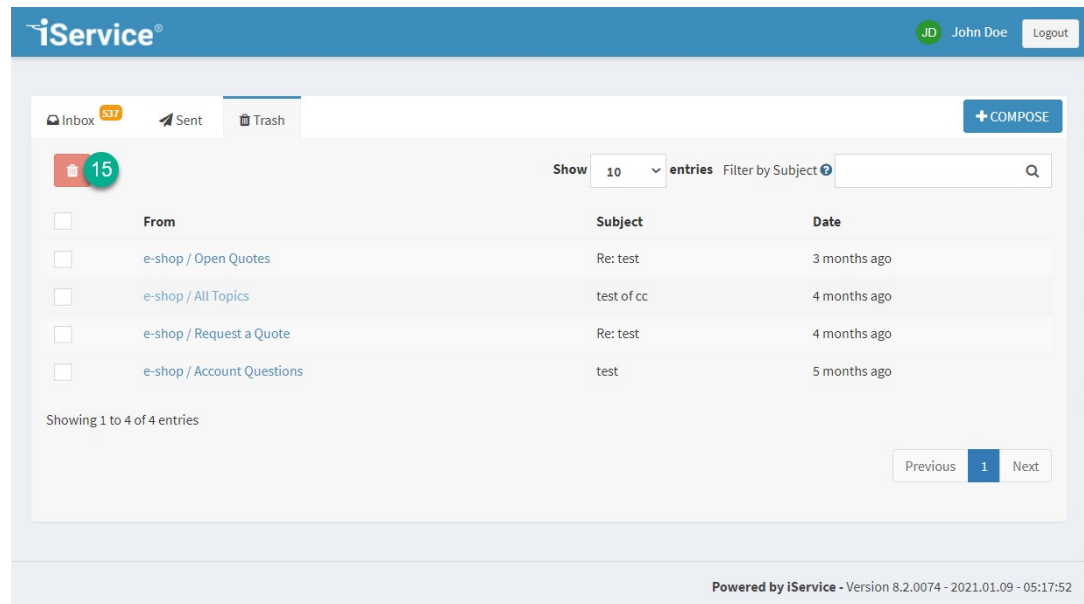
Customizing the tabs for Inbox and Sent

The Read Message Panel



The Read Message panel

The Trash Tab



The Trash tab

Customizing the Topic List in the Compose Form

The builtin Compose Message form displays all public topics. To override this with a custom topic list, add the following to the `message-portal-head` form that is referenced in the website. **Set the variable** `useCustomTopicList` **to true**. The example code must be included within a `<script>` section of that form.

```
<script>
/*This is custom topic list for the Compose menu*/
var useCustomTopicList = true;
var topicsList = [
  {'id' : '10', name: 'Customer Service' },
  {'id' : '13', name: 'Technical Support'},
  {'id' : '14', name: 'Sales'}
];
</script>
```

In the example above, the Compose menu would include three topics in the topic list. The display names would be Customer Service, Technical Support, and Sales. The topic ID represents the actual topic that will receive the question (e.g., topic 10 for customer service).

Adding Custom Links to the Message Portal Top Banner

You can include hyperlinks in the Message Portal top banner. Add the following to the `message-portal-head` form that is referenced in the website and **set the value for `displayMenus` to `true`**. The example code must be included within a `<script>` section of that form.

```
<script>
/*These are header menus for the message portal*/
var displayMenus = true;
var menuList = [
  {
    'name': 'Our Website',
    'url': 'https://www.ourwebsite.com',
  },
  {
    'name': 'Our Help Site',
    'url': 'https://www.ourhelpsite.com',
  }
]
</script>
```

Inserting Content Into the Message Portal

The portal includes a spot to insert you own HTML above and below the message section. Add the following to the `message-portal-body` form that is referenced in the website and set the content as desired. The example code must be included within a `<script>` section of that form with the exact id as shown below.

To insert code above the message section.

```
<script type="text/ng-template" id="message-portal-top"
<!-- Your custom HTML goes here -->
<p>This is the top</p>
</script>
```

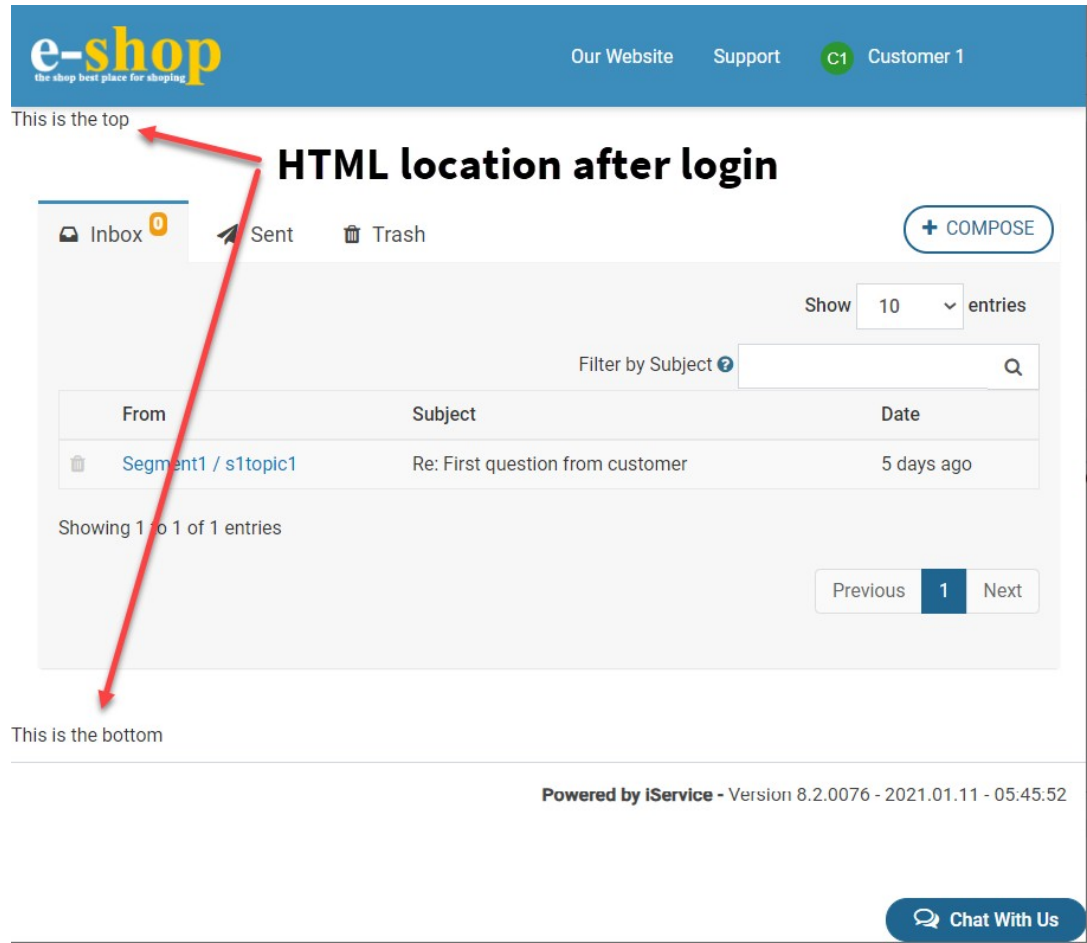
To insert code below the message section.

```
<script type="text/ng-template" id="message-portal-foo"
<!-- Your custom HTML goes here -->
<p>This is the bottom</p>
```

</script>

The location of these examples on the login panel and after login is illustrated below.

The screenshot shows a web page with a blue header containing the 'e-shop' logo and the tagline 'the shop best place for shopping'. Below the header, the text 'This is the top' is positioned. A red arrow points from the text 'HTML location on the login panel' to the top of a login form. The login form is titled 'Login' and contains two input fields: 'Login Name' and 'Password', each with a small icon to its right. Below the fields is a link that says 'I forgot my password'. At the bottom of the form, there is copyright information: '© 2008- 2021 One-to-One Service.com. All rights reserved.' and 'Powered by iService Version 8.2.0076 - 2021.01.11 - 05:45:52'. A second red arrow points from the text 'This is the bottom' to the bottom of the login form.



Adding Chat to the Message Portal

The builtin message-portal form provides a spot for inserting a chat button in the bottom right corner of the page. It also includes an option for using a special chat form that is dedicated to the portal and loads within an iFrame on the message-portal page.

Using the embedded chat-message-portal form

A special purpose chat form, named `chat-message-portal`, can be used within an iFrame in your portal. This is the preferred method of including chat because this form load within the page (no popup), doesn't require a separate login, and uses the portal's

Compose form when agents are not available for the selected topic. There are two scripts that must be included in your message-portal-body to activate the embedded chat form.

The button script - this inserts a button into the bottom of the form that allows the chat iFrame to toggle on and off. Add the script exactly as shown below.

```
<script type="text/ng-template" id="chat-button.html">
  <button class="btn open-button pull-right chat-btn"
</script>
```

The chat-iFrame script - this is the actual chat form that will load when the chat button above is clicked.

```
<script type="text/ng-template" id="chat-iframe.html">
  <iframe scrolling="no" src="http://qadesign/f/chat-m
</script>
```

The topic list for the `chat-message-portal` form can be customized using the same approach as other chat forms.

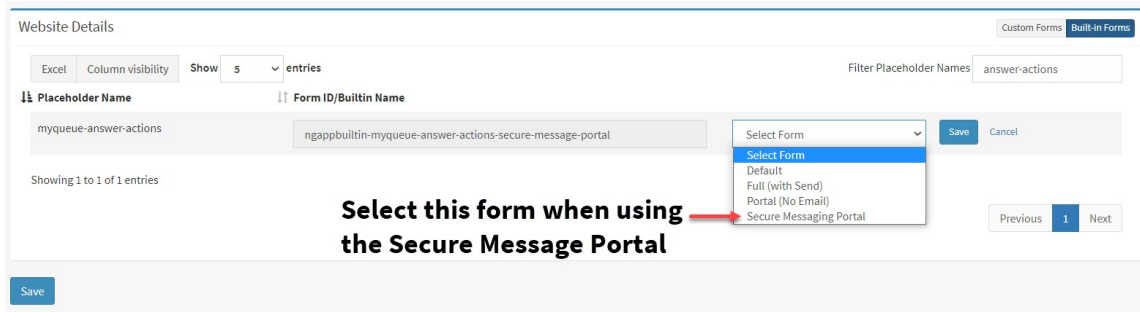
Inserting a button that opens chat in a new window

You can use the chat button location to insert your own buttons and open any form desired. To load the standard chat2 for insert the following into your message-portal-body customization form.

```
<script type="text/ng-template" id="chat-button.html">
<a class="btn pull-right chat-btn" href="$value -rootp
</script>
```

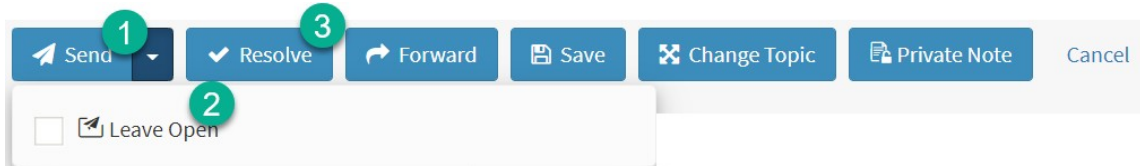
Using the Secure Messaging Answer Panel (no notifications)

The message portal is designed to work with a special answer panel that automatically creates the appropriate type of interaction and sets the values for the DoNotReply interaction property. To enable this answer panel, select it within the website as shown below. This panel is used when the organization does not use email. To generate email notifications to the customer when an answer is provided, use the [version that includes notifications](#). ³⁵²



Selecting the Secure Message Portal for your answer panel

This answer panel creates different types of interactions when sending answers as described below.



The Secure Message Portal Answer Panel

- 1 - The send button creates a Resolve Note instead of an Agent Response.
- 2 - The leave open option creates a Public Note instead of an Agent Email. This leaves the original question unresolved.
- 3 - The resolve button creates a Resolve Note, just like the default answer panel. But, it sets the DoNotReply interaction property to TRUE so the note is not shown to the customer.

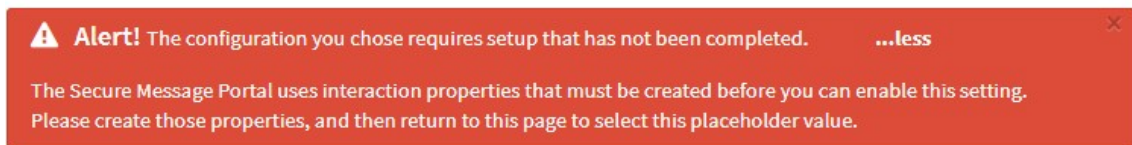
This version of the answer panel doesn't have Public Note button, because the Send - Leave Open option already creates a Public Note. It

also doesn't have a Spam button because secure message portals don't typically take in outside customer email.

The other action buttons are identical to the Default answer actions.

Error enabling secure message portal when properties are not configured

The secure message portal can be loaded without any configuration, but an error will be shown when users read messages. If you attempt to select the Secure Message Portal answer panel without the required properties, the following error will be displayed.



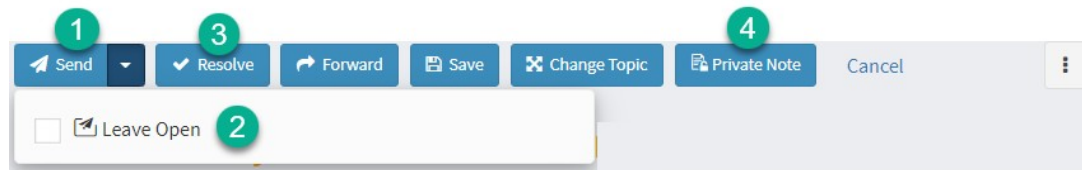
Error when required properties are not setup

Using the Secure Message Portal with Customer Notifications

The notifications version of the secure message portal sends your customer a secure notification each time you provide an answer. The agent interface functions similarly to the regular secure notification panel, but different interaction types are used for the Send and Send Leave Open actions. To use the notifications version of secure messaging, you must first create a Secure Notification that will be sent to the customer informing them their answer is available.

The agent answer panel

The secure notification answer panel functions similarly to the standard answer panel. The differences are illustrated below.



The secure answer panel with notifications

1 - The SEND button generates a Secure Response that the customer must log in to read. Similar to an Agent Response, the Secure Response resolves the customer question. The SEND button also sends the contact a Secure Notification email that informs them the answer is available. The interaction properties used for controlling display in the message portal are all set to False, meaning the answer will appear as unread in the message center Inbox of the customer.

2. The SEND - Leave Open button generates a Secure Email, which does not resolve the customer's question. A Secure Notification template is emailed to the customer so they know that an answer is available to their question. Similar to the Secure Response, the customer must log in to the message portal to read the Secure Email.

3. The Resolve button create a Resolve Note that is only available for agents to view. It resolves the customer question and the DoNotReply and Deleted interaction properties will be set to True for the answer. This prevents it from being displayed to the customer in the message portal.

4. The Private Note action is identical to the action in the standard interface. It creates a Private Note that is not viewable by the customer in the message portal. Since the secure message portal does not have a SPAM button, the Private Note button was moved from the SAVE split button to its own button here.

— Setting up the secure notification template

The secure notification process requires every segment using the notifications answer panel to have a Secure Notification defined within the segment. You should only create one Secure Notification template for each segment.

The content within your notification template should explain to the customer that an answer is available, and provide instructions for how to login and read the answer. There are no required variables for the notification template, but the standard variables for name, etc. function similar to other notifications.

— Configuring your website to use the secure notifications answer panel (v8 and prior)

This is deprecated beginning with version 9.0. Use the [Answer Panel Buttons](#)³¹⁵ page to select the secure notifications answer panels.

For versions v8 and prior only

The secure notification answer panel prior to v9 is set within the [Website](#)⁶³¹ settings page. The setup for the notifications version of the secure answer panel requires the message center interaction properties, and a secure notification template. Once these are configured you may select the panel in the Website settings page.

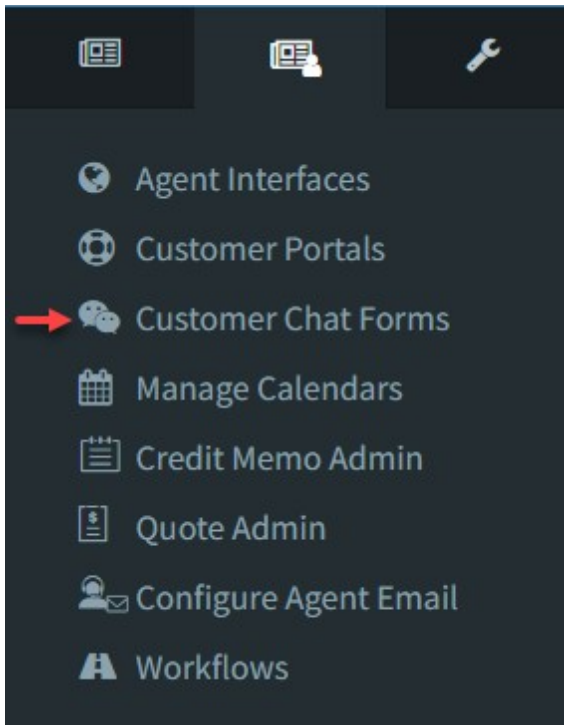
13.3 Customer Chat Forms



iService Chat is an integrated feature that allows your agents to engage in real-time dialogue with your customers. As an integrated component of iService, your team has access to the full suite of productivity tools like stock responses, customer history, and the iService knowledge base while chatting. Chat history is archived in the iService database along with all other interaction types (customer email, agent responses, notes, etc.).

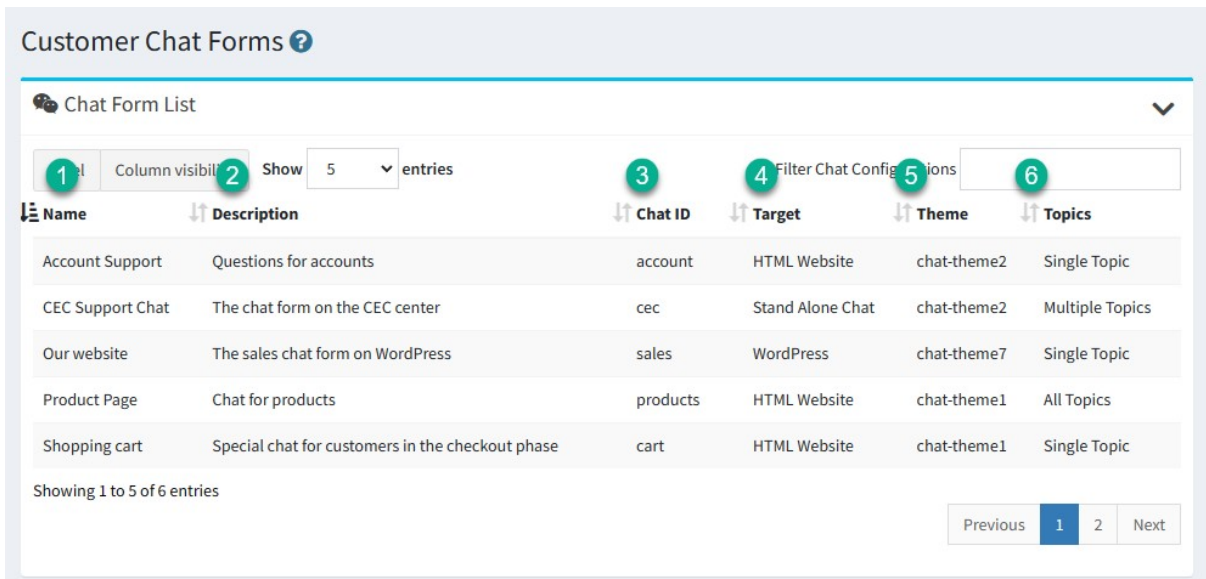
The chat feature leverages your existing iService configuration, such as business segments, topics, skills, and agents. When configuring iService Chat, you design your customer chat forms using the Customer Chat Form configuration page. In most cases, you can use your existing iService configuration with minimal changes.

The first step in deploying chat is to create the customer chat forms presented to your prospects and customers. Create your customer chat forms using the configuration wizard located in the Custom Forms Admin page.



The Customer Chat Forms menu

You can create an unlimited number of chat forms. Each form is saved with its configuration data that specifies the details for how the form looks and behaves. All of your configured forms for your tenant are displayed in the Chat Form List as shown below.



The Chat Form List

Each chat configuration includes the following:

- 1 - The **Chat Name** is a label used to identify the configuration within iService.
- 2 - Write a **short description** that explains where and how the chat form is used.
- 3 - The **Chat ID** is used in the URL for the chat and should be short but descriptive. The Chat ID must be unique to your tenant, and cannot include spaces or special characters.
- 4 - There are three primary **Targets** to deploy your chat: A WordPress website, an HTML website, or a stand alone chat form that is loaded directly in a browser.
- 5 - Choose a color **Theme** that matches your brand.
- 6 - You must **select the topics** that will be offered to the customer. Customers can only chat with agents that are skilled and available for the topics presented.

The primary settings for your chat form are the chat topics and the deployment options, which are specified in the [Chat Settings](#)^[357] page. Learn more about creating and deploying chat in the following chapters.

Learn more about configuring chat

- [Chat Settings](#)^[357] for topics offered and target deployments.
- Branding your chat form using [Theme](#)^[371] settings.
- Customizing the [Pre-Chat Survey](#)^[372].
- Custom form code for determining when agents are available using [Sif - chat](#)^[373].
- Admin settings for [chat Agents](#)^[374].
- The [customer experience](#)^[375] when using chat.
- [Security considerations](#)^[385] when deploying iService chat.

13.3.1 Chat Settings

The primary considerations when creating a customer chat form are the agents that will be interacting (topic Selection) and how your customers will find the chat form (target deployment). These are specified in the Topic Selection and Target Deployment parameters of your chat form. The chat

settings page also provides access to reCAPTCHA settings, which are used to prevent automated submission of your chat forms.

Click the **New Chat Configuration** button to begin configuring your chat form. There are two types of chat forms, live chat and Chatbot. Chatbots use the iService Live Chat window and are styled using the same configuration as live chats. See the toggle below for Chatbot configuration details.

Live Chat

There are five values to set on the main live chat configuration page: Chat Name, Chat ID, Description, Topic Selection, and reCAPTCHA . Chatbots also required an OpenID Assistant ID.

The Chat Settings Page

a

These settings are explained in more detail below.

– Chat ID

The Chat ID is used to identify the chat form and is part of the URL of the form. An example of a chat URL with a Chat ID of `sales` is shown below.

`https://tenant.iservicecrm.com/s/sales/chat`

Since the ID is part of the URL, special characters and spaces are not allowed in the ID. Use an ID that is short but descriptive such as sales or support. The IDs from all of your configurations, including workflow or other configuration settings, must be unique to your tenant. The settings page will display an error notifying you if the ID is already used or contains invalid characters.

Topic Selection

Every interaction within iService, including live chat, is associated with a topic. The chat topic determines the agents available to chat and should be chosen carefully to ensure you have agents available for the types of questions customers will ask. There are three options for setting the topic, each of which has its own configuration options.

Single Topic

If you only have one team of agents that support chat (e.g., Sales or Support), you can use a single topic configuration. This configuration allows the customer to skip the topic selection menu when they submit their chat request. Because the topic is already specified, you have the option to hide the chat button when there are no agents available for the specified topic. This configuration is appropriate when every agent that provides chat support has the skills for the topic chosen.

Topic Selection Types

- Single Topic
- Multiple Topics
- All Topics

Topics

Products
▼

Hide Chat When No Agents Available

A single topic chat configuration

Hide Chat When No Agents Available

The single topic setup allows you to hide the chat button from your website if there are no agents available to chat. For the chat button to appear on your website when this is on, you must have agents logged into iService that 1) have the `chat.access` access right, 2) are logged in and set as available to chat, and 3) have the segment access and skills for the chosen topic. When these conditions are not met, the chat button is hidden.

The hide chat button is only available when the single topic option is chosen, and is only relevant for WordPress or HTML deployments. The Standalone chat form is loaded independently and is not directly associated with a **Chat with us** button that can be automatically hidden.

Multiple Topics

This option allows you to create a custom menu that includes custom names for the topics selected. After selecting a topic, provide the text to display in the topic selection menu. This is a common approach when your tenant has many topics, and only a small number of them are appropriate for customer chat. This allows you to offer a single **Chat with us** button, and customers can choose the appropriate team of agents based on the topic.

Topic Selection Types

Single Topic
 Multiple Topics
 All Topics

iService Topic	Menu Display Name
Audio-Video	Audio Video Questions
Cameras	Camera Questions
Computers	Computer Questions

[+ Add another topic](#)

Configuring multiple topics for chat

All Topics

The All Topics option will display the standard topic menu to the customer, but will only display the public topics for segments configured in the [Websites](#) ⁶²³ page. There are no additional options to set with this configuration other than choosing the All Topics radio button. This options is usually only appropriate if you have a small number of topics that have customer friendly names.

Topic Selection Types

Single Topic Multiple Topics All Topics

The All Topics option

Target Deployment

You can deploy iService chat in many ways, but the most common are as a link on a web page or via a URL that you provide to your customer. The chat configuration tool provides a plug-in for WordPress sites, and a script file for other HTML websites. The standalone option provides a URL that you can email to a customer or open from a link on any web page.

WordPress

WordPress is one of the most popular content management systems for building websites. iService chat can be added to a WordPress site with the iService Chat Plugin, which can be downloaded from the settings page as shown below.

After you create your configuration, the plug-in and URL to enter within your WordPress settings will appear as below.

Target Deployment

WordPress HTML Website Stand Alone Chat

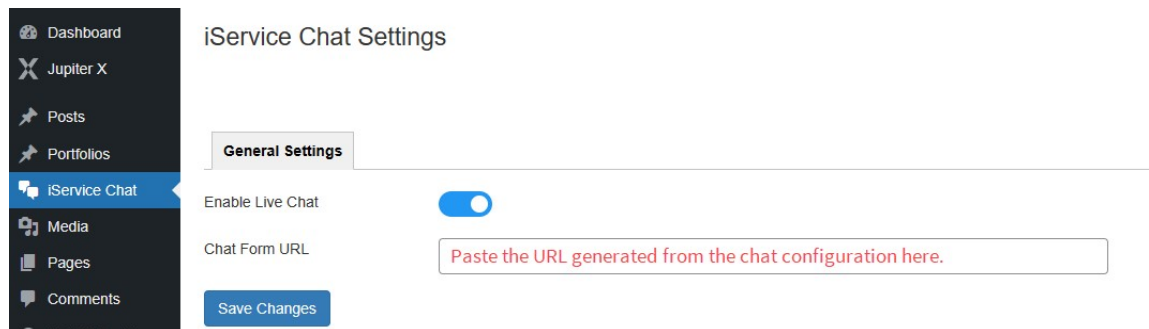
To install iService Chat on a WordPress website, configure the setup in this configuration and then install the WordPress plugin using the .zip file.

Copy URL:
Copy this URL to the WordPress plug-in

<https://eshopadmin.iservicecrm.com/s/chat/products>

Deploying to WordPress

Click the **Download plugin** button to download the iService Chat Plugin that you will install on your WordPress site. After you install the plugin on WordPress, an iService Chat settings menu will appear in your WordPress admin page. Copy the URL provided (see image above) to the settings page as shown below.

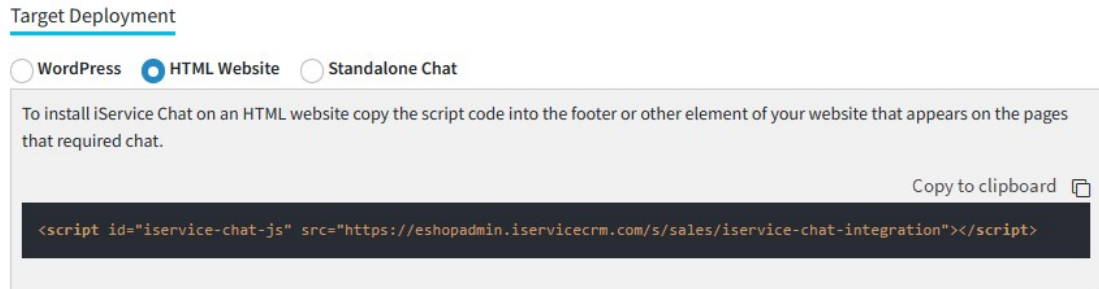


The WordPress Plug-in Settings Page

HTML Website

iService chat can be integrated into any HTML website, regardless of the content management system used. The **HTML Website** deployment option generates a <script> tag that you can copy into any page that requires iService chat. The most common method is to insert the script into a footer that is automatically included in the desired pages.

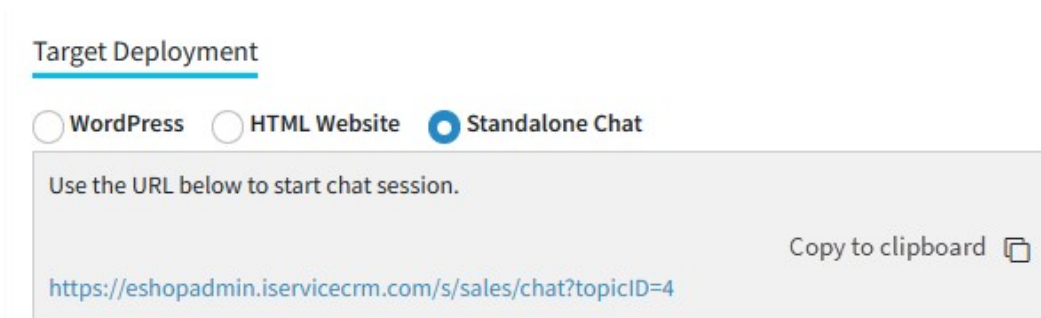
When you create the chat configuration with HTML Website as the target, the script will appear similar to the example below. When run on your web page, the script will create the iFrame that contains the chat button. The script includes the Chat ID, so you can install different chat forms on different pages of your website as needed.



An HTML Chat Configuration

Stand Alone Chat

This option provides a URL that can be loaded directly by a browser. Use this option to create a link for email footers, to invite a customer to a chat, or to open your customer chat window as it's own page (rather than an iFrame within a website). You can use the same configuration but a different topic by changing the `topicID` to any topic in your tenant.



Configuring a Standalone Chat Form

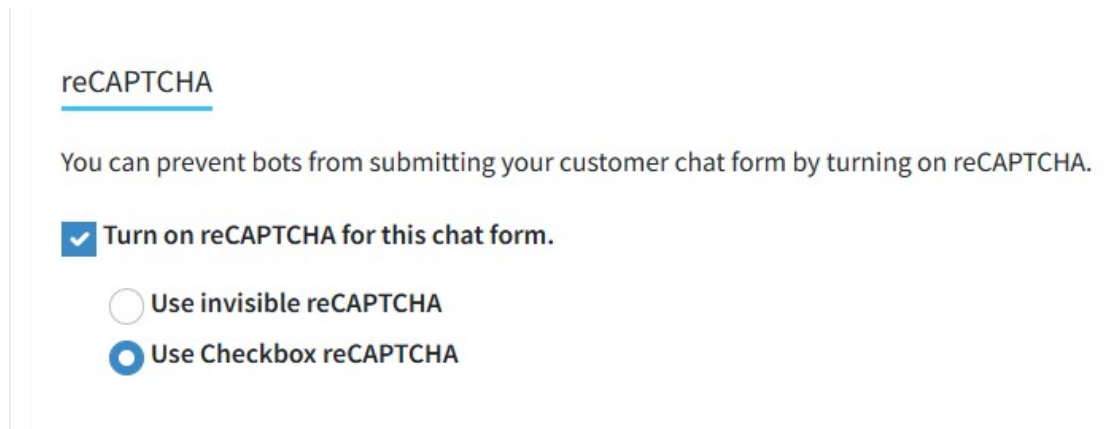
You can use custom iService form code to manage the display of buttons that open standalone chat forms. The `$if-chat` variable is used

to determine agent availability and can be used to make custom deployments. See [The \\$if -chat³⁷³](#) chapter for more details.

reCAPTCHA

iService includes built-in support for reCAPTCHA v2 (`invisible` and `checkbox`). The reCAPTCHA is enabled by default, but can be disabled if needed. Users will not see the reCAPTCHA challenge on their screen unless they are determined to be suspicious.

You can learn more about reCAPTCHA at <https://developers.google.com/recaptcha/intro>



The reCAPTCHA Setting

On-premises Users Only:

If you operate your own iService installation, you must add your site and secret keys to your master database to enable reCAPTCHA.

You can create reCAPTCHA keys at <https://www.google.com/recaptcha/admin>. Create a v2 Invisible key and then add the secret and site keys to your master database as shown below.

	name	value
▶	CurrentVersion	6
	GoogleRecaptchaSecretKey	6L
	GoogleRecaptchaSiteKey	6L
*	NULL	NULL

Adding site and secret keys to the master DB settings table

Adding a Chatbot

iService includes an integration to the OpenAI Assistant v2 API. To add a chatbot, create an Assistant in the [OpenAI Playground](#) using the tuning options and desired model. The only value you need to create your chat bot is the ID of the Assistant you create. iService uses the Assistant v2 API in chat forms. The styling of Chatbot forms is identical to the live chat forms.

The chat functions autonomously with runtime parameters that help ensure accurate results. Chatbot interactions can be monitored like live chats, and proactively converted to live chats by agents. All chatBot interactions are saved as contact history.

To create a chatbot, select Chatbot Only and enter the values described below.

Type of Chat

Live Only Chatbot Only

OpenAI Assistant ID 1

Chatbot Topic 2

Chat Name 3

Chat ID 4

Description 5

Opening Text 6

← → **B** *I* U

Welcome to the iService User Guide chatbot.

I'm trained on version 9.10, so ask me any questions about that version of iService.

You can ask things like:

- how do I add an agent to my tenant?
- how do I create a filter that finds incoming email based on a subject line, and what actions can I take when there's a match?

p > strong 61 words

reCAPTCHA 7

You can prevent bots from submitting your customer chat form by turning on reCAPTCHA.

Turn on reCAPTCHA for this chat form.

Editing Chatbot Settings

	Field Name	Description
1	OpenAI Assistant ID	This is the ID of the assistant you created within the OpenAI Playground .
2	Chat Topic	Every interaction within iService is associated with a topic. Chat history will be associated with this topic to support business intelligence.
3	Chat Name	This is the name used as labels in the chat list, but it is also displayed within the chat window as part of the introduction. Make this a customer friendly name.

	Field Name	Description
4	Chat ID	This must be a unique ID across all custom configurations in your tenant, including Workflow IDs. This value becomes part of the chat form URL (e.g., https://ex.iservicecrm.com/s/ChatID/chat)
5	Description	Add a description that explains the purpose of the chat. It can also be useful to note the locations where the chat form is embedded. For example, on the corporate website or other location.
6	Opening Text	Enter the text to display to users when they launch the chatbot. This can include images and URLs.
7	reCAPTCHA	You can enable or disable reCAPTCHA for your chatbot as desired.


The agent name displayed within the chat session will be the name of your OpenAI Assistant. Make sure your Assistant name is logical and customer friendly.

Once you save your customer chat configuration the chatbot is ready to use via the [Target Deployment](#)³⁵⁷.

Creating an OpenAI Assistant

OpenAI provides a robust environment for building and testing chatbots in the form of Assistants. Assistants can be trained on appropriate content and tested using the OpenAI Playground before you deploy it within iService. Creating your Assistant requires an OpenID account and a few steps explained below.

Step 1: Sign Up and Obtain API Key and Update iService External APIs

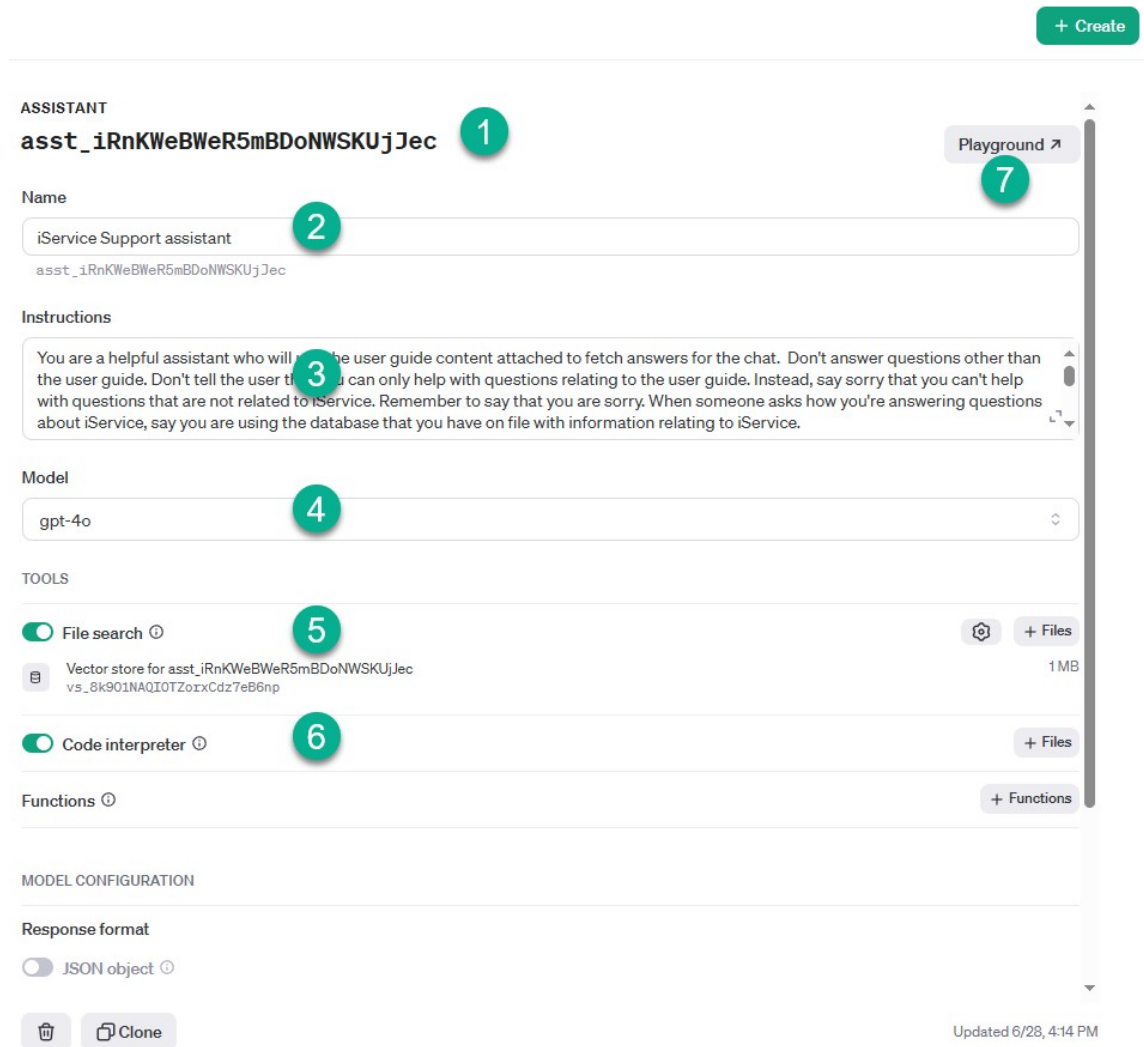
1. **Sign Up:** Visit [OpenAI's website](#) and sign up for an account.
2. **API Key:** After signing up, navigate to the [API section](#) in your account dashboard to obtain your API key. Make sure the project key is created in the same project as your Assistant.
3. Paste your API key into the OpenAI section of the [External APIs](#)  page in iService.

Step 2: Access the OpenAI Assistant page and Create Assistant

1. **Navigate to Assistant Page:** Go to <https://platform.openai.com/assistants/>
2. **Log In:** Use your OpenAI credentials to log in.
3. **Create an Assistant:** Click the +Create button.

Step 3: Configure the Assistant and Add to iService

Create your assistant by completing the sections shown below. Test it using the playground button, and then paste the Assistant ID into the iService chat form setup page.



Creating an OpenAI Assistant

	Assistant Element	Description
1	Assistant ID	This is the ID generated by OpenID for your assistant. This is the only value you will need to paste into your iService chatbot configuration.
2	Assistant Name	This will be displayed to the user as the name of the chatbot. Use an appropriate and descriptive name your customers will understand.

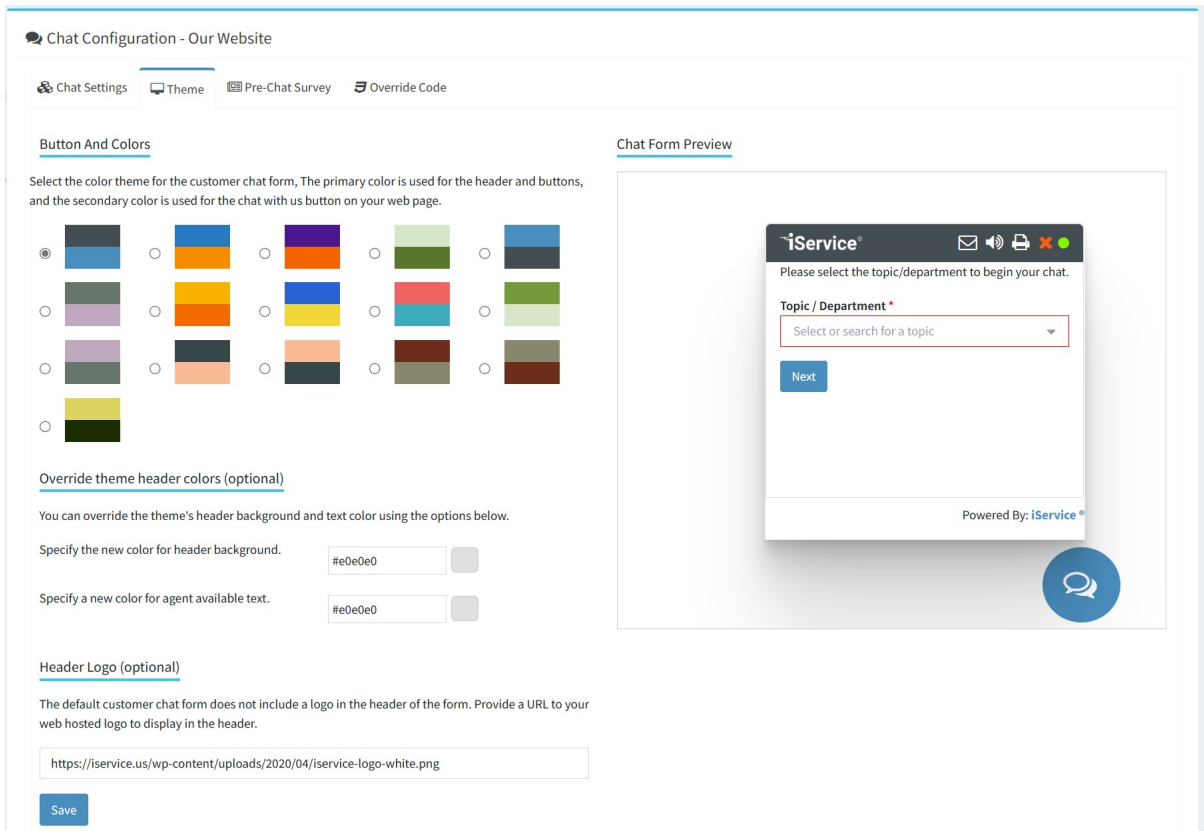
	Assistant Element	Description
3	Instructions	This is the initial prompt used by the assistant when evaluating the prompts provided by the user. They are used to guide the chatbot, limit responses, and set the tone for the conversation. Be as descriptive as you can and be clear about the rules the chatbot is to follow.
4	Model	Choose the GPT model for your chatbot.
5	File Search	File search enables the assistant with knowledge from files that you. Once a file is uploaded, the assistant automatically decides when to retrieve content based on user requests. The files are saved and accessible from within the Storage page at https://platform.openai.com/storage/ .
6	Code Interpreter	Code Interpreter enables the assistant to write and run code. This tool can process files with diverse data and formatting, and generate files such as graphs.
7	Playground	After you configure your Assistant, test it within the Playground by submitting prompts and evaluating the responses.

13.3.2 Themes and Branding

You can style your customer chat window to match your brand using theme options. Select the theme using the radio buttons, and click save. The theme will set the button colors for the chat image and the submit button as shown below.

You can override the banner and button colors using the optional override settings. Enter any color code desired, but be sure to test your changes to ensure the colors are compatible with the various buttons included in the banner (sound, print, etc.).

The default chat form does not include a logo, but you can insert a logo into the banner by specifying the URL to load in the Header Logo section.



Setting The Chat Theme

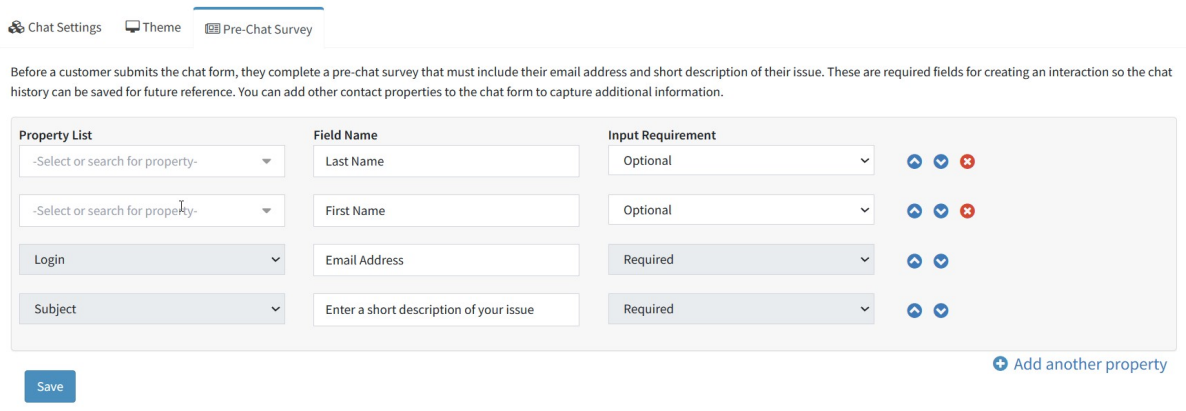
13.3.3 Pre-Chat Survey

Every interaction in iService includes a topic, a contact ID, a subject line, and a body. The pre-chat survey is used to capture the contact ID (usually an email address) and the subject line for the chat. The body of the chat will be created from the conversation after the chat ends.

The email address and subject are required inputs that are listed by default. You can change the label for these and the order, but cannot delete

them from the form. You can add other contact properties to the form by specifying them in this section.

In addition to the property, provide the label to display and set the order within the form using the up and down arrows.



The Pre-Chat Survey Page

13.3.4 The \$if -chat variable

A parameter for the iService \$if variable can be used to create custom deployments. The \$if variable determines if agents are available to chat, and can be used to display custom buttons and forms for special use cases.

The \$IF -chat command must be used with a -Ptopic parameter to specify the topic for the chat. This can be hard coded into the chat link, or it can be supplied by the customer when requesting the chat. In order for agents to be available, the following must all be true.

1. The contact requesting the chat has specified a valid topicID for the chat interaction.
2. An agent with segment access to the specified topic is logged into iService AND has set their chat status to available.
3. The available agent has the required Skills for the specified topic.

Example (determine if agents are available for topic ID 4):

```
$If -chat(available) -Ptopic'4'$
```

The code here is displayed when agents are available - for example

```
$Else$
```

```
    Display your "not available" image or an offline question form
```

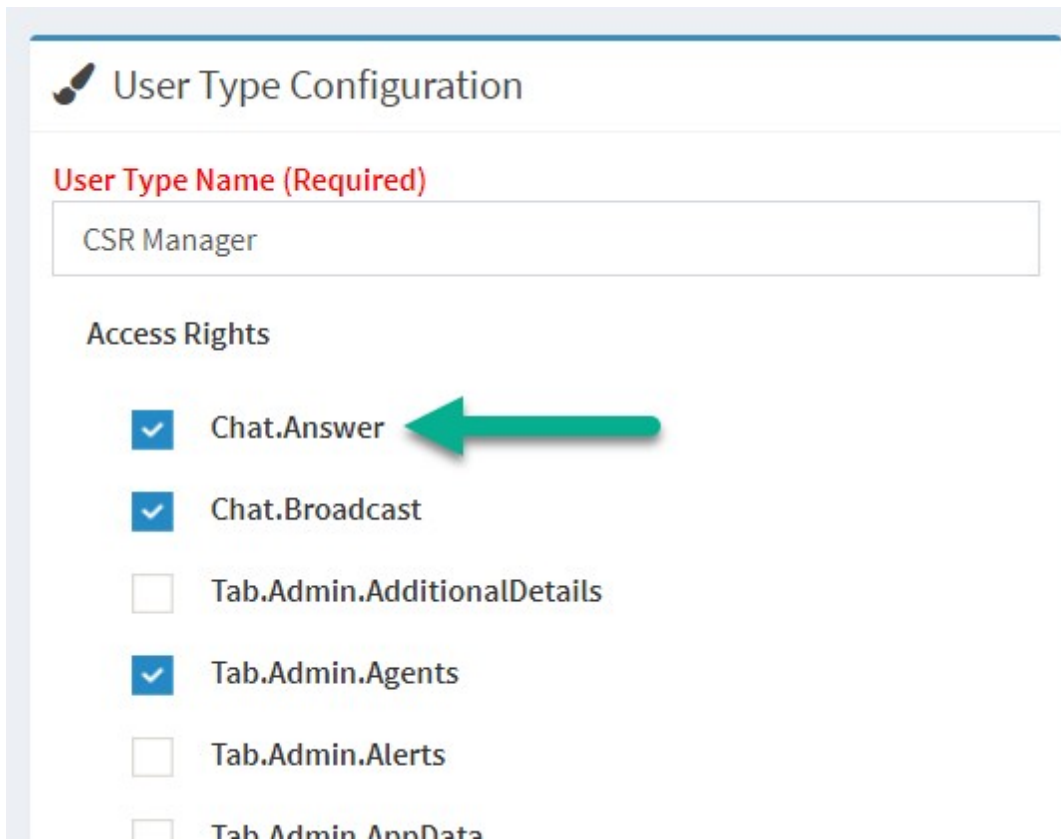
```
$EndIf$
```

13.3.5 Agent Chat Settings

Chat interactions are routed to iService agents that have been designated as "chat" agents. Chat agents are designated by an Access Right (Chat.Answer) that enables the various chat management buttons for agents. User Types are assigned to agents in the [Agent Admin](#)⁵⁴² page along with other agent attributes such as Segment Access, Skills, etc. This access right is the only requirement to enable chat for an agent. Chats are routed using the agents segment access and skills similar to other questions.

Creating a Special Chat User Type

Administrators can create an unlimited number of custom user types in the Tenant Settings - User Types page, or modify the rights of existing user types. To convert an existing user type to include chat, such as CSR, select that user type and check the `Chat.Answer` right as shown below. Then save the change.



The access right required for agent chat

13.3.6 Customer Experience

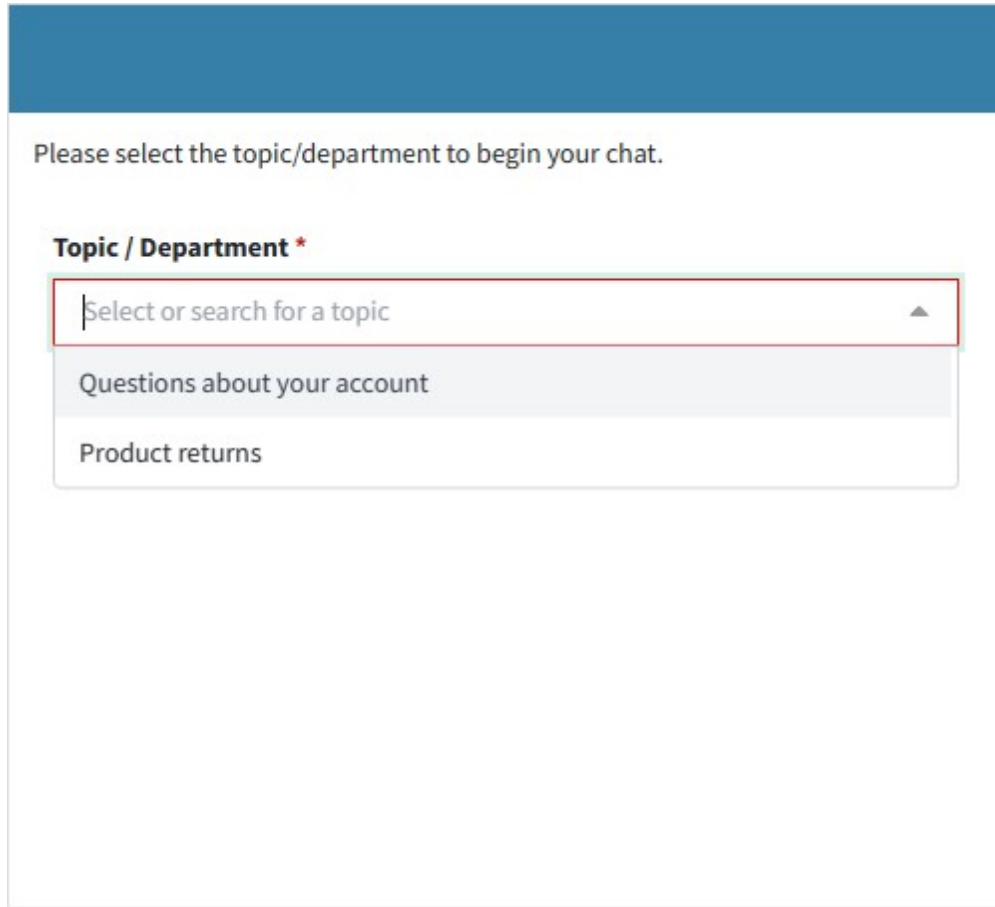
The customer chat phases are dependent upon the topic selection and available agents. There are five primary phases presented to the customer: topic selection, pre-chat survey, waiting for an agent, active chatting, and end of chat. When there are no agents available, the pre-chat survey is converted to a contact us form that creates a customer ticket.


Each of these phases are described below.

– Topic Selection

Every interaction in iService is associated with a Topic, which helps determine the agents that are skilled to answer the question. This phase is skipped when the chat form is configured as a single topic chat.

When agents are available, the topics are displayed as shown below. The customer selects a topic and clicks continue to load the pre-chat survey.



Powered By:  iService®

Multiple Topic Selection with Agents Available

When there are no agents available for a topic, it is shown grayed out with a tool tip that says:

There are no agents available for this topic. You can select this topic to leave a message, or choose a topic with available agents to chat.

Please select the topic/department to begin your chat.

Topic / Department *

Select or search for a topic ▲

televisions

Request a Quote

Open Quotes

Shipping

⊘ Technical Support

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Topic with No Agents Available

Pre-Chat Survey

After the topic is selected, the pre-chat survey requests details about the contact and the subject for the chat. The iService Chat Interaction is not created until this form is successfully submitted. Once it is submitted, the customer chat window will indicate that the chat request has been submitted and an agent will arrive shortly. At that point the chat interaction record is created and the pending chat will be displayed within the [Manage Chats](#)²²¹ page for managers.

Agent availability is displayed in the chat header as shown below.

Agents are available ●

Please tell us a few details about your request before we connect you to an agent.


First Name (optional)

Last Name (optional)

Email *

Subject for your question *

[Start The Chat](#) [Cancel](#)

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Pre-chat Survey Phase

If there are no agents available for the topic, the pre-chat survey is converted to a customer ticket form. The customer can submit their question and it will be routed similar to email or other customer tickets.

No agents available ●

We're sorry, but there are no chat operators available for the topic you selected. Please leave a message and we will respond as soon as possible.

First Name (optional)


Last Name (optional)

Email *

Subject for your question *

Short description of your question *

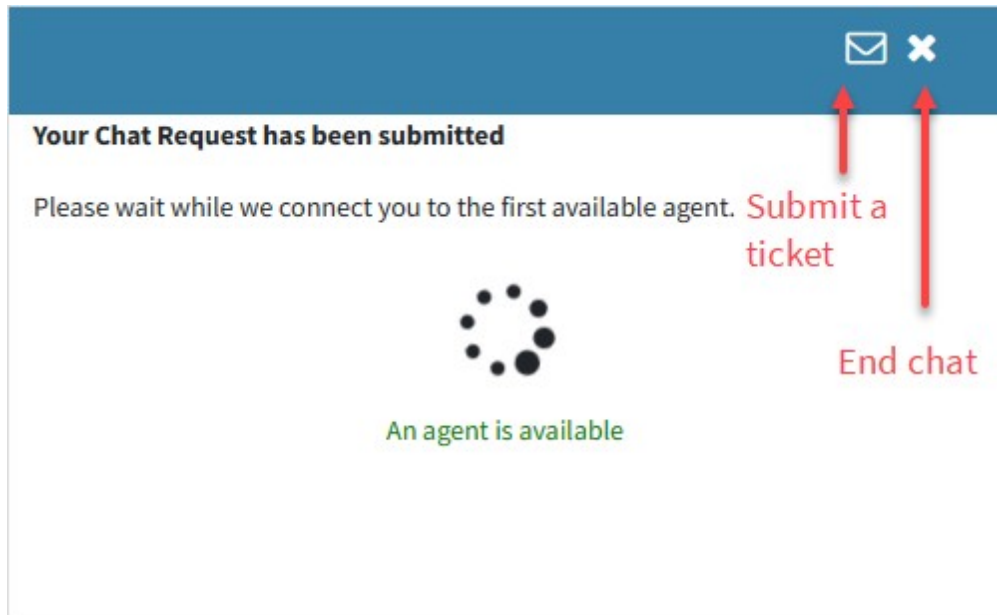
[Cancel](#)


Powered By:  iService®

No Agents Available

- Waiting for an Agent

When the chat is submitted, it begins as a Waiting Chat and is queued for the next available agent. The message **An agent is available** is displayed.

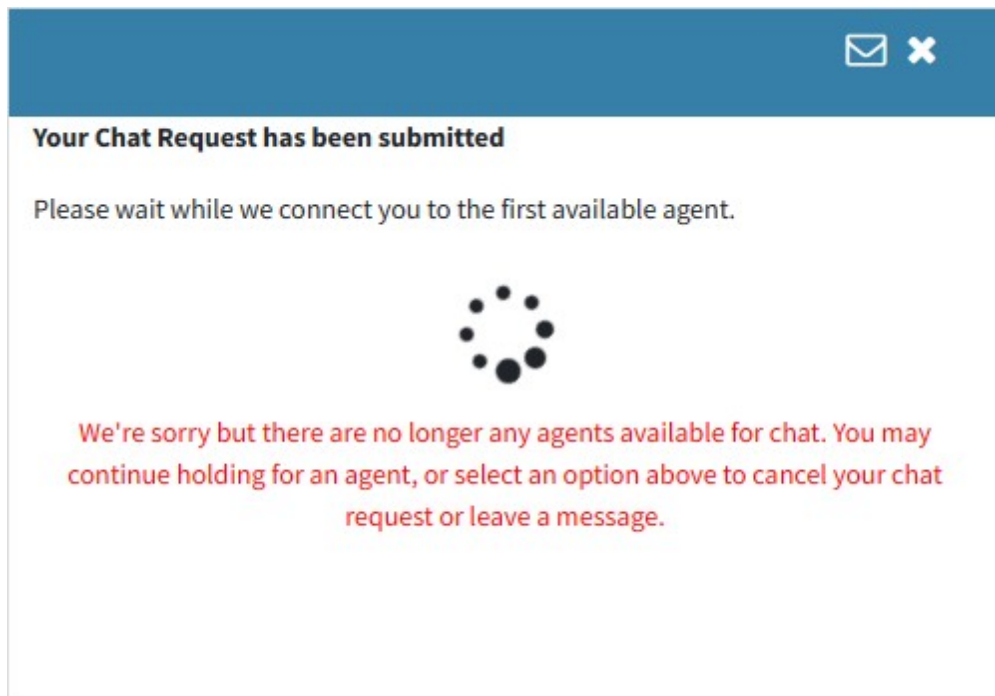



Powered By:  iService®

Waiting for an Agent

If all available agents go offline while the customer is waiting, the form updates with a message that reads:

We're sorry but there are no longer any agents available for chat. You may continue holding for an agent, or select an option above to cancel your chat request or leave a message.



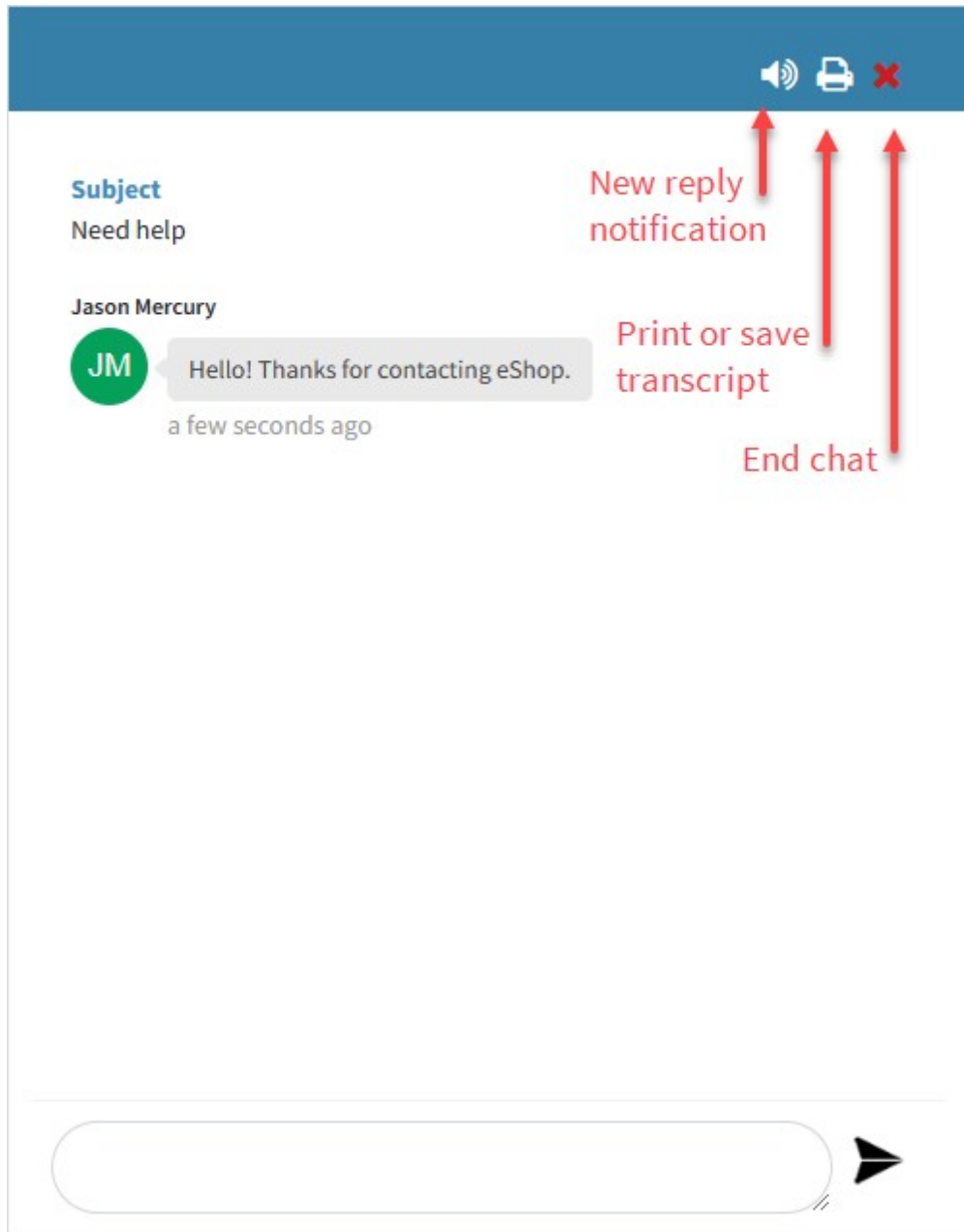
Powered By:  iService®


Agent Unavailable After Chat Request Submitted

The agent availability status is checked every 30 seconds, and will go back to showing available agents if they become available.

— Active Chat

When an agent takes the chat, the active chat window is presented. New messages from the agent generate a sound notifications. The sound can be turned off by the customer.




Powered By:  iService®

The Active Chat Window

The print button opens a print dialogue where the customer can save or print the chat transcript.

iService® **Chat Transcript**

Need help

Contact Name : John Smith	Interaction ID : 85243
Operator : Jason Mercury	Segment/Topic : e-shop / Account Questions
Date Created : 2023-03-15	Interaction Type :  Chat

Chat Dialog

[08:32 PM] **Jason Mercury:** Hello! Thanks for contacting eShop.

[08:39 PM] **Jason Mercury:** How can I help you today?

[08:39 PM] **John Smith:** I've forgotten my login. Can you help me get back into my account?

[08:39 PM] **Jason Mercury:** Sure. I can help you with that.

[08:40 PM] **John Smith:** You can request a password reset using this link: <https://eshop.iservice.info>.

© 2008-2023 One-to-One Service.com. All rights reserved. Version 9.2.0073 - 2023.03.14 - 16:54:02
Powered by iService (<https://www.iservice.us/>)

A Chat Transcript

End of Chat

When the chat is completed, the full dialogue is saved as an interaction in the customer's history.

Subject	Topic	Status	Type	Agent	Date
[ref#: 85333-85333] Need help	Account Questions	Resolved	Chat	Jason Mercury	2023-03-15 08:41:47 PM

Agent email
Note
Ticket
Forward Copy
⋮

Details & Attachments

Subject : Need help

To: e-shop / Account Questions

Customer
John Smith

Interaction ID: 85333

Segment / Topic: e-shop / Account Questions

Resolved By: Jason Mercury

Approved By:

Assigned To:

Interaction Status: Resolved

Interaction Type: Chat

[8:23 PM] Question:

[8:32 PM] Jason Mercury: Hello! Thanks for contacting eShop.

[8:39 PM] Jason Mercury: How can I help you today?

[8:39 PM] John Smith: I've forgotten my login. Can you help me get back into my account?

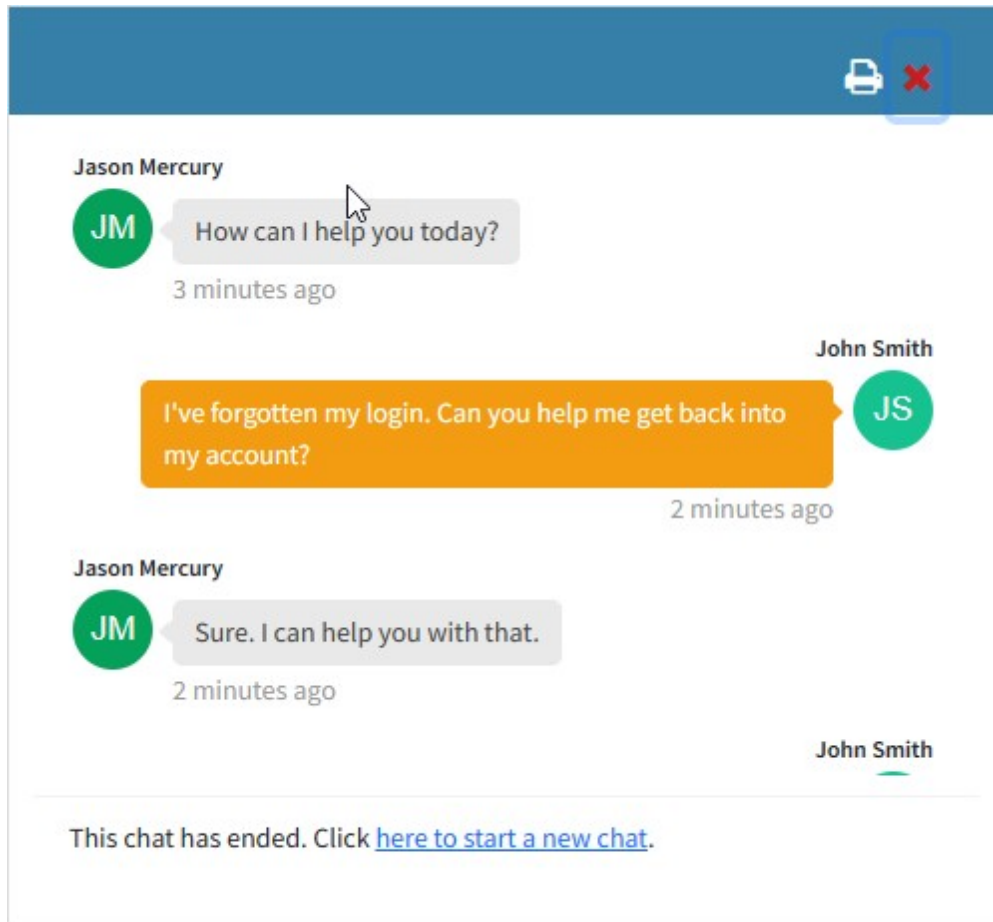

[8:39 PM] Jason Mercury: Sure. I can help you with that.

[8:40 PM] John Smith: You can request a password reset using this link: <https://eshop.iservice.info>.

[8:41 PM] John Smith: **Customer closed the chat.**

A completed chat in history

The customer is offered a button to start a new chat, or they can close the window.

Powered By:  iService®*A completed chat*

13.3.7 InfoSec Considerations

Whenever you expose a communication method to the internet, it's important to understand the potential security implications and attack vectors. iService Chat is a web based interface that uses the same APIs and security methods as the agent interface and customer portals. The chat forms are built using [iService Forms](#)³⁰² in the same way as all other iService interfaces. This chapter explains how to secure your chat implementation and features that help protect your organization from malicious use.

Protecting against automated submission (reCAPTCHA)

An important security consideration is preventing automated submission of your chat forms. Scripts and bots that maliciously submit chat requests could disrupt your iService agents with large numbers of chat requests, making it difficult to support your real customers.

iService Chat includes built-in support for reCAPTCHA to prevent bots and malicious scripts from spamming your iService Agents. The reCAPTCHA process used in chat follows the same configuration as other iService forms. Google reCAPTCHA v2 is integrated into every chat form by default, but can be disabled in specific chat forms if needed.

Text Bombing

Text Bombing is a form of cyber attack that involves sending a large amount of text to overwhelm a system's resources, causing it to crash or become unresponsive. This can be done manually by an individual or automated using specialized software. Text bombing is often used as a means of disrupting online services or harassing individuals.

iService Chat prevents text bombing in two ways. First, customers cannot post any comments into a chat until an agent joins the conversation. This prevents users of the form from loading the chat interaction with an excessively large message body before an agent is participating and can end the chat.

Also, customers can only post 1200 characters at a time. The underlying API used in customer chat forms limits the input to 1200 characters. Front-end validation in the customer chat forms truncate content over the allowed limit.

File Attachments

Files attachments are a common attack vector for malicious code. The default iService chat forms do not allow file transfers. If you have a business

need for file transfer, contact your iService account manager to discuss implementation options.

Malicious Content

Content entered into the chat by your customer is plain text for review by the agent. This prevents agents from accidentally clicking on malicious links, and the execution of JavaScript or other dangerous content.

The iService Chat Script

The iService customer chat form is an HTML page written in Vue.js. It is inserted into your website within an iFrame generated by the script created in the [Chat Configuration](#) settings page. The script creates the iFrame, which uses cookies to keep track of the status of the chat interaction. The contents of the script are below, but will include the chat ID from your configuration.

Example chat script

```
//
(function() {
  function setCookie(cname, cvalue, exdays) {
    const d = new Date();
    d.setTime(d.getTime() + (exdays * 24 * 60 * 60 * 1000));
    let expires = "expires=" + d.toUTCString();
    document.cookie = cname + "=" + cvalue + ";" + expires + ";";
  }

  function getCookie(cname) {
    let name = cname + "=";
    let decodedCookie = decodeURIComponent(document.cookie);
    let ca = decodedCookie.split(';');
    for (let i = 0; i < ca.length; i++) {
      let c = ca[i];
      while (c.charAt(0) == ' ') {
        c = c.substring(1);
      }
      if (c.indexOf(name) == 0) {
        return c.substring(name.length, c.length);
      }
    }
  }
}
```

```

        return "";
    }
    window.addEventListener('load', async function() {
        //include static js that contains iservice variable
        //
        var chatconfig = {
            "id": "sales",
            "name": "Our website",
            "targetDeployment": "HTML Website",
            "theme": "chat-theme7",
            "topicPresented": "Single Topic",
            "chatID": "sales",
            "description": "The sales chat form on WordPress",
            "specificTopics": [{
                "id": "",
                "name": ""
            }],
            "singleTopic": "4",
            "preChatSurvey": [{
                "propertyID": "",
                "fieldName": "",
                "isRequired": false
            }],
            "enableRecaptcha": true
        };
        var singleTopicAvailable = false;

        //get config ID from script attached
        var chatID = chatconfig?.id ? chatconfig.id : '';
        var topicID = (chatconfig?.singleTopic) ?
            `?topicID=${chatconfig?.singleTopic}` : '';
        var cookie = getCookie('chatGuid');
        //read cookies data from child
        window.addEventListener("message",
            function(e) {
                if (typeof e.data === 'string')
                    setCookie('chatGuid', e.data);
            },
            false);
        var chatGuid = cookie ? `chatGuid=${cookie}` : '';
        var urlParams = ''
        if (topicID && chatGuid)
            urlParams = topicID + `&${chatGuid}`;
        if (topicID && !chatGuid)
            urlParams = topicID;
        if (!topicID && chatGuid)
            urlParams = `?${chatGuid}`;
        //get domain of configuration from script URL

```

```

let domain = (new URL(document.getElementById(
    "iservice-chat-js").src));
var iframSrc = domain.origin +
    `/s/${chatID}/chat${urlParams}`;

window.mychat = window.mychat || {};
var iserviceChatContainer = document.createElement(
    'div');
iserviceChatContainer.id = "iservice-chat-container";
var styles = {
    "position": "fixed",
    "bottom": "0",
    "right": "0",
    "z-index": "99999"
};
if (chatconfig?.singleTopic && chatconfig
    ?.hideChatWhenNoAgent) {
    if (!singleTopicAvailable) {
        styles.display = "none";
    }
}
Object.assign(iserviceChatContainer.style, styles);
var chatIconImage = document.createElement('img');
chatIconImage.src =
    'data:image/png;base64,iVBORw0KGgoAAAANSUgAA';
var iserviceChatIcon = document.createElement('a');
var styles = {
    "cursor": "pointer",
    "opacity": "0.8",
    "position": "fixed",
    "bottom": "23px",
    "right": "28px",
    "border-radius": "50%",
    "color": "#fff",
    "padding": "20px 20px",
    "background-color": "#206590"
}
Object.assign(iserviceChatIcon.style, styles);
iserviceChatIcon.appendChild(chatIconImage);
iserviceChatContainer.appendChild(iserviceChatIcon);
var iserviceChatPopup = document.createElement('div');
iserviceChatPopup.id = "iservice-chat-popup";
var styles = {
    "position": "fixed",
    "bottom": "90px",
    "right": "38px",
    "border": "1px solid #f1f1f1",
    "z-index": "9",

```

```

        "background": "#fff",
        "width": "100%",
        "max-width": "350px",
        "border-radius": "20px",
        "height": "440px",
        "box-shadow": "0 2.8px 2.2px rgba(0, 0, 0, 0.03)",
        "display": "none",
        "transition": "all .4s ease-in-out"
    }
    Object.assign(iserviceChatPopup.style, styles);
    var chatIframe = document.createElement('iframe');
    // chat source (external url)
    chatIframe.src = iframSrc;
    chatIframe.id = "iservice-chat-iframe";
    var styles = {
        "height": "440px",
        "width": "100%",
        "border-radius": "20px",
        "border": "none"
    }
    Object.assign(chatIframe.style, styles);
    iserviceChatPopup.appendChild(chatIframe);
    iserviceChatContainer.appendChild(iserviceChatPopup);
    iserviceChatIcon.onclick = function() {
        if (iserviceChatPopup.style.display ==
            'block') {
            iserviceChatPopup.style.display = 'none';
        } else {
            iserviceChatPopup.style.display = 'block';
        }
    };
    document.querySelector('body').appendChild(
        iserviceChatContainer);
    });
    }) ();

```

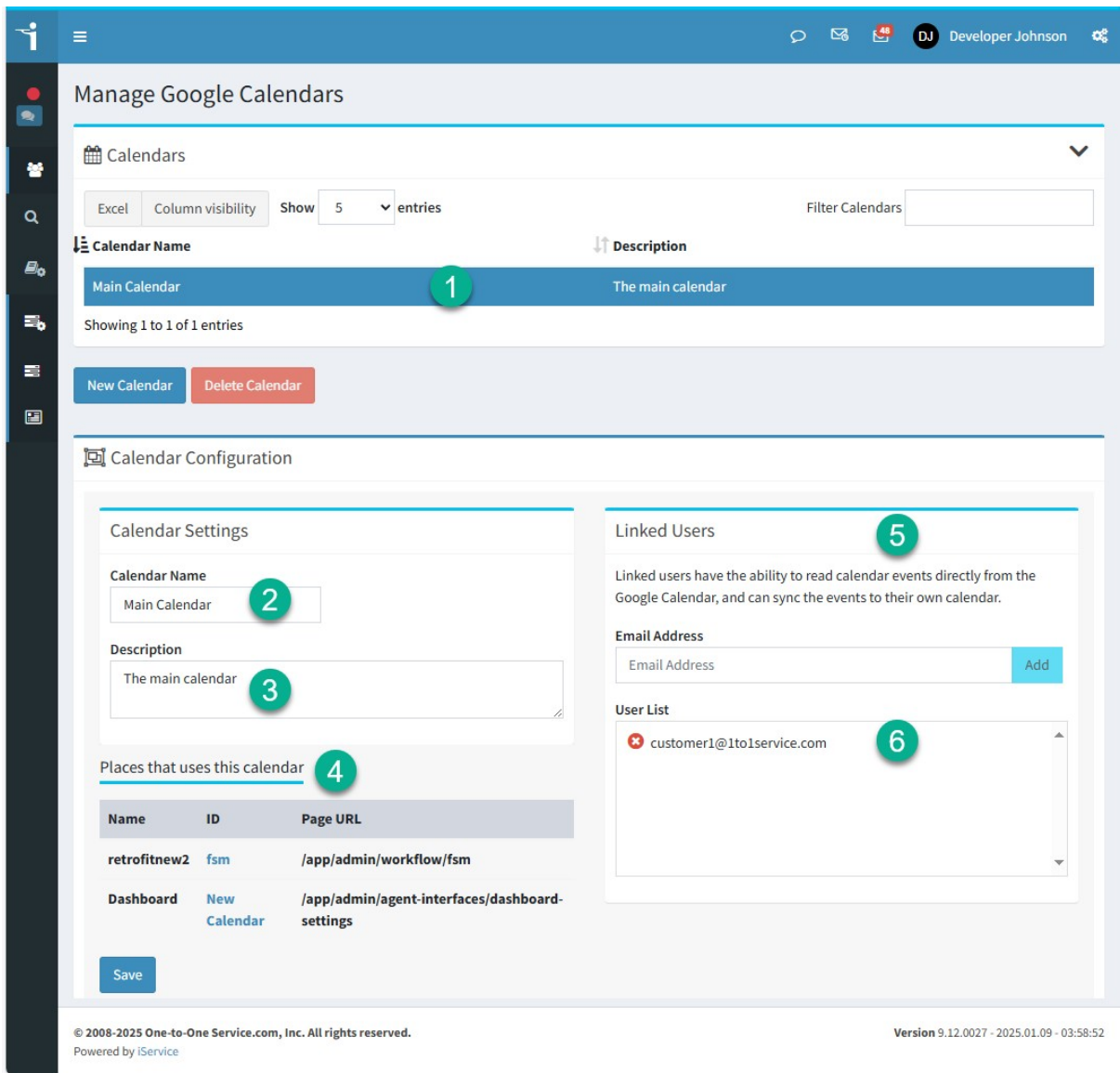
13.4 Manage Google Calendars



iService provides calendar views for various features, such as scheduling and viewing tickets, based on a `dateTime` property. The calendar used to display that information can be updated to support Google Calendar Events as well as iService tickets. Before you can add events to your calendar, you need to enable the Google Integration and create a calendars in your tenant from the Manage Calendars page. After you setup your [Google Calendar API](#)⁵⁸⁰, use the Manage Google Calendars page to create the calendar for your tenant. You can configure multiple calendars within your tenant. Each calendar you create within iService will generate an associated Google Calendar on the Google platform.

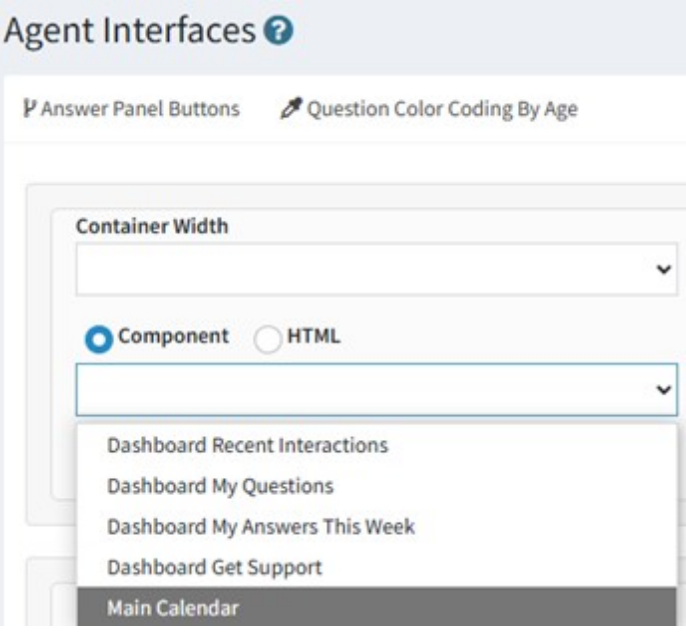
Your agents can sync the calendar events from the iService integrated Google calendar to their own personal Google Account using the Linked Users setting. The Linked User option will grant the user access to the calendar outside of iService.

The settings for Google Calendars are explained below.



The Manage Google Calendars page

#	Name	Description
1	Calendar List	Select your calendar from the Calendar List.
2	Calendar Name	This is the label used when referencing this calendar from other locations within iService, such as the Dashboard Settings ³²¹ or a Workflow panel ⁴⁴¹ .

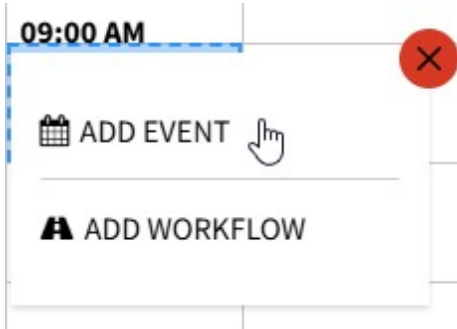
#	Name	Description
		
3	Description	Add a description that describes the purpose of the calendar.
4	Places that use this calendar	<p>If the calendar is used within a Dashboard or Workflow a reference will be shown here. You cannot delete a calendar that is currently in use.</p> <p><u>Name</u> - this is the name of the workflow or dashboard using this calendar. <u>ID</u> - this is the ID of the form using this calendar. <u>Page URL</u> - you can load the configuration page that uses this calendar at the link shown.</p>
5	Linked Users	Your agents or other users can be added as Linked Users to your calendar. This allows them to view the calendar within their own personal Google Calendar.
6	User List	To add a Linked User, add their email address (must be a Google account) using the Add

#	Name	Description
		<p>button. Google will send the user an email like the example below. Once the user accepts the link they will be able to view the calendar within their Google account.</p> <p>Hello</p> <p>We are writing to let you know that democontractor-tenant@calendar-438816.iam.gserviceaccount.com has given you access to view events on the Google Calendar called "Estimates".</p> <p>After adding this calendar to your other calendars, you can hide or completely remove it whenever you want.</p> <p>Add this calendar. ← Click this to add the calendar to your list of Google calendar you can access.</p> <p>- The Google Calendar Team</p> <p>View Your Calendar.</p> <p style="text-align: right;"><i>A linked user notice</i></p>

Once your calendar is created you can select it when creating calendar based features, like a Dashboard calendar or workflow calendar.

— Google Calendar Events

When you have a Google Calendar configured, an Add Event option will appear when you add events using the calendar user interface. In the example below, we have selected a time frame for the event.



Clicking the Add Event button will load the New Event panel.

A screenshot of the 'New Event' panel. It contains several input fields and buttons, numbered 1 through 7:

- 1: Title input field.
- 2: Start date (12/21/2024) and time (9:00 AM) fields, followed by 'until', and end date (12/21/2024) and time (10:00 AM) fields.
- 3: Full-day event checkbox.
- 4: Frequency dropdown (Once) and Until dropdown (12/21/2024).
- 5: Description text area.
- 6: Agent search input field.
- 7: Topic ID input field.

At the bottom right, there are 'Save' and 'Cancel' buttons.

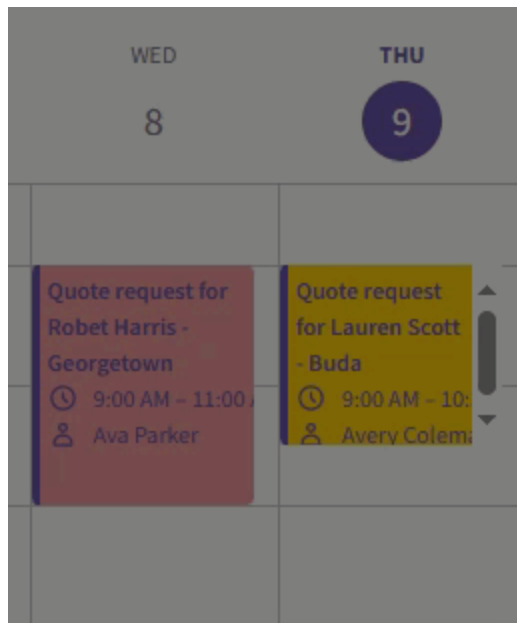
Adding a new event to a Google Calendar

#	Name	Description
1	Title	The title displayed on the calendar event. In this example, the title is

Working with iService Calendars

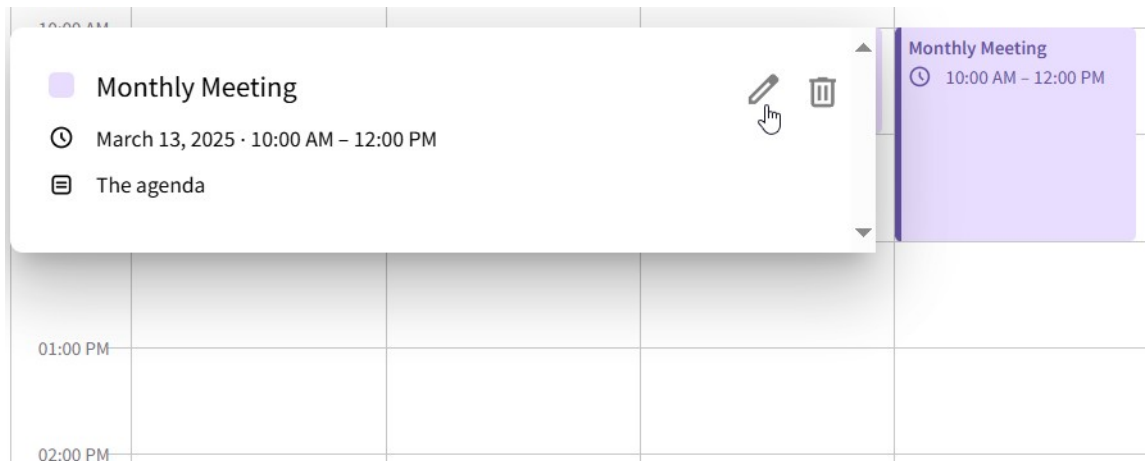
Changing Event Times by Drag and Drop

After you create events for your calendar, you can change the time using the Edit button or by dragging and dropping the event to a new time frame.



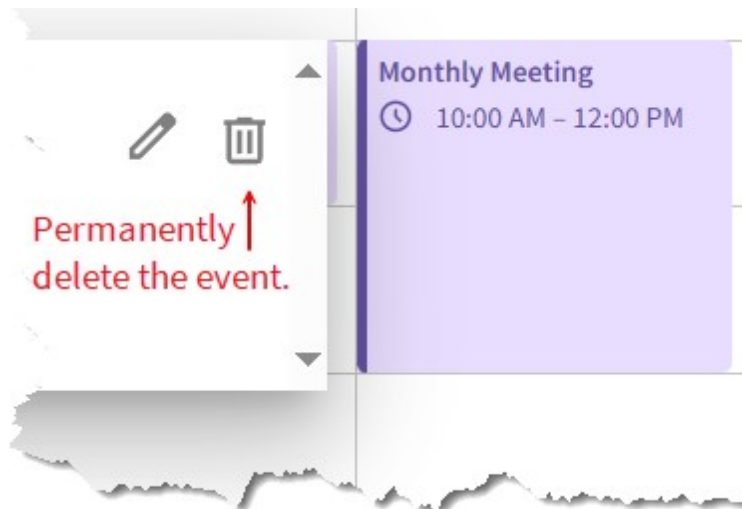
Editing Calendar Events

You can edit any of the values in the event by clicking the edit pencil on the event. This edit pencil is only available for Calendar events. iService tickets can only be modified within a ticket details panel.



Deleting Calendar Events

Use the delete button on a calendar event to remove it from the Calendar. Deleted events cannot be restored.

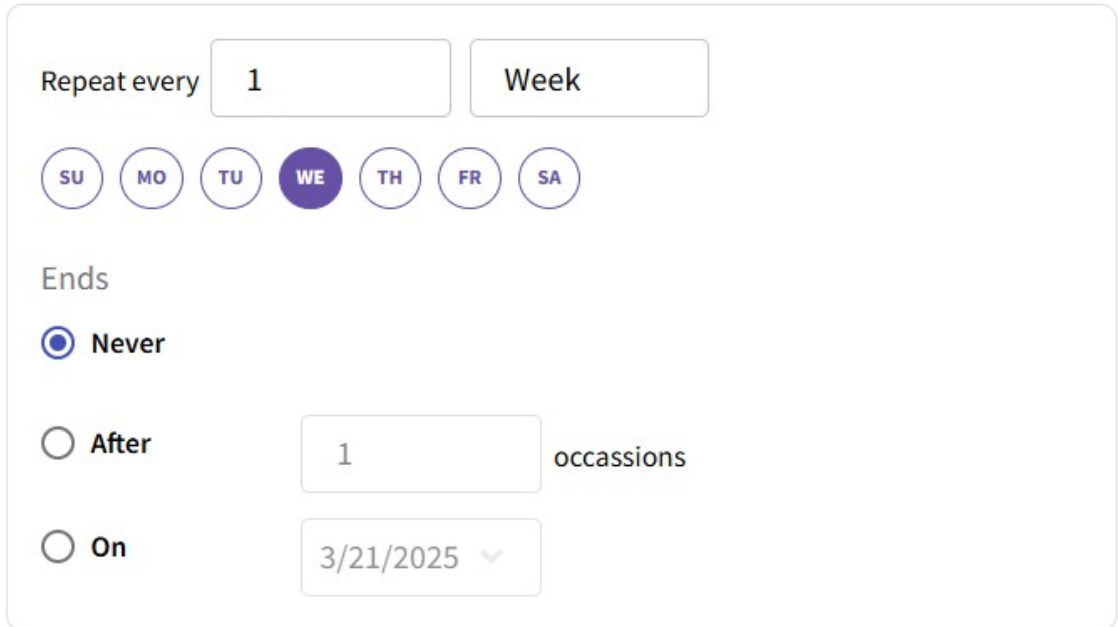


Event Frequency

The default value for frequency is once, which is a single event. You can set your events to recur on a custom schedule using custom repetition settings. Each custom setting allows you to specify the number of times the event will recur (number of time, an end date, or never end) and whether to skip a period, like every other month.

Day, Month, and Year - Daily, monthly, and yearly events will recur every nth period. For example, every two weeks for every three months. The starting day determines the day in future periods.

Weekly - Weekly events can be scheduled for specific days of the week, such every Monday or on weekends.



Repeat every

SU
 MO
 TU
 WE
 TH
 FR
 SA

Ends

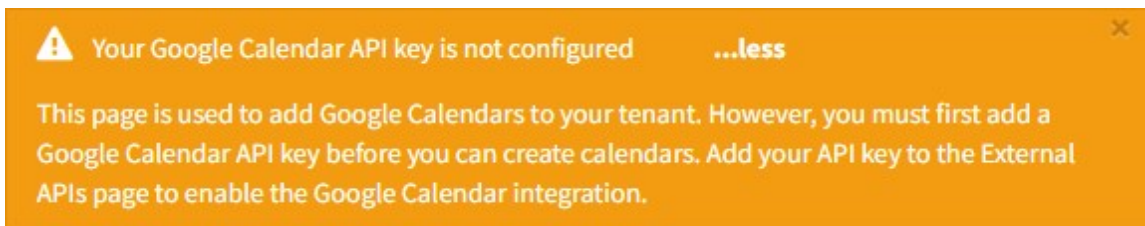
Never

After occasions

On

Error - "Your Google Calendar API Key is not configured"

You must configure your tenant with a Google Calendar API key before you can create any calendars. If you load the Manage Calendars page before you have setup the integration in the External APIs page you will see this alert message displayed.



Alert when the Google Calendar API key is not set

To learn more about setting the Google Calendar API key, see the [External APIs](#) 556 chapter.

13.5 Quote Admin



Sending and following up on quotes can be a high-volume process with significant revenue impact. This chapter describes built-in iService forms that can streamline the process for delivering quotes, provide a follow up mechanism for agents and managers, and allow customers to collaborate directly on the quotes. The goals of the quote process are to reduce the quote prep time required by agents, improve quote acceptance rates, reduce overall sales cycle time, and generate metrics and dashboards to help continuously improve the sales process.

Assumptions and Prerequisites

1. A topic(s) must be designated for quoting, and only quote requests are placed into that topic.
2. A topic(s) must be designated for tracking open quotes, and only follow up tickets will be placed into that topic.
3. Your quote templates are stored within stock responses the agent selects when composing a quote.
4. Interaction properties are used to store details of the quote, and are inserted into the stock response template for the quote. These properties are customizable.

Before you configure your quote and follow up forms, make sure you have the following prerequisites in place.

Step 1 - Setup interaction properties

Create the Interaction Properties that are required in your quote. This includes values like price, quantity, delivery date that will be in your stock response. If any of the properties require a list, create the list in

the Additional Details page. In addition to properties used to generate the quote, you might need a property to track the reason for the final disposition of your quote (won, lost, etc.).

In our example, we're using the following properties.

Property Name	ID	Property Type	Shared
0. Quote #	119	Case	False
1. Quantity	117	Case	False
2. Item #	35	Case	False
3. Item Description	115	Case	False
4. Unit Price	113	Case	False
5. Total Price	114	Case	False
6. Comments	118	Case	False
Quote Resolution	120	Case	False

In an ideal setup, the customer would be submitting a request with some values selected (e.g., quantity, item #, item description).


Step 2 - Setup stock responses

Create your Stock Responses that will be sent to your customer. The stock response will include the values you enter into the interaction properties created in step 1 above, and is what the customer will receive via email when you send the quote.

Name

Description

Html Response Body



Your eShop Electronics product quote is below

Thanks for requesting a price quote from eShop. All quotes are valid for 30 days, unless otherwise stated in the quotation. If you have any questions please contact us at 217-555-5555 during business hours (7am – 7pm ET), or reply to this email with your question. You can also chat with one of our sales specialists during normal business hours by [clicking here](#).

Quote Number: \$value -question(property119)\$	Quote Total: \$ \$value -question(property114)\$
Quote Date: \$value -today\$	

Qty.	Item No.	Desc.	Unit Price	Total Price
\$value -	\$value -	\$value -	\$ \$value -	\$ \$value -
question(property117)\$	question(property35)\$	question(property115)\$	question(property113)\$	question(property114)\$

An example stock response used for quotes

Step 3 - Setup topics for quote requests & follow-up

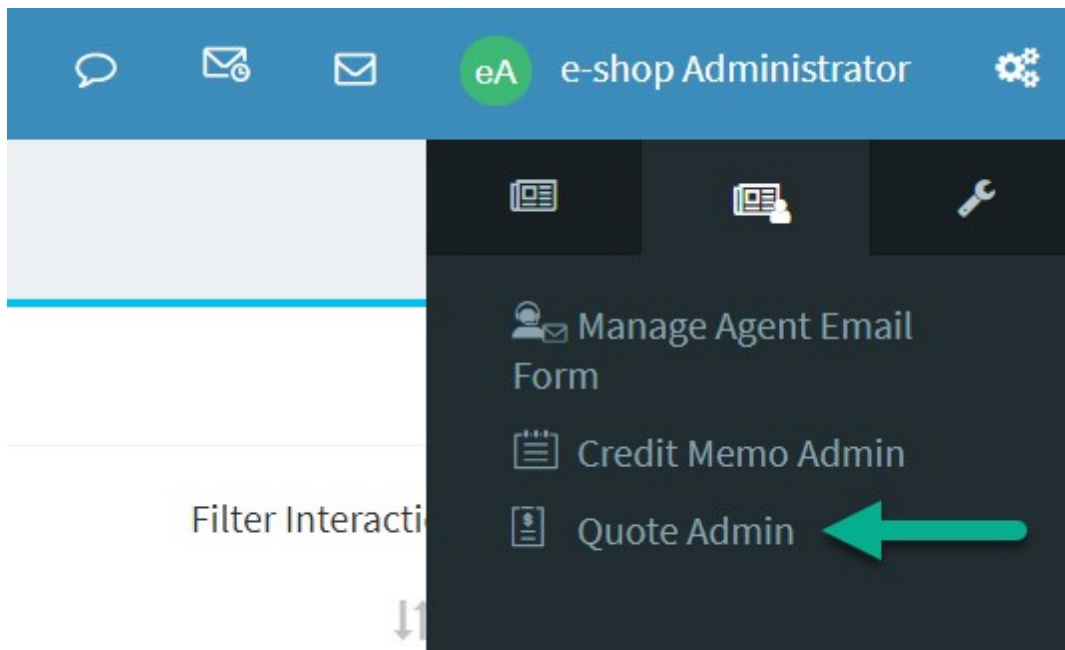
Create Topics for new quote requests ("To Quote") and tracking pending quotes ("Open Quotes"). Questions in the To Quote queue will be presented using the custom quote form you configure below. When quotes are sent, a tracking ticket will be created in the topic you specify for "Open Quotes."

In our example, we created the following topics for quote requests and the follow up tickets.

- To Quote
- Open Quotes

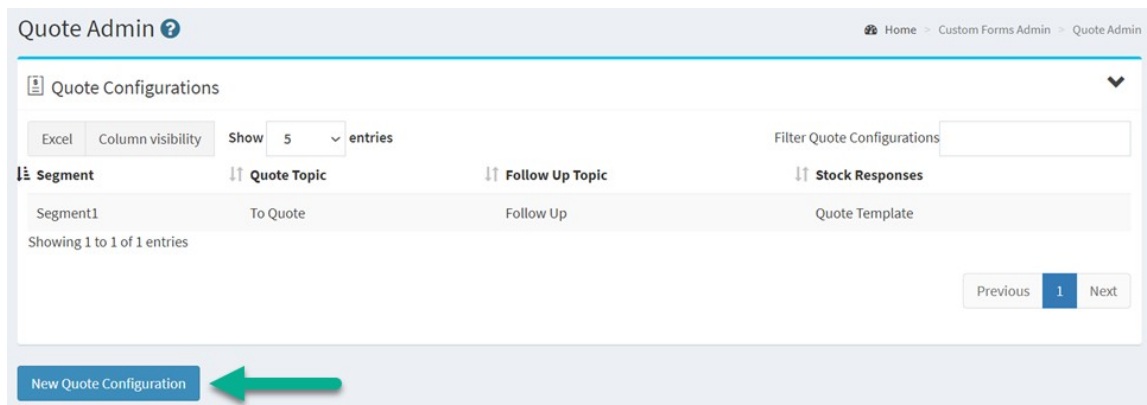
Step 4 - Create your Quote Configuration

After you have all of your prerequisites configured, you can create your quote configuration from the Quote Admin page (within the right side Settings Menu).



The Quote Admin page

Click "New Quote Configuration" to begin the process.



Click New Quote

Then configure the following aspects for your quote and follow up process.

- 1 - Select that topic that will contain the new requests for quotes. Agents will be given the custom quote form for questions in this topic.
- 2 - Select the properties that will contain the inputs for quotes in this topic. These properties must be setup and associated with your quote topic before you create the quote configuration.
- 3 - Select the stock responses that will be used for sending customer quotes for this topic. You may use as many stock response templates as desired. Agents will select their template from this list when preparing quotes for this topic.
- 4 - When a quote is sent, iService will create a tracking ticket and place it into a separate topic for tracking open quotes that are waiting for a customer decision. Select the topic for the tracking tickets here.

New Quote Configuration

Quote Request Details

"To Quote" Topic ?

To Quote 1

Interaction properties for topic: To Quote ?

Property Name	Property Type	Value Type 2
Agent Comments	Case	Text
Item Description	Case	Text
Item Number	Case	Text
Quantity	Case	Number
Quote Number	Case	Text
Total Price	Case	Number
Unit Price	Case	Number

Stock responses used for the "To Quote" topic ?

✖ Quote Template 3 +

Follow Up Ticket Details

"Open Quotes" Topic ?

Follow Up 4

Create Cancel

Configuring a new quote process

13.6 Quick Agent Email

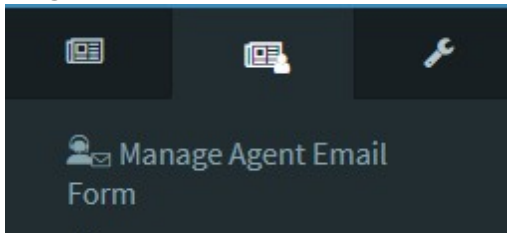


The Quick Agent Email form allows agents to send agent email messages without looking up the contact. It's included in the custom forms section of the left navigation panel. One of the advantages of this form is that you can designate the sending mailbox for each topic. If you have topics dedicated to a customer, you might want to use a private labeled mailbox for all email you send to that customer.

Topics that are not mapped to a mailbox will appear grayed out in the topic menu, and will use the Segment's [default mailbox](#)⁶⁴². Ensure your default mailbox has an appropriate name suitable to all recipients.

Configuring the Quick Agent Email form

Before agents can use this form, it needs to be configured. To configure the form, open the Manage Agent Email form from the Custom Forms Admin page.



The Manage Agent Email Form will look like the below screen before it's configured. You need to configure every segment that will be sending emails.

Manage Agent Email Form

Target Segment

Expect Customer Reply (Default)

Select the segment you want to configure.

Mailbox Assignment

Topic	Mailbox

Mailing Lists ?

Name	CC String
There are no mailing lists configured for this segment.	
+ Add another list	

An un-configured agent email admin form

To begin, select a segment. After you select the segment, the form will update and look similar to the example below.

Manage Agent Email Form

Target Segment

Segment1

Expect Customer Reply (Default)

1

Mailbox Assignment

Topic	Mailbox	
All Topics		✖
_Spam		✖
_Undeliverable		✖
Round Robin		✖
S1ReplyAtStart		✖
s1topic1	Segment 1 Topic 1	✖
s1topic1a		✖
s1topic1b		✖
s1topic12		✖
s1topic123		✖
s1topic2	Segment 1 Topic 2	✖
s1topic3	Segment 1 Topic 3	✖
S1Topic-Int Prop Svc Lvl - 20 min		✖
S1TopicSvcLvl-1 Min		✖
S1TopicSvcLvl-10 Min		✖
To Quote		✖
Follow Up		✖

2

Mailing Lists ?

Name

CC String

There are no mailing lists configured for this segment.

[+ Add another list](#)

3

Save


4

#	Element	Description
1	Expect Customer Reply switch	Enable this switch to set Expect Customer Reply as a default setting. This will place a copy of the email into the sending agent's My Pending Messages page.
2	Mailbox Mappings	Choose a mailbox that is appropriate for each topic. Some topics, like _Spam, will not need to be configured. If a mailbox is not configured, the topic will appear gray in the agent menu. The segment default mailbox is used for all topics that are not mapped to a mailbox.
3	Mailing Lists	You can Create lists of email addresses that can be selected from the form and paste it into the cc line. Each list has a name and a string of email addresses separated by a comma.
4	Save Button	After you've made your changes click the save button.

Controlling Access to the Admin Page

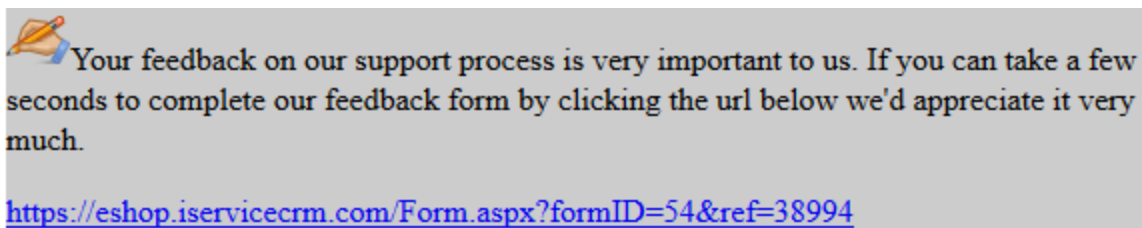
The Manage Agent Email Form configuration page is available to User Types that have the `Tab.Admin.AgentEmailForm` access right. By default, this access right is provided to CSR Managers and Administrators. You can modify [user types](#) or create a new user type with this access right as needed.

13.7 iSurvey

 iSurvey leverages the simplicity and flexibility of iService forms to capture survey results in your iService database. It combines Interaction properties, custom forms, and outbound email capabilities to capture customer feedback and marketing insights. You can use any of the interaction property value types in your survey forms (lists, text input fields, text areas, dates, integers, or numbers), and distribute your surveys using iService mass mailings, agent responses, or one-off agent emails.

A quick way to get started with a survey is to begin requesting feedback on agent responses. You can do this by incorporating a feedback link into your standard response footer. By including the reference number in your link, iService will associate the feedback with the agent's response. This allows you to gain insights not only into overall service levels, but on an agent by agent basis.

In the example below, the survey link is integrated into an agent response as part of the signature.



An iSurvey feedback link

Read more about the [Feedback Reports](#)⁷⁶⁷ in the business intelligence and reports section.

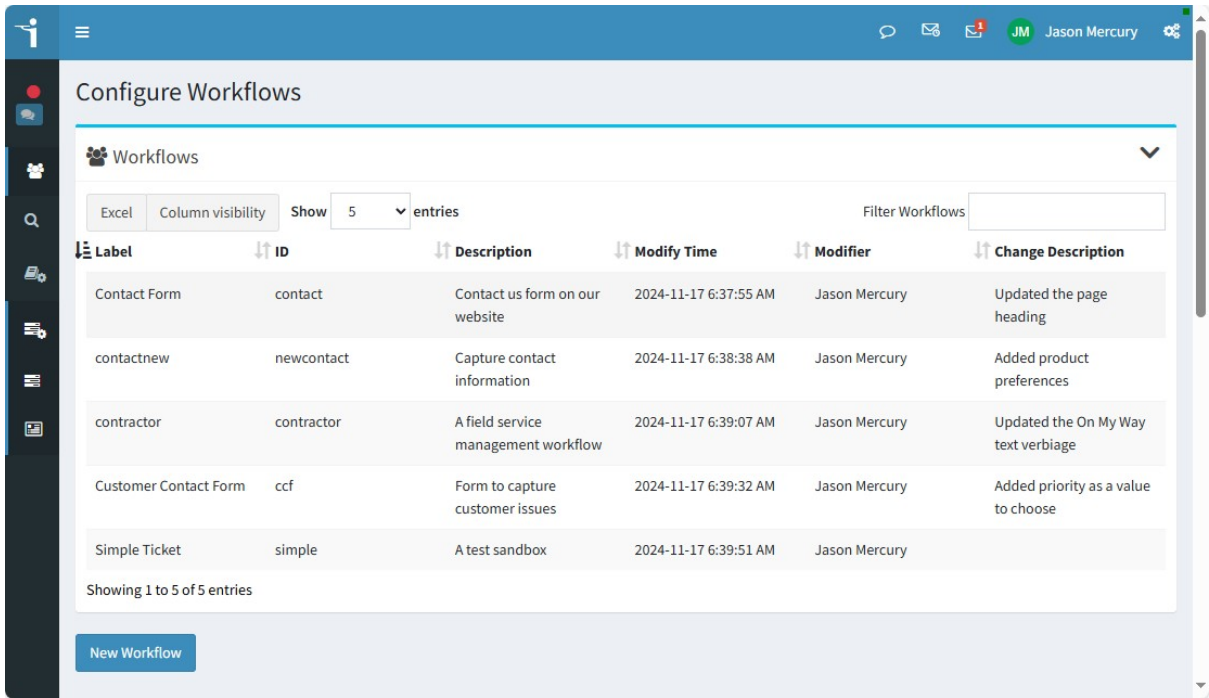
13.8 Workflows



iService includes a no-code workflow builder that makes it easy to create custom submit forms and agent menus to match your internal processes. Workflows can include a submit form to capture details needed for your process, such as a request for a quote. They can also include custom answer menus for agents that are rendered based on the topic of the question, or a tag added to the interaction. These answer menus can simplify the agent interface by presenting custom buttons that trigger the exact action needed. Custom answer panels replace the standard answer panel that has buttons for Send, Resolve, Forward, Change Topic, etc.

Do you have a process that requires items to be approved? Submit the request through a workflow submit form, and then queue it for the users that are authorized to provide approval. When the ticket is opened, the user is presented a simple action menu with Approve and Reject buttons. These types of custom processes will make your agents more productive and greatly reduce errors. In fact, many users will be able to interact with your workflow with no or minimal training on the iService user interface.

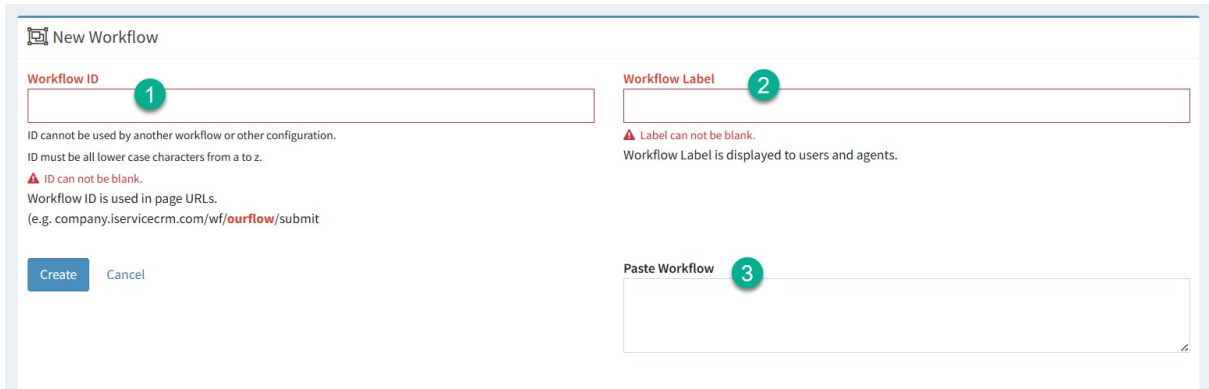
Similar to other settings pages, the workflow orchestrator provides a list of workflows that can be edited or deleted. When a workflow is deleted, the configuration is removed from your tenant database and all forms and custom answer panels will be removed. You cannot recover deleted workflows. The Workflows list includes details about the last update saved, including the time, agent, and description for the change.



The Workflows List

Creating a New Workflow

To create a new workflow, click the New Workflow button. Then enter the details below and click Create.



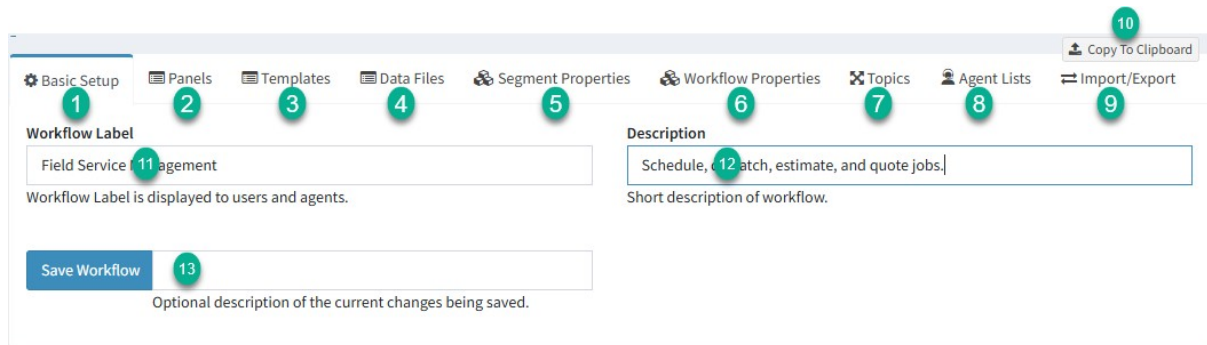
Creating a new workflow

#	Element Name	Description
1	Workflow ID	The ID entered becomes part of the URL used to access any submit forms created. You can only use lowercase


#	Element Name	Description
		letters in the ID, and the ID must be unique to all configurations within iService (including other configurations such as chat).
2	Workflow Label	The label is displayed in the Workflows List and should be descriptive.
3	Paste Workflow	You can import workflows by pasting them into this text box. All of the components will be automatically created, and you will use the Object Mapping page to set the values for things like topics, properties, and agent lists.

Editing Workflows

The Workflows interface includes these components. Workflow configurations are designed to be reused, so the mapping to your tenant specific IDs for topics and properties is separate from the configuration. The mappings are set within the Segment Properties, Topics, and Agent Lists tables. These tabs allow you to associate the names used in your workflow with the IDs for topics, properties, and agents that are specific to your tenant configuration. This allows you to create a workflow for one iService Segment and then share it with other segments or tenants. Or, you can import a workflow from the One-to-One Service workflow library and use the mappings pages to link it to the proper tenant values.



#	Component Name	Description
1	Basic Setup	The Basic Setup tab defines the label displayed.
2	Panels	Your workflow will contain various panels ⁴¹⁵ for things like customer submit forms, agent submit forms, and custom answer panels for agents when interacting with questions in the workflow. These panels include the layout for all the user interfaces in your workflow.
3	Templates	Your workflow can include various notification messages sent to customers and agents. You define and configure those messages in the Templates tab ⁵¹⁵ .
4	Data Files	You can upload an Excel spreadsheet for use within the workflow. For example, upload a price list and use it within a price estimation workflow step. Create your file definition and upload your file in the Data Files ⁵²⁰ tab.
5	Segment Properties	Your segment interaction and contact properties are selected in this tab.
6	Workflow Properties	Workflow Properties are defined directly within the workflow and do not require mapping to tenant values.
7	Topics	Use the Topics page to associate the names of topics used in your panel actions with the appropriate topics in your tenant.
8	Agent Lists	Use the Agent Lists page to define the lists of agents used within the agent pickers in your panels.
9	Import / Export	You can export or import individual components using this page. Use this to migrate single panels, complex property definitions, and message templates.
10	Copy to Clipboard	Use the Copy to Clipboard option to export an entire workflow configuration. You can then import the workflow directly into another tenant by pasting it into

# Component Name	Description
	<p>the Paste Workflow text box. There are two options for exporting: with mappings and without mappings. The mappings include the IDs for Segment Properties, Topics, and Agent Lists specific to the tenant. The no mappings option will export everything except for those three tabs. When importing into a different tenant that has different IDs for topics, segment properties, and agents use the <code>no mappings</code> version to avoid having elements mapped to the wrong item.</p> 
1 Workflow Label	This is a friendly name that is used to identify your workflow in the workflows page.
1 Description	This is an optional field for describing the purpose of your workflow.
1 Save Workflow	Your changes are not saved if you navigate away from your workflow before clicking the save button. When you save your changes you can add a description of the changes you made. This value is overwritten with each save action.

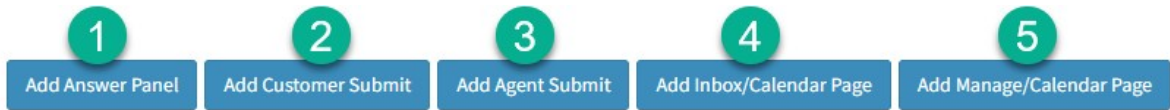
13.8.1 Panels




There are five types of panels in a workflow: Answer Panels, Customer Submit Panels, Agent Submit Panels, Inbox/Calendar Page, and Manage/Calendar page. Submission panels are used to capture information, such as a customer question. They usually include a single Submit button that does things like create a ticket and send a notification. These submission panels can be created for customer or agent use, depending on your use case. Agent submit panels can be included directly in the left navigation menu for convenient agent access in the Custom Form section. Agent submit forms support direct assignment of tickets to an agent.

Answer panels are replacements for the [standard answer panel](#)¹⁰⁵¹ shown in the action mode for an interaction (i.e., when answering an unresolved question). For example, purchase order requests may need to be approved or rejected before they are submitted to procurement. To simplify the process, you can provide a simple answer panel with an **Approve** and **Reject** button that automates the required actions. You can also build complete workflow processes within an answer panel, like a field service management system of sales lead tracking.

The Inbox and Manage / Calendar pages are used to separate your interactions that need to be viewed in a customer answer panel. Rather than combining these items with other customer questions, you can move them into their own page. Some workflow interactions are designed to manage work in progress over a relatively long period of time and should be managed differently from the routine types of questions handled in your My Message Inbox or the Manage Messages page. A calendar view can be added to these custom in-boxes so you can view them based on their time requirements. For example, if you need to schedule actions based on incoming questions (e.g., schedule a visit to create an estimate for a new quote request) you can view all of the requests in a calendar format.



The Add New buttons for workflow panels

#	Button Name	Description
1	Add Answer Panel 	Create a new answer panel that agents will use to take actions on a question. These are replacements for the standard answer panel.
2	Add Customer Submit	Customer submit forms allow anonymous or logged in customers to submit web forms that create tickets or perform other actions allowed by non-agents.
3	Add Agent Submit	These are similar to Customer Submit forms, but can only be used by logged in agents. These forms can be included in the left navigation menu of the agent interface as well as loaded from a dedicated URL.
4	Add Inbox/Calendar Page	You can separate workflow interactions that use a custom answer panel from your My Message Inbox. Those interactions can be viewed in the standard items list, or on a calendar based on a selected Date or DateTime property.
6	Add Manage/Calendar Page	Similar to the Inbox, but you can move workflow interactions out of the Manage Messages page into their own page.

You can create an unlimited number of panels within your workflow. The settings for each panel are contained within an accordion style element that can be collapsed or expanded. The type of panel and details, such as the URL for the submission or topic that triggers the answer panel, are included within the panel name.

The screenshot shows the 'Panels' section of the Custom Forms Admin Menu. At the top, there are navigation tabs: 'Basic Setup', 'Panels', 'Text Blobs', 'Data Files', and 'Object Mappings'. A 'Copy To Clipboard' icon is in the top right corner. Below the tabs, there is a list of three panels, each with a right-pointing chevron icon:

- Panel 1: "Answer panel for questions when in topic "approval requested""
- Panel 2: "Disabled Agent submit form app/submit/test/question" (with a red arrow pointing to the word "Disabled")
- Panel 3: "Answer panel for questions when in topic "Approval Needed""

Annotations in red text are present:

- Next to the top right corner: "The panel name indicates its type and basic details. Expand the panel to see its settings."
- Next to the second panel: "This panel is disabled and will not be displayed to users."

At the bottom of the panel list, there are three buttons: "Add Answer Panel", "Add Customer Submit", and "Add Agent Submit". Below these is a "Save" button.

Workflow Panel Examples

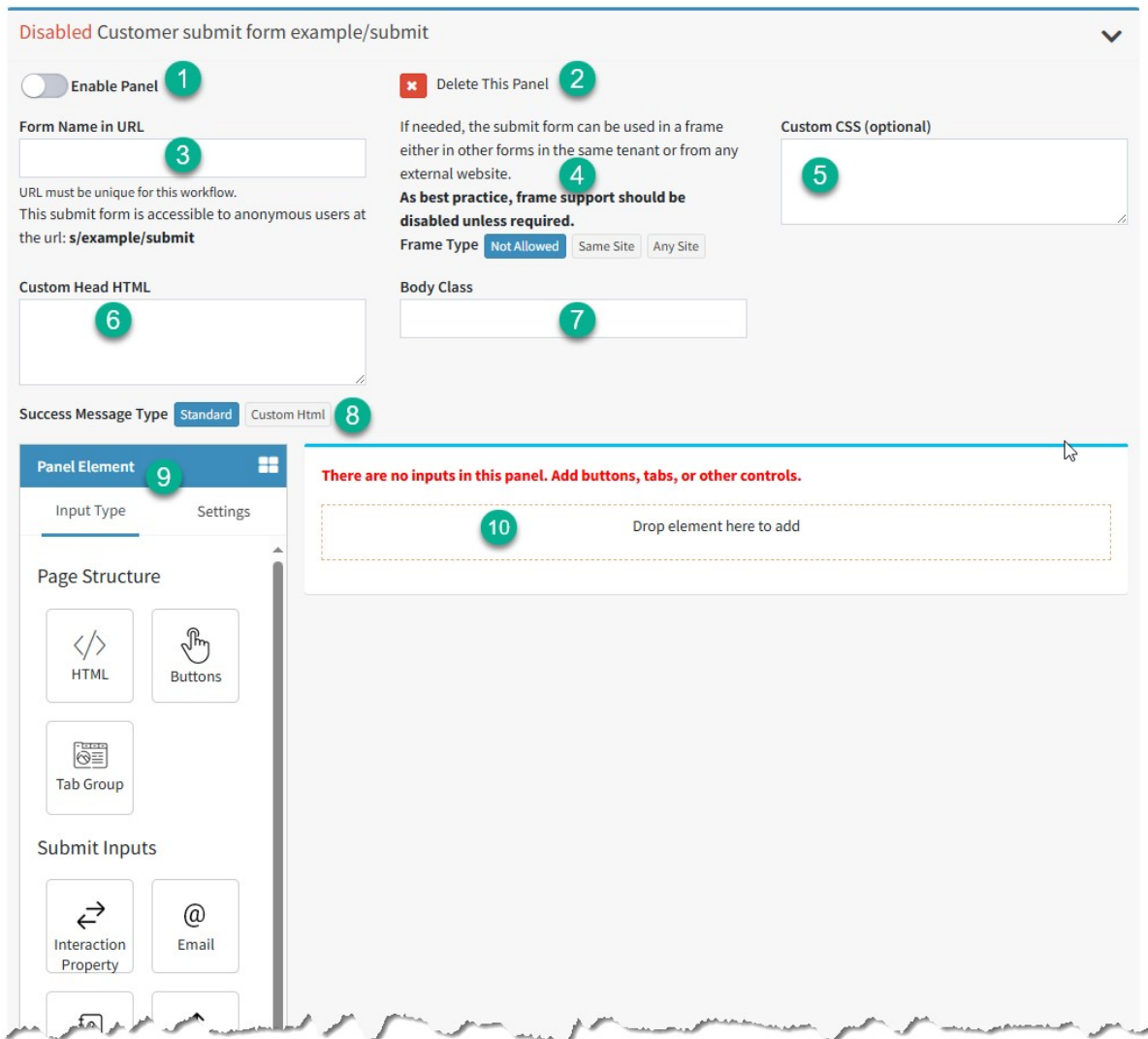
13.8.1.1 Submission Panels



Customer and Agent submission panels are web forms that are submitted to create tickets or post data for processing. The primary difference between customer and agent submission forms is that only agent forms allow the user to assign questions to agents. Agent forms can also be included within the **Custom Forms** section of the left navigation panel for quick access by agents. Customer submit forms are displayed outside of the agent interface, such as within an iframe on your website or as a stand alone web page.

Submission forms have two primary sections: the form body and the form actions. The form body contains inputs for things like email address, subject line, and property values. The form actions are tied to buttons on the page. When the button is clicked, actions like create ticket are executed.

When you create a new Customer Submit Form, the following screen is shown.



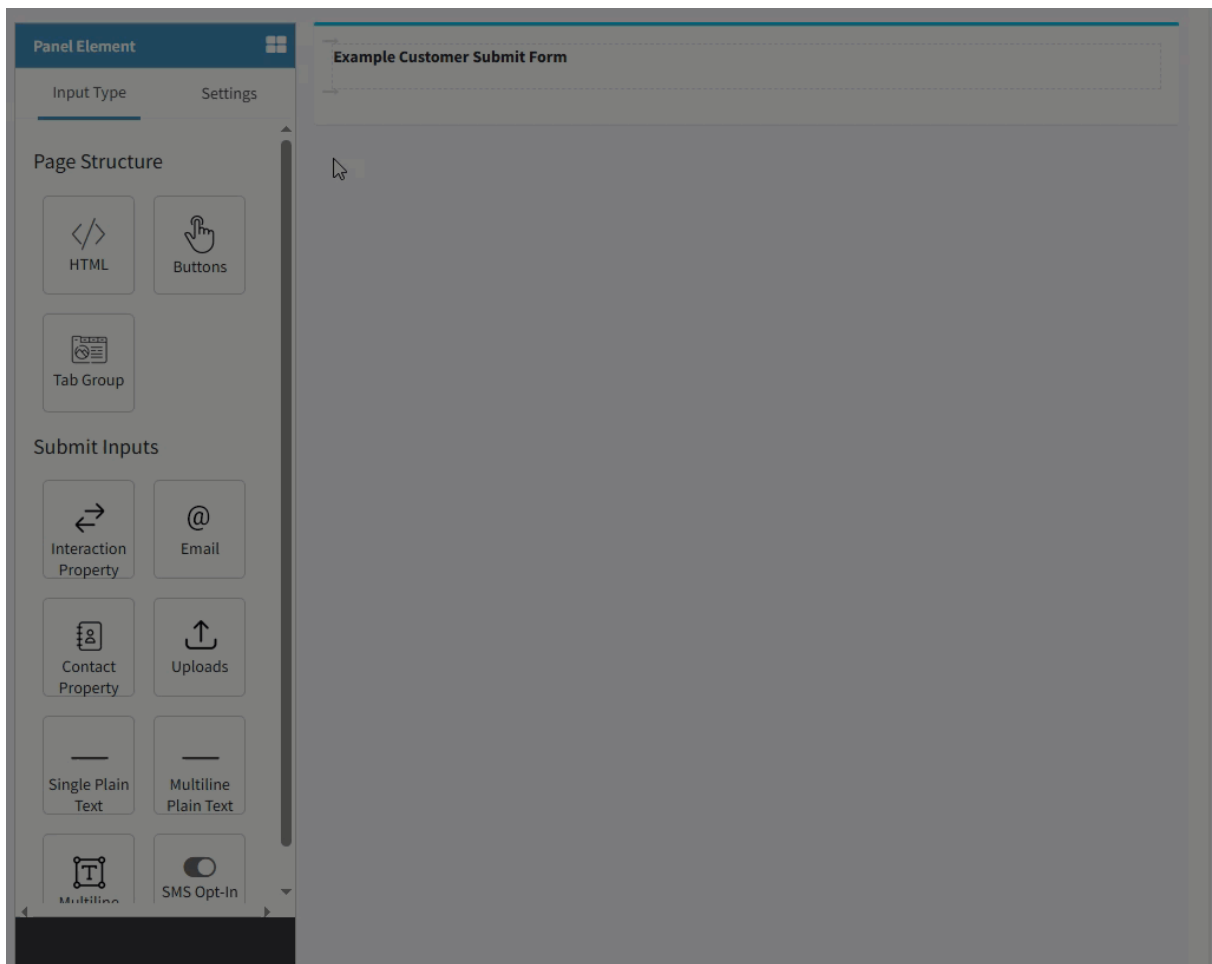
An empty Customer Submit Form

#	Element Name	Description
1	Enable Panel	Your form will be live as soon as you enable the panel.
2	Delete This Panel	You can remove the panel from the workflow. Once it is deleted and the workflow is saved, it cannot be recovered.
3	Form Name in URL	This value becomes part of the URL that is used to load the form. Use a value that is short and descriptive.

#	Element Name	Description
4	Frame Type	<p>It's common to embed your submit form into a web page, like your company website. To include a form into an iframe you must specifically allow it to be embedded. Without this setting, browsers will reject the iframe and present an error to the user trying to load it.</p> <p><u>Not Allowed</u> - the form will not load within an iframe.</p> <p><u>Same Site</u> - you can only embed the form into a page that has the same domain as your form. This would only be used to embed your form into a customer portal or other page that has the same domain as your iService tenant.</p> <p><u>Any Site</u> - use this setting to embed your form into a website with a different domain than your iService tenant.</p>
5	Custom CSS	Add custom CSS to the head of the submit form to control the theme and style of the form. Enter the CSS <u>without</u> the Style tag.
6	Custom Head HTML	Add a custom block of HTML into the Head section of the web page.
7	Body Class	Modify the class styles for the Body of the form.
8	Success Message Type	When the form is submitted, and standard success message will be displayed. You can replace this with a custom success message by clicking Custom HTML. Then paste your custom HTML or use the rich text editor to create the page. After your custom HTML page is created, click the edit pencil to edit the document.
9	Panel Elements	Layout the interface by dragging elements from the Panel Elements picker onto a drop zone in the body of the panel.

#	Element Name	Description
10	Panel Layout	Drag your HTML, Inputs, and Buttons into this areas to create the layout for your page.

To add an element to the panel, click the arrow for the location to create a drop zone. Then drag an element onto the drop zone to create it. This is illustrated below.



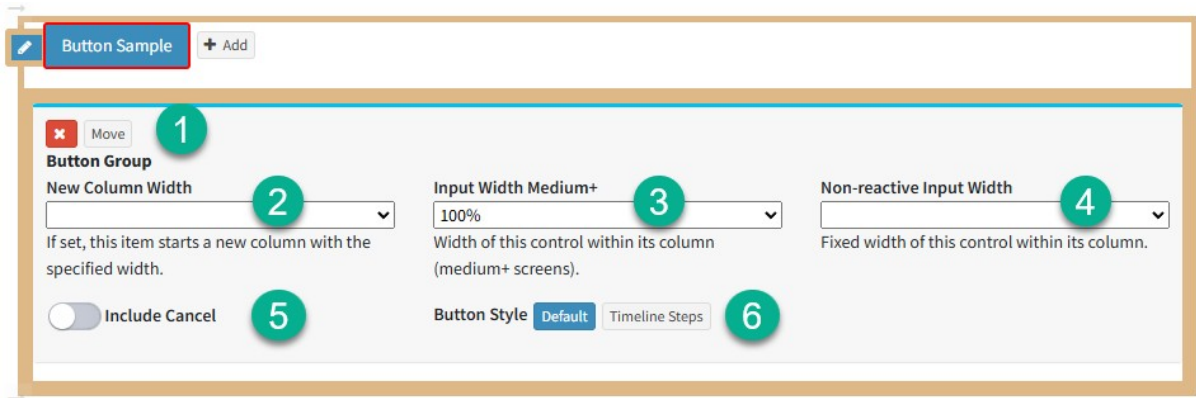
Dragging and dropping an element onto the form.

Submit Form Button Actions

Actions are attached to the button click on submit forms. Buttons are added to the page in Button Groups, which include the following configuration options.

Button Group Configuration

Click the pencil to the left of the button to open the Button Group settings.



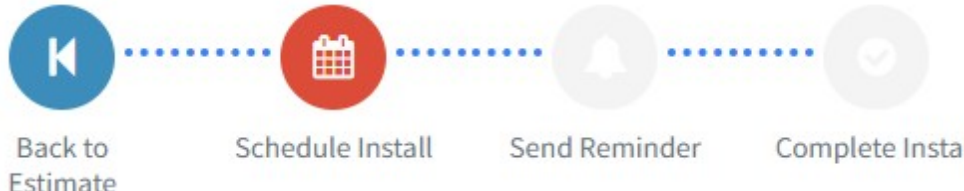
A Button Group panel

#	Description
11	Click the red x to delete the entire button group. To move the group to a new location, click Move and then click the drop area arrow in the panel for the new location. This will move the entire group of buttons.

#	Description
1	
2	<p>This defines the percentage of the row to use for the button group. If no value is set, the button will use whatever percentage of the row is left over from other elements. If set, it will start a new row on the page and will dedicate the percent specified to the group. For example, a setting of 50% will start a new row and put the buttons into the first half of the row. A setting of 100% will dedicate the entire row to the button group.</p>
3	<p>This defines the width of the control when displayed on smaller screens (responsive settings).</p>

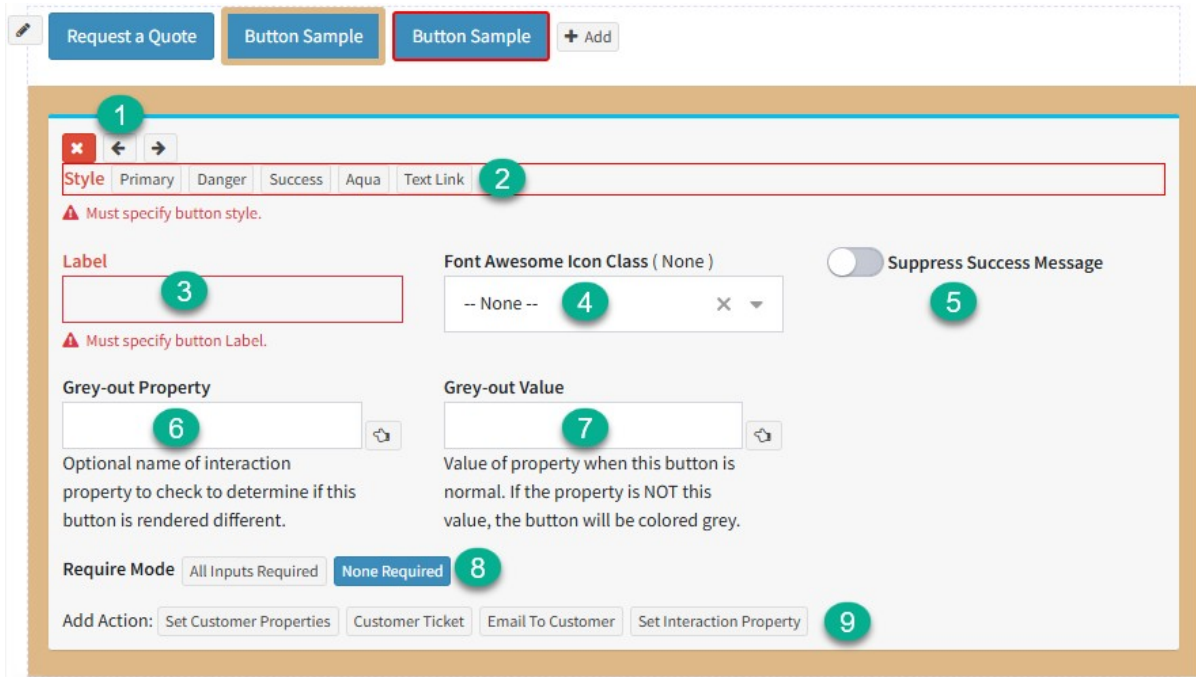
#	Description
41	This defines the width of the control on full size displays, such as desktops.

#	Description
U t V i C t H	
51	<p>This adds a cancel link as the last button in the group. The cancel button will exit the workflow back to the View Mode¹⁰⁴ of the interaction. For example, in a Manage Messages or Manage Workflow Tickets page, the user first sees the View Mode. After they load the answer panel, the cancel button will show the interaction in the view mode (without the answer panel).</p>
66	<p>There are two button styles to choose from. Default buttons are rectangles that look like standard submit buttons. Timeline Steps are round buttons that place the label below a circular button.</p>

#	Description
C r S t y l e	<p>An example using timeline buttons is below.</p>  <p><i>Timeline Button Example</i></p>

Button Configuration

Within the Button Group you can add as many buttons as desired. One button is added by default when the button group is created. Click the +Add button to add additional buttons.




Button Submit Form Actions


Panel Element	Description
1 Delete and Move	You can delete the button or move it left or right in the order of buttons within the button group.
2 Button Style	Pick the color for the button. Choose text link to create a plain hyperlink.
3 Label	Enter the label to display on the button, such as Submit. For time line buttons, the label is displayed below the button circle.
4 Font Awesome Icon Class	Select an icon to display with the button.
5 Suppress Success Message	When a button is clicked, a success message is displayed unless there is an error on the page. If you use a button for navigation within a form, you should suppress the success message.

	Panel Element	Description
6	Grey-out Property	When your button group has multiple buttons, you can highlight the selected button using this property.
7	Grey-out Value	This is the value that will cause the button to show the color. Unless the value for this property matches, the button will be grey.
8	Required Mode	The options are to require all properties in the form or none of the properties.
9	Add Action	Add the actions that button will trigger. The available actions are listed below. The example shown is for a Customer Submit panel. Agent submit panels also support Agent Notifications and Email to Submitter. Ticket created in agent submit forms are Agent Tickets, rather than Customer Tickets.



Actions Available (Both Customer and Agent Submit Panels)

There are four actions that both customer and agent submit forms can execute: Set Contact Properties, Create Ticket, Email to Customer, and Set Interaction Property.

[Set Contact Properties](#)  - Use this action to save all of the contact properties entered in the form for the customer. The only input for this action is the To Address that will get the property values.

[Create Ticket](#)  - Use this to create a new question from the customer. In Agent Submit forms, you can directly assign the ticket upon submission. For Customer Submit forms, questions are created with a status of unassigned. Agent submit forms create Agent Tickets rather than Customer Tickets.

[Email to Customer](#)  - This action sends an email to the customer

[Set Interaction Property](#)  - Set a value for an interaction property when the button is clicked. This can be a segment interaction property or workflow property. All workflow properties are [used as case properties](#) .

Additional Actions for Agent Submit Panels

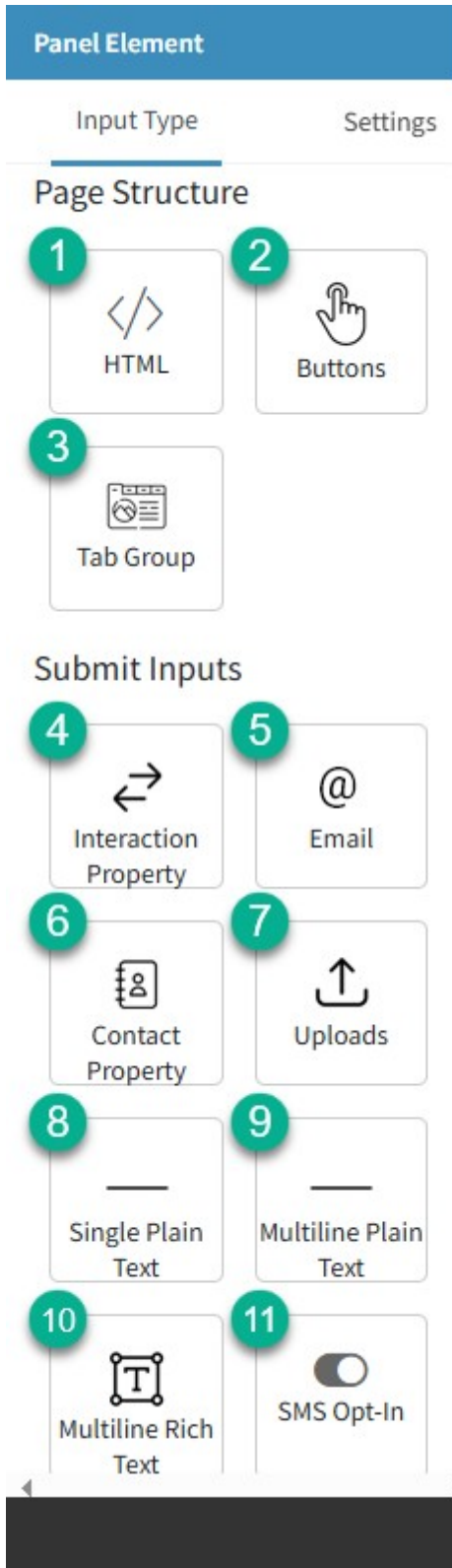
Agent submit forms include two additional actions that can be attached to buttons.

[Agent Notifications](#)⁴⁷⁸ - When the button is clicked, send a notification to the assigned agent. This only works in agent submit forms because customers do not have the option to assign questions to agents.

[Email to Submitter](#)⁴⁷⁹ - In addition to emailing the customer (message acknowledgment), this action will send an email to the agent that submitted the form.

Submit Form Elements

The controls within the Submit Forms are used to create the content on your form. Content is categorized as Page Structure and Submit inputs.



The Workflow Form Elements picker

Page Structure

The main elements of the form layout are Static HTML, Buttons, and Tabs.

#	Panel Element	Description
1	HTML	Add sections to your form that contain any plain text or HTML.
2	Button	Add a button group to include buttons on the form. There will be on default button in the group, and you can add additional buttons to the group.
3	Tab Group	The iService UI design uses tabs to contain related information. You can add tabs to your form to organize content, or hide/show content as needed.

Submit Inputs

Before submitting forms by clicking buttons, users must input data such as their email address and other information. These inputs can be added inside of tabs, or directly on the page.

#	Panel Element	Description
4	Interaction Property	You can add a segment interaction property of any type (case, question, or answer) or use a workflow property. Workflow interaction properties mimic the behavior of segment Case properties, but do not require any configuration outside of the workflow builder.
5	Email	Most submit forms require an email address to create the interaction. This is used to locate or create a contact for an interaction. The login/email for a contact is a special field within iService that enforces unique values and other attributes. You must use the Email Address field to save a value into a contact's login field.
6	Contact Property	Add any segment contact property to the form, such as first name or account number.
7	Uploads	Add a file drop area and select file option to the form. The code required for saving the uploads is automatically added to the form. Uploads are limited to 10MB.
8	Single Plain Text	This creates a basic HTML Text Input field. This is a single line input.
9	Multiline Plain Text	This creates a basic HTML Text Area input field. This allows multiple lines of text, such as for typing the body of a question.
10	Multiline Rich Text	This functions like the plain text version for capturing input, but includes a rich

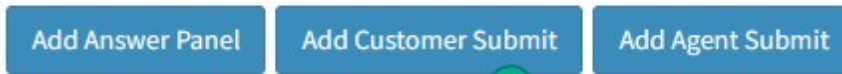
#	Panel Element	Description
		text editor with formatting controls.
11	SMS Opt-In	When added to an input form, you can automatically convert a mobile phone number to an Email to SMS login structured for Sinch Message Media .

Agent Submit forms can also include an agent picker. This is used to create agent lists for tasks like reassigning a ticket.



- A Simple Form Example

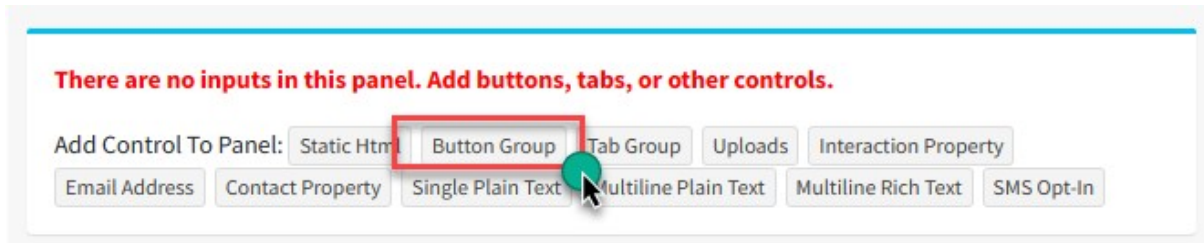
A common use case for forms is a contact form that creates a customer ticket. To get started, create a Customer Submit panel by clicking the button.



Creating a customer submit form

Step 1 - Add a submit button

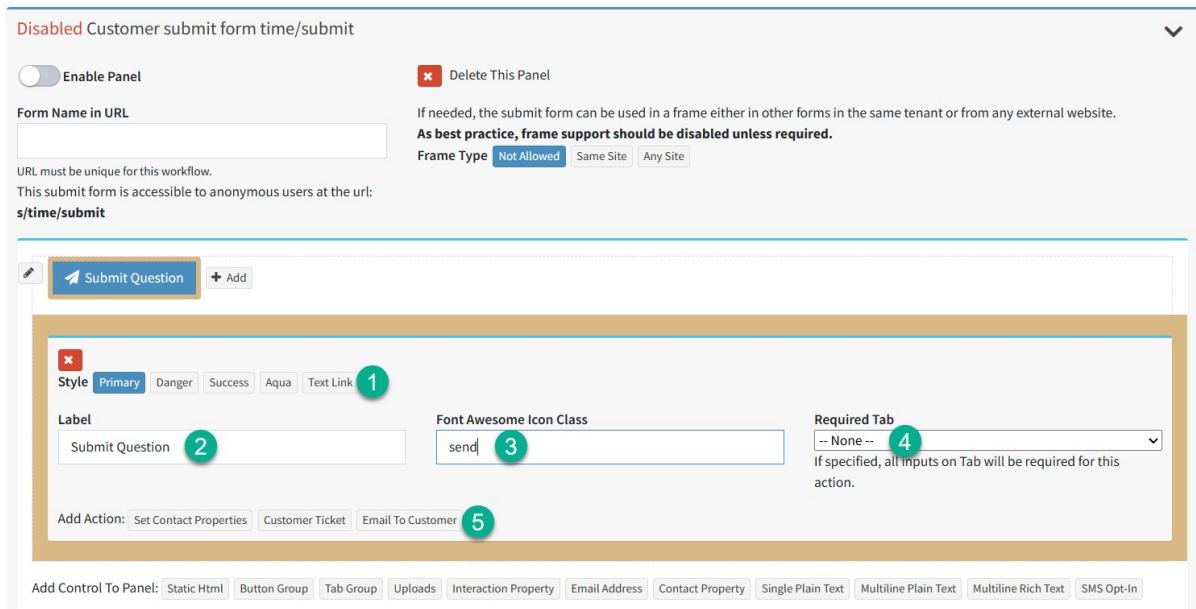
To see the required inputs for a customer ticket, add a button so you can attach the create ticket action.



Adding a button to the form

The required values for your button are shown below.

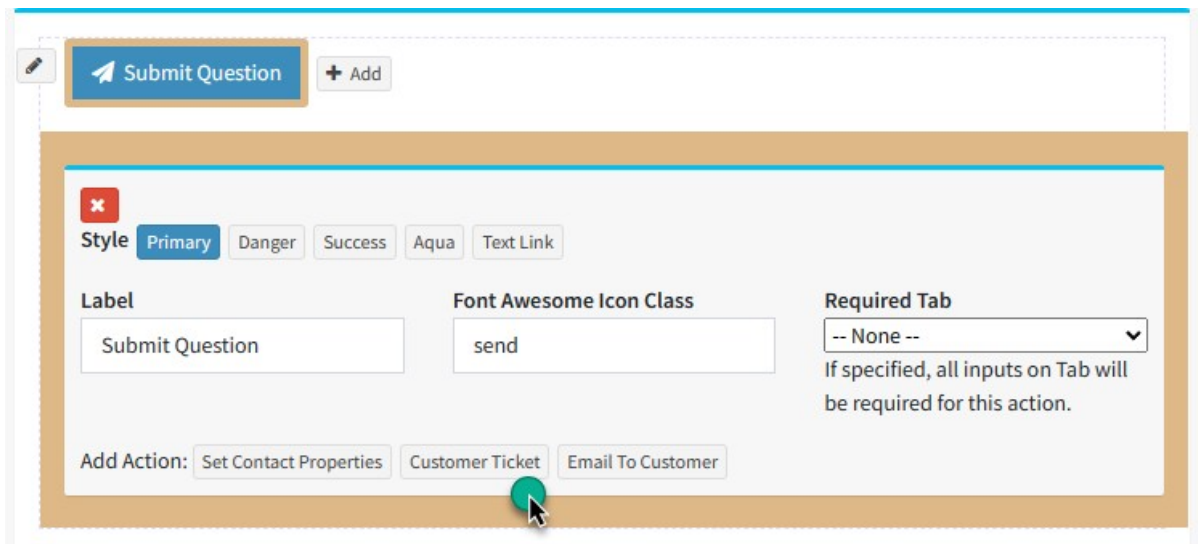
#	Button Settings	Description
1	Button Color	Select a color for the button or select Text Link to create a standard hyperlink.
2	Label	This is the label displayed on the button.
3	Font Awesome Icon Class	(optional) You can use any font awesome icon for your button, or leave it blank.
4	Required Tab	If your inputs are within a tab, you can select the tab to require all of those inputs to be set when the form is submitted.
5	Add Action	<p>After you format the submit button, you can add actions.</p> <p><u>Set Contact Properties</u> - This action will save any contact properties on the form to the contact that is entered. This requires that you have contact properties on the form and an email address to identify the contact.</p> <p><u>Customer Ticket</u> - Create a customer ticket when the form is submitted.</p> <p><u>Email to Customer</u> - Use this to send a notification to the contact when the form is submitted. For example, a custom message acknowledgment that is different from the standard acknowledgment configured for the topic.</p>



Adding a submit button to a form

Step 2 - Add a Create Customer Ticket action

After the Submit button is created, we add Create Customer Ticket as the action.



Add Customer Ticket to button actions

There are eight inputs to the customer ticket to consider.

#	Customer Ticket Values	Description
1	Destination Email Input ID	A customer email address is required for them to submit their question. After you add the email field to the form, select it here.
2	Topic Name	Every interaction is associated with a topic. You can preset the topic, or let the user choose one from the list of topics that are public.
3	Subject	This will be the subject of the ticket created. You can preset the subject line (including variables), or let the user input the subject.
4	Set Question Properties	If you have question properties as inputs, turning this switch on will save values into the properties. When off, you can add the properties into the ticket body but they will not be saved into the iService database as separate property values.
5	Save Case Properties	Similar to question properties, turn on this switch to save all inputs to case properties in the database.
6	Message Acknowledgment	To override the normal message acknowledgment, select No standard ack . Use this setting when you send a custom acknowledgment directly from the form action. For example, when the form is submitted you can send an acknowledgment that says "Thanks for submitting the xyz form." When the customer sends a new email into the topic, iService will then send the standard acknowledgment that says "We got your question."
7	Ticket Body	The ticket body can be preset by

The screenshot shows a configuration panel for a 'Submit Question' action. At the top, there's a 'Submit Question' button and an '+ Add' button. Below that, there's a 'Style' section with options: Primary, Danger, Success, Aqua, Text Link. The 'Label' field contains 'Submit Question'. The 'Font Awesome Icon Class' field contains 'send'. The 'Required Tab' dropdown is set to '-- None --'. Below this is an 'Actions:' section with a red 'x' icon and the title 'Create Customer Ticket'. The description says 'Create a customer ticket with the specified parameters.' There are eight numbered callouts (1-8) pointing to various fields: 1. Destination Email Input ID (dropdown), 2. Topic Name (text input), 3. Subject (text input), 4. Set Question Properties (toggle), 5. Save Case Properties (toggle), 6. Ack (dropdown), 7. Ticket Body (text input), 8. Result Name (text input). There are also several warning messages (red triangles) and instructions for each field. At the bottom, there's an 'Add Action:' section with buttons for 'Set Contact Properties', 'Customer Ticket', and 'Email To Customer'.

Adding the Customer Ticket action

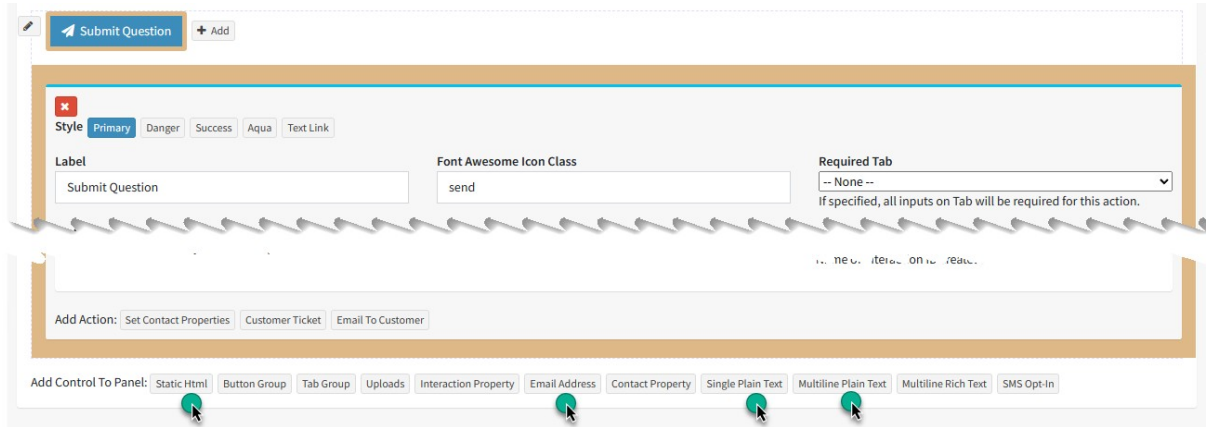
Step 3 - Add the required inputs

Now we'll add all the required input fields to the form. The minimum required inputs for the ticket action are:

1. Email address
2. Topic
3. Subject
4. Ticket Body

In our example, we also add some static HTML to the top of the form. Add these inputs to your form and arrange them as desired with the field input size and your custom labels. Select the inputs from the **Add Control to Panel** section shown below. In the example, we use a Multiline Plain Text

area for the ticket body. You could also use the Multiline Rich Text input if you want to provide an editor.



After the inputs are added to the form and arranged in the proper order, the submit form looks like the below.

Customer submit form ccf/submit

Enable Panel Delete This Panel

Form Name in URL

URL must be unique for this workflow.
This submit form is accessible to anonymous users at the url: **s/ccf/submit**

If needed, the submit form can be used in a frame either in other forms in the same tenant or from any external website.
As best practice, frame support should be disabled unless required.
Frame Type Not Allowed Same Site Any Site

Get in touch

Thanks for reaching out. We'll follow up with you as soon as possible.

Email Address

Topic

Subject

Please provide a detailed question

Style Primary Danger Success Aqua Text Link

Label **Font Awesome Icon Class** **Required Tab**
If specified, all inputs on Tab will be required for this action.

Actions:

Create Customer Ticket
Create a customer ticket with the specified parameters.

Destination Email Input ID <input type="text" value="Email Address"/> Email Address entered by submitter is used to create or find the customer contact.	Topic Name <input type="text" value="Account Questions"/> Style Preset Topic Chosen by User Ticket created in named topic.	Subject Input ID <input type="text" value="Subject"/> Style Preset Subject Entered by User Ticket subject is entered by user in the specified input.
---	---	---

Set Question Properties
All question properties in the panel are set in this ticket.

Save Case Properties
All case properties in the panel are set in this ticket's case.

Ticket Body
Style Preset Body Entered by User
Preset body with the specified name is set into the ticket.

Interaction Body Name

Result Name

Name of interaction ID created.

Ack No standard Ack Normal Ack

The normal business rules for customer acknowledgement can apply or be suppressed when this ticket is created.

iService User Guide

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Step 4 - Load and test the form

You're done! You can load the form from the URL specified and submit it as a test.

The screenshot shows the configuration interface for a custom form titled "Customer submit form ccf/submit". It includes a toggle for "Enable Panel" (which is turned on), a "Delete This Panel" button, and a "Form Name in URL" input field. Below this, there are instructions about URL uniqueness and frame support, with a "Frame Type" dropdown set to "Not Allowed". A red box highlights the URL "s/ccf/submit" in the text "This submit form is accessible to anonymous users at the url: s/ccf/submit". A red arrow points from this box to a red text overlay that says "Load this URL for your tenant to test the form." Below the configuration is a preview of the form, which has the heading "Get in touch" and a message: "Thanks for reaching out. We'll follow up with you as soon as possible." There is an "Email" input field with the value "customer-email@sample.cor".

The URL for your form

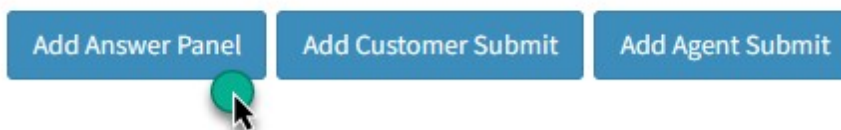
13.8.1.2 Answer Panels



iService provides a [standard answer panel](#)¹⁰⁵ for working with unresolved questions (unassigned or queued to an agent). The standard panel includes buttons for answering, resolving, forwarding and modifying an interaction in various ways. However, there are use cases where you know the agent must take a specific action. In those cases you can provide a custom user interface to the agent that exactly fits their needs. For example, approval requests that must be approved or rejected can include two buttons: Approve Request and Reject Request.

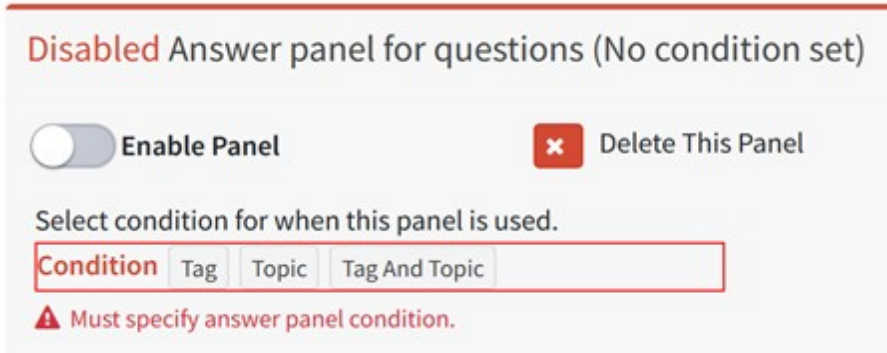
Answer panels can be presented to agents based on two settings: tags and topics. Tags are values associated with an interaction, like a property, that are not displayed to agents. They cannot be edited or removed directly from the user interface. Tags must be added an interaction when it is created, either via a filter or directly on a submit form.

To add an answer panel to your workflow, click the **Add Answer Panel** button.



Adding an Answer Panel

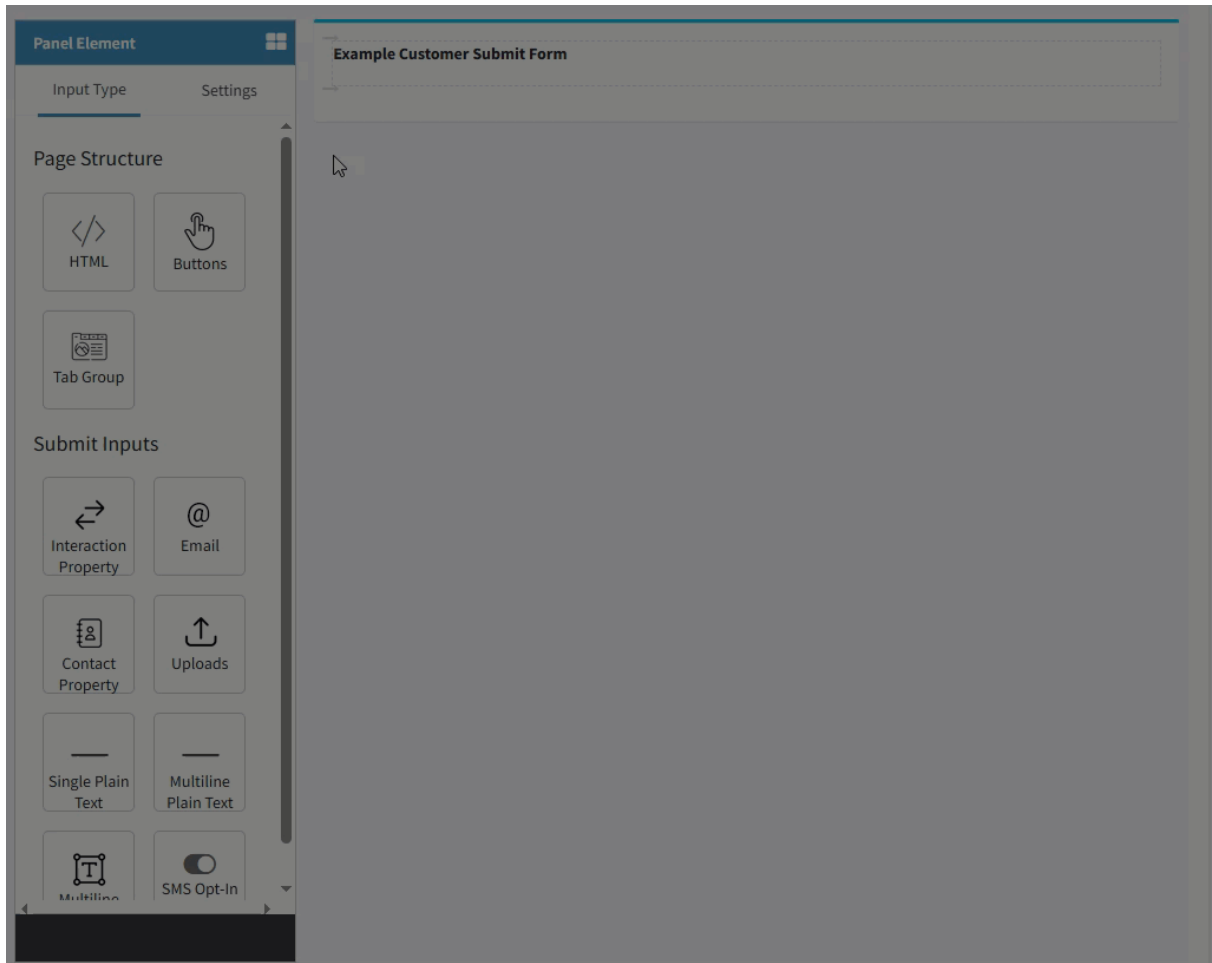
If your workflow has a tag value specified, you will see three options for triggering the panel: Tag, Topic, and Tag and Topic. The tag will limit the display of your custom answer panel to interactions that contain the tag value, regardless of the topic. For example, you might offer custom panels to agents that handle a form submission but use the standard panel for general questions that arrive into a topic. Tags can only be added and edited via system functions, like form submissions and action buttons. Users cannot manually edit tags, which makes them reliable to controlling the user interface.



Conditions for your custom answer panel

Answer panels are created using the same process as [Submission Panels](#)⁴⁴¹. Create the structure for the page with HTML, buttons, and tabs. Then add inputs and actions to the panel as needed using the [same method](#)⁴⁴¹ as submit panels shown above. The primary difference between submit forms and answer panels are the controls used on the page.

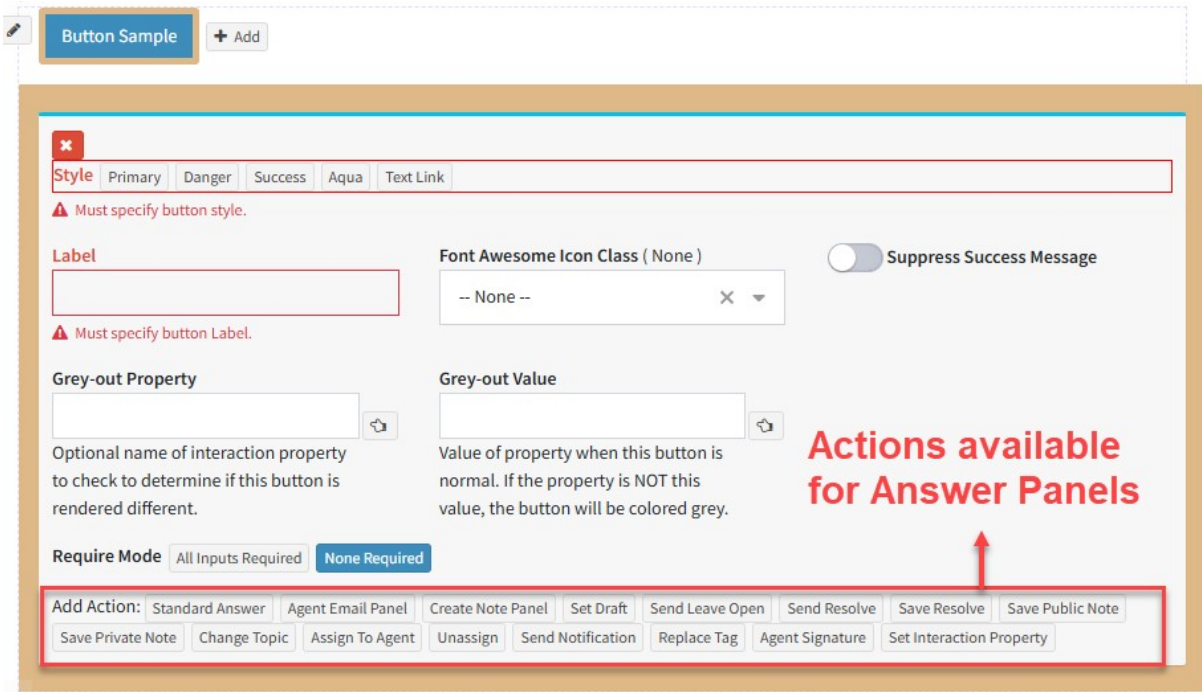
To add an element to the panel, click the arrow for the location to create a drop zone. Then drag an element onto the drop zone to create it. This is illustrated below.



Dragging and dropping an element onto the form.

— Answer Panel Actions

There are many actions available for the agent buttons. Actions include button clicks that are within the standard answer panel, like the Send, Change Topic, and Forward. They also include workflow specific actions, like Agent Signature, that perform workflow specific tasks.



Answer Panel Actions

[Standard Answer](#)^[495] - If you provide a limited set of buttons, you might want to give the agent the option for loading the full answer menu. This will replace the workflow menu with the standard answer menu when clicked.

[Agent Email Panel](#)^[495] - This action will load the Agent Email panel (same panel as Agent Email in the [View Mode](#)^[104]).

[Create Note Panel](#)^[494] - This action will load the Create Note panel (same panel as Note in the [View Mode](#)^[104]).

[Set Draft](#)^[494] - When an agent is working on a response to a question, they compose a draft response that is then converted to an answer. The Set Draft action is used to create the draft response that can then be used with Send Leave Open, Send Resolve, Send Notification, Save Public Note, or Save Private Note.

[Send Leave Open](#)^[493] - This action replicates the Send button in the standard answer panel when the Leave Open panel when the Leave Open option is checked. This action requires Set Draft to be set as the prior action.

[Send Resolve](#)^[492] - This action replicates the Send button in the standard answer panel, without the Leave Open option. This action requires Set Draft to be set as the prior action.

[Save Resolve](#)⁴⁹¹ - This action replicates the Resolve button in the standard answer panel. This action requires Set Draft to be set as the prior action.

[Save Public Note](#)⁴⁸² - This action replicates the Save Public Note button in the standard answer panel. This is different from the Create Note Panel, because the note will be created from the draft answer that is already present in the interaction. This action requires Set Draft to be set as the prior action.

[Save Private Note](#)⁴⁹⁰ - This action replicates the Save Private Note button in the standard answer panel. This is different from the Create Note Panel, because the note will be created from the draft answer that is already present in the interaction. This action requires Set Draft to be set as the prior action.

[Change Topic](#)⁴⁹⁶ - This action replicates the Change Topic button in the standard answer menu.

[Assign To Agent](#)⁴⁹⁰ - This action replicates the Forward to Agent action from the standard answer menu.

[Unassign](#)⁴⁸⁹ - This action replicates the Forward - Unassign action from the standard answer menu.

[Send Notification](#)⁴⁸⁶ - This action will send a predefined email to the customer using the body created in the template.

[Replace Tag](#)⁴⁸⁵ - Use this action to remove the tags from the interaction or set a new tag value.

[Agent Signature](#)⁴⁸⁴ - This action is used in workflow that require evidence of approval. It requires an interaction property that has a text based description and a text value. When clicked, it will record the date and time plus the agent that clicked the button.

[Set Interaction Property](#)⁴⁸³ - Use this to set the value for an interaction property when the button is clicked.

Answer Panel Page Elements

These controls within the Answer Panels are used to create the agent user interface provide when taking action on an unresolved question. Elements are categorized as page structure and answer panel inputs.



The Answer Panel Page Elements

Page Structure

The main elements of the answer panel layout are the same as submit forms: HTML, Buttons, and Tab Group.

#Element	Description
1 HTML <small>497</small>	Add sections to your answer panel that contain any plain text or HTML.
2 Button Group <small>498</small>	Add a button group to include buttons on the form. There will be on default button in the group, and you can add additional buttons to the group.
3 Tab Group <small>506</small>	The iService UI design uses tabs to display related information. You can add tabs to your answer panel to organize content, or hide/show content as needed based on values that have been set.

Answer Panel Inputs

Some actions require inputs, such as selecting an agent or setting a value. These inputs can be added inside of tabs, or directly on the page.

#	Element	Description
4	<u>To Address</u>	Some actions within the answer panel might require a TO email address. For example, you might add a notification action that sends email to the customer when the action is taken. Since a customer may have multiple email addresses, the agent must pick one of those from the To Address field. This field will automatically populate with a list of user logins that are email addresses or Email to SMS.
5	<u>Uploads</u>	Add a file drop area and select file option to the form. The code required for saving the uploads is automatically added to the form. Uploads are limited to 10MB.
6	<u>Interaction Property</u>	You can add a segment interaction property of any type (case, question, or answer) or use a workflow property. Workflow interaction properties mimic the behavior of segment Case properties, but do not require any configuration outside of the workflow builder.
7	<u>Agent Picker</u>	Actions such as reassigning a question require the user to pick an agent. The Agent Picker input is configured in the Object Mappings page with a specified list of agents for this list.
8	<u>Case Properties</u>	The Case properties input will display an editable list of all Case Properties associated with the interaction. This includes any value set, plus all properties associated with the topic of the interaction
9	<u>Preview Display</u>	If you have an action on your form that composes a response using a Text Blog,

#	Element	Description
		you can preview that response before sending it in the Preview Display.
10	<u>Original Question</u>	In most cases, you will want to show the agent the original question (ticket body) they are working on. This control adds a quoted copy of the original question to the panel.

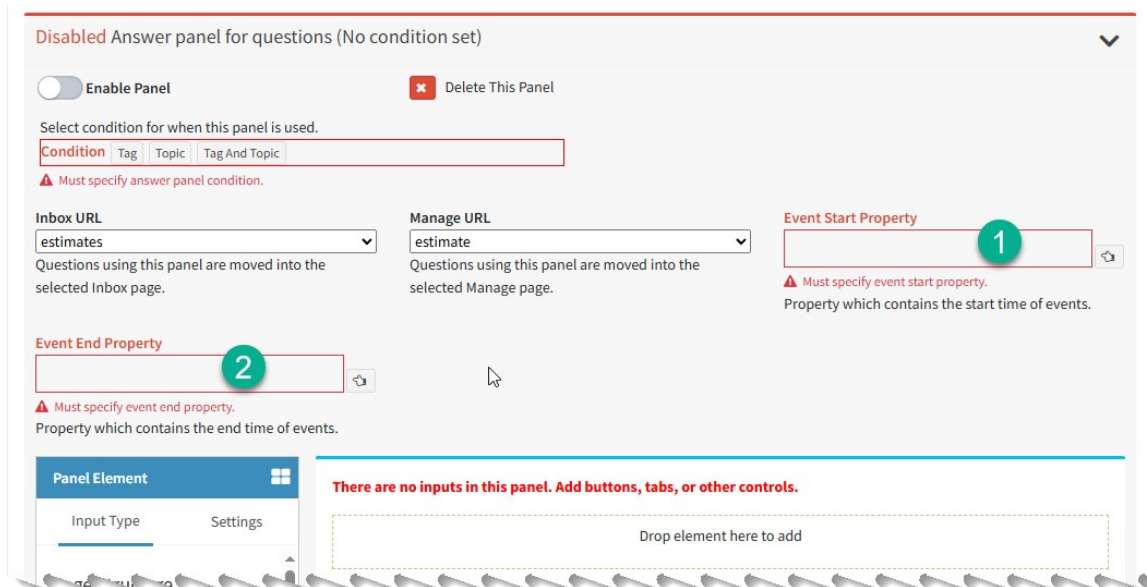
Using a Dedicated Inbox or Calendar

Workflow interactions that require a special answer panel can be managed within dedicated inboxes and manage interaction pages. The process for configuring your custom inboxes is done in two steps.

Step 1 - Create the [Inbox/Calendar page](#)⁴⁵⁰.

Step 2 - Select the Inbox/Calendar page you created within each Answer Panel for which you want to move interactions.

The settings required for using the Inbox/Calendar page are shown on the top of your Answer Panel after you select the new inbox.



Configuring a dedicated inbox or calendar

If your dedicated Inbox also includes a calendar (Show As Calendar is turned on), two new settings are required.

- 1 - Select the interaction property used to determine the beginning date and time on your calendar.
- 2- Select the interaction property used to determine the ending date and time on your calendar.

By default, all Calendars will also include a Create Event option. This creates a Google Calendar item that is displayed on the Calendar unrelated to your interactions. For example, you might add events for days that your office is closed so users know not to schedule work on those dates. There are no configuration settings required for calendar events.

13.8.1.3 Creating Inboxes and Calendars



Questions are displayed in your My Message Inbox (when assigned to you) and Manage Messages by default. However, when the question requires a workflow answer panel you might want to move it into it's own location. Many workflow interactions are not customer questions awaiting a simple answer. They might be quote requests, approval requests, or other requests that you want to manage separately from traditional customer questions.

The Manage Message page displays interactions that require a custom answer panel without a mass update option. This is because the standard answer panel used in Mass Update only supports the standard answer panel, as illustrated below. When you see a question without the checkbox it means that a customer answer panel will be provided in the Action mode.

The screenshot shows the 'Manage Messages' interface. On the left is a 'Topic List' sidebar with categories like Compliance and Human Resources. The main area shows a 'Message List' table with columns for Subject, Contact Name, Due Date, Assigned To, and Topic. A 'Mass Update' bar is at the top with buttons for Merge, Resolve, Forward, Change Topic, and Spam. A red box highlights the checkboxes in the first column of the message list. Red annotations with arrows point to these checkboxes: 'These have custom answer panels.' points to the top two rows, and 'These can be mass updated using the standard answer panel.' points to the bottom two rows.

	Subject	Contact Name	Due Date	Assigned To	Topic
<input type="checkbox"/>	Change Requested	Support	2024-06-06 02:37 PM	Support	All Topics
<input type="checkbox"/>	Signature Required from Client	Brian	2024-05-30 09:46 AM	Support	Scheduled Tasks
<input type="checkbox"/>	Signature Required from Client	Support	2024-05-30 09:42 AM	Support	All Topics
<input type="checkbox"/>	Termination Request	Support	2024-05-28		User Access

Interactions that require a custom answer panel

You can create custom **My Inboxes** and **Manage Message** pages to display these special workflow interactions. You can optionally include a calendar for the list of interactions to view them based on a DateTime property. For

example, in a field service management application you might want to see quote requests in a calendar based on the date and time scheduled for the estimation visit.

There are two types of Inbox/Calendars: One for moving interaction out of My Message Inbox, and one for moving them from the Manage Messages page.



The process for creating custom Inboxes and Manage Interactions pages for workflow interactions is done in two steps.

Step 1 - Create the Inbox/Calendar page.

Step 2 - Select the Inbox/Calendar page you created within each [Answer Panel](#)⁴⁴⁸ for which you want to move interactions.

See the [Manage Calendars](#)³⁹¹ page for details on working with Google Events in the calendar.

– Inbox/Calendar page (My Message Inbox Replacement)

Creating the Inbox Page and Calendar

Click the Add Inbox/Calendar Page button to create the Inbox definition.

The Inbox/Calendar Page

#	Description
1	You can temporarily disable the panel by disabling this switch. When disabled, your interactions will be listed in the My Message Inbox until it is enabled again.
2	This will permanently delete the panel.

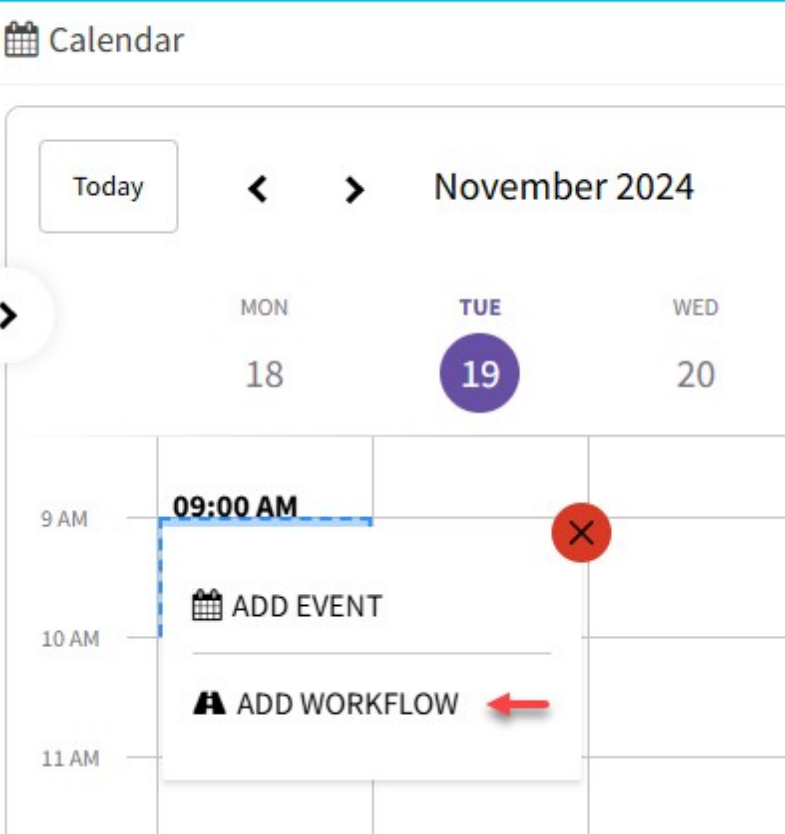
#	Description
1	
3	Specify a value to use in the page URL. You can load the new inbox using the menu link or typing the URL.
4	This is the text used for the menu link in the left navigation menu. It appears within the My Work Queues section.
5	Select an icon to show next to the menu link in the left navigation menu.

Description	
	<p>You can limit the display of the Inbox to agents that have access to a specific segment. Type a name for the segment, and then associate it with the segment in the Segment Properties tab of your workflow.</p>
	<p>If you want to display your interactions in a calendar, turn on this switch. When the switch is on, five new settings will become required.</p>

#	Description
l e r C a r	
8 a l e r C a r N a r e	<p>This is the label that will be displayed in the Answer Panel drop down for</p>
5 r e a t	<p>If your Inbox includes a calendar, you need a method for adding new tickets within the calendar itself. Create an Agent Submit form in your workflow that will be used with the calendar and then select it there. This form will be loaded when the agent (selects Add Workflow.</p>

Description

Estimates Calendar



Calendar

Today < > November 2024

MON TUE WED

18 19 20

9 AM 09:00 AM

10 AM

11 AM

ADD EVENT

ADD WORKFLOW

When an agent creates a new ticket on the calendar (using the Add Workflow button), the new ticket will have an interaction ID. This ID must be given a name, such as id. The name can be any text string. If you are unsure what to name the result, a common value is **id**.

#	Description
r	e
1	Select the properties that you want to display for the ticket when an agent clicks the item in the calendar. (For example, you might include the customer address or phone number.
1	Each property added can optionally have an icon placed in front of it.

– Manage/Calendars (Manage Messages Replacement)

Creating the Manage Page and Calendar

Click the Add Manage/Calendar Page button to create the Manage Interactions definition.

The configuration for the Manage page is identical to the [Inbox page](#)⁴⁵¹.

13.8.1.4 Panel Actions



Actions are one of the most powerful features of iService workflow forms. They allow you to **automate various actions by attaching them to buttons** on your pages. There are many actions available for submission and answer panels. Actions include button clicks that are within the standard answer panel, like the Send, Change Topic, and Forward. They also include workflow specific actions, like Agent Signature, that perform workflow specific tasks. Some of the actions specific to agent vs customer submission panels. For example, direct notifications to agents or form submitters are only supported in agent forms for security purposes.



Submission Form Actions



Answer Panel Actions

13.8.1.4.1 Submission Form Actions

Submission forms are used to create new content in iService, whereas answer panels are used to take actions on existing tickets. The content from a submission form is usually a ticket, but the actions within the form can set property values, load payment forms, and perform other actions.

Actions Available (Both Customer and Agent Submit Panels)

There are four actions that both customer and agent submit forms can execute: Set Contact Properties, Create Ticket, Email to Customer, and Set Interaction Property.

[Set Customer Properties](#)⁴⁶¹ - Use this action to save all of the contact properties entered in the form for the customer. The only input for this action is the To Address that will get the property values.

[Set Contact Properties](#)⁴⁶¹ -

[Email to Customer](#)⁴⁶² - This action sends an email to the customer that is the contact for a question.

[Set Interaction Property](#)⁴⁶⁵ - Set a value for an interaction property when the button is clicked. This can be a segment interaction property or workflow property. All workflow properties are [used as case properties](#)⁹².

[Customer Ticket](#)⁴⁶⁸ - Create a question submitted by anonymous our customer users.

[Agent Ticket](#)⁴⁷⁵ - Use this to create a new question submitted by an agent. In Agent Submit forms, you can directly assign the ticket upon submission. Agent submit forms create Agent Tickets rather than [Customer Tickets](#)⁴⁶⁸.

Additional Actions for Agent Submit Panels

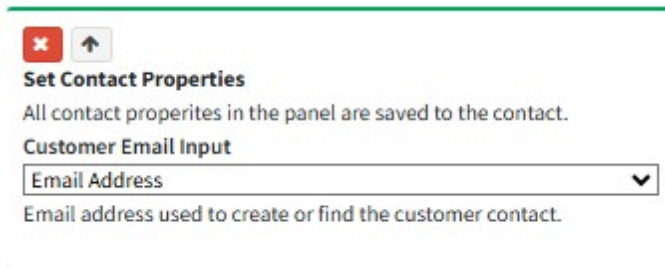
Agent submit forms include two additional actions that can be attached to buttons. Agent submit forms can be integrated into the left side agent menu.

[Agent Notifications](#)⁴⁷⁸ - When the button is clicked, send a notification to the assigned agent. This only works in agent submit forms because customers do not have the option to assign questions to agents.

[Email to Submitter](#)⁴⁷⁹ - In addition to emailing the customer (message acknowledgment), this action will send an email to the agent that submitted the form.

13.8.1.4.1.1 Set Customer Properties (both)

When setting up a workflow, use the **"Set Contact Properties"** action to store all customer details submitted through the form. This includes essential fields like First Name, Last Name, and any other properties configured as contact properties in the workflow builder.



The **"Customer Email Input"** drop-down allows you to select the property where a contact's email address is entered. For more details on the email input fields used in a submit form, refer to Email (Submit Only) in the panel elements section.

13.8.1.4.1.2 Set Contact Property (both)

Use the **"Set Contact Property"** action to assign a value to an existing contact property in iService®.

For example, when a form is submitted, you can update the **"Subscription Status"** property for the contact.

Set Contact Property
Set value for a contact property.

1 **Property Name**
Subscription Status
Name of contact property to set.

2 **Property Value**
Subscribed
Value to set into the property. Blank will remove any existing property value.



ID	Name	Description
1	Property Name	This is the name of the property that will be updated when the workflow submit button is clicked. After entering a property name, you will be prompted to map it to the corresponding contact property in iService®.
2	Property Value	This is the value that will be stored in the contact property that was previously mapped.

In addition to the settings above, you can pass an interaction property value into the **Set Contact Property** action using the following variable:

```
$form -id'prop:(workflow id):(name of the interaction property) '$
```

13.8.1.4.1.3 Email to Customer (both)

At its core, this action simply sends an email to the customer's email address. However, there are several options available to customize the settings for this action. Details below:

Send Email to Customer

Send an email to the customer.

1 **Customer Email Input**
-- None --

Email address used to create or find the customer contact.
If no email specified the best customer email is used.

2 **From Mailbox**
[Text Field]


Mailbox that email is sent out from. If empty, the segment default mailbox will be used.

3 **CC**
[Text Field]

Optional CC list for additional recipients.


4 **Topic Name**
[Text Field]

Style **Preset Topic** Set by property

 Must specify Topic name.
Email created in named topic.

5 **Subject**
[Text Field]

Style **Preset Subject** Entered by User

 Must specify interaction subject.
This preset subject set into the email.

Suppress reference number in subject


6 **Interaction Tag**
[Text Field]

Optional Tag set into the sent email.

7 **Email Body**
Style **Preset Body** Entered by User

Preset body with the specified name is set into the email.

8 **Interaction Body Name**
[Text Field]

 Must specify interaction body name.

9 **Result Name**
[Text Field]

Name of interaction ID created.

ID	Name	Description
1	Customer Email Input	This is where a drop-down menu will be presented to select the field where the customer or agent enters the contact's email address.
2	From Mailbox	You can specify a mailbox from which the email will be sent. If no mailbox is specified, the segment's default mailbox will be used.
3	CC	Specify a "CC" address to include additional recipients when sending an email to the customer.
4	Topic Name	<p>A topic must be specified where the email interaction will be recorded. This can be done using either the "Preset Topic" or "Set by Property" option:</p> <p>1. Preset Topic: This option allows you to hard-code the topic for the email.</p> <p>2. Set by Property: This option lets the topic be determined dynamically based on a selected property in the submit form.</p> <p>The "Preset Topic" option is selected by default when setting up this action. For more details on "Entered by User" options, refer to the end of this page.</p>
5	Subject	The subject line that will be included in the email. Users can also enter their own subject line if the form is setup to use the " Entered by User " option. The "Preset

ID	Name	Description
		Subject" option is selected by default when setting up this action.
6	Interaction Tag	An optional tag that can be added to the email for more detailed categorization.
7	Email Body	Specify whether the email body will be a "Preset Body" , which is predefined, or "Entered by User" , allowing the user to input custom content.
8	Interaction Body Name	This is the template used to send the email. It is specified when selecting the "Preset Body" option in the Email Body section.
9	Result Name	The interaction ID can be hard-coded by specifying the result name field

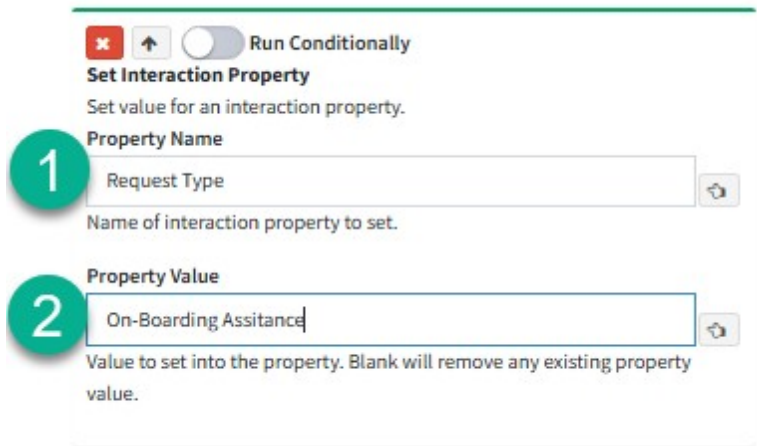
13.8.1.4.1.4 Set Interaction Property (both)

This action enables users to assign a specific interaction property to the ticket being created through the submit button.

For example;

`Request Type = On-boarding Assistance`

Since this property is assigned to the ticket upon submission, iService® users are able to search and report on all interactions with the Request Type set to 'On-Boarding Assistance.'



ID	Name	Description
1	Property Name	This is the name of the property that will be set upon submission. If the property is new and hasn't been mapped yet, iService® will prompt you to map it in the 'Workflow Properties' tab.
2	Property Value	This is the value that will be set for the property specified above.

The Property Value can either be hard-coded, as shown in the screenshot, or set dynamically using a variable tied to another property on the form.

Description:

Using a variable allows you to pass a value captured elsewhere on the form into the property being set by the Set Interaction Property action.

Example:

You can present a drop-down or choice field for the user to select an issue type (e.g., "Technical Support," "Sales"). The selected value can then be passed as a variable and used to populate the corresponding interaction property during submission.

The screenshot shows a form with the following fields: First Name, Email Address, Phone Number, Issue Details, Related To, Assign Agent, and a toggle for 'Allow to Send SMS'. The 'Related To' dropdown menu is open, showing options: -- Pick A Value --, -- Pick A Value --, On-boarding Assistance, Sales, and Technical Support. The second '-- Pick A Value --' option is highlighted in blue. Below the form, there is a note: (Maximum 10 MB upload at one time.)




Now, instead of using the hard-coded value "On-Boarding Assistance," we'll set the "Request Type" property dynamically based on the value selected in the "Related To" drop-down.

To use a variable in the "Set Interaction Property" action, enter the Property Name as usual. Then, in the Property Value field, use the following formula to reference the variable:

```
$form -id'prop:(workflow id):(name of the interaction property) '$
```

13.8.1.4.1.5 Customer Ticket (customer only)


Use the Create Customer Ticket action to generate a ticket from the submission form. The options for this configuration depend on your choices for topic, subject, customer acknowledgment, and ticket body. When adding other actions, like notifications regarding the ticket, always make the ticket the first action on the button. This is required because some actions may use values generate from the ticket.


Create Customer Ticket


Create a customer ticket with the specified parameters.

Customer Email Input 1

 Must choose customer email address input.
Email address used to create or find the customer contact.


Topic Name 2

 
Style **Preset Topic** Set by property


 Must specify Topic name.
Ticket created in named topic.

Subject 3

Style **Preset Subject** Entered by User

 Must specify interaction subject.
This preset subject set into the ticket.

Interaction Tag 4

 
Optional Tag set into the created ticket.



The normal business rules for customer acknowledgement can apply or be suppressed when this ticket is created. 5

Ack **No standard Ack** Normal Ack

Ticket Body 6

Style **Preset Body** Entered by User
Preset body with the specified name is set into the ticket.

Interaction Body Name

 
 Must specify interaction body name.

Result Name 7

Name of interaction ID created.

	Description
10	<p>When a user submits a form that creates a ticket, iService needs their email address. Since the form can include more than one email input you must choose the input that will be the email for the new question.</p>
21	<p>There are two options for setting the topic for the customer ticket. Use <code>Preset Topic</code> if all tickets go to the same topic. When you type the topic name, a mapping entry will be added to the Topics tab so you can pick the iService topic.</p> <p>When you use <code>Set by Property</code>, the user will be presented a drop down list to choose the topic for their question. This requires a multiple choice property with each option mapped to a topic in your tenant.</p> <p>In this example, we use a property named <code>Vehicle Topic List</code>.</p>

Description

Ca
r
e

Topic Property Name
Vehicle Topic List

Style Preset Topic **Set by property**

Ticket created in the topic chosen from a list.

This creates a property in the Workflow Properties tab that needs to be configured. We save it as a multiple choice property with two values.

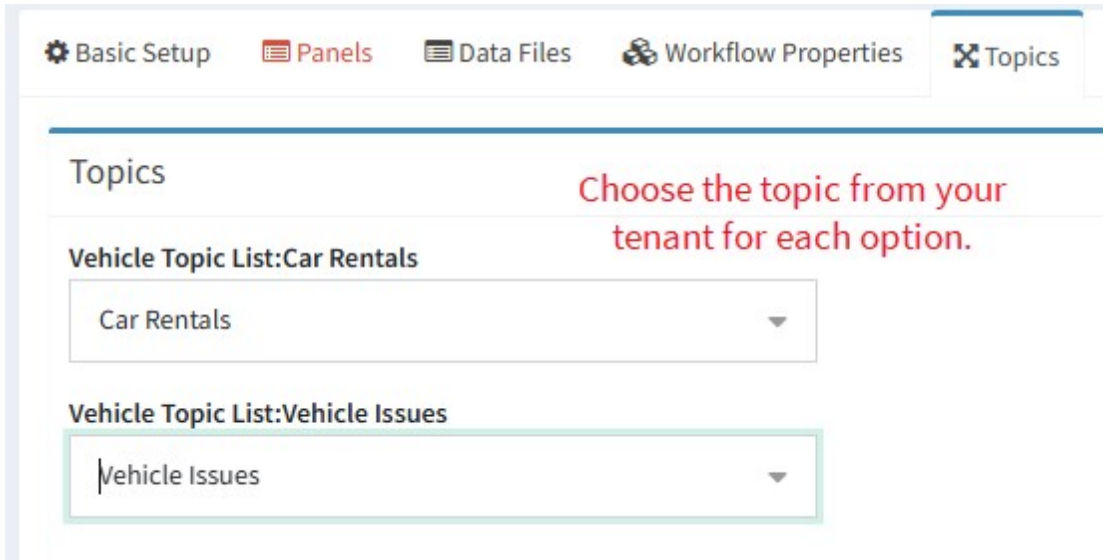
Vehicle Topic List

Value Type
Multiple Choice
User chooses a value from a preset list of values.

Value Choices
Vehicle Issues
Car Rentals
Vehicle Issues

[← Add Value](#)

The final step is to map each menu option to the corresponding topic.

<p>33</p>	<p>Description</p>  <p>Every interaction must have a subject line. You can set the subject line as a preset value, or have the user type the subject into an input box on the form.</p> <p>Preset Subject</p> <p>You can enter a subject line that will be the same for every question. You can also add variables to the subject line to insert values from the form inputs or the contact's details that might already be saved.</p> <p>To insert a value from an input on the form, use:</p> <pre>\$form -id'workflow property name'\$ or \$form -id'prop:workflowID:workflow property name'\$</pre>
<p>41</p>	<p>Tags are used to identify questions that require a custom answer panel or for reporting purposes.</p>

	Description
C t i c r T a g (c p t i c r a l)	
5	If your workflow sends its own customer acknowledgment, you should suppress the acknowledgment (No Standard Ack) that would normally be sent by the segment configuration for the topic.

	Description
6	
6	<p>The user can either type the entire body of their question (Entered by User), or you can use a predefined Template for the body. If you choose Entered by User you must include an input on the form where they can enter the body details. If you choose Preset Body, a blank Template will be created where can layout the body of the ticket.</p>
7	<p>When the action completes, you can optionally save a value for the interaction that can be referenced by other workflow steps.</p>



	Description
f t i c r a l)	

13.8.1.4.1.6 Agent Ticket (agent only)


Use the Create Agent Ticket action to generate a ticket from the submission form. The difference between a Customer Ticket and an Agent Ticket lies in the submission form used. A Customer Ticket is created when a user submits the "Customer" form, while an Agent Ticket is created through the "Agent" submit form. More details regarding submission forms can be found [here](#)⁴¹⁸.


The options for this configuration depend on your choices for topic, subject, customer acknowledgment, and ticket body. When adding other actions, like notifications regarding the ticket, always make the ticket the first action on the button. This is required because some actions may use values generate from the ticket.

Actions:

  Run Conditionally


Create Agent Ticket
 Create a agent ticket with the specified parameters.


1 Customer Email Input
 Email Address 
 Email address used to create or find the customer contact.
 If no email specified the submitter's best email is used.

2 Topic Name
 
 Style
 ⚠ Must specify Topic name.
 Ticket created in named topic.


3 Subject

 Style
 ⚠ Must specify interaction subject.
 This preset subject set into the ticket.

4 Interaction Tag
 
 Optional Tag set into the created ticket.

5 Agent
 
 Name of input where user selects an agent (optional).

6 Ticket Body
 Style
 Preset body with the specified name is set into the ticket.

7 Interaction Body Name
 

8 Result Name

 Name of interaction ID created.

ID	Name	Description
1	Customer Email Input	This is where a drop-down menu will be presented to select the field where the agent enters the contact's email address.
2	Topic Name	A topic must be specified where the ticket will be created. This can be done using either the " Preset Topic " or " Set by Property " option:

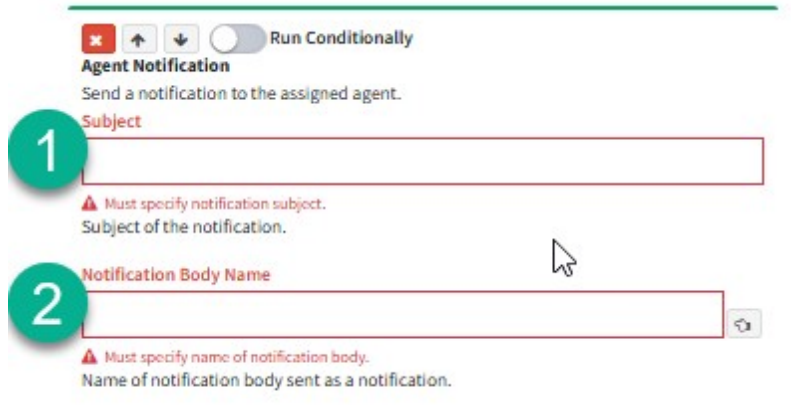
ID	Name	Description
		<p>1. Preset Topic: This option allows you to hard-code the topic for the ticket.</p> <p>2. Set by Property: This option lets the topic be determined dynamically based on a selected property in the submit form.</p> <p>The "Preset Topic" option is selected by default when setting up this action. For more details on "Entered by User" options, refer to the "Entered By User" page(link here)</p>
3	Subject	<p>The subject line that will be included in the email. Users can also enter their own subject line if the form is setup to use the "Entered by User" option. The "Preset Subject" option is selected by default when setting up this action.</p>
4	Interaction Tag	<p>An optional tag that can be added to the email for more detailed categorization. This tag can also be used to trigger custom answer panels configured in the Workflow Builder, rather than the default Standard Answer Panel.</p> <p>More details on "Answer Panels" can be found here⁴⁴¹.</p>
5	Agent	<p>Agent Submit Panels have the capability to request that an agent select another agent (from a list provided by the Admin) when submitting an agent form.</p>

ID	Name	Description
		The list set up by your Admin must be chosen in the Agent dropdown menu during the ticket creation process. This ensures that the ticket is assigned to the selected agent. If no agent is specified, the ticket will not be assigned to anyone, even if the submitter has selected an agent from the list.
6	Ticket Body	This will be the body of the ticket being created. You can specify whether the ticket body will be a "Preset Body" , which is predefined, or "Entered by User" , allowing the user to input custom content.
7	Interaction Body Name	This is the template used to create the ticket. It is specified when selecting the "Preset Body" option in the Ticket Body section.
8	Result Name	The interaction ID can be hard-coded by specifying the result name field

13.8.1.4.1.7 Agent Notification (agent only)

The Agent Notification action is one of the actions available only when configuring an Agent Submit Form. As the name suggests, it sends a notification to the agent assigned to the ticket that's created by the Agent Ticket action.

To ensure the notification is sent, make sure the Agent Ticket action has an "Agent" list selected in the drop-down. Without specifying this list, the notification won't be triggered because no agent will be assigned at the time the ticket is created.



ID	Name	Description
1	Subject	The Subject of the notification email.
2	Notification Body Name	This is the name of the template that will be used to send the notification. If you're creating a new template, iService® will prompt you to enter the template content in the "Templates" tab within the Workflow Builder.

13.8.1.4.1.8 Email to Submitter (agent only)

As the name suggests, the "Email to Submitter" action sends an email to the person who submitted the form.

This notification can be configured to confirm that the submission has been received and logged—particularly useful for notifying submitting agents.

When setting up this action, several configurations are required:

✖ ↑ ↓
 Run Conditionally

Send Email to Submitter
Send an email to the submitting agent.

1 From Mailbox

 Mailbox that email is sent out from. If empty, the segment default mailbox will be used.

2 CC

 Optional CC list for additional recipients.

3 Topic Name
 🔍
 Style Preset Topic Set by property
 ⚠️ Must specify Topic name.
 Email created in named topic.

4 Subject

 Style Preset Subject Entered by User
 ⚠️ Must specify interaction subject.
 This preset subject set into the email.

Suppress reference number in subject

5 Interaction Tag
 🔍
 Optional Tag set into the sent email.

6 Email Body
 Style Preset Body Entered by User
 Preset body with the specified name is set into the email.

7 Interaction Body Name
 🔍
 ⚠️ Must specify interaction body name.

8 Result Name

 Name of interaction ID created.

ID	Name	Description
1	From Mailbox	The "From Mailbox" field allows you to specify which mailbox will be used to send the notification email. This field is optional—if left blank, iService® will automatically use the default mailbox of the Segment associated with the selected Topic.

ID	Name	Description
2	CC	When this email is sent, you can specify a CC email address using the "CC" field.
3	Topic Name	<p>A topic must be specified where the email interaction will be recorded. This can be done using either the "Preset Topic" or "Set by Property" option:</p> <p>1. Preset Topic: This option allows you to hard-code the topic for the email.</p> <p>2. Set by Property: This option lets the topic be determined dynamically based on a selected property in the submit form.</p> <p>The "Preset Topic" option is selected by default when setting up this action. For more details on "Entered by User" options, refer to the "Entered By User" page(link here)</p>
4	Subject	The subject line that will be included in the email. Users can also enter their own subject line if the form is setup to use the " Entered by User " option. The "Preset Subject" option is selected by default when setting up this action.
5	Interaction Tag	An optional tag that can be added to the email for more detailed categorization.
6	Email Body	Specify whether the email body will be a " Preset Body ", which is predefined, or " Entered by User ", allowing the user to input custom content.

ID	Name	Description
7	Interaction Body Name	This is the template used to send the email. It is specified when selecting the " Preset Body " option in the Ticket Body section.
8	Result Name	The interaction ID can be hard-coded by specifying the result name field

13.8.1.4.2 Answer Panel Actions

Answer Panel Actions are actions within iService's workflow builder that can be assigned to buttons to perform various tasks on an interaction—such as saving a draft, updating interaction properties, unassigning the interaction, changing its topic, and more.

Most actions include settings that let you customize how they behave when used in a button. You can add multiple actions to a single button, and they'll run in the order you've set.

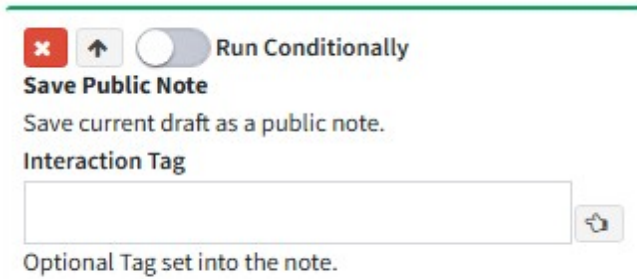
The workflow builder offers a variety of actions you can use. Each one is explained in more detail in the child topics of this section.

13.8.1.4.2.1 Save Public Note

The **Save Public Note** action allows you to save a note that the contact can view in your iService® Customer Portal. These notes are only visible to the specific contact when they log in to their account.

NOTE: Although the term "**Public Note**" might sound like it's visible to everyone, it's only accessible to the individual contact the note is saved for.

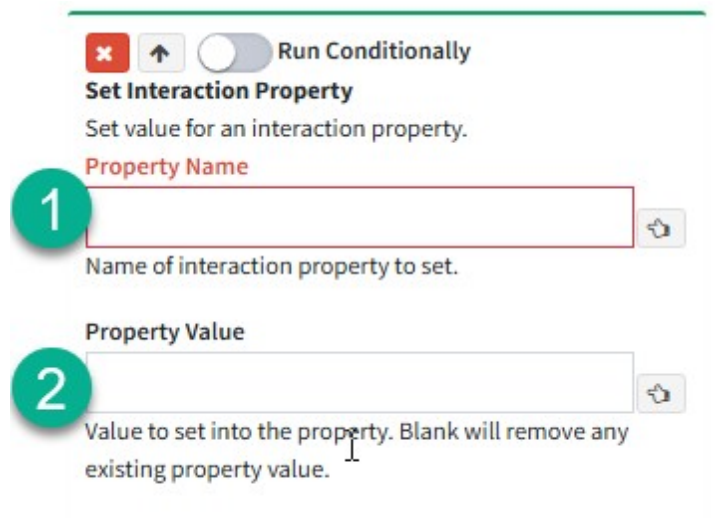
This action is often used along with the Send Notification action to let the contact know that an update to their question is available in the Customer Portal.



You can also add an optional tag to the note, which helps categorize the interaction within the iService® database.

13.8.1.4.2.2 Set Interaction Property

The Set Interaction Property action is used to update a specific property on the selected interaction with a new value.



To set up this action, you’ll need to provide the following configuration details:

ID	Name	Description
1	Property Name	The name of the property that will be updated when the button containing this action is clicked.
2	Property	The value of the property that will be updated when the button containing this action is clicked.

Value	
-------	--

13.8.1.4.2.3 Agent Signature

The **Agent Signature** action records the signature of the agent who clicks the button. When the button is pressed, the agent’s signature is saved to the interaction.

This action is typically used when escalating an interaction to a supervisor while restricting further actions by the agent who was previously assigned. Once the signature is saved, the signing agent can no longer make any changes to the interaction.

This action pairs well with the **Assign to Agent** action to forward the interaction to a selected supervisor. It can also be used alongside the **Unassign** and **Change Topic** actions to move the interaction to a different queue and unassign it—allowing a supervisor to take over and perform the necessary actions.

✕
↑
 Run Conditionally

Agent Signature
Set agent's name and current time into a property value.

Property Name

1

+

⚠ Must specify interaction property name for signature.

Name of interaction property where signature is saved.

2

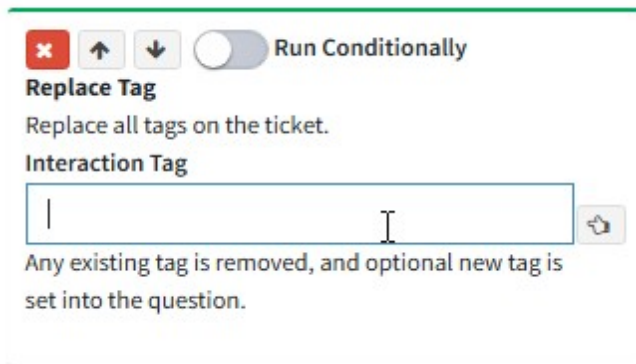
Can not sign own interaction
 If checked, neither the submitting agent nor the customer is allowed to sign the interaction.

ID	Name	Description
1	Property Name	Name of the property where the signature will be saved.

		<p>Note: This must be a segment property that meets the following requirements:</p> <ul style="list-style-type: none"> • It must be a DateTime value. • It must be a Shared Property. • It must Allow Multiple Values. • The "Has Descriptions" option must be enabled, with the description type set to Text. <p>After entering the name of the property, you'll be prompted to map it to the segment property that matches the configuration above.</p>
2	Can not sign own interaction	When this toggle is turned on, the signing agent will no longer be able to take any further actions on the interaction after clicking the button that includes the Agent Signature action.

13.8.1.4.2.4 Replace Tag

As the name suggests, this action replaces the current tag on an interaction with a new tag specified in the action's configuration.



The screenshot shows a configuration panel for the 'Replace Tag' action. At the top, there are three small icons: a red 'x' in a square, an upward arrow, and a downward arrow. To the right of these is a toggle switch labeled 'Run Conditionally'. Below the icons is the title 'Replace Tag' and the description 'Replace all tags on the ticket.' Underneath is the label 'Interaction Tag' followed by a text input field with a cursor and a small icon to its right. Below the input field is the text: 'Any existing tag is removed, and optional new tag is set into the question.'

Setting up this action is simple—just enter the new tag that should be applied to the interaction when the button containing this action is clicked.

13.8.1.4.2.5 Send Notification

This action sends a notification to a contact specified in its configuration. It supports sending notifications to two types of users:

Customer Notification:

Sends a notification to the customer selected in the "To Address" dropdown.

Run Conditionally

Send Notification
Send a preset message to customer or submitter.

1 **Recipient**

To Address

⚠ Must choose To address input name.
Name of input where user selects a customer email address.

2 **Subject**

⚠ Must specify notification subject.

3 **Suppress reference number in subject**
Subject of the notification.

4 **Interaction Tag**

Optional Tag set into the sent notification.

5 **Notification Body Name**

⚠ Must specify name of notification body.
Name of notification body sent as a notification.

Submitter Notification:

Sends a notification to the person who originally submitted the ticket.

Run Conditionally
Send Notification
 Send a preset message to customer or submitter.

1 Recipient

2 Subject

3 Suppress reference number in subject
 Subject of the notification.

4 Interaction Tag

 Optional Tag set into the sent notification.

5 Notification Body Name

 Name of notification body sent as a notification.

Configuration:

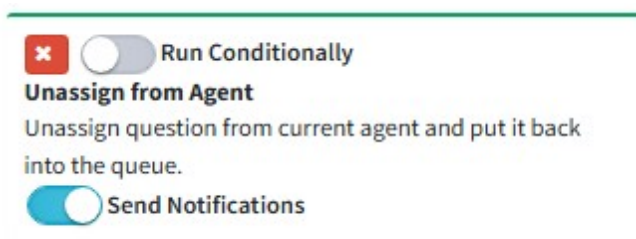
When setting up the "Send Notification" action, please refer to the table below for the required settings:

ID	Name	Description
1	Recipient Selector	Choose whether this notification should be sent to the ticket's Contact or its Submitter. For example, agents may create tickets on behalf of other contacts but still need to be notified of updates. This feature allows you to treat the contact as the primary recipient while keeping the submitting agent in the loop.

	To Address (Customer Notification Only)	Select the property where the To Address for the customer is chosen by the agent.
2	Subject	The Subject line of the notification
3	Suppress Reference Number	This toggle removes the reference number from the notification sent to the customer or submitter.
4	Interaction Tag	An optional tag can be added to the notification to help categorize it.
5	Notification Body	Choose the template for the notification being sent. If you're creating a new template, just type the template name and write the content in the "Templates" tab of the workflow builder.

13.8.1.4.2.6 Unassign

The Unassign action removes the current agent's assignment from the workflow interaction and returns the interaction to the topic with an 'Unassigned' status.



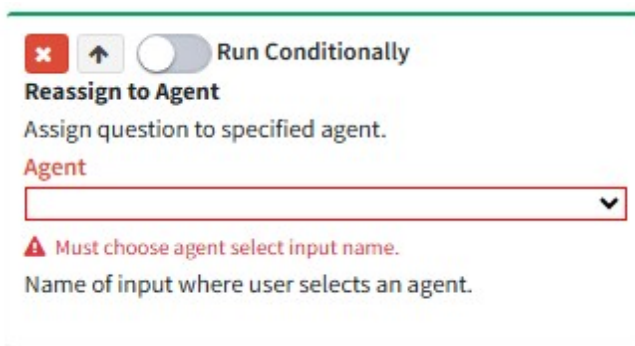
Send Notifications Toggle:

By default, the Unassign action removes an interaction from the assigned agent and returns it to the queue for reassignment. Once the interaction is back in the queue (topic), the default notification configured for that segment is triggered and sent to all agents who are qualified to handle the interaction.

If notifications are not required when unassigning a workflow interaction, the Send Notifications toggle can be turned off to ensure that no notification is sent for that specific interaction.

13.8.1.4.2.7 Assign to Agent

The Assign to Agent action allows an interaction to be assigned to an agent selected from a predefined list. This list is presented to the currently assigned agent for reassignment.



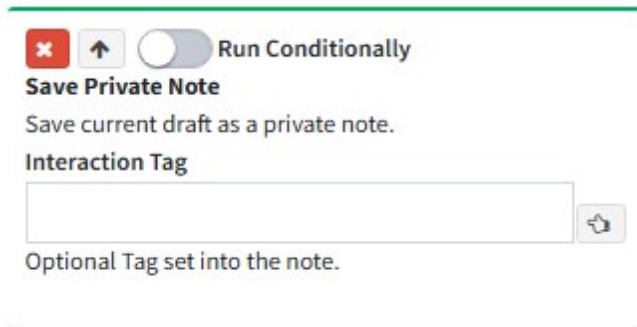
The screenshot shows a configuration panel for the 'Reassign to Agent' action. At the top, there are three controls: a red 'x' icon, an upward arrow icon, and a toggle switch labeled 'Run Conditionally'. Below these is the title 'Reassign to Agent' and the description 'Assign question to specified agent.' A red label 'Agent' is positioned above a red-bordered dropdown menu. Below the dropdown is a red warning triangle icon followed by the text 'Must choose agent select input name.' and the instruction 'Name of input where user selects an agent.'

When configuring the Assign to Agent action, a drop-down menu is presented to select an agent list. The assigned agent will then choose the next agent from this list to whom the interaction will be assigned.

Refer to Agent Picker for details on configuring the list of agents available for reassignment.

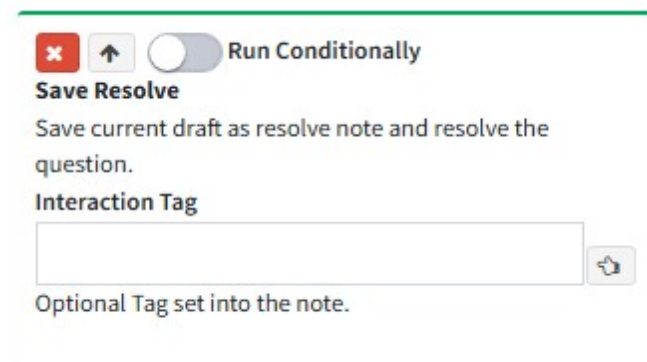
13.8.1.4.2.8 Save Private Note

The Save Private Note action adds a note to the interaction that is only visible to agents within iService®. An optional tag can be added to the note for more detailed categorization.



13.8.1.4.2.9 Save Resolve

The Save and Resolve action saves the current draft as a resolve note within the interaction and then resolves it. This action is typically used in combination with the [Set Draft](#)⁴⁹⁴ action. The Set Draft action applies a specified template as a draft, and the Save and Resolve action finalizes it by saving the draft as a resolve note and resolving the interaction.



An optional tag can be added to the resolve note for detailed categorization.

13.8.1.4.2.10 Send Resolve

The Send and Resolve action sends the current draft to the specified contact as a response and then resolves the interaction. This action is commonly used in combination with the [Set Draft](#)⁴⁹⁴ action, which sets a specified template as the draft. The Send Resolve action then sends this draft as a response to the contact and resolves the interaction.

Send Resolve
Send current draft response as an answer to the customer, resolving the question.

1 To Address
Must choose To address input name.
Name of input where user selects a customer email address.

2 Suppress reference number in subject
Interaction Tag

3 Interaction Tag
Optional Tag set into the answer.

ID	Name	Description
1	To Address	Select the property where the To Address for the customer is chosen by the agent.
2	Suppress Reference Number in Subject	This toggle removes the reference number from the answer sent to the contact.
3	Interaction Tag	An optional tag can be added to the answer to categorize it in the iService® database.

13.8.1.4.2.11 Send Leave Open

The Send Leave Open action sends the current draft as an agent email to the specified contact and leaves the interaction in the Open status. This action is commonly used in combination with the [Set Draft](#)⁴⁹⁴ action, which sets a specified template as the draft. The Send Leave Open action then sends this draft as an email to the contact keeps the interaction open.

Send Leave Open
Send current draft response as an email to the customer or submitter, leaving the question open.

1 **Recipient**
Customer | Submitter

2 **To Address**
[Dropdown menu]
⚠ Must choose To address input name.
Name of input where user selects a customer email address.

3 **Suppress reference number in subject**
[Toggle]

4 **Interaction Tag**
[Text input field] [Add icon]
Optional Tag set into the answer.

ID	Name	Configuration
1	Recipient Selector	Choose whether this notification should be sent to the ticket's Contact or its Submitter. For example, agents may create tickets on behalf of other contacts but still need to be notified of updates. This feature allows you to treat the contact as the primary recipient while keeping the submitting agent in the loop.
2	To Address (Customer Notification Only)	Select the property where the To Address for the customer is chosen by the agent.

3	Suppress Reference Number	This toggle removes the reference number from the notification sent to the customer or submitter.
4	Interaction Tag	Choose the template for the notification being sent. If you're creating a new template, just type the template name and write the content in the "Templates" tab of the workflow builder.

13.8.1.4.2.12 Set draft

The Set Draft action applies the specified template as a draft to the workflow interaction.

Set Draft
Save preset body and/or subject into the draft response.

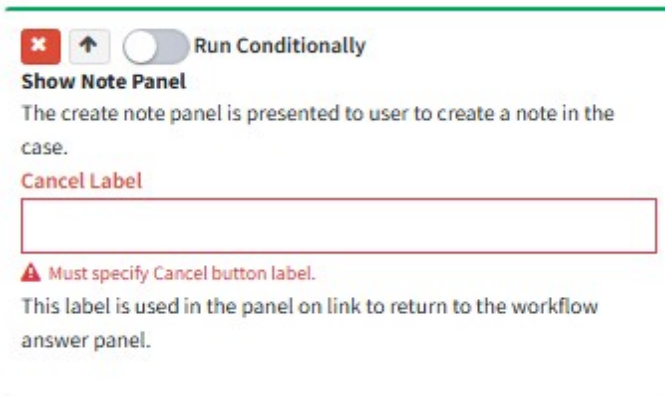
1 Subject
Subject that will be set into the draft response.
A blank subject is allowed and will be set if none is specified.

2 Interaction Body Name
⚠ Must specify interaction body name.
Name of interaction body that will be set into the draft response.

ID	Name	Description
1	Subject	Subject of the template that will be set as a draft.
2	Interaction Body Name	Name of the template body that will be set as a draft.

13.8.1.4.2.13 Create Note Panel

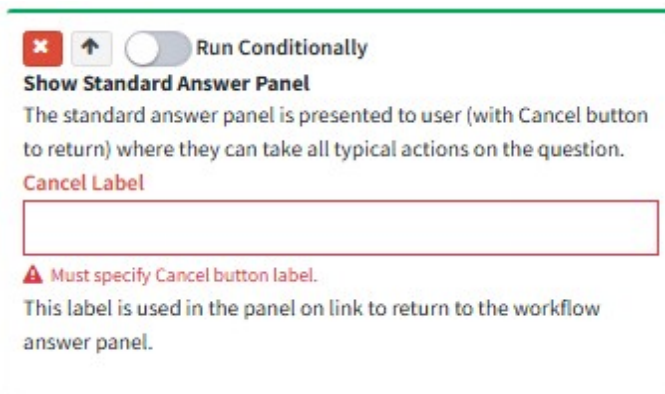
The Create Note Panel action opens the "Create Note" panel within the workflow interaction, allowing users to add either a Public or Private note to the interaction.



A Cancel label must be specified, enabling the agent to click and return to the workflow ticket.

13.8.1.4.2.14 Standard Answer Panel

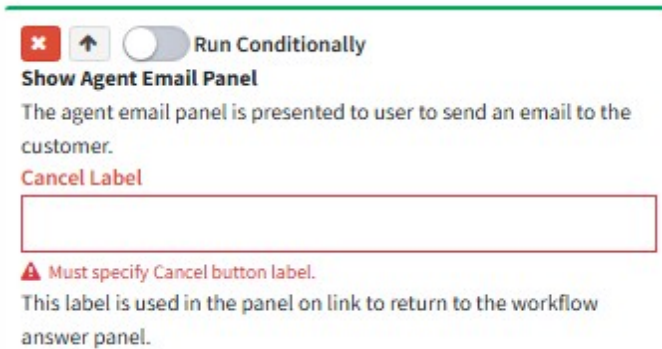
The Standard Answer Panel action allows agents to switch from your custom workflow answer panel to the default Standard Answer Panel in iService®, which includes standard actions such as Send, Resolve, Forward, Change Topic etc.



A Cancel Label must be specified, which agents can click to return to the custom workflow answer panel from the Standard Answer Panel.

13.8.1.4.2.15 Agent Email Panel

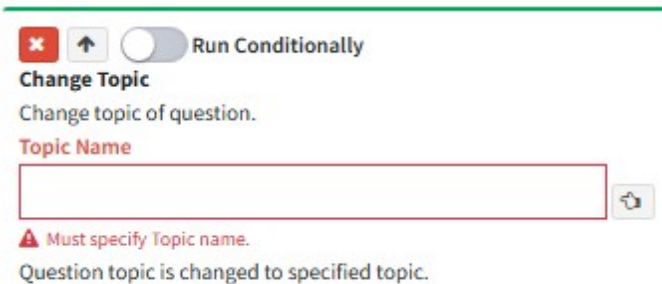
The Agent Email Panel action opens the default Agent Email panel, allowing agents to send an agent email to the contact associated with the interaction.



A Cancel Label must be specified, which the agent can click to return to the custom workflow answer panel.

13.8.1.4.2.16 Change Topic

The Change Topic action changes the topic of the workflow interaction to the topic specified in this action.



Note - A topic can be selected using the finger picker, which displays all available mapped topics, or by typing the topic name. If the typed topic is new and not yet mapped in the workflow, it will appear as an item to map in the 'Topics' tab of the workflow builder settings.

13.8.1.5 Panel Elements

Use the panel elements to build your workflow forms. These include the basic components for most web pages and web apps.

13.8.1.5.1 Page Structure

The page structure elements are used for the high level layout of your page. This includes HTML content (including iService variables), buttons, and tabs that may contain other page structure elements.

13.8.1.5.1.1 HTML

Static HTML allows users to add a text section to display instructions or information for agents. When adding text in the workflow answer panel or submit forms, two customization options are available:

Raw HTML

The Raw HTML option allows users to add text without formatting customizations such as bold, italic, or color changes.

Move
Static HTML
 New Column Width

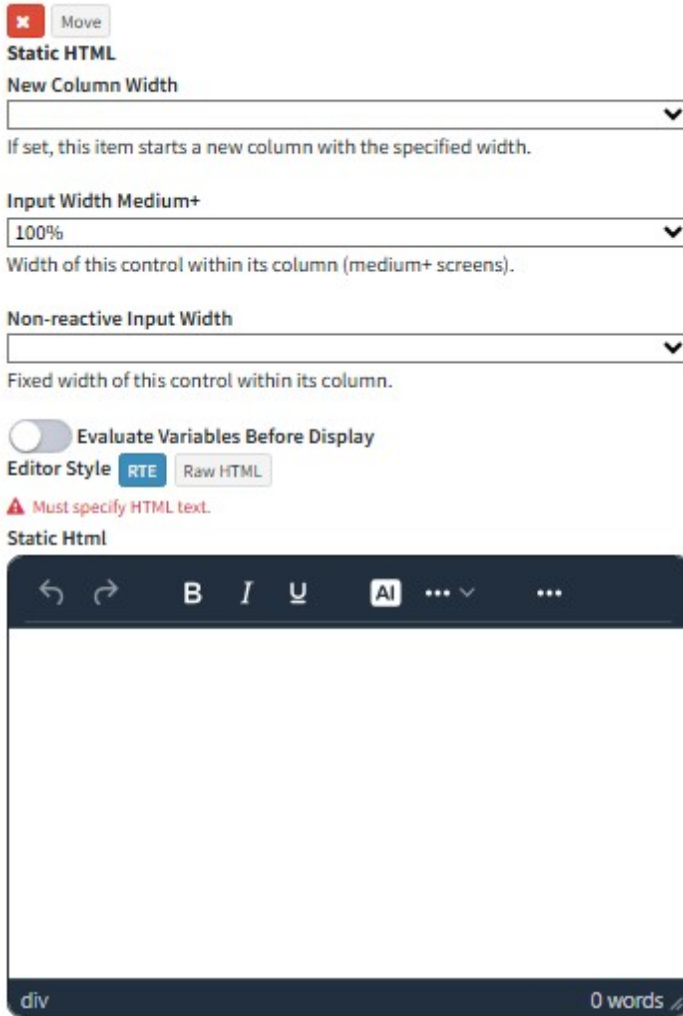
 If set, this item starts a new column with the specified width.
 Input Width Medium+

 Width of this control within its column (medium+ screens).
 Non-reactive Input Width

 Fixed width of this control within its column.
 Evaluate Variables Before Display
 Editor Style
 ⚠ Must specify HTML text.
 Static Html

Rich Text

The Rich Text option allows users to add rich text with formatting customizations such as bold, italic, color changes, and more.



Note - When adding variables in Static HTML, make sure the '**Evaluate Variables Before Display**' toggle is turned on so the variables show up as expected in the text.

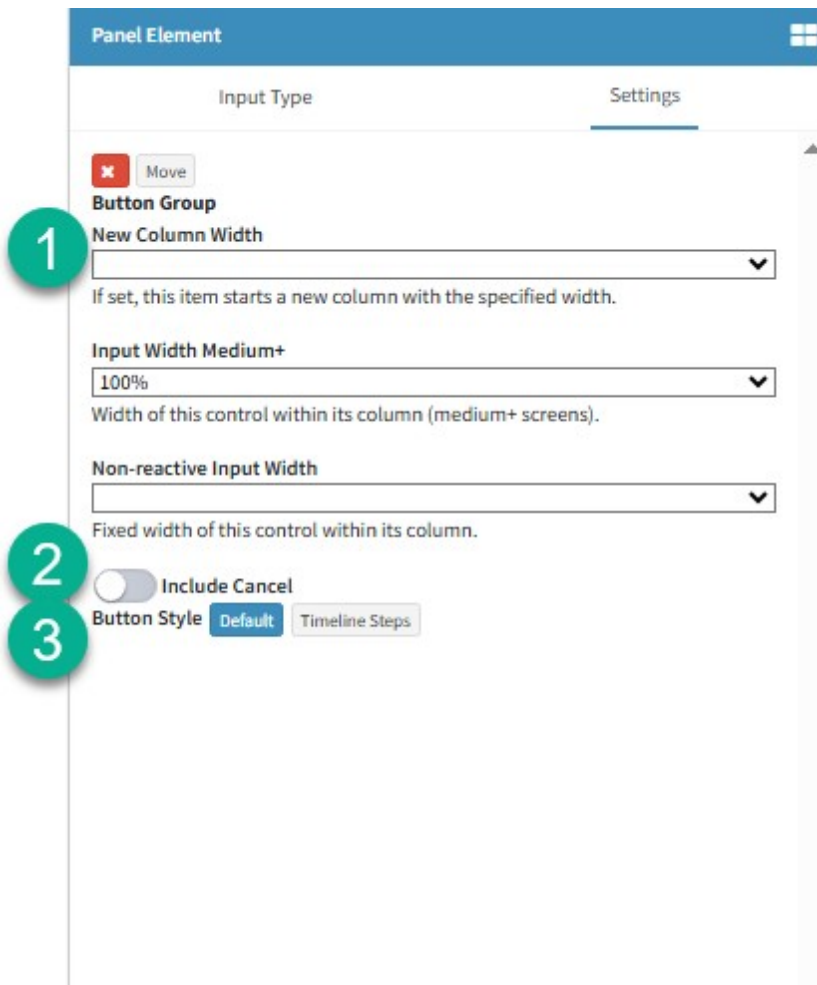
13.8.1.5.1.2 Buttons

Buttons are used to trigger an action—for example, submitting a form, sending an agent email, resolving an interaction, or changing the topic.

Button Configurations

When adding buttons in a workflow, several configuration options are available. See below for the required and optional settings.

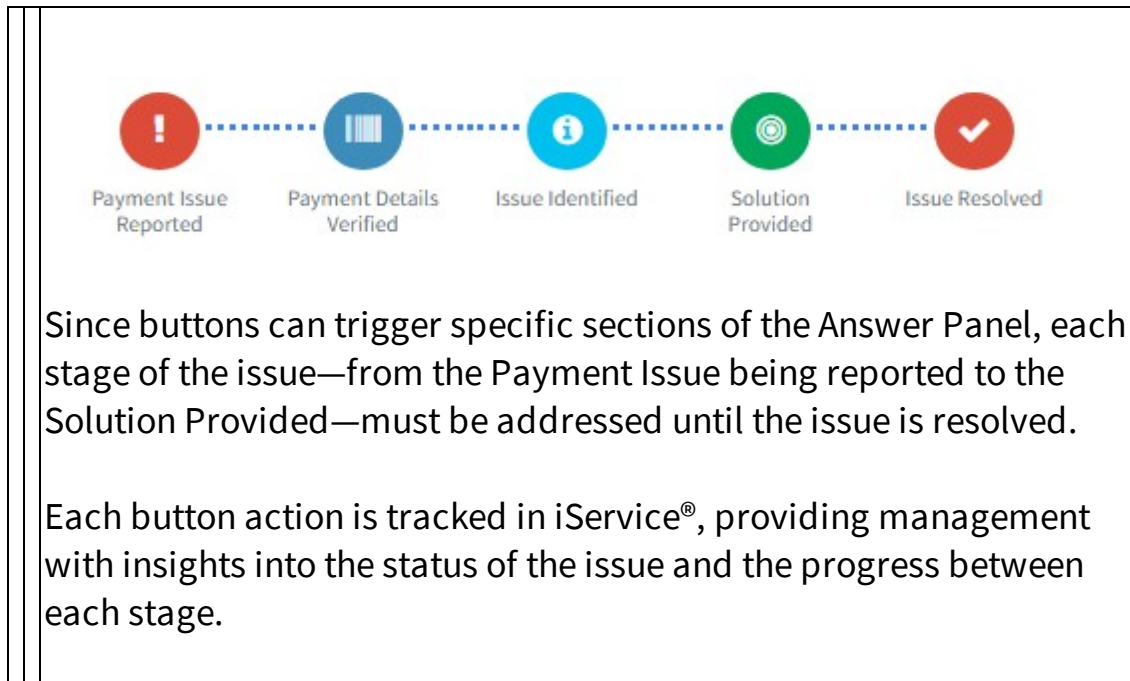
Button Group Settings:



	Description
1	Several sizing options are available for button groups, allowing you to choose what best fits your design and layout needs. For more

	<p>tdetails on how size options work, see Workflow Elements Size Options (Link here).</p>
21	<p>In a button group, a 'Cancel' button link can be provided to agents, allowing them to close the interaction they are working on (Note - any changes made to the interaction are not saved).</p>

t y l e c E u t t c r c r c u F C r l y)	
3E u t t c r S t y l e e	<p>There are two button styles available by default.</p> <p><u>1. Default:</u> This is the 'Default' button style used across the iService® UI.</p> <p><u>2. Timeline Steps:</u> The Timeline steps option arranges buttons in a streamlined view, typically used to display the stages an interaction goes through from start to finish.</p> <p>For example, consider a customer with a 'Payment' related issue.</p>



Button Settings(Individual)

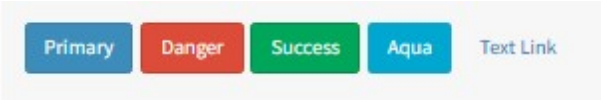
Each button has individual settings, allowing it to perform its own configured actions.

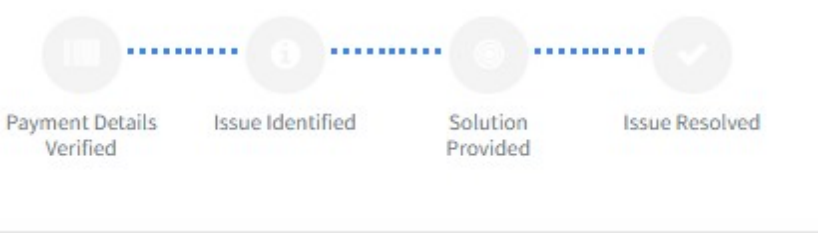
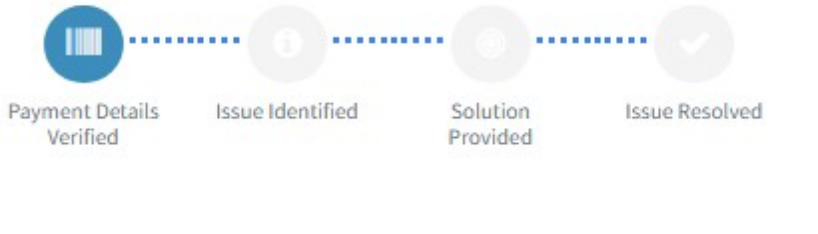
Below are some of the customizations available:


The screenshot shows a configuration window for a custom form button. It includes the following elements:

- 1**: A dropdown menu for 'Style' with options: Primary, Danger, Success, Aqua, Text Link. A red error message below it says: "Must specify button style."
- 2**: An empty text input field for 'Label'. A red error message below it says: "Must specify button Label."
- 3**: A dropdown menu for 'Font Awesome Icon Class (None)' with the selected value "-- None --".
- 4**: A toggle switch for 'Suppress Success Message' which is currently turned off.
- 5**: A text input field for 'Grey-out Property' with a refresh icon on the right. Below it is the text: "Optional name of interaction property to check to determine if this button is rendered different."
- 6**: A text input field for 'Grey-out Value' with a refresh icon on the right. Below it is the text: "Value of property when this button is normal. If the property is NOT this value, the button will be colored grey."
- 7**: 'Require Mode' section with two buttons: 'All Inputs Required' and 'None Required' (which is highlighted in blue).
- 8**: 'Add Action:' section with a grid of buttons including: Standard Answer, Agent Email Panel, Create Note Panel, Set Draft, Send Leave Open, Send Resolve, Save Resolve, Save Public Note, Save Private Note, Change Topic, Assign To Agent, Unassign, Send Notification, Replace Tag, Agent Signature, Set Interaction Property, Set Contact Property, and Payment Panel.

Name	Description
1Styl	Select the button's 'Style' based on the action it performs. For example, a button that triggers a 'Resolve' action might use the 'Danger' style to highlight that the interaction will be closed when clicked. Here is a quick view of the button styles available:

	 <p>Quick Tip: Resolved Interactions can be "Reopened" at any time by using the "Understanding Interactions" option. See the "Questions" section under "Interaction Types and Status" for more details!</p>
2La b el	<p>This defines the name or label displayed on the button.</p>
3B ut to n lc o n	<p>Select an icon from the available list that best represents the button's purpose.</p>
4S u p pr es s S uc ce ss M es sa ge	<p>Each button in the workflow has a default success message that pairs with its label. For example, a button labeled 'Resolve' will show a 'Resolve Success' message in the bottom-left of the iService® interface.</p> <p>In some cases, this message should be bypassed. For instance, a button that opens the Agent Email panel shouldn't show a success message, as it only opens the panel—it doesn't send the actual email, which could lead to confusion.</p>
5Gr ey - O ut	<p>To change a button's appearance, use the 'Grey-Out' property. Enter the property to be checked—if the condition is not met, the button will appear greyed out to indicate it's not the active step; if the condition is met, the button will be colored to show it's active.</p>

Property	
Example	<p>This is the value that will be checked against the property specified above.</p> <p>For example, in the first stage of a payment issue, we've setup this test workflow to check the value of the 'Payment Issue Stage' property.</p> <p>This property is updated when agents click the corresponding payment issue buttons below.</p>  <p>Before any button is clicked, all flow steps appear greyed out. When a stage is selected, its button becomes colored to indicate it is the active step in the workflow.</p> 

	
7R Require Model	<p>Require all inputs on the form to be filled out before the form can be submitted</p>
8A Add Action	<p>Add an action to the selected button from the list of available actions.</p> <p>For details on button actions, refer to "Panel Actions"⁴⁵⁹</p>

13.8.1.5.1.3 Tab Group

At its core, Tab Groups are used to split forms into sections or to display parts of a form conditionally—either when clicked or when certain workflow conditions are met.

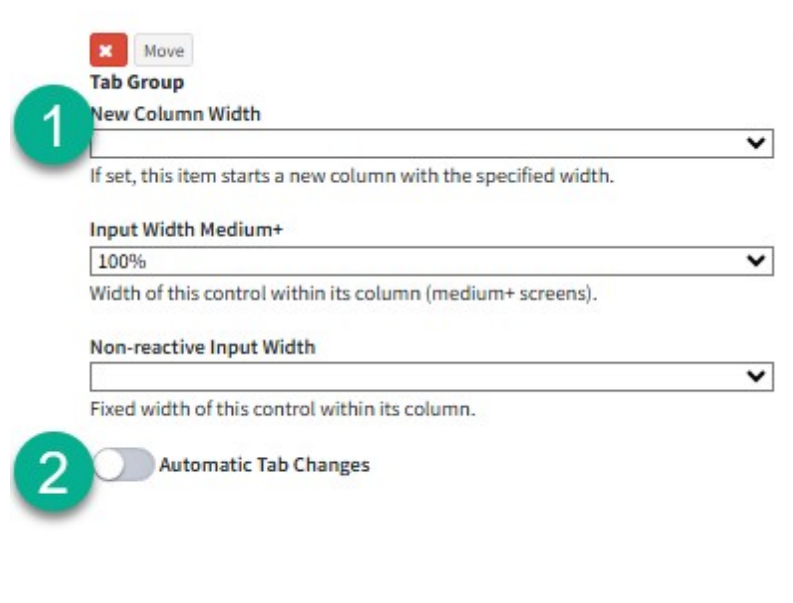
Tab Configurations

When setting up a tab group, there are two types of configurations available:

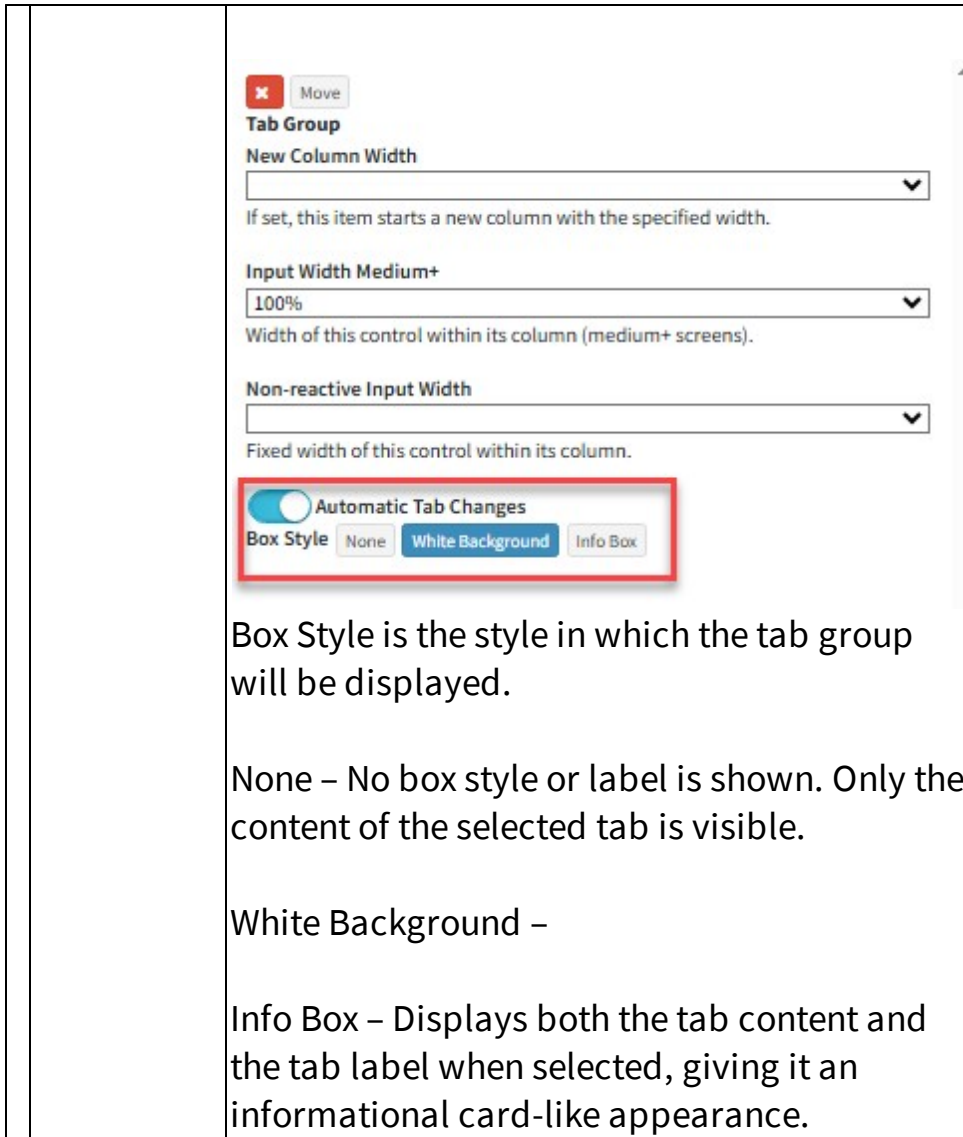
Tab Group Settings

These are settings applied at the group level — they control the overall behavior and appearance of the entire tab group.

Example: Similar to how settings apply to a Button Group element.



ID	Name	Description
1	Tab Group Size	Several sizing options are available for tab groups, allowing you to choose what best fits your design and layout needs. For more details on how size options work, see Workflow Elements Size Options (Link here) .
2	Automatic Tab Changes	The Automatic Tab Changes toggle determines if tabs in the group will be navigated manually or automatically when a condition on the submit form or answer panel is met. More detail on Automatic Tab Changes can be found below.
3	Box Style	When the "Automatic Tab Changes" toggle is turned on, an additional setting is available for the user to select:



Tab Group

New Column Width
 [Dropdown menu]
 If set, this item starts a new column with the specified width.

Input Width Medium+
 [Dropdown menu: 100%]
 Width of this control within its column (medium+ screens).

Non-reactive Input Width
 [Dropdown menu]
 Fixed width of this control within its column.

Automatic Tab Changes

Box Style [None] [White Background] [Info Box]

Box Style is the style in which the tab group will be displayed.

None – No box style or label is shown. Only the content of the selected tab is visible.

White Background –

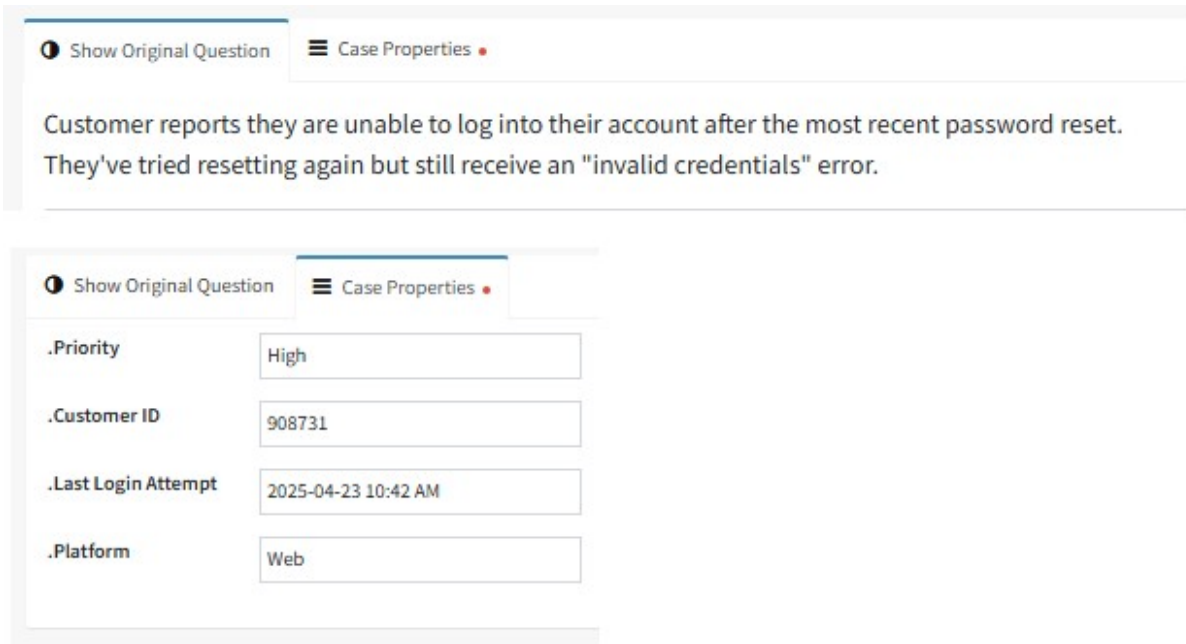
Info Box – Displays both the tab content and the tab label when selected, giving it an informational card-like appearance.

Tabs in a Tab group can be navigated in two ways by agents:

Manual Tab Changes (Toggle Off)

All tabs are shown, and the agent manually switches between tabs.

For Example: A custom workflow answer panel with two tabs—one showing the details of a ticket, and the other displaying information such as case properties tied to the interaction.



Automatic Tab Changes (Toggle On)

Tabs are displayed based on a specific condition—typically the value of an interaction property. When Automatic Tab Changes is enabled, the workflow builder prompts users to define a condition for each tab, specifying when it should be shown and what content it displays.

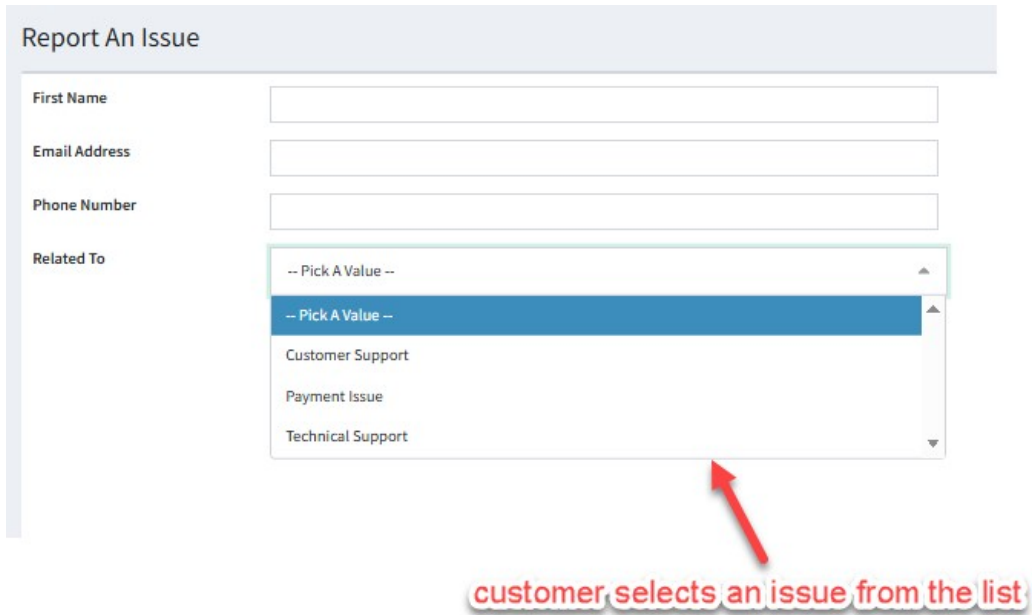
Example:

A Submit Form allows customers to report one of three issue types: **Payment Issue**, **Customer Support**, or **Technical Support**.

When a customer selects an issue type:

- A ticket is created for the corresponding team.
- The relevant tab is displayed on the form which would be hidden till the customer selects the issue they are reaching out for, showing questions specific to that issue type to gather more context from the customer.

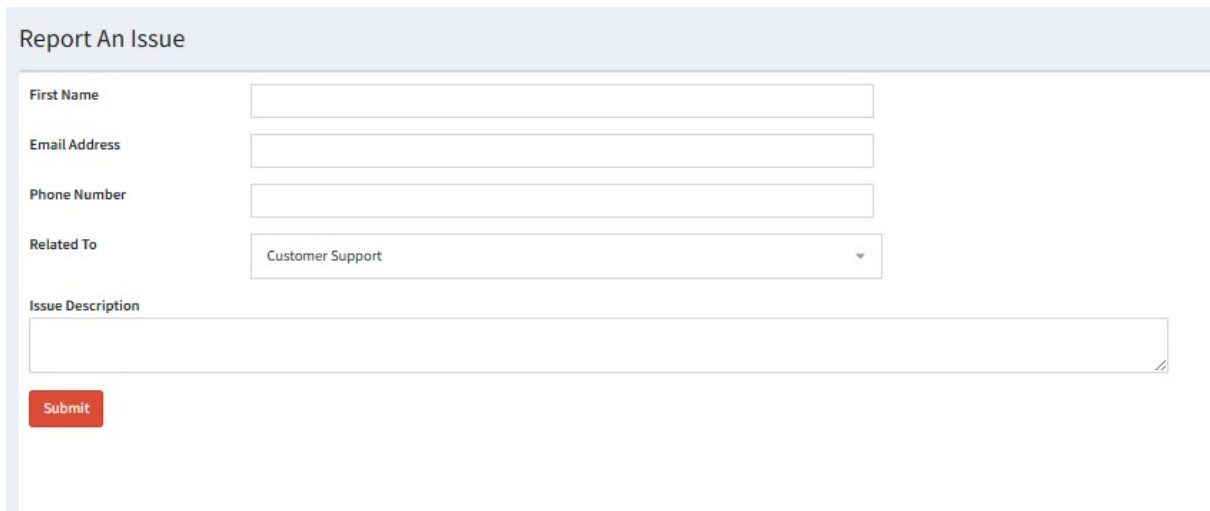
See below:



The screenshot shows a form titled "Report An Issue" with the following fields: "First Name", "Email Address", "Phone Number", and "Related To". The "Related To" field is a dropdown menu that is currently open, showing a list of options: "-- Pick A Value --", "Customer Support", "Payment Issue", and "Technical Support". A red arrow points to the "Customer Support" option in the list. Below the dropdown menu, there is a red text box with the text "customer selects an issue from the list".

Selecting each issue from the list will display a different set of inputs for the customer to fill out:

1. Customer Support:



The screenshot shows the "Report An Issue" form with the "Related To" dropdown menu set to "Customer Support". The form includes the following fields: "First Name", "Email Address", "Phone Number", "Issue Description" (a large text area), and a red "Submit" button.

2. Payment Issue:

Report An Issue

First Name

Email Address

Phone Number

Related To

Issue Description

Payment Method Used

Date and Time of Payment

Transaction ID

3. Technical Support:

Report An Issue

First Name

Email Address

Phone Number

Related To

Device and Operating System

Browser

Issue Description

Tab (Individual) Settings

After configuring the tab group settings, each individual tab must be set up with the following:

1 **Tab Label**
Must set Tab Label.

2 **Font Awesome Icon Class (None)**
-- None --

3 **Auto Select Type**
Text =
Comparison type to determine if this tab is visible.

4 **Auto Select Property**
Name of property that is checked.
Must set tab auto selection property.

5 **Auto Select Value**
Must choose automatic tab property value.

Name	Description
1 Tab Label	The label of the tab. This will be visible in the workflow form / answer panel only when Automatic Tab Changes is turned off, or when using the Info Box style with Automatic Tab Changes enabled.
2 Tab Icon	The Icon of the tab. This will be visible in the workflow form / answer panel only when Automatic Tab Changes is turned off, or when using the Info Box style with Automatic Tab Changes enabled.
3 Auto Select Type (Automatic	Select the condition of the data that will be compared to display the tab selected.

<p>Tab Changes Only)</p>	<div data-bbox="532 241 1214 688" style="border: 1px solid black; padding: 5px;"> <p>Auto Select Type</p> <div style="border: 1px solid gray; padding: 2px;"> <p>Text =</p> <p style="background-color: #0070C0; color: white; padding: 2px;">Text =</p> <p>Number <</p> <p>Number <=</p> <p>Number ></p> <p>Number >=</p> <p>No Value</p> <p>Any Non-Empty Value</p> <p>Always</p> </div> </div> <ul style="list-style-type: none"> - Text = Compares when the text value exactly matches the specified string. - Number < Displays the tab when the value is less than the specified number. - Number <= Displays the tab when the value is less than or equal to the specified number. - Number > Displays the tab when the value is greater than the specified number. - Number >= Displays the tab when the value is greater than or equal to the specified number. - No Value Displays the tab when the interaction property has no value set. - Any Non-Empty Value
--------------------------	---

	<p>Displays the tab when the interaction property contains any value (i.e., is not blank or null).</p> <p>- Always</p> <p>Only applicable to the last tab in the tab group. This displays the tab when the interaction property value does not match any of the conditions defined for the other tabs</p>
<p>4 Auto Select Property (Automatic Tab Changes Only)</p>	<p>The interaction property used to verify the specified 'Auto Select Value'.</p>
<p>5 Auto Select Value (Automatic Tab Changes Only)</p>	<p>Specify the interaction property value used to display the corresponding tab</p>

13.8.2 Templates



Workflows often use predefined templates for emails, notes, tickets, and notifications that require formatted text. These templates are created in the Templates tab. They are documents in plain text or HTML format that can include iService variables for displaying values from your contact and interaction properties. Templates may include any of the `value` parameters for displaying details about contacts or interactions. They may also contain any valid HTML markup and most iService form commands (like `if`). Similar to other settings pages, the Templates page includes a list of all templates configured in your workflow.

The Templates List

The Workflow templates list

All of your templates will be listed at the top of the Templates page in the Templates list.

1 - The name of your template is specified within the action that uses it. These actions can be in a submit or answer panel.

2 - Since your template might be used in multiple locations, the exact path to the location where it is referenced is displayed here. The format of the location is as follows:

Example:

Answer panel for questions with tag "job" when in topic "Homeowner J

Answer panel for questions with tag "job" when in topic "Homeowner Jobs" - This is the name of the panel that contains a reference to the template.

- **Tab "Scheduling Actions"** - Within the panel, look inside the Tab Group named Scheduling Actions.

- **Button "Email Notice"** - Within the Scheduling Actions button group, there is a button using the label Email Notice.

- **notification** - The Email Notice button includes a Notification action that uses this template.

Creating Templates

When a panel action references a preset body, like a ticket body, it's created as plain text or HTML in the Templates page. The template is created automatically when preset text is selected in a panel's details. You do not create templates manually from the Templates page. They are create for you by the system as placeholders for your template when you click Preset Body.

In the example below a ticket body is specified, and the template is created.

Create Customer Ticket
Create a customer ticket with the specified parameters.

Destination Email Input ID
Email Address
Email Address entered by submitter is used to create or find the customer contact.

Topic Name
Request a Quote
Style: Preset Topic, Chosen by User
Ticket created in named topic.

Subject Input ID
Short description of your project
Style: Preset Subject, Entered by User
Ticket subject is entered by user in the specified Input.

Set Question Properties
All question properties in the panel are set in this ticket.

Save Case Properties
All case properties in the panel are set in this ticket's case.

Ticket Body
Style: Preset Body, Entered by User
Preset body with the specified name is set into the ticket.

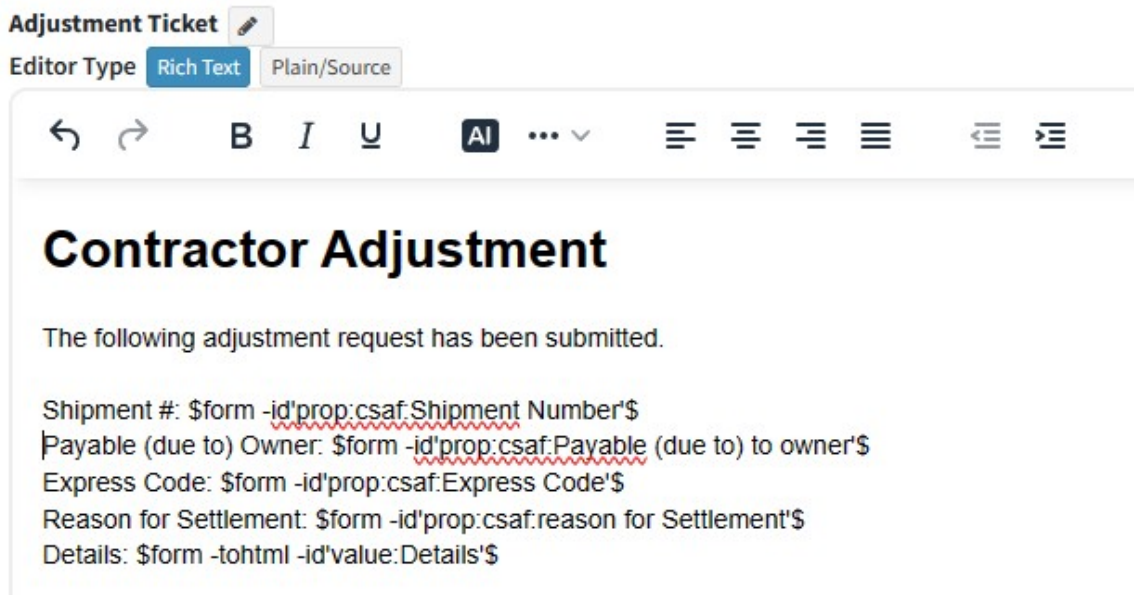
Interaction Body Name
Adjustment Ticket

Result Name
Name of interaction ID created.

Ack: No standard Ack, Normal Ack

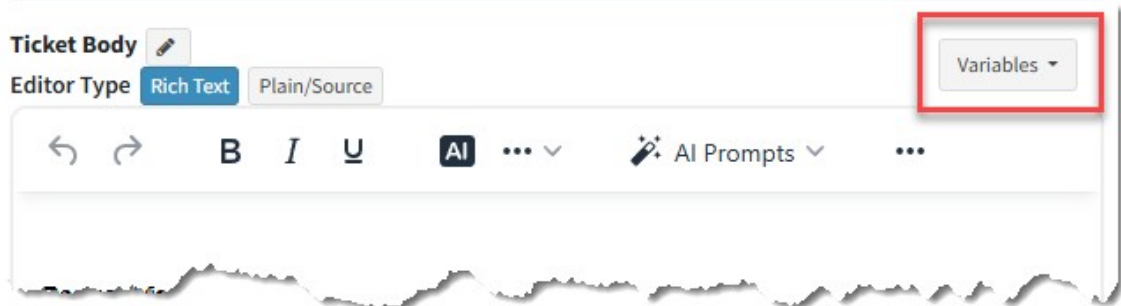
Action that references a preset ticket body

Because the **Ticket Body** input specified that a Preset Body is used, a template with the name from the **Interaction Body Name** input is automatically created. As soon as you specify preset text is used, the placeholder will appear. You do not need to save the Workflow for the template to appear.



Text blob for ticket body

When adding variables to your template, use the variable picker to get the correct syntax.



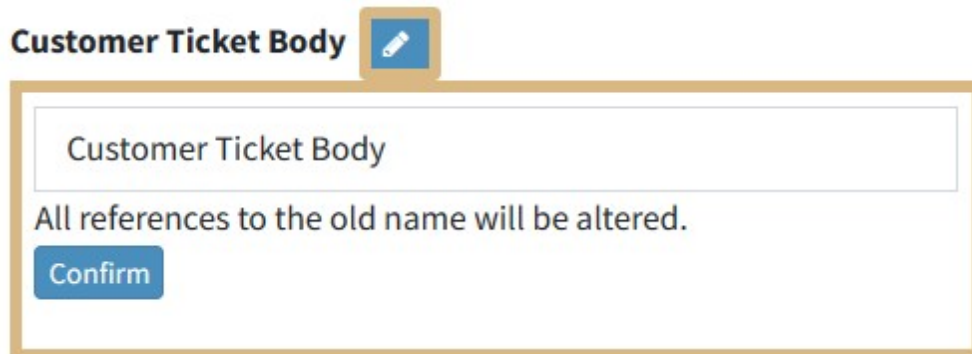
The variable picker

Editing Templates

You can modify and save the contents of templates at any time. When you save the workflow configuration, the new text will be used for any interaction created from that point forward. Templates used previously within tickets, etc., will not be updated. The change will only impact new interactions.

Renaming Templates

You can rename templates by clicking on the edit pencil next to their name. When you confirm the new name, all references from panels will be updated to match the new name.



Changing the name of a template

13.8.3 Data Files



Some use cases, like preparing a cost estimate as part of a request for proposal, require a data file with various data fields. You can define these values in a file definition and then upload your data in Excel format from the Data Files tab. The data is then available within your agent answer panels for use in grid properties. The workflow interaction properties include a "grid" property that can reference these data files, and fetch data based on a value in the file. For example, when the agent enters a SKU into the grid the associated description and price can be automatically added to the grid. You can combine other properties, like quantity, to prepare estimates or other documents for delivery to customers and prospects.

You can create an unlimited number of data files. Once you prepare your file definition and upload your file, changes to the definition will require you to re-enter your data.

Creating a new data file

To create a new data file, click the **Add Data File** button and enter a name for the file. The name will be referenced by properties so it should be short and meaningful.

Price List

Data File Name

Price List

Definition

Upload file

Choose File
No file chosen
Upload

File must be Excel (xlsx) format.

Naming a data file

The first step in creating the file is to define all of the fields. The file is comprised of columns of data, and each column must have a unique field name and defined data type. To create your file definition, click the edit

pencil. Then add your column definitions as described below making sure they are in the same order as the file you will upload.

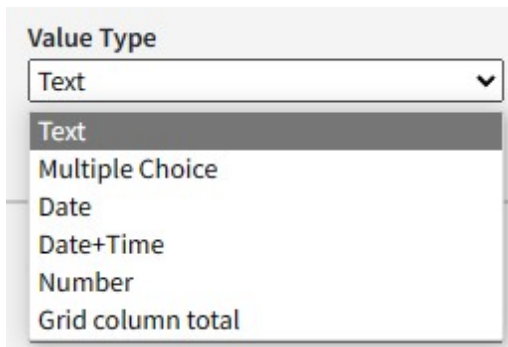
The screenshot displays the 'Price List' configuration page. At the top, the 'Data File Name' is set to 'Price List'. Below this is the 'Definition' section, which contains three field definitions:

- Field 1:** Field Name 'SKU', Value Type 'Text'. Description: 'Name of this sub-field within the property. User can enter a simple single line text value (450 chars max).' A 'Remove Field' button is present.
- Field 2:** Field Name 'Description', Value Type 'Text'. Description: 'Name of this sub-field within the property. User can enter a simple single line text value (450 chars max).' A 'Remove Field' button is present.
- Field 3:** Field Name 'Price', Value Type 'Number'. Description: 'Name of this sub-field within the property.' A 'Remove Field' button is present.

An 'Add Field/Column' button is located below the field definitions. The 'Upload file' section includes a 'Choose File' button, a 'No file chosen' indicator, and an 'Upload' button. A note states 'File must be Excel (xlsx) format.' Below this is the 'File Data' section, which is a table with three columns: 'SKU', 'Description', and 'Price'. Each column has an empty input field. A red 'x' icon is visible in the bottom right corner of the table area.

A simple price list file definition

The available data value types are similar to segment interaction properties.



After the definition is prepared, you can either manually enter the data into the File Data grid, or upload your Excel file that matches the definition. In our example, we upload a file to get this final result.

Price List ▼

Data File Name

[Definition](#)
NOTE: Changing the file definition will clear all file data.

<p>Field Name <input type="text" value="SKU"/> Name of this sub-field within the property.</p>	<p>Value Type <input type="text" value="Text"/> User can enter a simple single line text value (450 chars max).</p>
✖ Remove Field	
<p>Field Name <input type="text" value="Description"/> Name of this sub-field within the property.</p>	<p>Value Type <input type="text" value="Text"/> User can enter a simple single line text value (450 chars max).</p>
✖ Remove Field	
<p>Field Name <input type="text" value="Price"/> Name of this sub-field within the property.</p>	<p>Value Type <input type="text" value="Number"/></p>

Upload file

File must be Excel (xlsx) format.

File Data

SKU	Description	Price	
hk75	Three quarter inch base	75.4	✖
hk88	Full size base	94.77	✖
kj22	Half sized tube	100.25	✖
lm33	Four point connector	300.01	✖
jj44	Connection extension	25.11	✖
			✖

A completed file definition

Performing File Maintenance

You can edit the rows of your data file manually, or upload a new file to replace the contents. You can upload new files at any time as long as they

match the file definition. **If you change the file definition, all data will be cleared from the table.**

13.8.4 Segment Properties



Your workflow forms may include references to settings within a specific [segment](#) of your tenant. Workflow configurations use a mapping process where you provide a friendly name within a workflow panel (like a submit form), and then you associate it with the value in your tenant. This allows you to import and export workflow configurations between tenants without the issue of the underlying IDs of the item being different. For example, the ID of your Technical Support topic in your tenant might be 10. But if the workflow is imported into another tenant, that same topic name might have an ID of 11. Separating the mapping from the panel configuration makes it easy to import workflows into your tenant with minimal configuration.

There are three types of segment values that can be referenced in your workflow: Contact Properties, Interaction Properties, and Calendars.

The screenshot displays the 'Segment Properties' tab in the Custom Forms Admin Menu. The top navigation bar includes 'Basic Setup', 'Panels', 'Templates', 'Data Files', 'Segment Properties' (active), 'Workflow Properties', 'Topics', 'Agent Lists', and 'Import/Export'. A 'Copy To Clipboard' button is visible in the top right corner. The main content area is divided into three sections:

- Contact Properties:** Contains two dropdown menus. The first is labeled 'First Name' and has 'First Name' selected. The second is labeled 'Last Name' and has 'Last Name' selected.
- Interaction Properties:** Contains one dropdown menu labeled 'Install Comment to Customer' with a pencil icon for editing. The selected value is 'Comments for Install Notice'.
- Calendars:** Contains two dropdown menus. The first is labeled 'estimates' with a pencil icon and has 'Estimates' selected. The second is labeled 'jobs' with a pencil icon and has 'Jobs' selected.

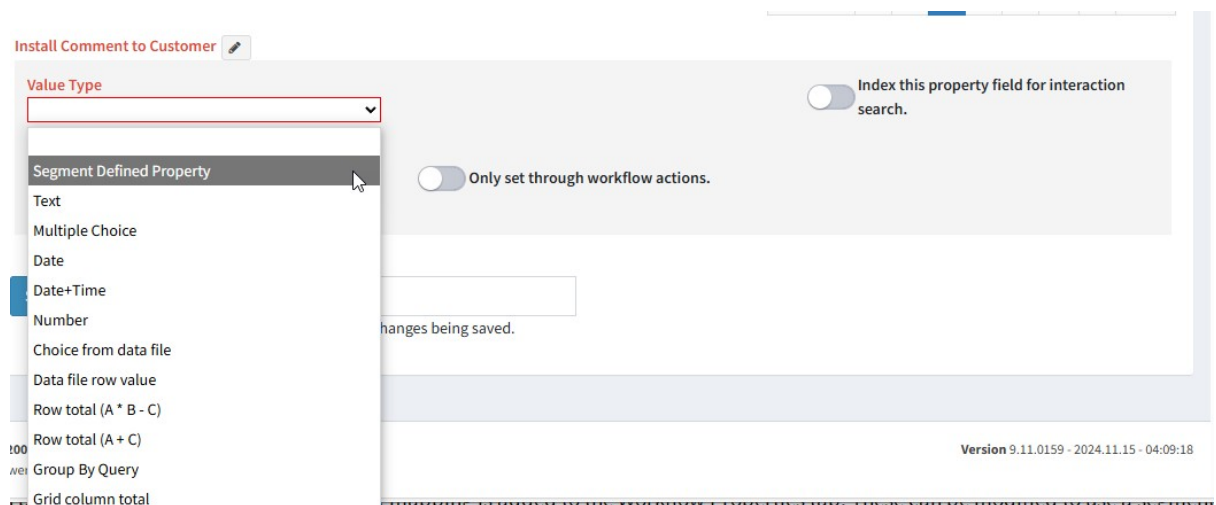
The Segment Properties tab

Contact Properties

When you insert a contact property into your workflow panel, a mapping setting is automatically created in the Segment Properties tab. Use the drop down menu to choose the corresponding property that has already been created within a segment of your tenant. You can also choose default values, like first and last name. Most customer submit forms will include contact properties, like first and last name.

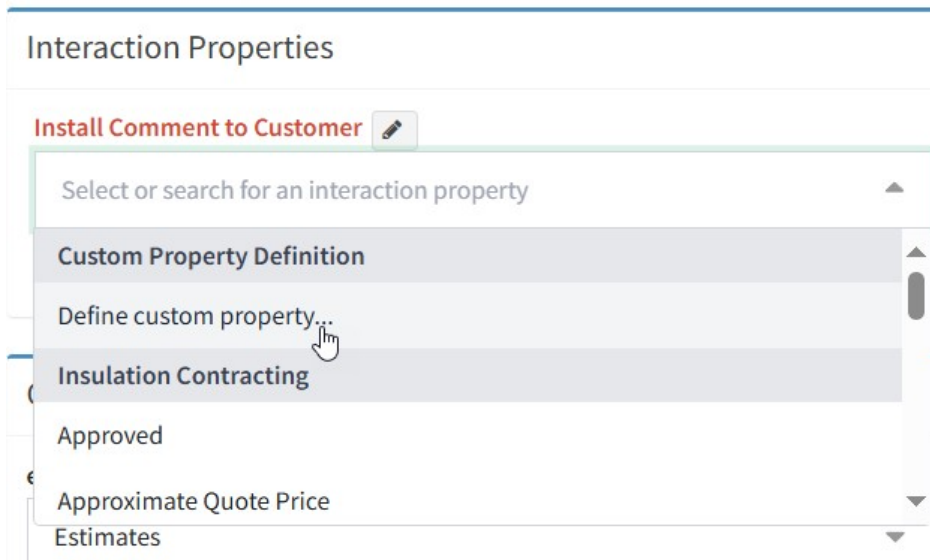
Interaction Properties

When you insert an interaction property into your workflow, the default mapping is added to the Workflow Properties tab. These can be modified to use a segment interaction property instead.



Converting a workflow property to a segment property

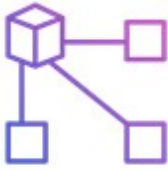
You can also convert a segment property into a workflow property by choosing **Define custom property**.



Calendars

You must create a calendar in your tenant before you create an Inbox or Manage/Calendar. Use the drop down here to select the calendar that will store your calendar events in the workflow. Create the calendar using the [Manage Calendars](#) ³⁹¹ page.

13.8.5 Workflow Properties



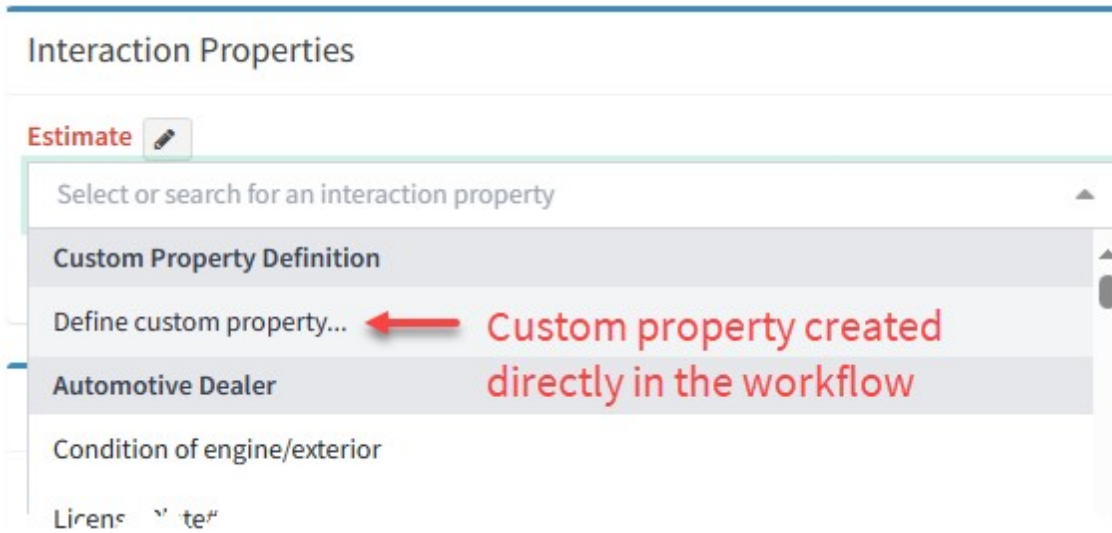
The iService Workflow system has its own interaction properties that are created within the workflow. These function similar to segment interaction case properties, but with a few differences. All workflow properties are managed as Case properties, where the same value is associated with every interaction within the Case. The workflow properties support most of the same configurations as segment properties, such as allowing multiple values. The primary difference is that workflow properties are not shared with any other workflow or page within the iService system. They are dedicated to use within the specific workflow. This removes the need to map them to IDs within your tenant, because they are the same in every tenant where the workflow is imported.

All [workflow](#) properties behave as if they were a "Case" property. This means there is only one value recorded for the property inside of the entire case (conversation). The value shown will be the same regardless of whether you are viewing a question or answer in the conversation. On the other hand, [Segment Interaction properties](#)⁶⁴⁴ can be case, question, or answer properties. If you need to save a different value for every interaction within a conversation, you will need to use a question or answer property created within a Segment.

Interaction Property Methods

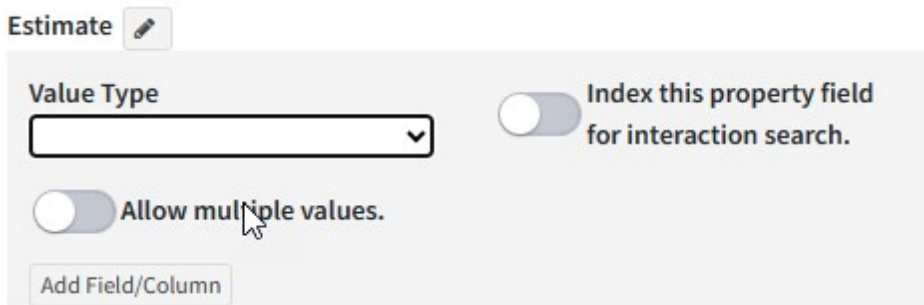
There are two methods for using interaction properties within a workflow. You can use existing interaction properties created within your tenant's Segments (Segment Defined Property), or you can create a custom property that only exists within the workflow interface. Workflow interaction properties are not listed in the [Topic settings](#)⁶⁹¹ for your segments and cannot be added directly to non-workflow interactions. Otherwise, they function similarly.

To create a workflow property, select **Define Custom Property**.

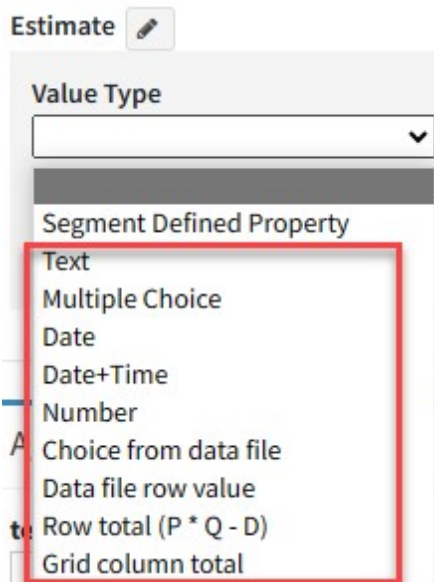


Creating a custom property

In the property definition panel, select the type of value for the input. Turn on the "Index this property field" switch if you want to include this field in the Search Interactions page. When you enable indexing, the values in the database are indexed and made available for searching. If you want to allow more than one value for the property, like a list of product preferences, turn on the Allow Multiple Values switch. This will add the option for the user to enter an unlimited number of values for the property.



The value types available are shown below.



Workflow property value types

The setup for these value types is different than the Segment Defined Properties. All of the values are configured directly within the workflow panel. For example, a multiple choice property functions like a segment property that uses a list of values. In a segment property, the list is defined in the Tenant Settings - Lists page. In a workflow property you create the list directly within the workflow.

Some value types are only valid for a grid property and require additional setup before they can be defined. Grid properties have multiple columns in their display and can perform special functions. These value types are listed below:

Choice from data file - This is the look up field in a grid property where you choose the primary value that will return other values. An example would be select a product name to return the price.

Data file row value - This value is returned from a data file and not entered by the user. An example would be to return the price in this field when the user selects a product. This field does not allow direct input.

Row total (P * Q - D) - This is a preset formula for making a price calculation. The value is computed as Price x Quantity minus a discount amount.

Grid column total - If your grid has numbers, you can insert a total using this property. An example would be calculating a total price for an estimate based on the row totals in the grid.

Renaming Workflow Properties

To rename an object, click on the edit pencil next to the objects name that was entered in your panel.

Renaming a property

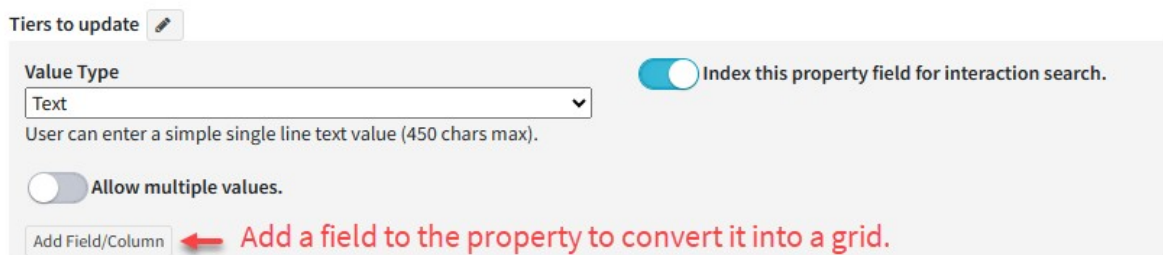
If you change the name of a referenced object directly in a panel, the object mapping **will be removed and replaced by a new property definition**. You will need to remap the reference in the mapping page.

Be cautious when renaming workflow properties! Workflow properties are a special type of property stored in the iService database that are referenced by their name. Changing the name after the property has been in use will make old data inaccessible from search or reporting. This is not an issue for properties mapped to Segment Properties because the workflow name is separate from the segment configuration of the property.

Creating a Grid Property


Workflows include a special type of property that mimics a spreadsheet or table of data. This property inserts a table that can look up values from a file and perform basic calculations. It is often used for generating estimates and proposals. The grid will automatically add new rows as you fill in the first row.

To create a grid property, start by defining the first column of the grid. Then, click Add Field/Column to convert the property into a grid.



Creating a grid property

This will update the property as shown below with multiple columns.

Tiers to update 

Field Name <input type="text" value="Tier"/> Name of this sub-field within the property.	Value Type Text User can enter a simple single line text value (450 chars max).	<input checked="" type="checkbox"/> Index this property field for interaction search.
Remove Field Field Name <input type="text" value="Comment"/> Name of this sub-field within the property.	Value Type Text User can enter a simple single line text value (450 chars max).	<input type="checkbox"/> Index this property field for interaction search.
Remove Field Field Name <input type="text" value="Priority"/> Name of this sub-field within the property.	Value Type Multiple Choice User chooses a value from a preset list of values.	<input type="checkbox"/> Index this property field for interaction search.

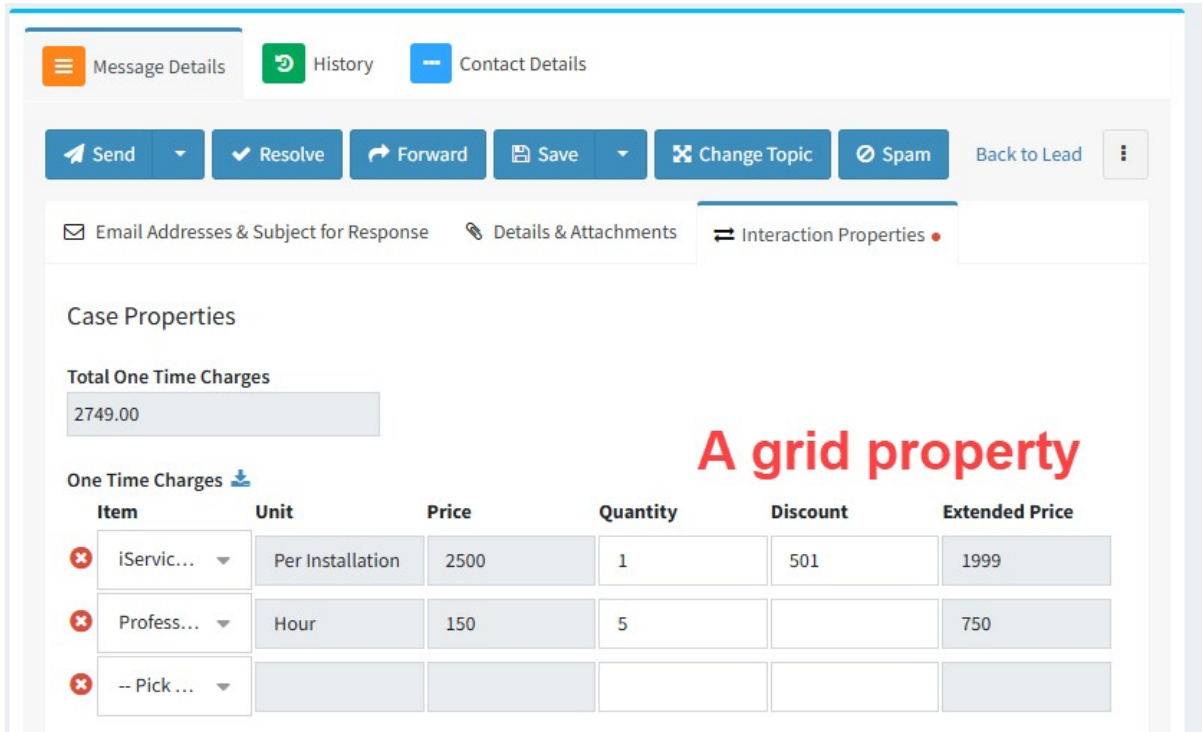
Value Choices

[Delete 'High'](#)

[← Add Value](#)

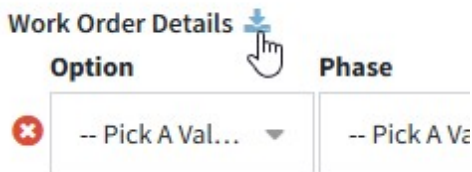
Example grid property

Grid properties are included in the Interaction Properties tab of your interaction.



A grid property example

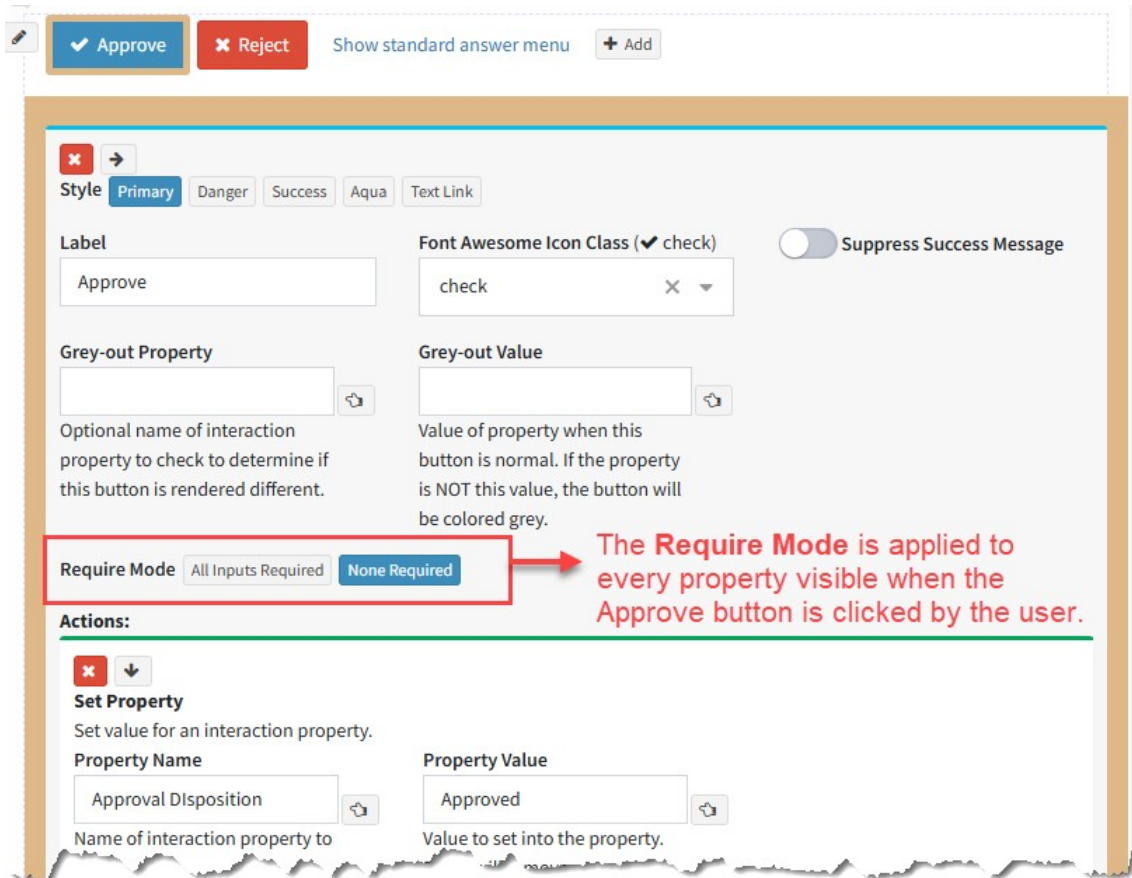
You can download the contents of a grid property to a CSV file by clicking the download icon next to the property name.



Required Workflow Properties

Required workflow properties behave differently from Segment Properties. Segment properties can be used by associating the property with a topic. The topic then determines when the property is shown, and it can be required in every use case. Workflow properties, however, are not associated with a topic. They are only referenced directly within workflow forms, and the required attribute is dependent upon the submission button.

Workflow forms may include multiple buttons, and properties must be defined as required within the action buttons themselves. The required property configuration is set within the button because each button can run different action. Some properties may only be required for specific button clicks. When All Inputs Required is chosen iService will require all the visible form fields on the page. If an input field is not visible (e.g., within a hidden tab) it is not required.



– Inserting existing contact properties into an Interaction Property

In some use cases, the person submitting a form will be logged into iService and have existing contact properties. For example, their name or other details that you want to save directly into a ticket. You can pass

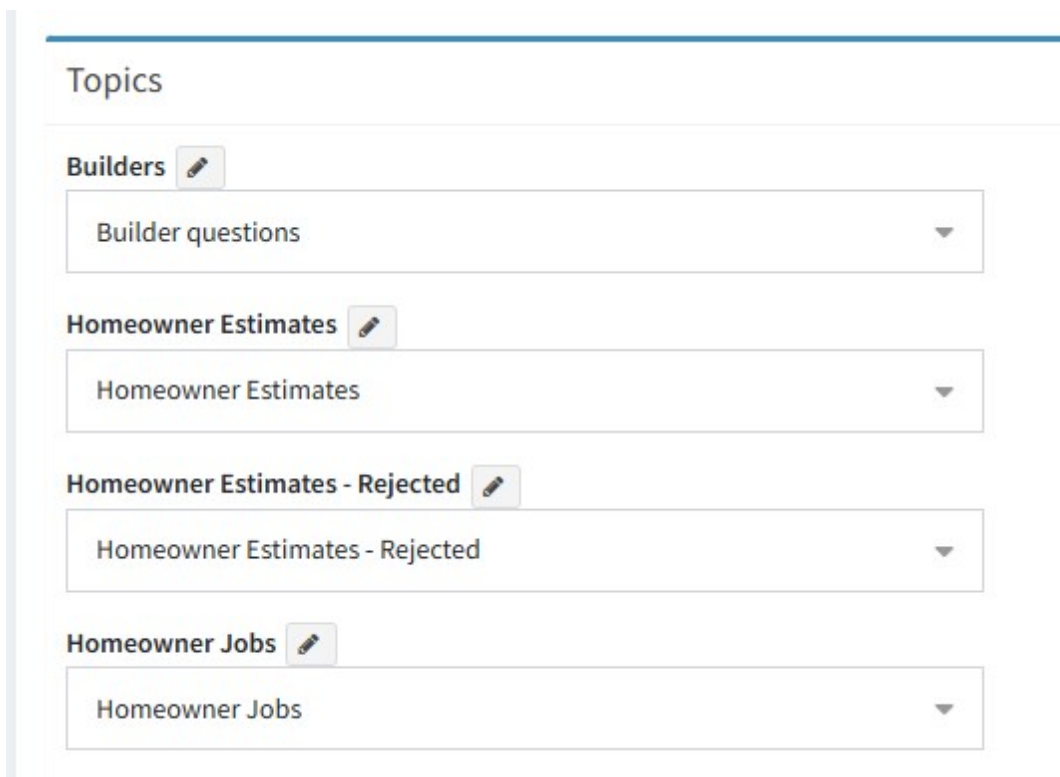
these values into an Interaction property using the Set Interaction Property action and the \$value variable for contact data.

For the value you want to save into a property, use the format below to fetch it from the iService database.

`$value -customer(property 'XXX')` where xxx is the name of the contact property.

13.8.6 Topics

Every interaction within iService is associated with a topic. When you create a ticket, note, or send email you must specify a topic.



13.8.7 Agent Lists

Some workflow actions may require selecting a user from a list, such as an approver. These lists are built in the Agent Lists page.

Agent Lists

Assigned Sales Rep

- ✕ Emily Mitchell
- ✕ Grace Mackie
- ✕ Jason Alexander
- ✕ Justin Case
- ✕ Liam Murphy
- ✕ Nick Lee
- ✕ Noah Davis
- ✕ Shannon Macleod

Field Manager

- ✕ Avery Coleman

Add Agent: 8 options selected ✕ ▼

Add Agent: 1 option selected ✕ ▼

13.8.8 Import/Export

Use this tab to Import / Export individual panels, property definitions, and templates.

≡ Import/Export	
Panel - Answer panel for questions with tag "estimate" when in topic "Homeowner Estimates"	Copy Import
Panel - Answer panel for questions with tag "job" when in topic "Homeowner Jobs"	Copy Import
Panel - Agent submit form app/retrofit/submit/estimate	Copy Import
Panel - Customer submit form retrofit/submit/business	Copy Import
Panel - Customer submit form retrofit/submit/request	Copy Import
Panel - Inbox Calendar page app/retrofit/calendar/estimates	Copy Import
Panel - Manage Calendar page app/retrofit/calendar/jobs	Copy Import
Panel - Manage Calendar page app/retrofit/calendar/estimate	Copy Import
Panel - Agent submit form app/retrofit/submit/calendarestimateitem	Copy Import
Panel - Agent submit form app/retrofit/submit/calendarjobitem	Copy Import
New Panel	Import
Definition - Add comment to reminder (optional) (text)	Copy Import

Settings Menu

14 Settings Menu



The configuration of your iService system is done through the web interface. This chapter describes two types of configuration settings: tenant level settings, and segment level settings. [Tenant level settings](#)⁵⁴¹ are used by all segments. [Segment level settings](#)⁶³⁸ are unique to a particular segment. iService also includes built-in forms that can be customized for your specific business requirements. These forms are optional features that require configuration before agents can use them. The [custom forms admin](#)³¹⁴ menu provides links to these built-in forms that you can configure for your tenant.

Learn more about [Tenant Settings](#)⁵⁴¹.

Learn more about [Segment Settings](#)⁶³⁸.

Learn more about [Custom Forms Admin](#)³¹⁴.

14.1 Tenant Level Settings



The tenant configuration pages are used to configure tenant level settings. Tenant level information is available to all segments and is configured independent of the segments. For instance, skills used for routing can be referenced by all segments and are therefore part of tenant configuration. And, agents may be members of multiple segments and are therefore configured within tenant settings. Some tenant level settings are optional, but there are a few that are required in order to use iService.

Required tenant settings

Agents – the Agent Settings page is used to add, modify, and remove agents from iService. You must configure your agents before they can login to iService.

Optional tenant settings

Other than agents, the rest of the tenant settings are optional. The default installation of iService will function without changes to the other tenant settings.

14.1.1 Agent Admin



Agents are “internal” users of iService that handle questions from contacts, populate the knowledge base, and administer the iService web site. The Agents page can be accessed by Tenant Administrators and CRS Managers. New Agents are added by clicking the New Agent button. To remove an agent, select their contact and click Remove Agent.

The Agent List

The agent list provides summary information about all of your agents. The license details section shows the number of licenses used and the total authorized. Some agent settings can be updated directly in the agent list, such as receive notifications, by toggling the switch on or off.

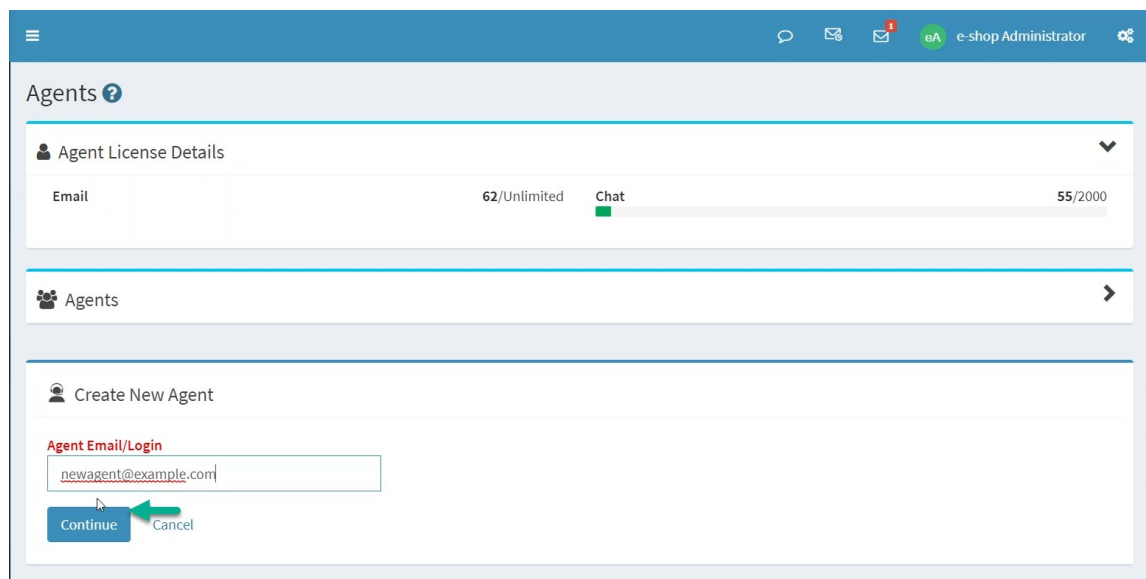
Email	Full Name	User Type	Segment Access	Skills	Department Membership	Logged In	Chat Available	Last Activity
	Landlord Administrator	Super User	*** hidden global parent ***, e-shop, sales	accounts, commercial, new_user_add-notice, operations, products, property, sap, shipping, system security, tech	sales	●	●	2020-10-19 4:34:25 PM
	Julie Margonia	CSR Manager	sales			●	●	2011-03-28 12:47:37 PM
	Damodhar	Administrator	e-shop, logistics		it project requestors	●	●	2017-05-03 12:12:24 PM
	e-shop Administrator	Administrator	e-shop	accounts, products, shipping, tech		●	●	2020-10-26 9:54:07 PM
	Justin Case	CSR	e-shop	commercial, products, shipping		●	●	2020-10-20 1:26:10 PM

The Agents list

Adding New Agents (Contact is not in iService)

In most cases, the agent you're adding will not be a contact in the iService database. You must enter a password for the user that they can change upon sign in. We suggest using a strong hash type of random password and requiring the user to reset it using the [password reset function](#).

Start by clicking the **New Agent** button. Then enter the agent's email address and click **Continue**.



The screenshot displays the 'Agents' management page in the iService interface. The page title is 'Agents' with a help icon. Below the title, there are two main sections: 'Agent License Details' and 'Agents'. The 'Agent License Details' section shows 'Email' with a value of '62/Unlimited' and 'Chat' with a value of '55/2000'. The 'Agents' section has a right-pointing arrow. Below these sections is the 'Create New Agent' form. The form has a title 'Create New Agent' and a label 'Agent Email/Login'. The input field contains the email address 'newagent@example.com'. Below the input field are two buttons: 'Continue' and 'Cancel'. A green arrow points from the 'Continue' button to the 'Cancel' button.

Next, enter their initial password and click **Continue**.

Agents ?

Agent License Details

Email	62/Unlimited	Chat	55/2000
-------	--------------	------	---------

Agents

Create New Agent

Agent Email/Login

newagent@example.com

Enter an initial password for the agent. The agent should change their password immediately after signing into iService.

Password

Continue Cancel

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Then, select their user type and click **Create Agent**.

Agents ?

Agent License Details

Email	62/Unlimited	Chat	55/2000
-------	--------------	------	---------

Agents

Create New Agent

Agent Email/Login

newagent@example.com

Enter an initial password for the agent. The agent should change their password immediately after signing into iService.

Password

ChangeMe!

Agent User Type ?

CSR

Create Agent Cancel

Adding New Agents When The Contact Is Already In iService

In some cases, your new agent may have already interacted with iService. If their email address is already in iService you will not assign them an initial password. The user will either already know their password, or can reset it using the [password reset process](#)⁶⁹.

The process is identical to adding an agent that is not already in iService, except there is no input offered for the initial password. After clicking New Agent and entering the existing email address, iService will inform you that no initial password is required. Click **Continue** to select the User Type.

The screenshot shows the 'Agents' management interface. At the top, there's a navigation bar with the user's name 'e-shop Administrator'. Below that, the 'Agents' section is visible, including 'Agent License Details' and a table showing 'Email' with '62/Unlimited' and 'Chat' with '55/2000'. The main area is the 'Create New Agent' form. The 'Agent Email/Login' field is filled with 'newagent@example.com'. A message below the field states: 'A contact already exists in your tenant with this login. Since the user already has a password, they will use it when logging in as an agent. If the user doesn't know their password, they can use the reset process to set a new one.' The 'Continue' button is highlighted in blue.

Select the Agent User Type and click **Create Agent**.

This screenshot is similar to the previous one but shows the 'Agent User Type' dropdown menu open. The dropdown is currently set to 'CSR'. The 'Create Agent' button at the bottom of the form is now highlighted in blue, indicating it is the next step in the process.

Agent Details

The Agent Details tab

Agent Details

The basic setup details for an agent are described below.

1 – The agent name (or login if there is no name specified) is displayed here.

2 – Windows Domain Login Name – Active directory authentication authenticates the user to iService based upon their Windows login. To utilize this feature, the agent’s domain and login name must be entered here. The name should be entered in the format domain\login_name. If the agent is currently logged into the domain, their authentication will be passed to iService and they will not have to re-login to iService.

The agent’s browser must be configured to support NTLM authentication. See [IIS and Browser Configuration for Active Directory](#)

[Authentication](#) for instructions on configuring Active Directory Authentication. The page for auto-agent login is agent.aspx rather than the default.aspx web page. When the agent loads this page while logged into their Windows domain, they will be automatically logged into iService.

NOTE: Windows Authentication is removed from version 9.10 of iService. Use Open ID instead of Windows Authentication when possible.

3 - Agent User Types

The following user types are available by default.

Super User – Each installation has a Super User that is able to create administrator accounts. Since users can only create accounts that are at a level below them, this is the only account that can create Administrators.

Administrator - These users have the ability to access all areas of iService including the Admin Tools pages. Administrators are generally the people that maintain your topic tree, add new users, create mailboxes, etc.

Anonymous – This user type allows those with no login account to see what is granted to this account.

Customer – If you have a CSR or Administrator that leaves your company or should no longer have access to iService, you can change their user type to customer. This will retain their information within iService for reporting and message archival purposes, but limit their access to publicly viewable pages.

CSR - this user type is designed for customer service representatives that will be answering questions, but not managing other users. They have access to the Message Queue => My Queue page, but can't access the Supervise pages within the Message Queue. The CSR also has access to Customer Info and Find Answers, including private articles within Find Answers.

QACSR - this user type is designed for customer service representatives that will be answering questions, but not managing other users. As a QA CSR, they do not have the ability to send responses to customers. They can only submit proposed responses that must be reviewed by a QA Manager before the response is sent.

CSR Manager - this user can access the same pages as the CSR, plus the Manage Message and Chats pages within the Message Queue.

QA Manager - this user can access the same pages as the CSR, plus the Manage Message and Chats pages within the Message Queue. In addition, they receive the proposed responses from the QA CSR's for review and approval via an additional GetQA button.

The Super User can modify the access rights assigned to the [default User Types](#)⁶¹⁵ and create new User Types. However, be careful when modifying access rights to avoid creating a user that has more access than the defaults. In order to access the details of a contact, agents must have a superset of the rights assigned to that contact.

4 - Agent Status – This panel shows whether the agent is logged in, whether they're available for chat, and the last date/time they completed an activity. Agent activity is defined as use of any iService web service (loading any page will use a web service). Agents can be logged out by an administrator via the Logout Agent button. Any unsaved information Created by the agent will be lost when the agent is logged out by an administrator.

5 – Segment Access – Agents must have access to at least one segment in order to answer messages and view contact information. Segment access is specified by checking the box for each segment to which they are granted access.

6 – Department Membership – When an agent is assigned to a department, they inherit all of the segment access rights and skills of that department.

7 – Skills – Skills are assigned to agents to determine the messages routed to them via the Msg Queue > My Queue page when the request a new message. Agents are limited to messages where their skills match ALL of the skills assigned to a message's topic. Keep in mind that if you only have a small number of Agents, or you want all Agents to answer questions from all topics, you don't have to use skills.

Agent Settings

Agent Setting control various behaviors, such as whether the agent receives notifications and special settings created with each segment.

8 - Receive Notifications – This is an optional field for each Agent. When the Receive Notification option is True, iService will notify this Agent via email when a new message is received by a topic that matches the Agent's skills. Agents are also notified when the topic is changed for messages from a topic which they don't have the required skills to a

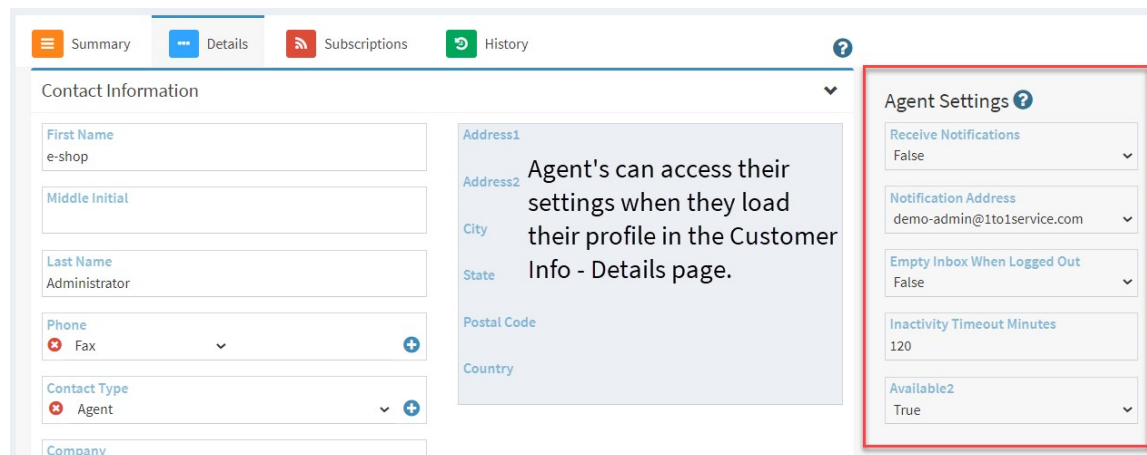
new topic in which they do have the required skills. Notification Address specifies the address to which notifications will be sent.

9 - Empty Inbox When Logged Out – This option will reassign all interactions from the agent’s My Queue back to an unassigned state when the agent logs out. Unsent responses they started will be available to the next agent that has the interaction assigned.

10 - Inactivity Timeout Minutes – When an agent has been inactive for this period they will be automatically logged out of iService. The default timeout within iService is 90 minutes. When this value is left blank the default timeout of 90 minutes will apply.

11 - Segment Agent Properties – You can create custom contact properties that are only available to agents. Those properties are viewed and set in the Agent Settings tab, rather than within the Customer Info - Contacts tab like other contact properties.

Agents can view their own settings when viewing their contact details in the Contact Details page as shown below.



Viewing the settings for an agent in the Contact Details page

Agent Contact Details

The screenshot displays the 'Agent Contact Details' page. At the top, there are three tabs: 'Agent Details', 'Agent Contact Details' (which is active), and 'Agent Stock Responses'. Below the tabs, the page is titled 'Global'. The main content area contains several input fields and dropdown menus:

- First Name:** Justin
- Middle Initial:** (empty)
- Last Name:** Case
- Phone:** A dropdown menu showing 'Fax' with a red 'x' icon and a blue '+' icon.
- Contact Type:** A dropdown menu showing 'Agent' with a red 'x' icon and a blue '+' icon.
- Company:** Demonstration Company
- Job Title:** Service Representative
- Logins:** A list of login entries. The first entry is 'demo-csr' with a red 'x' icon. The second entry is 'Email' with a red 'x' icon and the value 'demo-csr@1to1service.com'.

On the right side, there is a vertical sidebar with the following fields:

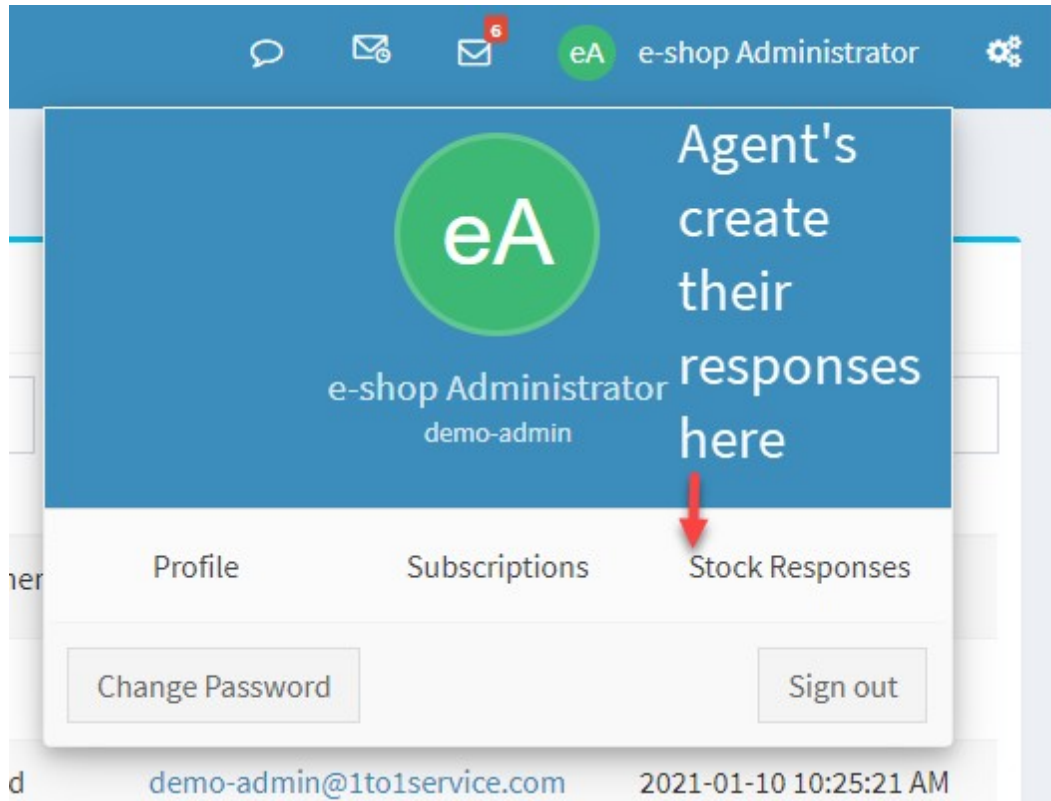
- Address1
- Address2
- City
- State
- Postal Code
- Country

Contact details within the agents tab

The agent's contact details, such as name and phone number, can be updated from the Agent Contact Details page as well as the Customer Info>Contact Details page. This is the same page as [Contact Details](#)¹⁶². Agents are contacts in the iService database, just like customers.

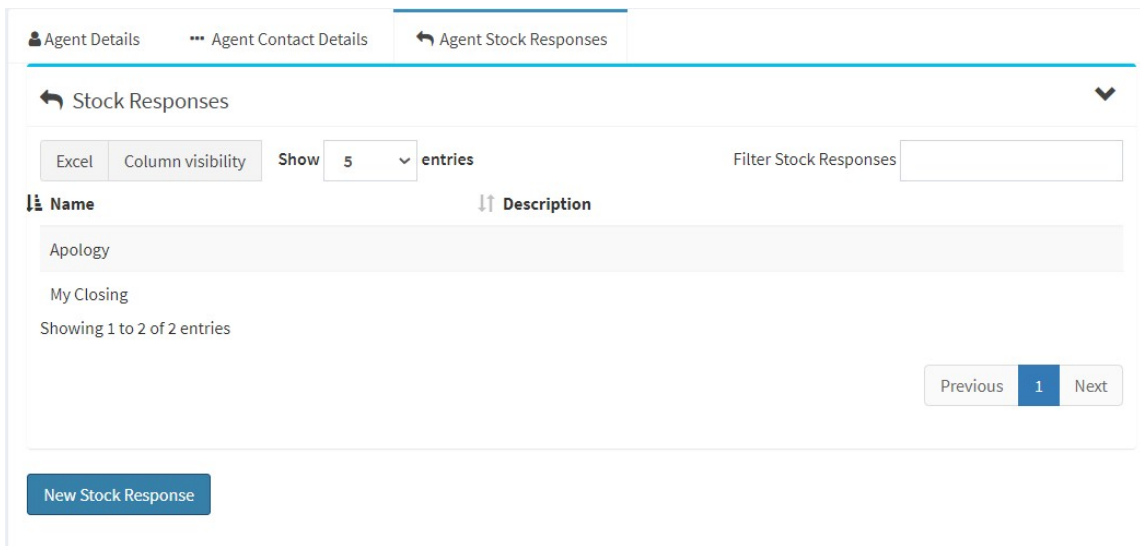
Agent Stock Responses

Agents can create their own stock responses from the My Account > Stock Responses page.



Agent's create their stock responses here

Administrators can access the personal stock responses created by agents from within the Agent Stock Responses tab in agent settings, as shown below.



The Agent Stock Response tab

14.1.2 Departments



Departments are used to organize groups of Agents according to common attributes, such as job function. Skills and Segment access can be assigned to Departments and then inherited by agents that are assigned to the department. If you have groups of agents that require the same skills in segment access, departments can streamline your setup process. You can also use departments to facilitate custom reports, and within round-robin filters to evenly distribute questions among agents in the department. See the [Filters](#) section for details on configuring round-robin filters.

Department Settings ? Home > Tenant Settings > Department Settings

Departments ▼

Copy Excel PDF Column visibility Show 10 entries Filter Departments

Id	Department Name	Description	Segments	Skills
111	Sales	Departments related to sales activities	Sales	Product Sales
112	Customer Service	Department Customer Support	Customer Support	Customer Service

Showing 1 to 2 of 2 entries

Previous 1 Next

New Department Delete Department...

The Departments list

The departments list shows the segments and skills assigned. Add a new department or remove department from this page. Review the list of agents assigned to the department before deleting it and make appropriate adjustments.

The screenshot shows the 'Department Configuration' interface. At the top, there is a title 'Department Configuration' with a small icon. Below this, there are two input fields: 'Department Name' (callout 1) and 'Description' (callout 2). Underneath, there are two sections: 'Segments' (callout 3) with checkboxes for 'Sales' and 'Customer Support', and 'Skills' (callout 4) with checkboxes for 'Product Sales' and 'Customer Service'. A 'Save' button is located below the Segments section (callout 5). At the bottom, there are two sections: 'Agents In Department' (callout 5) listing 'Jacob Smith', 'Justin Time', 'Alek Packard', and 'Robert Charleston' with red 'x' icons, and 'Round Robin Filters With This Department' (callout 6) listing 'Sales Segment', 'Sales Lead', 'Customer Service Segment', and 'Account Cancellation'. A callout 7 points to the Segments and Skills sections.

Configuring a department

1. The department name is shown in other menus within iService.
2. Provide a short description of the purpose of the department.
3. Agents in this department will inherit the segment access shown here.
4. Agents of this department will inherit the skills shown here.
5. This section shows the agents that are currently a member of the department.
6. The section shows any round-robin filters that use this department to select agents.

14.1.3 External APIs



Use the External API Settings page to save configuration details for integration with third party APIs. Each integration has its own inputs for the required credentials. For most third party integrations, once your settings are saved the related buttons will appear within the iService user

interface.

Details regarding how to use the integrated applications are described elsewhere within this user guide. The values for the External API settings are generally provided by a technical resource within your organization.

14.1.3.1 Okta OpenID Configuration



Service supports the Okta platform using an OpenID integration to simplify the agent login process. Once you create your Okta Client ID and Okta Domain, enter the values into the Okta configuration as shown below. Once you save your values the integration will be immediately enabled. There are not additional settings required. Once the values are saved, the **Sign in With Okta** button will appear on your [agent login panel](#)^[69].

Open the External APIs page, and select the Okta integration.

Click **Set New Value** to enter your details.

Sign in with Okta

Okta Client ID [Set New Value](#)

Okta Domain [Set New Value](#)

After you click Set New value, enter the value and click the Save button as shown below.

Enter your value and click **Save**.

Sign in with Okta

Okta Client ID [Save](#) [Cancel](#)

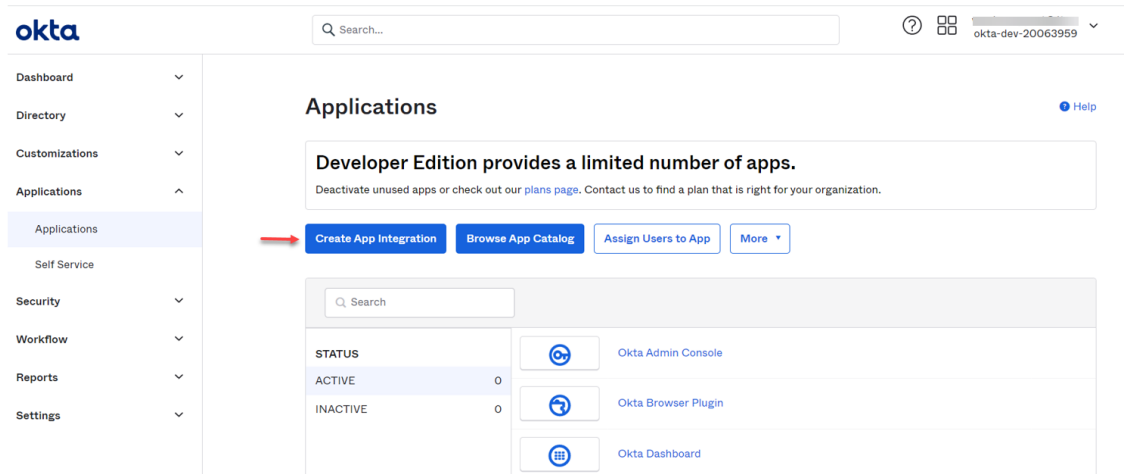
Okta Domain [Set New Value](#)

Creating Okta credentials for iService

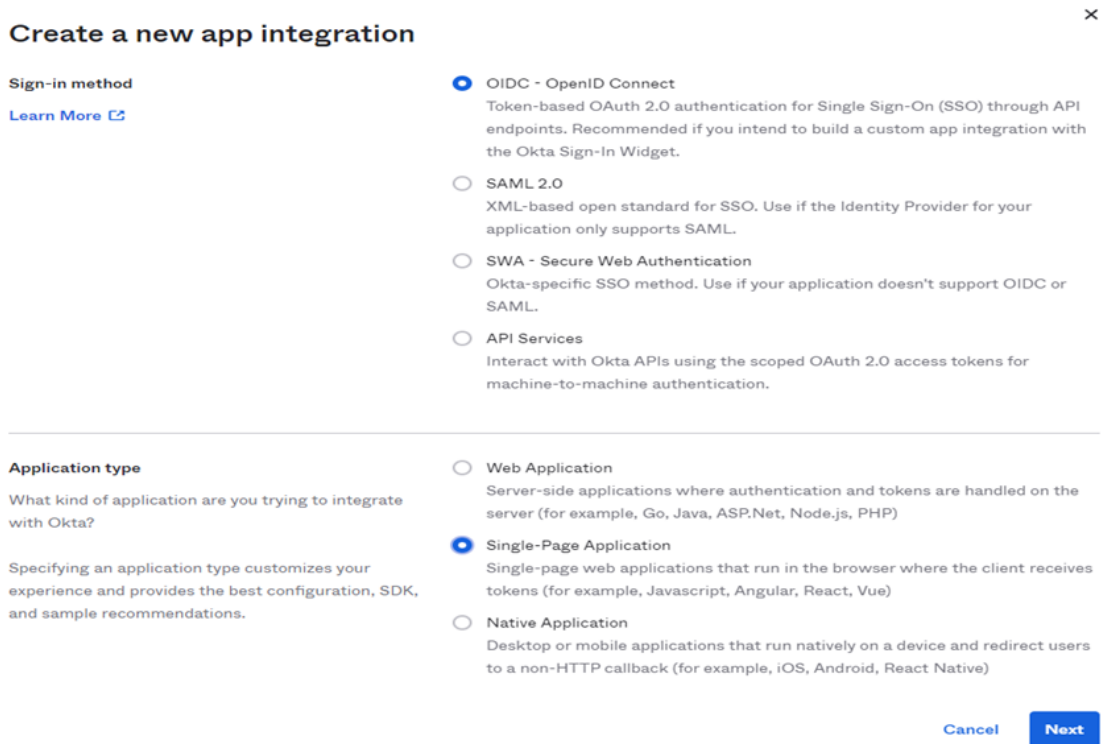
App registration with Okta

Login to your Okta console.

Go to Applications and click on Create App Integration.



Select Sign In method as OIDC – OpenID connect and application Type as Single-Page Application.







Set application name, sign in redirect url, and sign out redirect url within the Single Page App Integration page.

New Single-Page App Integration

General Settings

App integration name

Logo (Optional)   


Grant type [Learn More](#) 


Client acting on behalf of a user

- Authorization Code
- Refresh Token
- Implicit (hybrid)

Sign-in redirect URIs Allow wildcard * in sign-in URI redirect.


Okta sends the authentication response and ID token for the user's sign-in request to these URIs




[Learn More](#) 

Sign-out redirect URIs (Optional)

After your application contacts Okta to close the user session, Okta redirects the user to one of these URIs.



[Learn More](#) 

The following settings are dependent upon how your organization manages user access to applications. The example below makes the iService application available to all users in your Okta organization.

Trusted Origins

Base URIs (Optional) ✕

Required if you plan to self-host the Okta Sign-In Widget. With a Trusted Origin set, the Sign-In Widget can make calls to the authentication API from this domain.

[+ Add URI](#)

[Learn More](#) 🔗

Assignments

Controlled access

Select whether to assign the app integration to everyone in your org, only selected group(s), or skip assignment until after app creation.

- Allow everyone in your organization to access
- Limit access to selected groups
- Skip group assignment for now

Enable immediate access (Recommended)

Recommended if you want to grant access to everyone without pre-assigning your app to users and use Okta only for authentication.

- Enable immediate access with **Federation Broker Mode**

i To ensure optimal app performance at scale, Okta End User Dashboard and provisioning features are disabled. [Learn more about Federation Broker Mode](#) 🔗.

Disable Federation Broker Mode if Allow Everyone is chosen.

[Save](#) [Cancel](#)

Add settings for Origin from Security > API > Trusted origins > Edit > Allow iframe

Add Origin

Grant access to websites that you control and trust to access your Okta org through the Okta API. [Learn more](#)

[✕](#)

Origin name

Origin URL

Input origin URL for Okta API access or custom page redirect.
Expected format: https://organization.com

Choose Type

- Cross-Origin Resource Sharing (CORS)
Selecting 'CORS' enables the origin URL to access Okta APIs from Javascript.
- Redirect
Selecting 'Redirect' allows for browser redirection to 'Origin URL' after signing in or out.
- iFrame embed (Max limit 100)
Allows iFrame embedding of the Okta sign-in pages and SSO URLs. [Learn more](#)
- Allows iFrame embedding of Okta End User Dashboard
[Learn more](#)

[Save](#) [Cancel](#)

Allow Embedded widget sign-in support

Setting > account > Embedded widget sign-in support > Edi

Embedded widget sign-in support [Edit](#)

Interaction Code Allow admins to configure the Interaction Code grant type for apps and authorization servers that they manage.
[Read more](#)

Get the application client ID.

[General](#) [Sign On](#) [Assignments](#) [Okta API Scopes](#)

Client Credentials

Client ID

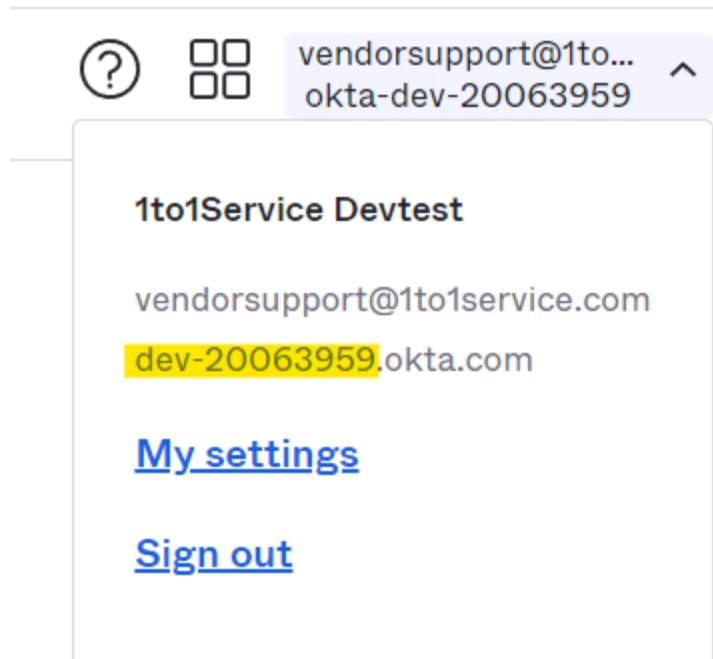
Public identifier for the client that is required for all OAuth flows.

Client authentication None

Proof Key for Code Exchange (PKCE) Require PKCE as additional verification

Get Okta domain in which application is registered.

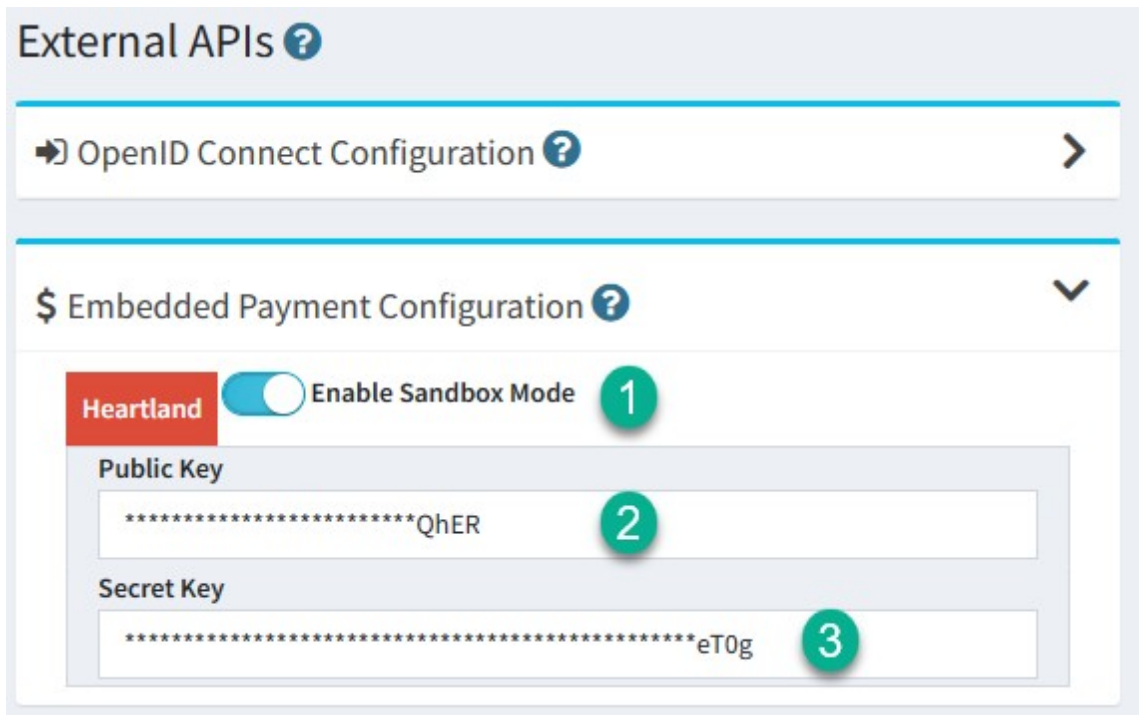
Note: Do not include okta.com while copying the domain.



Use the Client ID and Domain provided by Okta to setup your integration as shown at the beginning of this chapter.

14.1.3.2 Embedded Payment Configuration

iService includes direct integration to the Heartland Global Payments network for processing credit card payments and refunds. To configure the payment integration, obtain your Public Key and Secret Key for your merchant account directly from Heartland. Once you enter the keys into the integration, the Payment button will be automatically enabled in your iService user interface. You can control access to the payment button by [User Type](#)⁶¹⁵. Add or remove the payment access right to your user types as needed.



External APIs ?

➔ OpenID Connect Configuration ? >

\$ Embedded Payment Configuration ? ▾

Heartland Enable Sandbox Mode 1

Public Key

*****QhER 2

Secret Key

*****eT0g 3

Configuring payment integration

1 - The sandbox mode is used for testing the payment button within a Heartland development sandbox. This requires a separate set of keys that you will generally not use. This setting is primarily used for internal regression testing.

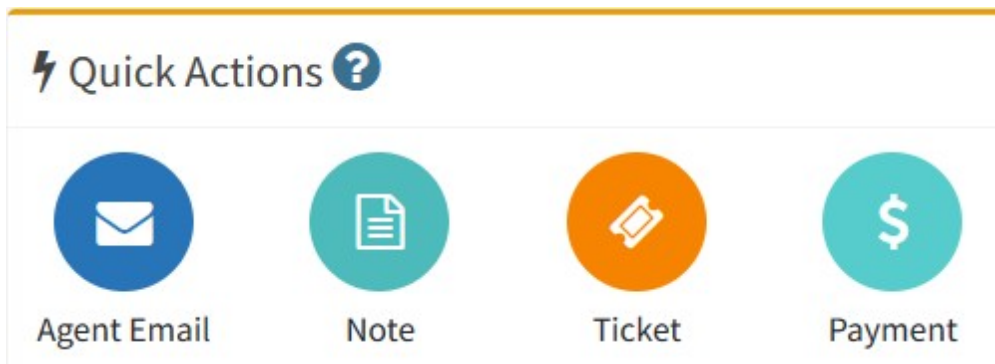
2 and 3 - Enter the public and secret keys you obtain from Heartland here. Once you save these values the payment button will appear for agents with access to the payment system. The payment button is explained below.

The Payment Button

The payment button is presented in the following locations and can be added to custom forms as needed.

Contact Summary Quick Actions

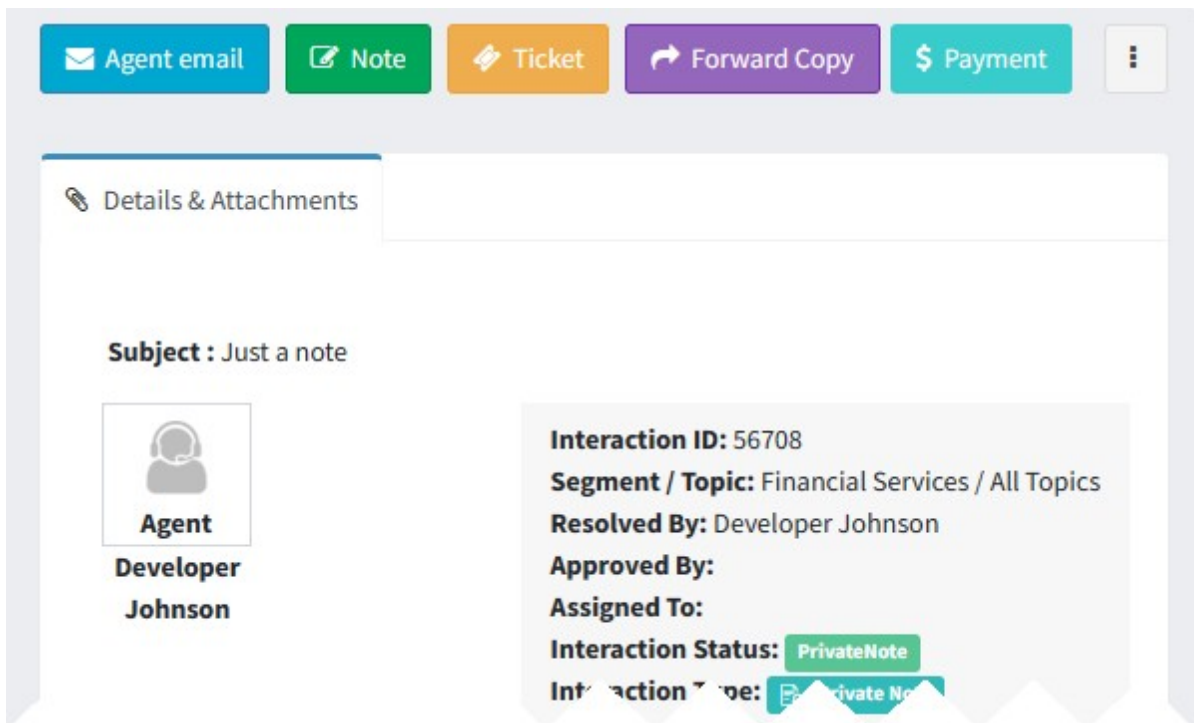
You can collect a payment for a contact directly on their Contact Summary page.



Payment on the Contact Summary Page

View Mode Actions

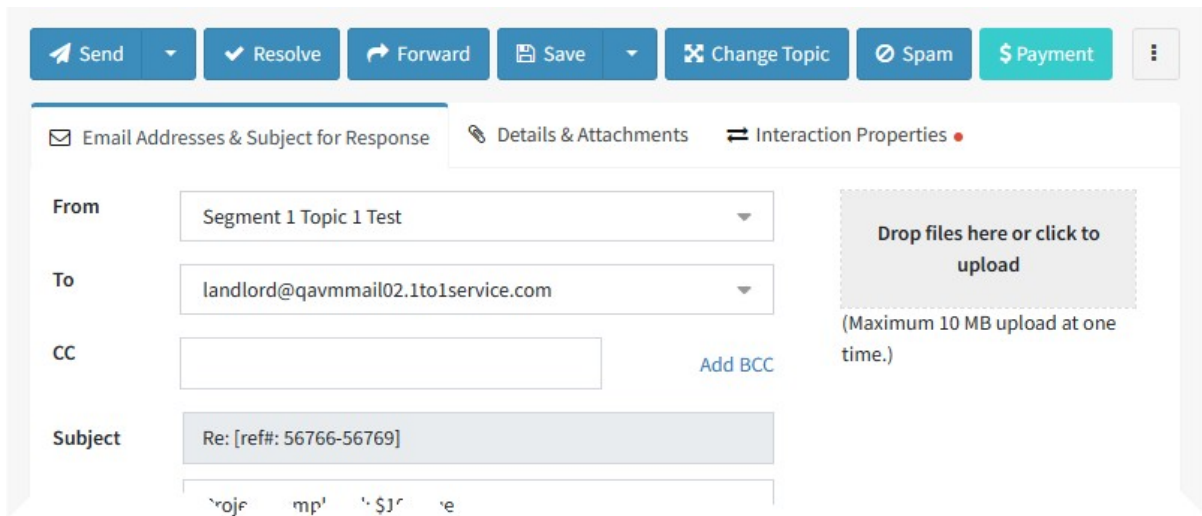
The payment button will be accessible from the View Mode of every interaction. For example, in interaction search results or the Manage Messages page.



Payment button on the View Mode menu

Action Mode

You can load the payment window from the action mode of any open question.



Payment button in the Action Mode menu

14.1.3.3 Microsoft Configuration



iService includes two integrations to Microsoft that require separate configurations: Sign in with Microsoft and Graph API. The Sign in With Microsoft configuration is an OpenID Connect integration that support single sign-on using your Microsoft login credentials. The Graph API configuration is used for any mailboxes that use the Microsoft Graph API protocol for reading and sending email.

Microsoft OpenID Integration

The screenshot shows a configuration panel titled "Sign in with Microsoft". It contains two input fields. The first is labeled "Azure Client ID" and has a "Set New Value" link to its right. The second is labeled "Azure Tenant ID" and also has a "Set New Value" link to its right.

The Microsoft OpenID integration supports two methods for authentication: personal accounts or Azure accounts. In both cases, add your Azure Client ID here (Azure Client Id is the Active Directory Application Id). The Azure Client Id is the unique identifier of an application created in Active Directory. You can have many applications create within Active Directory, and each application will have a different access level that is defined in your Azure tenant. *This is a required field for using both methods of Microsoft OpenID authentication.* When the Azure Client ID is used without the Azure Tenant ID, agents can use any Microsoft account for authentication (including personal accounts like Hotmail).

Add the Azure Tenant ID to limit access to your Azure users

You can limit agents to their Azure login by adding your Azure Tenant ID.

Creating Azure credentials for iService

App registration with Azure

We recommend reading the quick start guide provided by Microsoft at <https://learn.microsoft.com/en-us/azure/active-directory/develop/quickstart-register-app>.

There are two ways to configure iService access with OpenID Connect in Azure (the process is a bit different for each)

1. Allowing Microsoft logins only from users in your Azure directory, or
2. Allowing any Microsoft login, including from your directory.

This guide explains option 1 above. You will need to make the following three settings.

- ✓ Accounts in this organization directory only
- ✓ Redirect URI platform set to 'Single-page Application (SPA)'
- ✓ Redirect URI set to your tenant's FQDN in the format of:
<https://<tenanturl>/app>

These settings are shown in the image below.

Register an application

* Name

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (iService365 only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

After you create it, you'll be presented with the following properties. You'll need to note the Application (client) ID and Directory (tenant) ID, since you'll need to plug these into your iService tenant settings in the OpenID page.

Dashboard > iService365 | App registrations >

iService test

Search [] Delete Endpoints Preview features

Got a second? We would love your feedback on Microsoft identity platform (previously Azure AD for developer). →

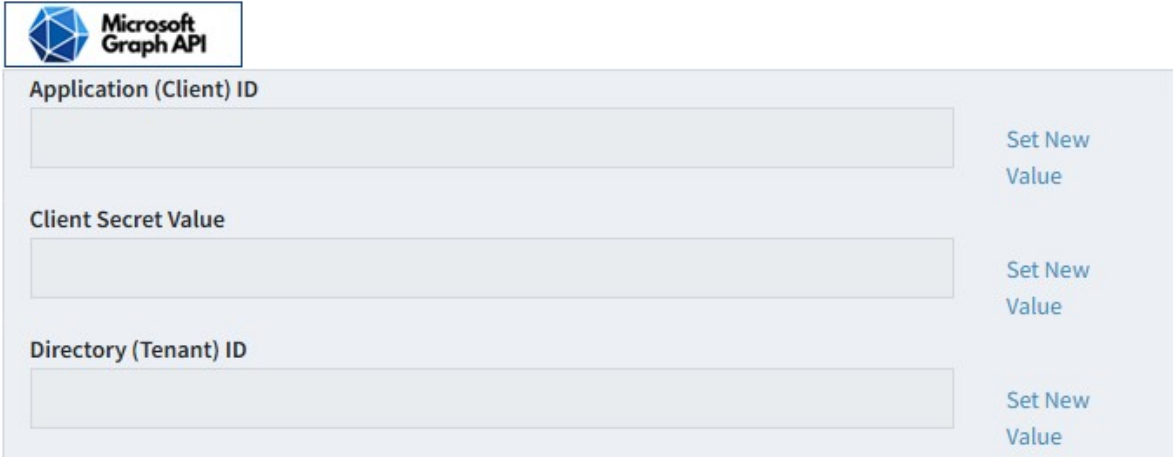
Essentials

Display name	: iService test	Client credentials
Application (client) ID	: edc	Redirect URI
Object ID	: fe	Application
Directory (tenant) ID	: a4	Managed app

Supported account types : [My organization only](#)

Use the Client ID and Tenant ID from the page shown above to complete the OpenID setup described at the top of this chapter.

Microsoft Graph API Integration



The screenshot shows a form titled "Microsoft Graph API" with three input fields and corresponding "Set New Value" links:

- Application (Client) ID**: A text input field with a "Set New Value" link to its right.
- Client Secret Value**: A text input field with a "Set New Value" link to its right.
- Directory (Tenant) ID**: A text input field with a "Set New Value" link to its right.

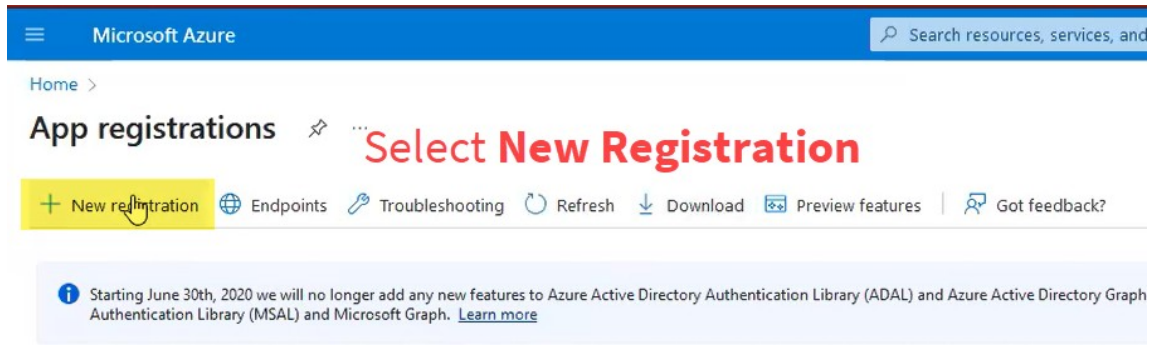
Microsoft Graph API mailboxes are configured differently from other protocols. For other protocols, user credentials are entered for each mailbox configuration. For Graph API mailboxes, however, you enter your security credentials in the External APIs page only. The credentials are not entered in the [Segment Mailbox](#) configurations pages. When using Graph API, the first step is to create an application within your Azure configuration that will contain the various mailboxes. You will use the values created from that setup to complete the settings shown above.

The Graph API integration values must be entered before any of your Graph API mailboxes may be configured.

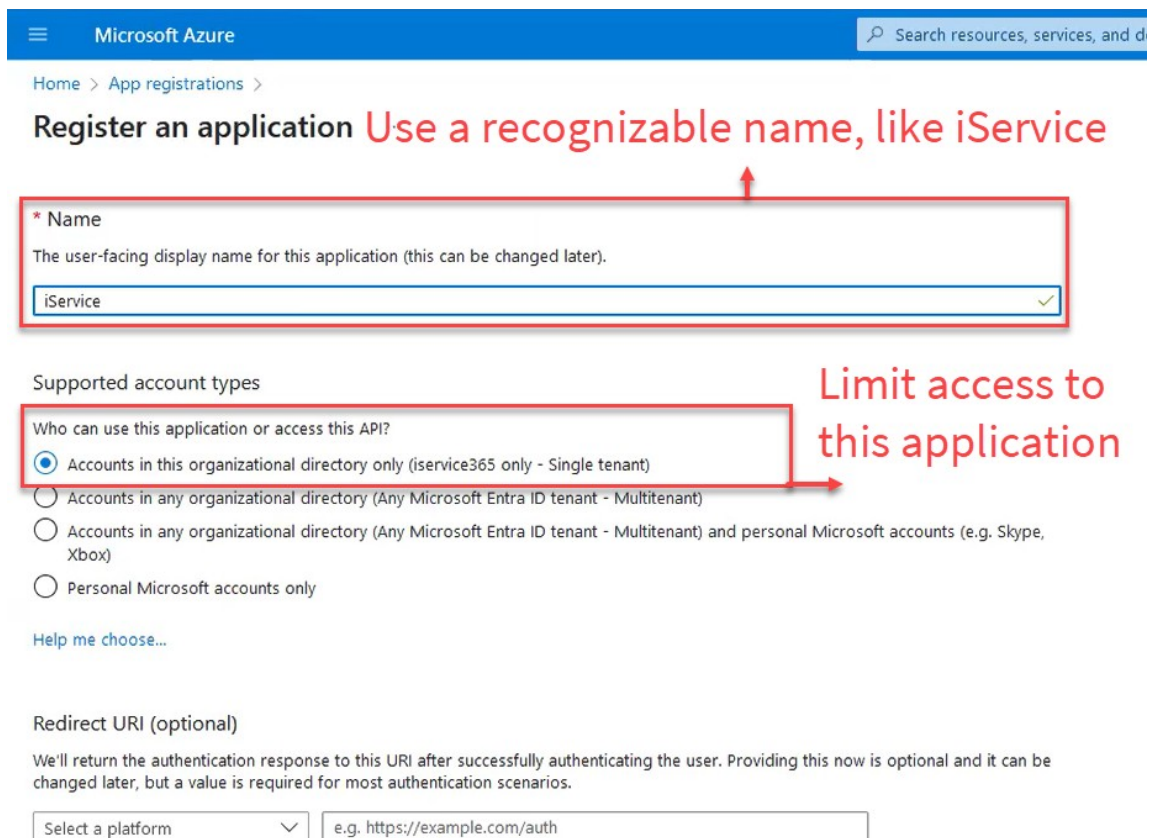
— Creating your Microsoft Graph API credentials

Create your application

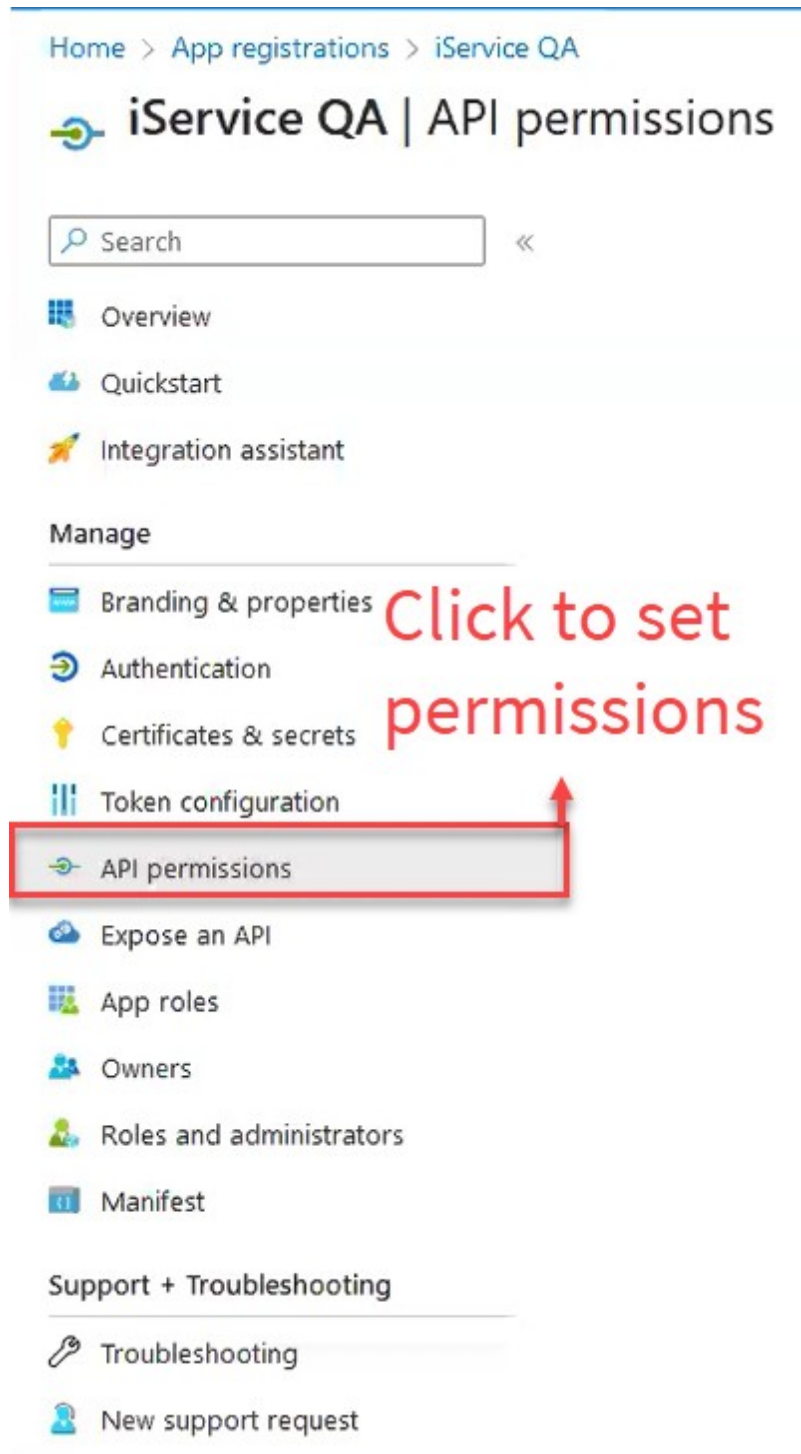
After you log into Azure, navigate to Applications and click **New Application**.



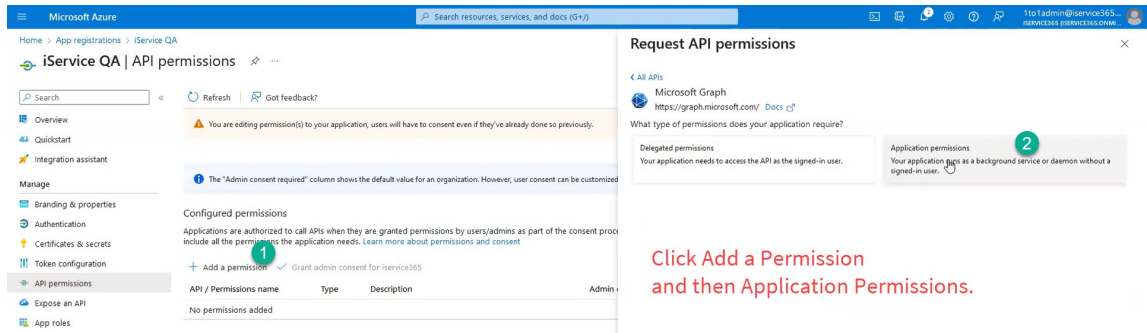
Enter a name that others will recognize, like iService. Set the scope of the application so it limits access to account in this organizational directory. You do not need to enter a value for the Redirect URI.



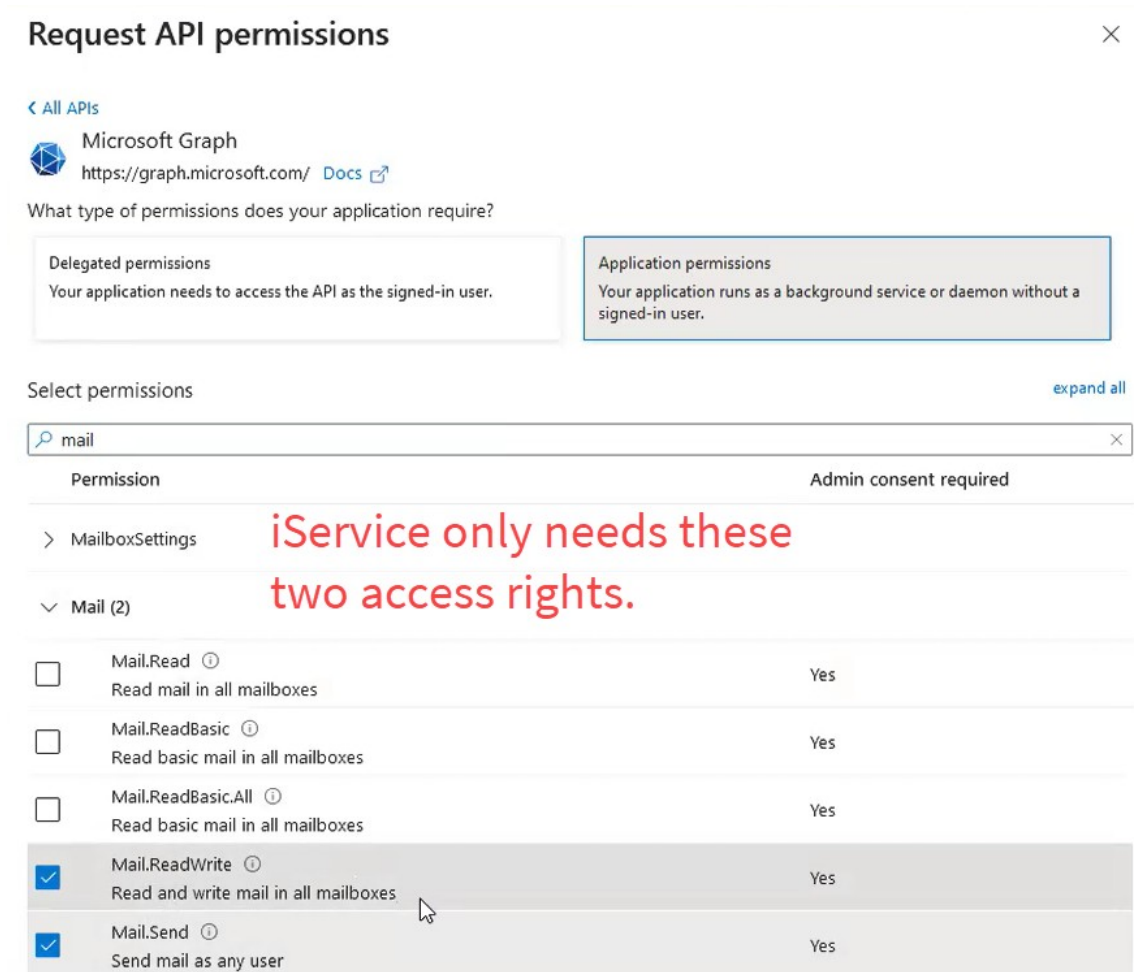
When you save your app, navigate to **API Permissions**.



Click **Add a permission** and then select **Application Permissions**.



Your application should only have the two permissions shown below (Mail.ReadWrite and Mail.Send).



After you add the permissions, you must **Grant Admin Consent** for the permissions. Click on **Grant admin consent** to open the dialog box and the select Yes.

Microsoft Azure | Search resources, services, and docs (G+)

Home > App registrations > iService QA

iService QA | API permissions Click **Grant Admin Consent** and then confirm.

Search Refresh Got feedback?

Grant admin consent confirmation.
Do you want to grant consent for the requested permissions for all accounts in iservice365? This will update any existing admin consent records this application already has to match what is listed below.

Yes No

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission **Grant admin consent for iservice365** 1

API / Permissions name	Type	Description	Admin consent req...	Status
Microsoft Graph (2)				
Mail.ReadWrite	Application	Read and write mail in all mailboxes	Yes	⚠ Not granted for iservice...
Mail.Send	Application	Send mail as any user	Yes	⚠ Not granted for iservice...

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

After you grant admin consent, the status will turn green.

Microsoft Azure | Search resources, services, and docs (G+)

Home > App registrations > iService QA

iService QA | API permissions

Search Refresh Got feedback?

Successfully granted admin consent for the requested permissions.

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value.

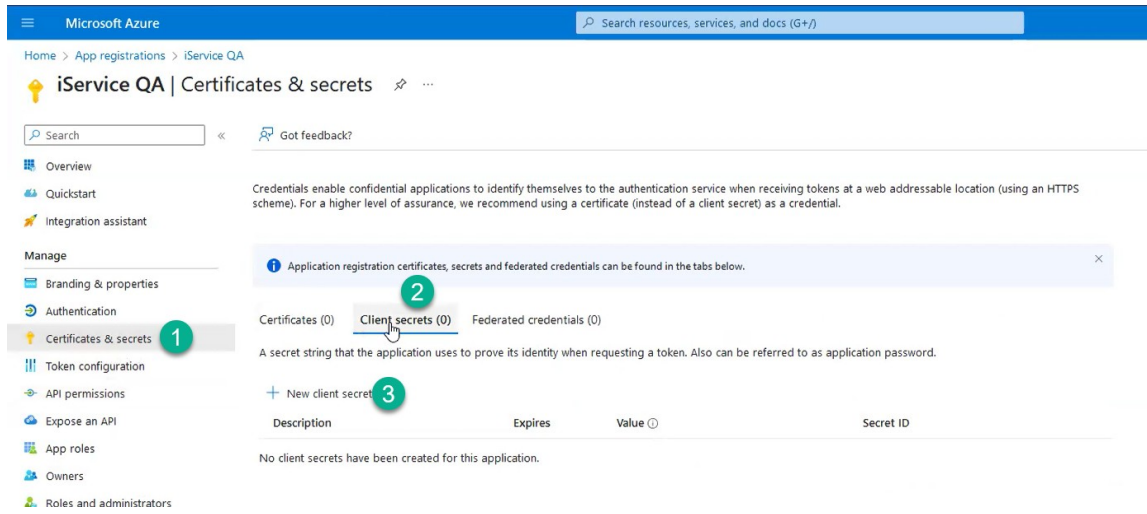
Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

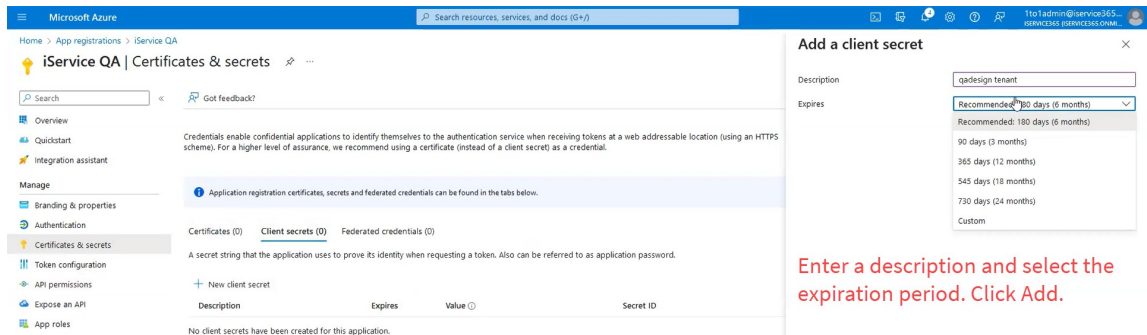
+ Add a permission **Grant admin consent for iservice365** 1 Status will be green when granted

API / Permissions name	Type	Description	Admin consent req...	Status
Microsoft Graph (2)				
Mail.ReadWrite	Application	Read and write mail in all mailboxes	Yes	✔ Granted for iservice365
Mail.Send	Application	Send mail as any user	Yes	✔ Granted for iservice365

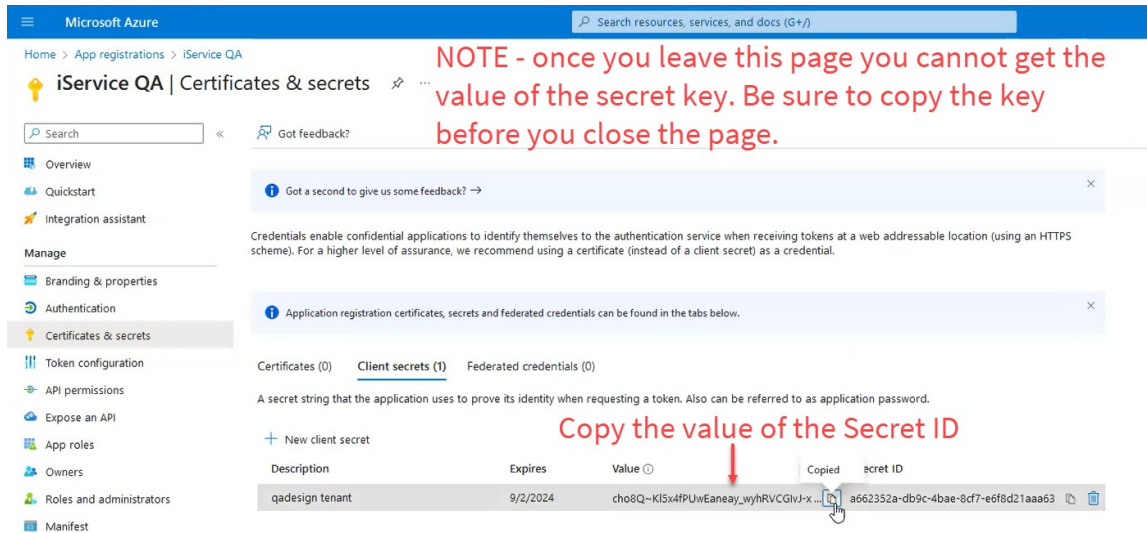
To obtain your secret key for the application, click on **Certificates and Secrets** and then **Client Secrets**. Then click on **New Client Secret** to create the secret.



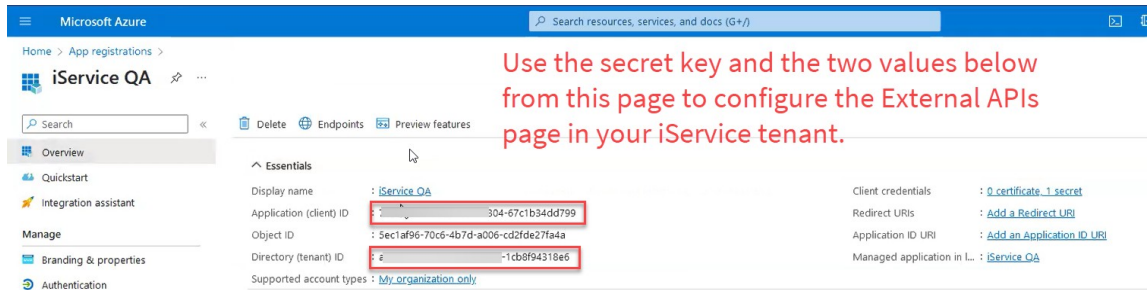
Enter a short description for the secret and then select the expiration period. **Be sure to note the date the secret expires and create a new one before the expiration date.**



After you configure the secret key and set the expiration, the key will be displayed.



To get the other two values, load the Overview page.



Locking down Microsoft Graph API for security

After you create your application, you should setup the proper restrictions to limit the access of the credentials you create to only the associated mailboxes. This is a separate step from creating the application in the process described above.

The steps are roughly as shown below.

1. Create a new app registration in the Azure directory for iService to use. In the app registration settings:
 - o In the app registration API permissions page, assign this app the proper permissions- I think Mail.Read and Mail.Send would be all that's needed, but this will ultimately depend on how we

implement it I guess. Then grant admin consent for these permissions.

- In the certificates and secrets page, generate the secret key for to later plug in to the iService app
2. Define a "[Mail-Enabled Security Group](#)" in the directory and add then add the mailboxes they want us to have access to, to that group. For the example below, this group is called `iservice@mydomain.com`
 3. Create an application access control policy that restricts the app created in step 1 to only have access to the mailboxes in the mail-enabled security group created in step 2:
`New-ApplicationAccessPolicy -AppId <your-app-id> -
PolicyScopeGroupId iservice@mydomain.com -AccessRight
RestrictAccess -Description "Restrict iService app to mailboxes in the
iService security group."`
 4. Create the mailbox in iService tied to the Azure app created in step 1, including the app id, secret key, etc. Ideally we'll have this part abstracted out in the iService admin panel by then though so that you can just define it once there, then reference in a dropdown when creating each iService mailbox.

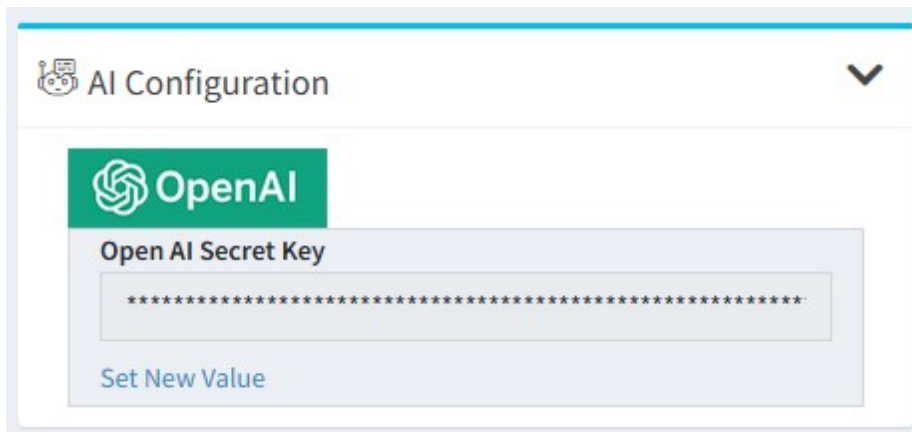
The Microsoft documentation for this step can be found at <https://learn.microsoft.com/en-us/graph/auth-limit-mailbox-access>.

14.1.3.4 AI Configuration



iService includes an integration to the OpenAI, which is used for the iService Copilot feature, custom prompts, chatbots, and various other AI related

features. The prompt windows and iService Copilot menus will appear in the rich text editor as soon as you enter the required keys for the OpenAI API integration. After you enter and save your OpenAI keys, you will not be able to retrieve them from the iService interface. To update your key after you have saved it the first time, use the Set New Value button.



Setting the keys for AI integration

Obtain your key from your OpenAI account on the <https://platform.openai.com/api-keys> page.

Creating your OpenAI Keys

To configure the [iService Copilot](#) buttons in the rich text editor, paste your openAI API key into the OpenAI Secret Key input. Create the secret key from your organizations openAI API Keys page at <https://platform.openai.com/api-keys>. Be sure to save the key when you create it, because you can't access the key after the window is closed.

API keys

Your secret API keys are listed below. Please note that we do not display your secret API keys again after you generate them.

Do not share your API key with others, or expose it in the browser or other client-side code. In order to protect the security of your account, OpenAI may also automatically disable any API key that we've found has leaked publicly.

Enable tracking to see usage per API key on the [Usage page](#).

NAME	SECRET KEY	TRACKING	CREATED	LAST USED	
Nir	sk-...6d1M	+ Enable	Dec 15, 2023	Jan 7, 2024	
1to1service ten...	sk-...0YUK	Enabled	Dec 27, 2023	Jan 11, 2024	

[+ Create new secret key](#)

Default organization

If you belong to multiple organizations, this setting controls which organization is used by default when making requests with the API keys above.

One-to-One Service

Note: You can also specify which organization to use for each API request. See [Authentication](#) to learn more.

Creating a secret key for the openAI integration

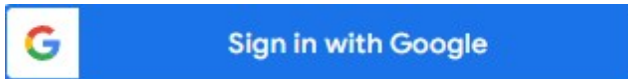
14.1.3.5 Google Configuration



iService supports two integrations to Google products: OAuth for single sign on using OpenID Connect, and the Google Calendar API. Both of these configurations are set on the External APIs page under the Google Configuration tab. The features become immediately available when you save your credentials. When you save your OAuth credentials, the Sign in with Google button will appear on the [agent login panel](#)^[69]. When you save your Graph API credentials, that protocol will be available for use in the [Mailbox](#)^[655] setup.

The Google configuration is managed on the iService External APIs page. <https://yourtenant.iservicecrm.com/app/admin/external-apis>


Sign in with Google



iService supports OpenID Connect for single sign on using Google as an identify provider. Click Set New Value and enter the Google Client ID for your company. Be sure to add the fully qualified URL for your iService tenant to your Google account. Once your Google Client ID is entered the Sign in with Google badge will appear in the login panel. Users can then associate any Google account with their iService login.

➔ Google Configuration ?

To use OpenID with iService, you need to first register your entity and obtain a Client ID that can be entered into iService.



Google Client ID

Set New Value

Creating your Google Client ID for Single Sign On

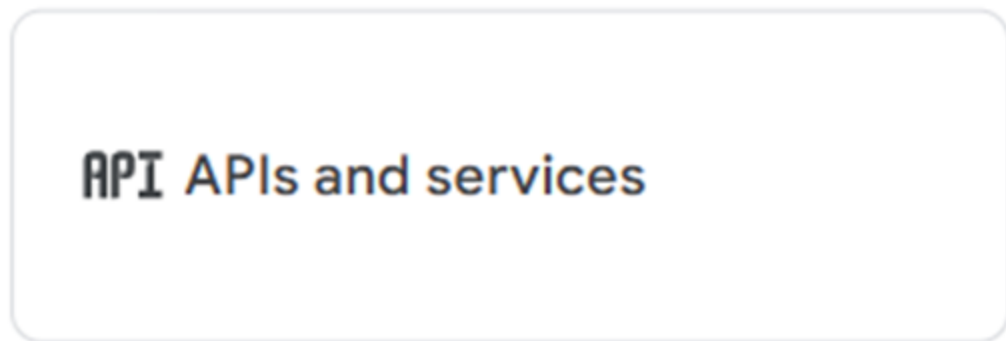
App Registration with Google cloud

This section explains how to create your Sign In with Google credentials within your Google account.

Login to the Google console using this link:

<https://console.cloud.google.com/>

Search for APIs and Services.




Select Credentials from the left navigation menu.

Click on Create Credentials and Select OAuth client ID.

If you are registering the iService app for the first time it will ask to Configure Consent Screen.

[←](#) Create OAuth client ID

A client ID is used to identify a single app to Google's OAuth servers. If your app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information. [Learn more](#) about OAuth client types.

 To create an OAuth client ID, you must first configure your consent screen

[CONFIGURE CONSENT SCREEN](#)


Select the user type and click the Create button.

If your organization is not using Google Workspace, select external user.


OAuth consent screen

Choose how you want to configure and register your app, including your target users. You can only associate one app with your project.

User Type

Internal 

Only available to users within your organisation. You will not need to submit your app for verification. [Learn more about user type](#)

External 

Available to any test user with a Google Account. Your app will start in testing mode and will only be available to users you add to the list of test users. Once your app is ready to push to production, you may need to verify your app. [Learn more about user type](#)

CREATE

Add the required email id and details for the consent form. Click on Save and continue.

Edit app registration

App name *

The name of the app asking for consent

User support email *

For users to contact you with questions about their consent

App logo

This is your logo. It helps people recognise your app and is featured on the OAuth consent screen.

Logo file to upload

Upload an image, not larger than 1 MB on the consent screen that will help users recognise your app. Allowed image formats are JPG, PNG and BMP. Logos should be square and 120px by 120px for the best results.

App domain

To protect you and your users, Google only allows apps using OAuth to use Authorised Domains. The following information will be shown to your users on the consent screen.

Application home page

Provide users a link to your home page

Application privacy policy link

Provide users a link to your public privacy policy

Application Terms of Service link

Provide users a link to your public Terms of Service

Authorised domains

When a domain is used on the consent screen or in an OAuth client's configuration, it must be pre-registered here. If your app needs to go through verification, please go to the [Google Search Console](#) to check if your domains are authorised. [Learn more](#) about the authorised domain limit.

Developer contact information

Email addresses *

These email addresses are for Google to notify you about any changes to your project.

Final summary form

Edit app registration

✔ OAuth consent screen — ✔ Scopes — ✔ Test users — 4 Summary

OAuth consent screen

[EDIT](#)

User type

External

App name

iService Gmail Api

Support email

Email for user support

App logo

Not provided

Application Homepage link

Not provided

Application Privacy Policy link

Not provided

Application Terms of Service link

Not provided

Authorised domains

Not provided

Contact email addresses

Email for Google support

Scopes

[EDIT](#)

API ↑	Scope	User-facing description
No rows to display		

Test users

[EDIT](#)

0 users (0 test, 0 other) / 100 user cap ?

Filter Enter property name or value ?

User information

No rows to display

[BACK TO DASHBOARD](#)

Once the consent form is set you can create your OAuth client ID for iService.

The final OAuth Client ID form should look like the below.

← Create OAuth client ID

A client ID is used to identify a single app to Google's OAuth servers. If your app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information. [Learn more](#) about OAuth client types.

Application type *
Web application

Name *
iService web app

The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.

i The domains of the URIs you add below will be automatically added to your [OAuth consent screen](#) as [authorised domains](#).

Authorised JavaScript origins **?**

For use with requests from a browser

URIs 1 * Enter your tenant URI here
 

+ ADD URI

Authorised redirect URIs **?**

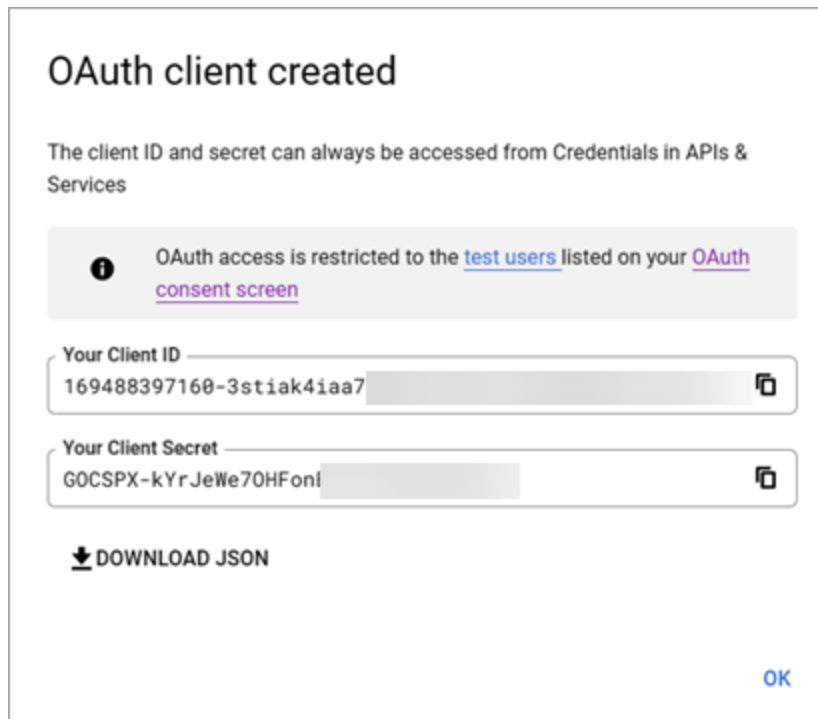
For use with requests from a web server

+ ADD URI

Note: It may take five minutes to a few hours for settings to take effect

CREATE CANCEL

Click Create to generate your ID and key.



You will only enter the Client ID into iService as explained at the beginning of this chapter.

— Creating your Google Calendar API Key

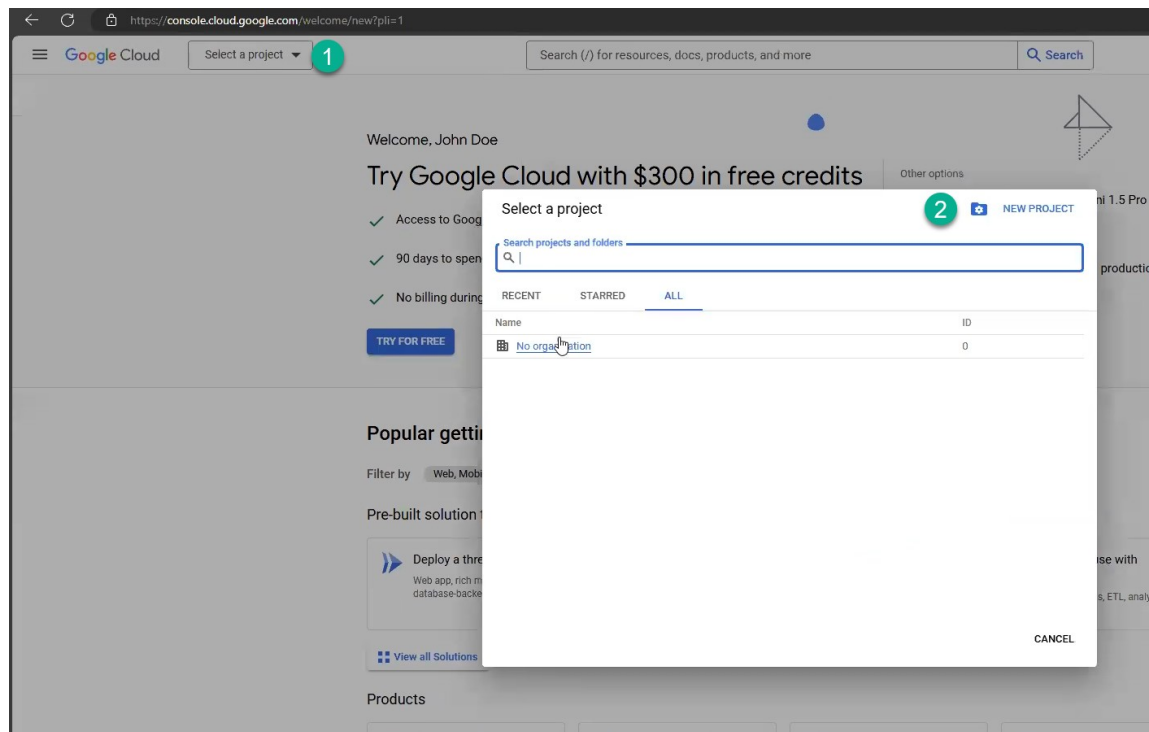
Google Calendar API

iService includes a direct integration to the Google Calendar API. The integration does not require a paid Google Workspace account because it uses the consumer API. You can use the calendar for scheduling activities, viewing interactions, or to trigger scheduled tickets by connecting the calendar events to a Zapier Zap. The section below explains how to create your Google Calendar Service Account key (JSON).

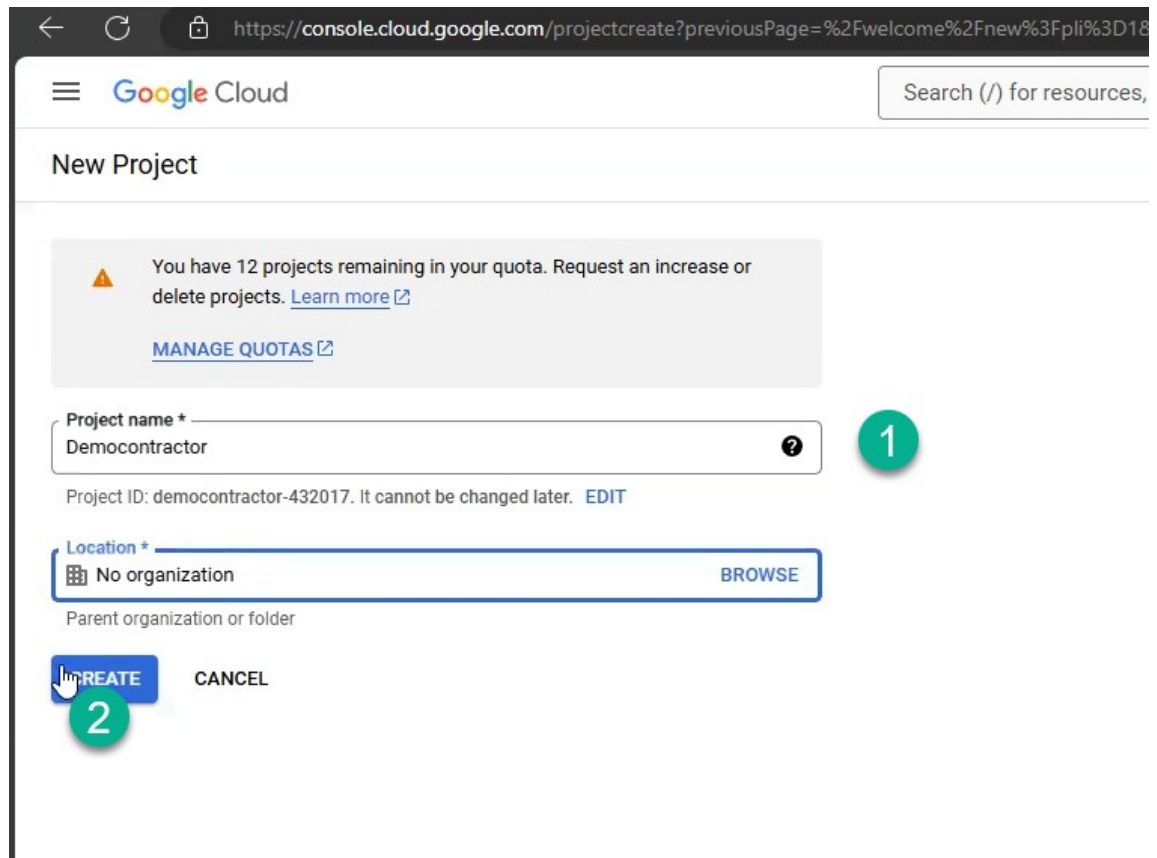


Log into your Google account at <https://console.cloud.google.com>.

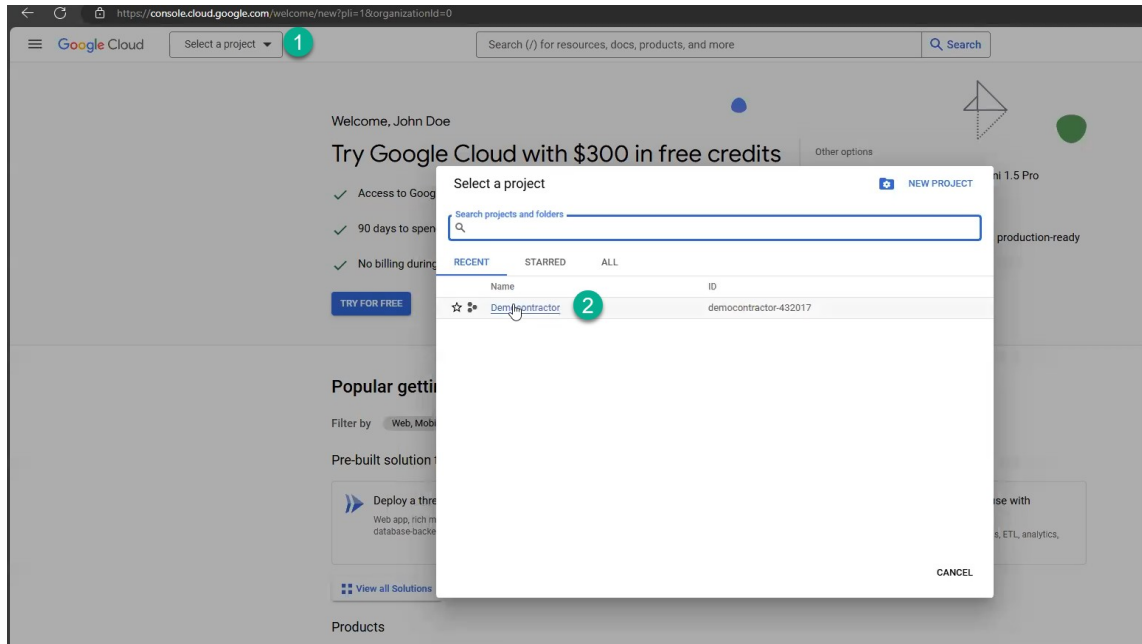
Then click Select a Project (1) and New Project (2).



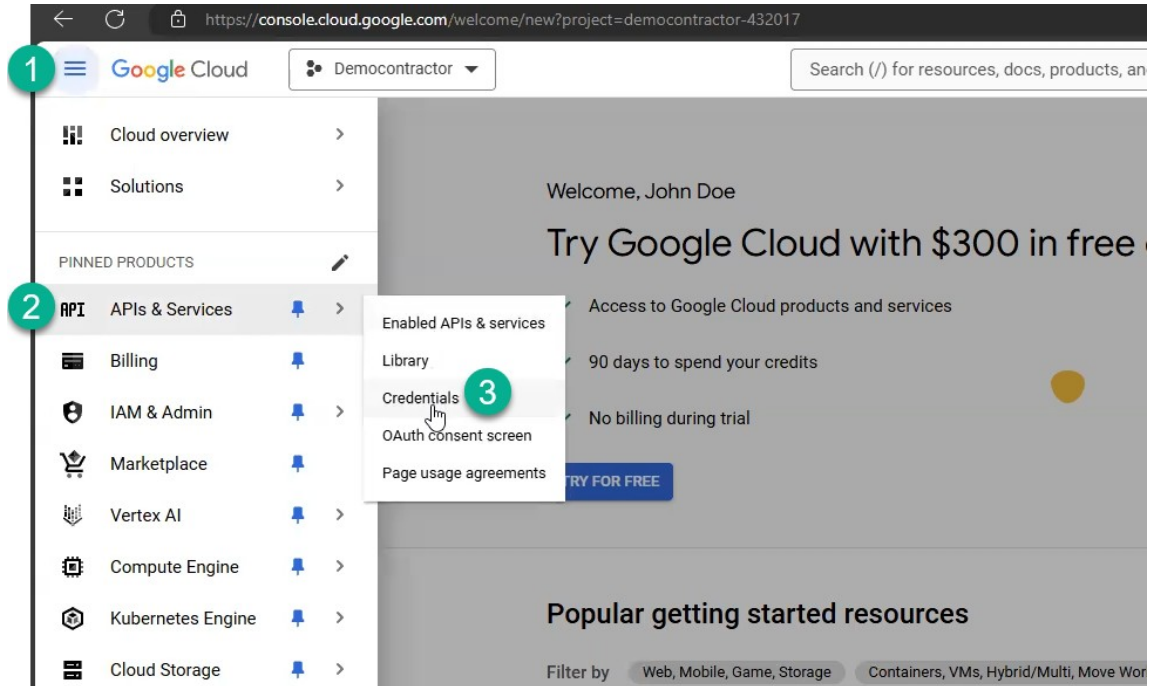
On the New Project page, enter a Project Name (1) and click Create (2).



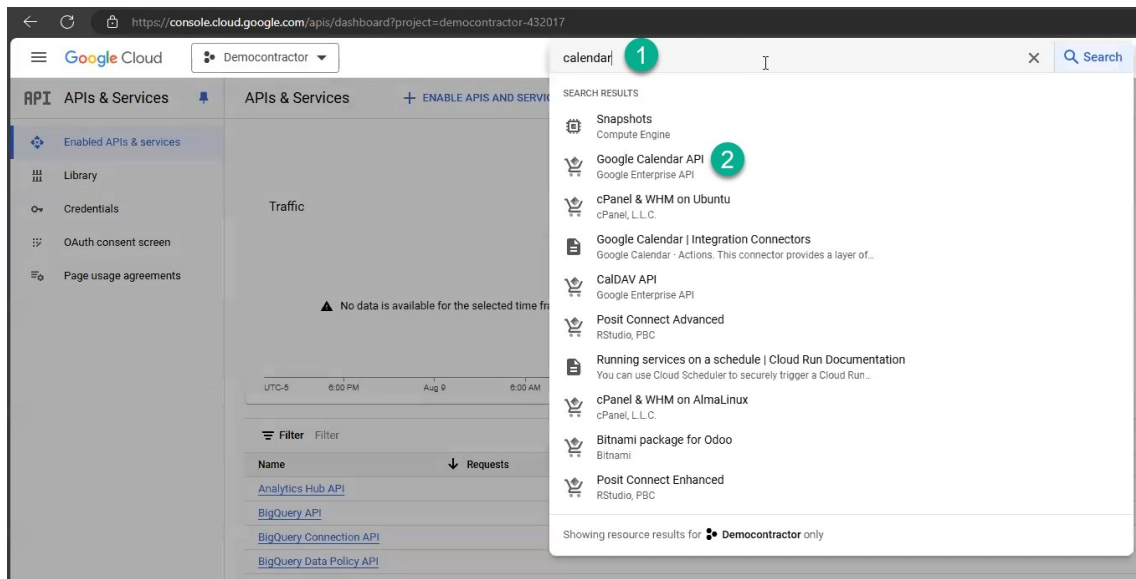
After you create the project, select it as shown below. Click Select a Project (1) and then select your project (2).



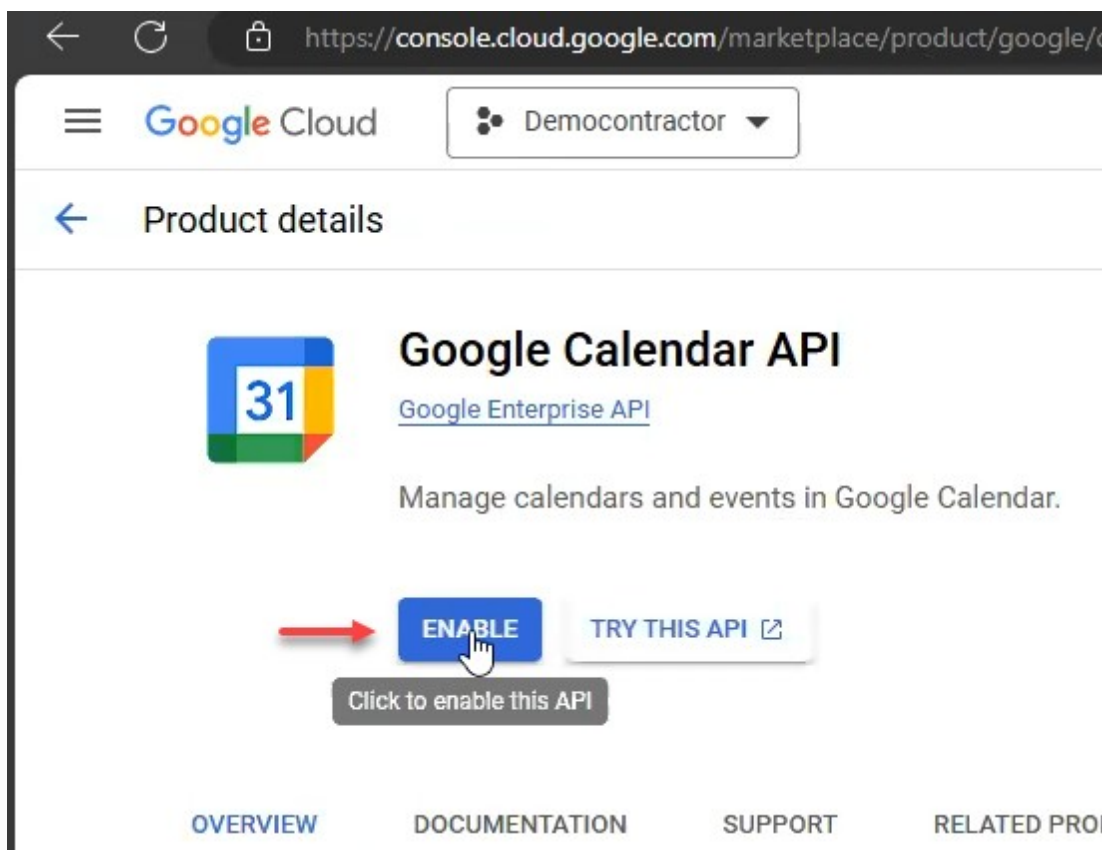
After you select your project, click the main menu (1) and choose APIs and Services (2). Then click Credentials (3).



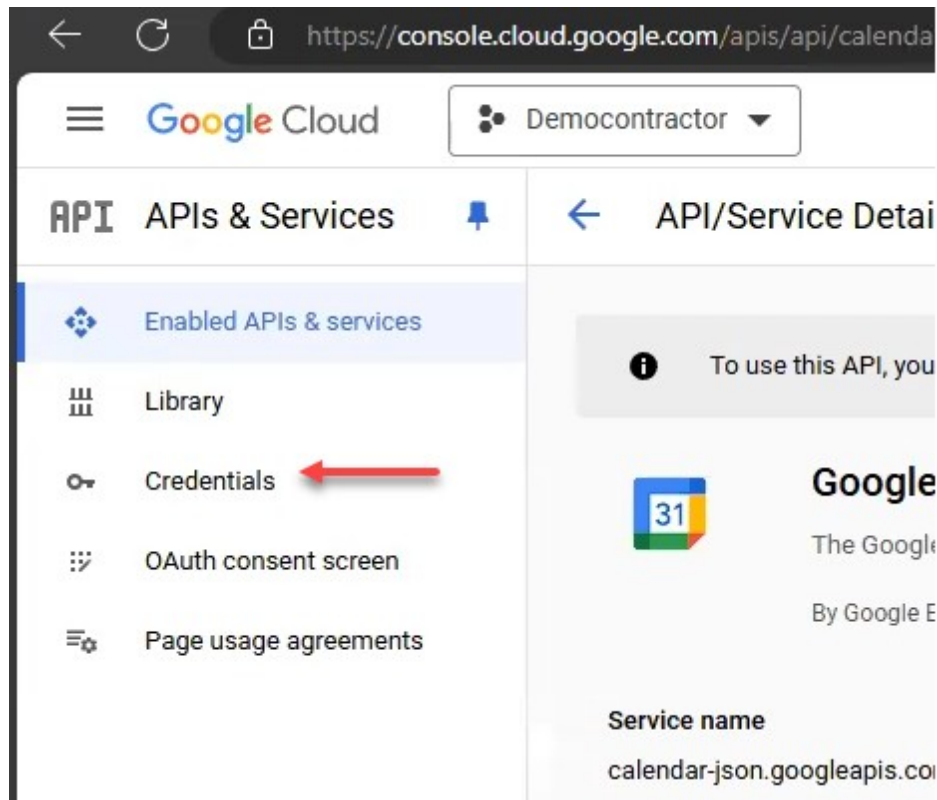
In the credentials page, search for the Calendar API (1) and select Google Calendar API (2).



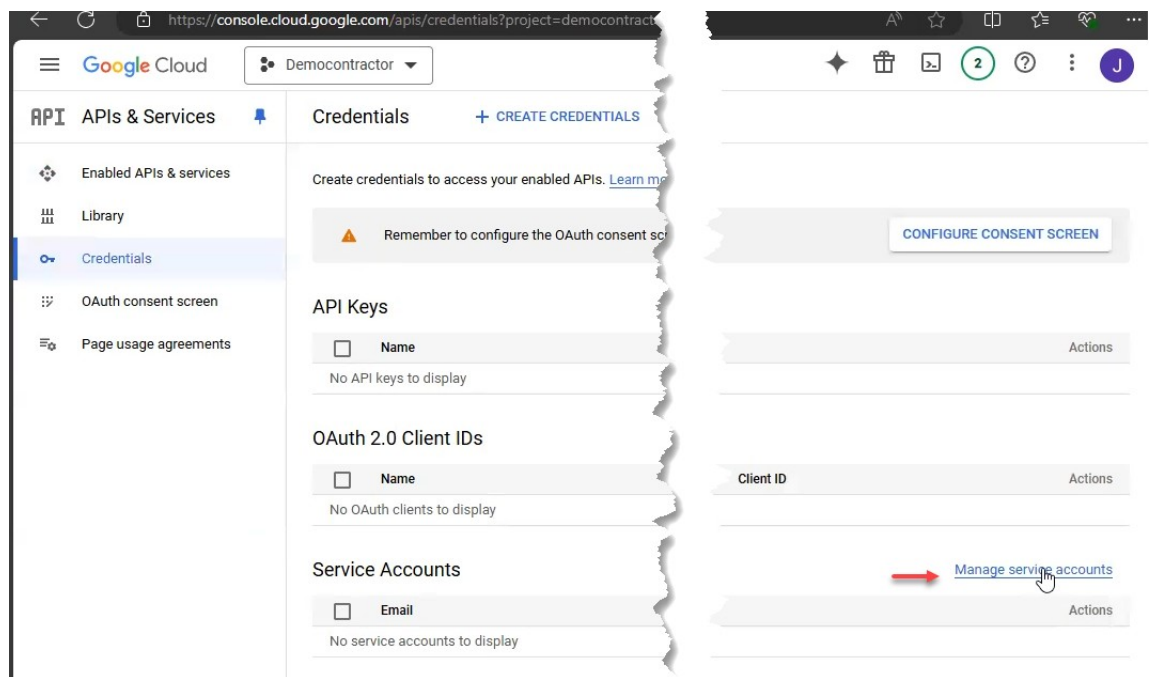
Click the Enable button to enable the Calendar API.



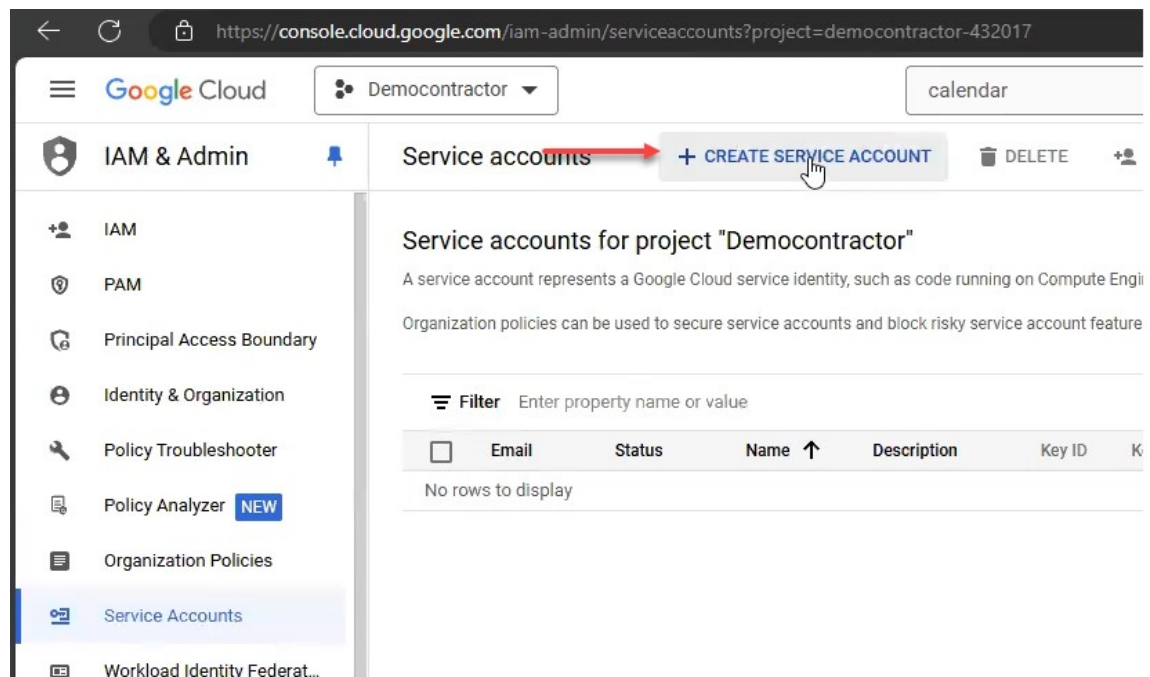
Within the APIs and Services page, select the Credentials link.



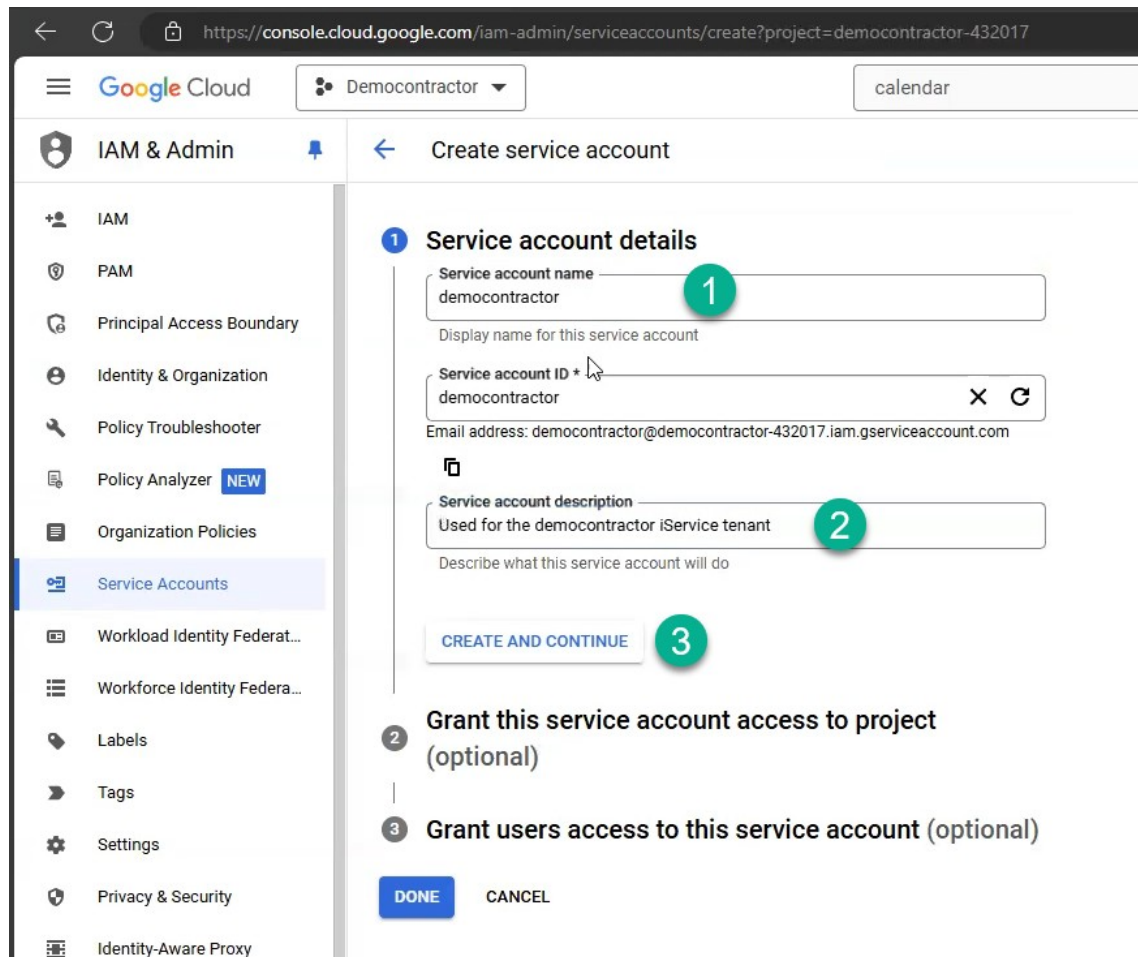
Then click Manage Service Accounts.



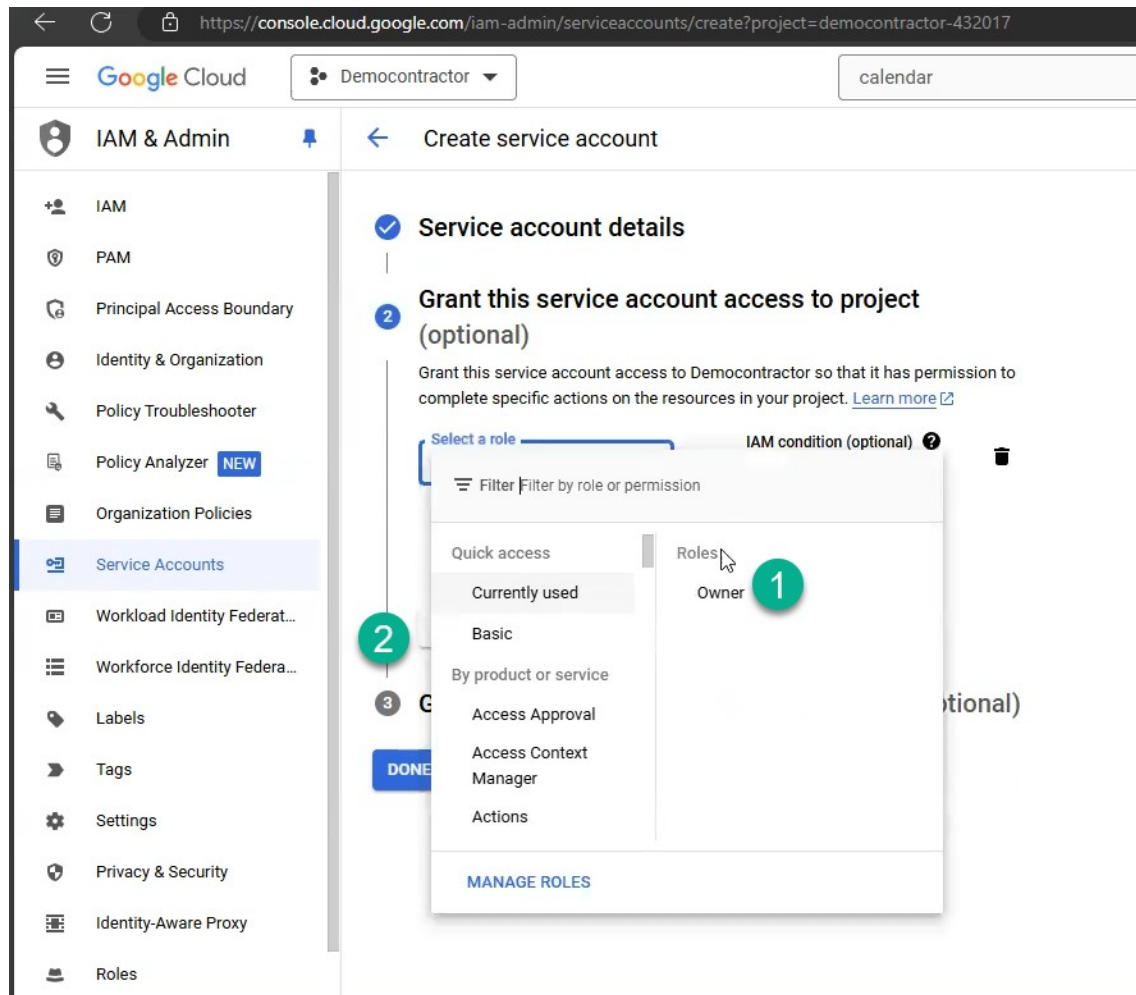
Then create a service account by clicking Create Service Account.



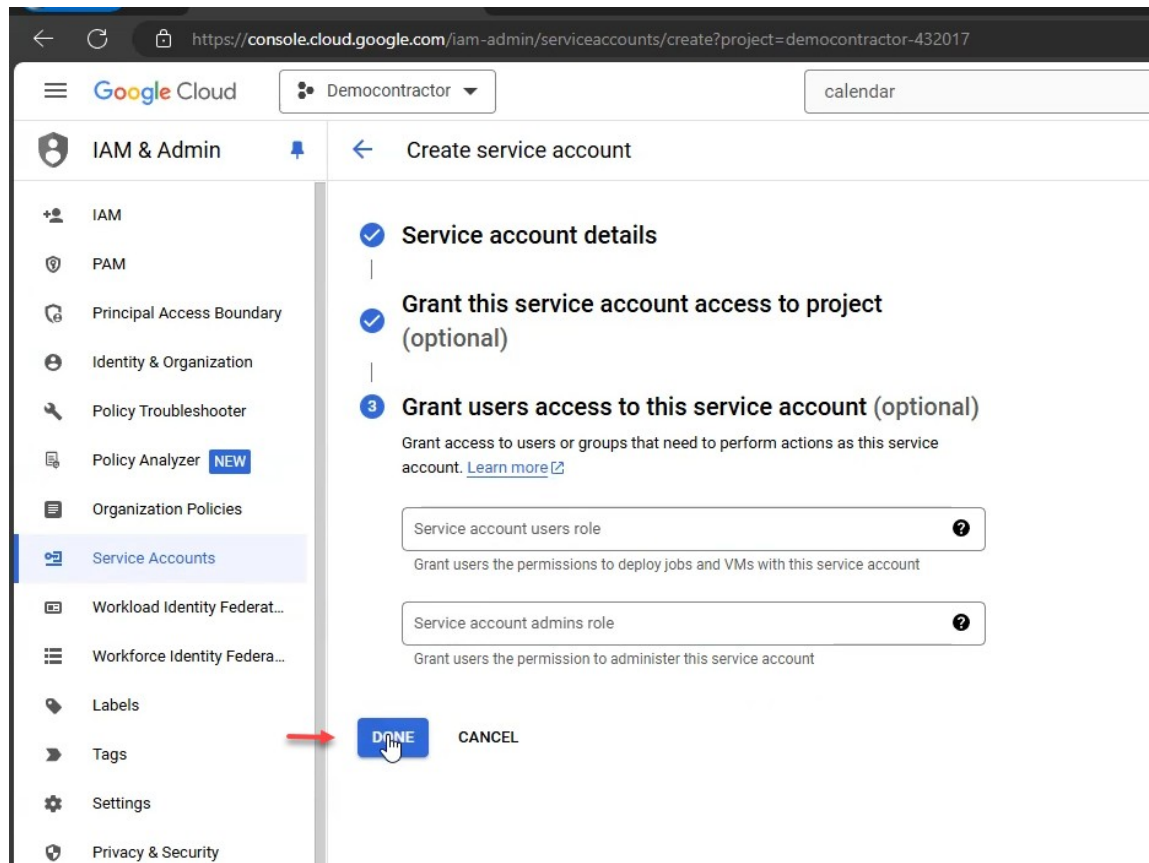
To create the service account, enter an account name (1), a description for the account (2), and then click Create and Continue (3).



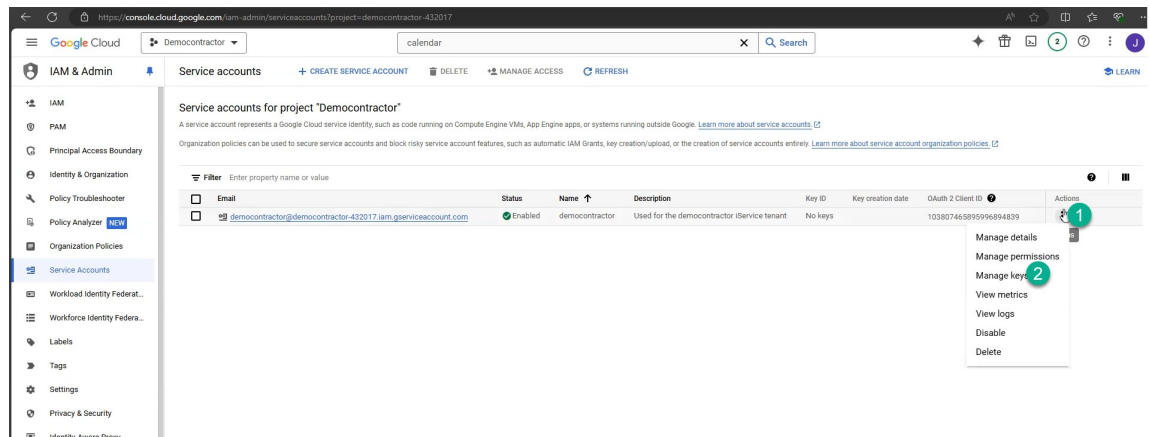
When the account is created, grant it the Owner role.



After you assign the role, click Done.



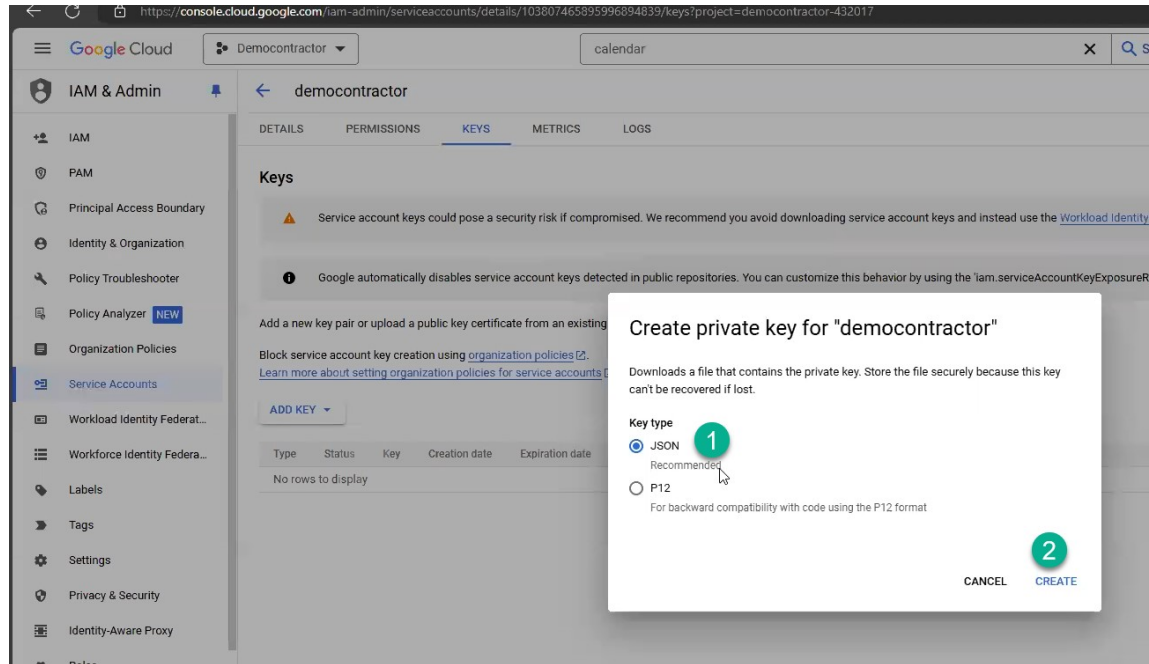
Now that the credentials are created, you can create your keys. Click the Actions link (1) and select Manage Keys (2).



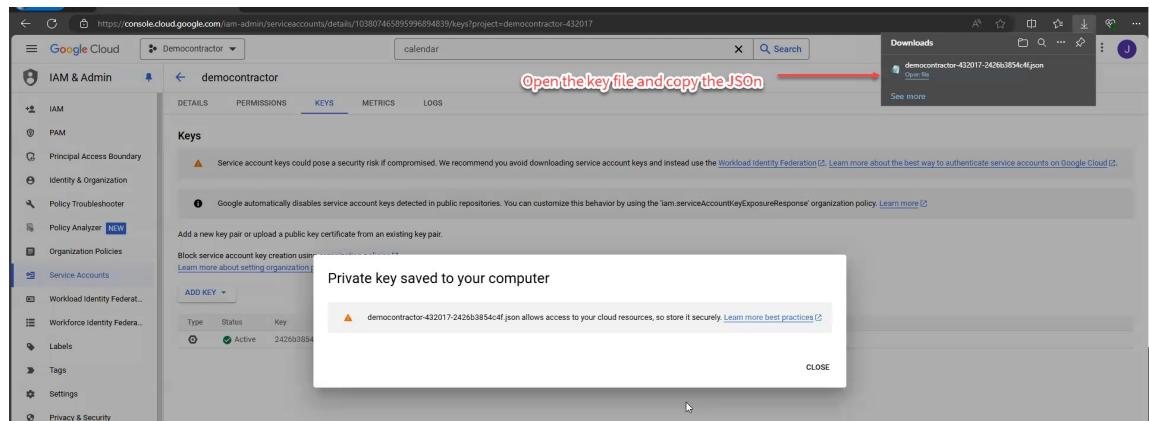
Then click Add Key (1) and Create new key (2).

The screenshot shows the Google Cloud IAM Admin console for a service account named 'democontractor'. The 'KEYS' tab is active, displaying a warning about security risks and a message about automatic key disabling. Below these messages, there is an 'ADD KEY' dropdown menu. The dropdown is open, showing two options: 'Create new key' and 'Upload existing key'. A red circle with the number '1' highlights the 'ADD KEY' dropdown, and another red circle with the number '2' highlights the 'Create new key' option. The 'Create new key' option is also highlighted with a mouse cursor. Below the dropdown, there is a table with columns for 'Creation date' and 'Expiration date'.

iService requires a JSON key to integrate with Google Calendar. Choose JSON (1) and then click Create (2).



Your key will be downloaded by your browser. Open the key and copy the values.



Once you obtain your JSON key, paste it into your iService tenant in the External APIs tenant settings as shown below. Then use the Manage Calendars page to add your desired calendars.

The screenshot shows a settings interface for a calendar. At the top left is a calendar icon with the number '31' and the word 'Calendar'. To its right is a red text instruction: 'Click to set value here.'. Further right is a blue button with a gear icon and the text 'Manage Calendars'. Below these elements is a light gray box containing the text 'Google Calendar Service Account Key (Json)'. Inside this box is a text field with two lines of asterisks. To the right of the text field is a vertical scroll bar. To the right of the scroll bar is a blue button with the text 'Set New Value'. A red arrow points from the red text instruction to the 'Set New Value' button.

14.1.4 Lists



Lists are values saved that can be referenced within [contact](#)⁶⁵¹ and [interaction properties](#)⁶⁴⁴. For example, if you submit a technical support question to iService using one of our forms we'll ask you to select the iService version number. The list of version numbers you select from would be saved in a List and then referenced by an interaction property, like Version Number. Lists are a tenant level configuration because the lists may be reused within any number of segments.

The screenshot displays the 'Lists Settings' page in the iService interface. On the left is a navigation sidebar with options like 'Available', 'Pages', 'Dashboards', 'Customer Info', 'Search Interactions', and 'Manage Work Queues'. The main content area is titled 'Lists Settings' and contains a table of lists. Below the table are buttons for 'New List' and 'Delete List...'. A 'New List' modal is open, showing fields for 'List Name' (Address Type) and 'Description' (Type of addresses), an 'Add Value' button, and a list of values containing two 'example1.com' entries. At the bottom of the modal are 'Create' and 'Cancel' buttons.

Id	List Name	Description
111	Address Type	Type of addresses
112	Equipment Type List	List of all equipment types

These Skills a Settings page

d

To create a new list, click on New list and enter the following information.

List Name – this is the name of the list that will be referenced in the Contact Properties and Interaction Properties tab.

Description - provide a description of the list and how it will be used.

Add Value Input Box – To add a value to the list, enter its in the text box and click **Add Value**.

Values – These are the values that will be presented within the property’s drop down menu. Use the red x to remove a value from the list.

Once the list is created, you can associate it with a contact property or interaction property in one or more segments. This is done within the [Contact Properties](#)⁶⁵¹ and [Interaction Properties](#)⁶⁴⁴ tab of segment configuration.

14.1.5 Service Levels



iService prioritizes the assignment of messages to agents based upon a calculated target response time. The target response time is based upon the time a message is received, plus any applicable service level that is applicable. Service levels are assigned to each segment from the Segment – Details tab and the Segment – Topics tab. They can be created based upon interaction or contact property values. Or, they can be created with no properties specified as shown in the examples below.

Service levels are assigned to incoming questions in one of four ways.

Default Segment Service Level – Each segment can have a default service level set on the Admin Tools – Segment – Details page. This type of service level typically does not include any property values and sets in the lowest service level for all interactions in the segment. Use the other three service levels to adjust the target response time in relation to the default.

Topic Service Level – Each topic can have its own service level. Topic service levels are typically used for urgent topics that need a response faster than the default segment service level.

Interaction Property Service Level - you might need to assign questions that have certain interaction property values ahead of other questions in the same topic. For example, if you have an interaction property named priority, questions that have a value of urgent might require more rapid response. This allows you to adjust the routing priority of questions that are in the same topic.

Contact Property Service Level - if you use contact properties to identify your most important customers, you can use those values to set a target response time. For example, if you have a contact property named customer level, questions that come from contacts whose value is "Platinum" can get the shorter response target.

iService evaluates all of the available service levels to determine the actual priority. The question is given the highest priority based upon each of these

four options. Here is an example of how this might work for two questions from the same contact.

Default - 120 minutes

Topic A - 90 minutes

Contact Property - 60 minutes

Interaction Property - 30 minutes

Scenario 1 - a question in Topic A from a contact that has the matching contact property would have a service level of 60 minutes.

Scenario 2 - a question from the same contact that has the interaction property on a question would have a service level of 30 minutes. But, their other questions would have a service level of 60 minutes.

Creating and managing service levels

The screenshot displays the iService Settings Menu. The left sidebar contains navigation options like 'Available', 'Take chat', 'Search Customer Info...', 'Pages', 'Dashboards', 'Customer Info', 'My Work Queues', 'My Message Inbox', 'My Pending Messages', 'My Messages to Approve', 'My Open Quotes', 'Manage Work Queues', 'Manage Messages', 'Manage Chats', 'Logged in Chat Agents', 'Manage Open Quotes', 'Manage KB Articles', 'Custom Forms', 'Quick Agent Email', 'Submit Credit Memo', 'Page Components', 'Interaction (view mode)', 'Interaction (action mode)', 'Send Agent Email', and 'Create Note'. The main content area is titled 'Service Level Settings' and shows a table of service levels. Below the table are buttons for 'New Service Level' and 'Delete Service Level...'. The 'Service Level Configuration' section includes fields for 'Service Level Name (Required)', 'Minutes (Lower Means More Urgent)', 'Description', 'Property Type (Required)', and 'Contact Property'. A 'Save' button is also present. Below the configuration are sections for 'Topics That Use This Service Level' and 'Segment Defaults That Use This Service Level'.

Id	Name	Description	Minutes	Property Type	Property Name	Property Value
111	Contact Property	Contact Property	0	Contact	LinkedIn (QA)	us
112	Quote	Quote	0	Interaction property	Authorization Type (QA) (Question)	1

Showing 1 to 2 of 2 entries

Previous 1 Next

Service Level Configuration

Service Level Name (Required) 1
Contact Property

Minutes (Lower Means More Urgent) 2
0

Description 3
Contact Property

Property Type (Required) 4
Contact

Contact Property 5
Contact Property
Windows Groups (QA)

Interaction Property Value
Domain Admin

Save 6

Topics That Use This Service Level 7
Sales Segment
All Topics -- Sales Prospecting ✖
All Topics -- Follow Ups ✖
Human Resource Segment
All Topics -- _Spam ✖

Segment Defaults That Use This Service Level 8
Sales Segment ✖
Customer Service Segment ✖
Human Resource Segment ✖

Editing a contact property based service level

Create and edit your service levels using the service-level tab within the settings menu. when you are creating a service level for topics, leave the contact and interaction property fields blank.

1. The name of the service level. This is displayed in the other pages of iService.
2. Designate the number of minutes to add to the creation time of an interaction to determine the target response time. Your service levels

should be made in relation to each other, not for the desired response time. Service levels are used to adjust assignment through the get next process.

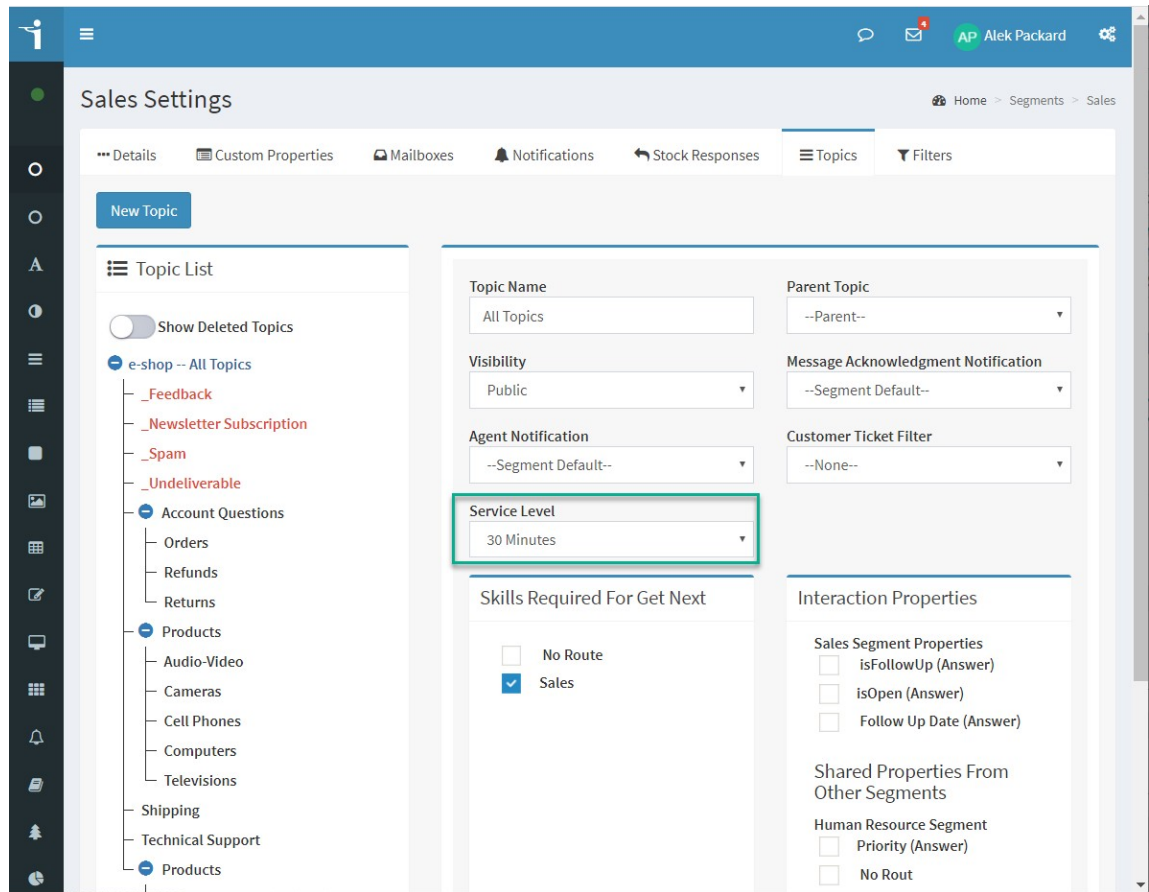
3. Provide a short description of the service level here.
4. If your service level is based on a contact or interaction property, select the type here. Otherwise leave this blank.
5. This section will update depending on whether you select interaction or contact property types. Select the property and then designate the value. If you have multiple values you will need to create multiple service levels. For example, if you have platinum gold and silver priorities and want a different level for each, you would need to make three separate service levels with the appropriate number of minutes for each.
6. Be sure to save your changes.
7. This page will list all the topics that are using the service level. You can remove the service level permit topics by clicking the red X.
8. Any segments that use this service level for their default will be listed here. In general, it's not logical to use contact or interaction properties for segment defaults since they only apply to specific contacts and interactions. You can remove the service level using the red X.

Setting a Segment default service level

The default service-level for a segment

To set a default service level for a segment, select it on the [Segment Details](#) ⁶⁴⁰ page. When using service levels it's important to set a segment default. Since the priorities are adjusted by adding time to the creation date, without a default setting your other questions will likely be considered lower priority than questions that don't obtain your topic or property service levels.

Setting a service level based on Topic



Setting the Service Level for a topic

To assign a service level to a topic, select it on a topic by topic basis.

Setting a service level based on Contact property value

Service Level Settings

Service Level

Id	Name	Description	Minutes	Property Type	Property Name	Property Value
111	Contact Property	Contact Property	0	Contact	LinkedIn (QA)	us
112	Quote	Quote	0	Interaction property	Authorization Type (QA) (Question)	1

Showing 1 to 2 of 2 entries

Service Level Configuration

1 Service Level Name (Required): Contact Property

2 Minutes (Lower Means More Urgent): 0

3 Description: Contact Property

4 Property Type (Required): Contact

5 Contact Property: Windows Groups (QA)

6 Save

7 Topics That Use This Service Level

8 Segment Defaults That Use This Service Level

- Sales Segment
 - All Topics -- Sales Prospecting ✗
 - All Topics -- Follow Ups ✗
 - Human Resource Segment
 - All Topics -- _Spam ✗
- Customer Service Segment ✗
- Human Resource Segment ✗

Service level based on a contact property

Contact property-based service levels don't require any configuration other than creating the service level itself. In the example above, a separate process would be used to set the value of Manager on the Windows Group contact property. This would be done via integration with another system, manually setting the value on the contact, or within the custom form that captured the question. Once the property value is set, iService will automatically assign this service level to any questions from that contact.

Setting a service level based on Interaction property value

The screenshot displays the iService Service Level Settings interface. The top section shows a table of existing service levels:

Id	Name	Description	Minutes	Property Type	Property Name	Property Value
111	Contact Property	Contact Property	0	Contact	LinkedIn (QA)	us
112	Quote	Quote	0	Interaction property	Authorization Type (Question)	Manager

The bottom section shows the 'New Service Level' form with numbered callouts:

- Service Level Name (Required): Quote
- Minutes (Lower Means More Urgent): 0
- Description: Quote
- Property Type (Required): Interaction
- Interaction Property: Authorization Type (QA) (Question)
- Interaction Property Value: Manager

A service level based on an interaction property

Interaction property-based service levels don't require any configuration other than creating the service level itself. In the example above, a separate process would be used to set the value of manager on the authorization type property. This would be done based on a filter or within a custom form that captures the question. Once the property value is set on the interaction, iService will automatically assign the related service level.

14.1.6 Skills



Skills are used to ensure incoming questions are routed to the correct agents. Skills are assigned to interactions based on their topic or interaction properties, and agents are limited to questions where their skills match ALL of the required skills.

Skills are not required for implementations of iService that do not need skills-based routing. If skills are not used, CSRs will be allowed to receive any inbound message for all segments to which they are granted access. Keep in mind that adding a skill to a topic will prevent CSRs from receiving messages from that topic, unless the agent also has the corresponding skill.

There are two types of skills: standard skills and interaction property skills.

A standard skill is simply a label, such as Basic Tech, that is assigned to a topic. To handle the questions within that topic will require the agent to also be assigned the standard skill.

Interaction property skills are based on a specific value for an interaction property. For instance, an interaction property named Operating System might have three possible values – Windows, Mac, and Linux. If a skill is created that references a value for this property (e.g., Mac), then any message within any topic that has that interaction property value (e.g., Mac) will only be routed to the agents that have this skill assigned. Skills that are based on interaction properties are NOT assigned to topics. They are only assigned to agents. The values for the interaction property itself are assigned to the question using filters or are set by the contact when the question is submitted.

Creating and editing skills

The screenshot displays the iService Skills Settings page. On the left is a navigation sidebar with options like 'Available', 'Take chat', and various 'Pages' such as 'Dashboards', 'Customer Info', and 'My Work Queues'. The main content area is titled 'Skills Settings' and contains a table of skills. The table has columns for 'Id', 'Skill Name', 'Description', 'Property Name', and 'Property Value'. Two skills are shown: '111 No Route' and '112 Priority'. The 'Priority' skill is highlighted in blue. Below the table, there are buttons for 'New Skill' and 'Delete Skill...'. The 'Skill Configuration' section includes a 'Skill Name (Required)' field with the value 'priority' (marked with a '1'), a 'Description' field with the value 'Tag high priority questions for senior agents' (marked with a '2'), and a 'Save' button. To the right of the configuration form is a section for 'Interaction Property Based Skills' with a dropdown for 'Interaction Property' (set to 'Change Priority (QA) (Question)') and a text field for 'Interaction Property Value' (set to 'Urgent'). Below this are three sections: 'Topics That Require This Skill', 'Agents That Have This Skill', and 'Departments That Have This Skill', each with a list of items and red 'X' marks indicating associations.

Example of a skill based on an interaction property value

To create a new skill in the iService application, click the New Skill button and enter the following information.

Name – The skill name is used throughout iService as a reference to the skill. It is displayed within the Topics, Departments, and Agents settings pages. Choose a name for the skill that is representative of the attributes agents need to answer questions. For example, "Technical Support 1" might be a good name for a skill used to describe entry-level technical support.

Interaction Property Based Skills - You set a specific interaction property value as a skill. This creates a skill that is applied to ALL

incoming interactions that contain the matching property value. Skills that are based on a specific interaction property are not assigned to topics, because they apply to all messages regardless of their topic.



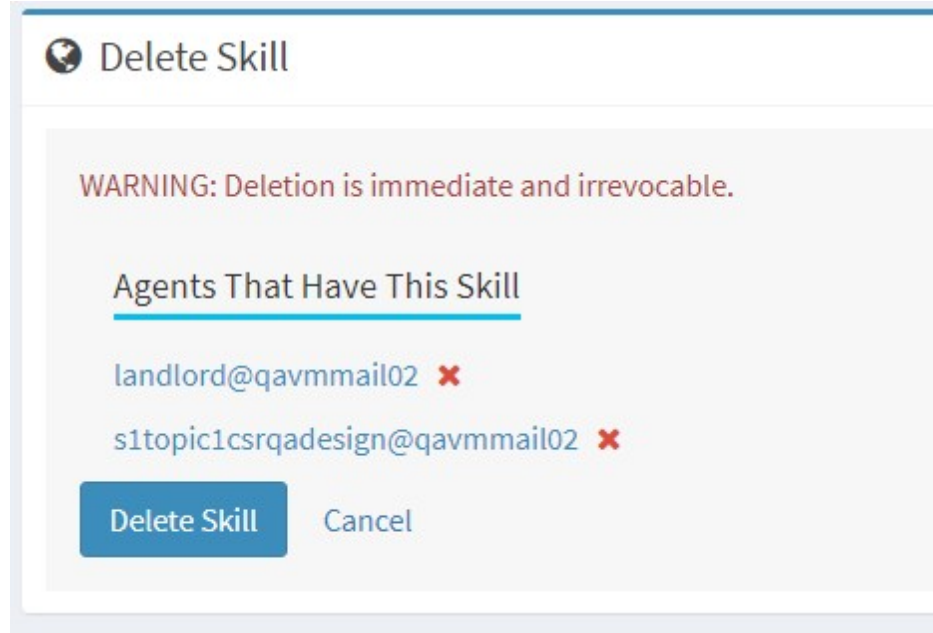
An example of an Interaction Property skill is segregating Spanish questions. A filter can be used to identify Spanish words to determine that an incoming question is written in Spanish. That filter can set a value for an interaction property named "Language" with a value of "Spanish." You might name this skill "Spanish Support", and only assign it to agents that can correspond in Spanish. Any message that arrives into any topic with this designation would then only be routed to agents that speak Spanish.

The skills page lists all of the topics, agents, and departments that are using the skill. You can remove these by clicking the red ask next to the item.

Deleting skills

Care should be taken when deleting skills. Any agents, departments, or topics that are using the skill will have the skill removed when deleted. Deleting skills is a two step process: Evaluate the impact of deleting and then confirm deletion.

Clicking Delete Skill will generate the following panel.



The Delete Skills panel

This panel shows all agents, departments, and topics that are currently using the skill. Clicking on Delete Skill will delete the skill and remove the association with each agent, department, and topic.

Overriding skill requirements

Skills are used to determine the types of messages routed to agents via the Get Next process. However, they can be overridden by a manager from the when reassigning the question to any agent. CSRs can only assign questions to agents that have all of the required skills.

To learn about applying skills to Topics, see the [Segment Settings - Topics](#)⁶⁹¹ section.

To learn about applying skills to Agents, see the [Tenant Settings - Agents](#)⁵⁴² section.

To learn about applying skills to departments, see the [Tenant Settings - Department](#)⁵⁵⁴ section.

14.1.7 User Types



The User Types page can only be viewed by an Administrator or SuperUser, which is typically the person that maintains your overall iService tenant. Each user type includes a set of access rights that determine what the agent can do. Administrators can modify the access rights within each User Type or create custom user types from this menu. It's best to not modify the default user types. If you need to adjust access, you should create a new user type and configure it appropriately. The access rights are enforced at the web service level, not at the user interface level. Therefore, it's possible to create user types that allow agents to see certain pages that are not functional for the agent. This also means that the access rights are enforced regardless of the interface used (e.g., custom forms that you make, utilities, etc.).

Access to interaction history, questions and customer data is controlled by the Segment Access settings in [Tenant Settings - Agents](#)⁵⁴² page. User types do not impact the questions or properties that agents can view.

Creating and editing user types

User Types

Id	User Type Name	User Count
1	Anonymous	0
2	Customer	25035
3	CSR	13
4	CSR Manager	4
5	Administrator	2
6	Super User	1
7	QA CSR	1
8	QA Manager	0

Showing 1 to 8 of 8 entries

User Type Configuration

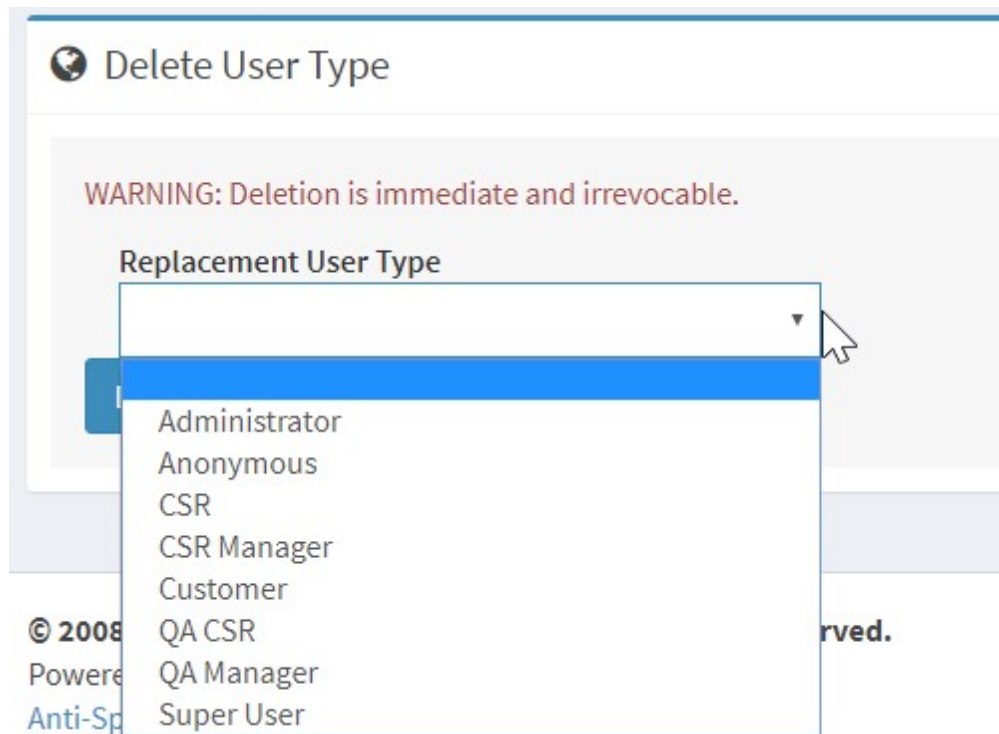
User Type Name (Required)

Access Rights

- Chat.Answer
- Chat.Broadcast
- Tab.Admin.AdditionalDetails
- Tab.Admin.Agents
- Tab.Admin.Alerts
- Tab.Admin.AppData
- Tab.Admin.ContactProperties
- Tab.Top.CustomerInfo
- Tab.Top.FindAnswers
- Tab.Top.MessageQueue
- Tab.Top.MyAccount
- Tab.UserTypes.CreateAdmin

Viewing the CSR User Type

The access rights associated with each user type are displayed as shown above. When you delete a user type, you will need to pick a replacement user type to be assigned to any contact that currently has the type you are deleting.



Deleting a User Type

Access Right Definitions

Some access rights determine whether the page is presented to a user. In those cases the page name is included within the access right name. In other cases, the access rights control whether a user can see or interact with functionality within certain pages. In those cases the functionality is described in the access right name.

Access Rights List

`Admin.ExternalAPI` - controls page access to the [External APIs](#)⁵⁵⁶ settings page.

`Chat.Answer` - This access right is required for [Chat Agents](#)²⁵². It displays the chat controls on the top of each page Go Available and Take Chat.

`Chat.Broadcast` - This access right is required to view broadcast messages displayed in the header of the iService web site. Learn more about broadcast messages in the [Management Console User Guide](#).

`Payment` - Controls access to the [Payment button](#)^[556] when embedded payment integration is configured.

`Tab.Admin.AdditionalDetails` - Controls page access to the [Lists](#)^[601] settings page.

`Tab.Admin.AgentEmailForm` - Controls access to the [Agent Email Configuration](#)^[405] settings page.

`Tab.Admin.Agents` - Controls access to the [Agents](#)^[542] settings page.

`Tab.Admin.Alerts` - Controls access to the [Alerts](#)^[298] settings page.

`Tab.Admin.ContactProperties` - Controls access to the [Contact Properties](#)^[651] settings page.

`Tab.Admin.Departments` - Controls access to the [Departments](#)^[554] settings page.

`Tab.Admin.Forms` - Controls access to the [Tools - Forms](#)^[302] page.

`Tab.Admin.InteractionProperties` - Controls access to the [Interaction Properties](#)^[644] segment settings page.

`Tab.Admin.Mailings` - controls access to the [Mass Mailing](#)^[289] settings buttons.

`Tab.Admin.Monitor` - Controls access to the [Server Process Management](#)^[307] page.

`Tab.Admin.Monitor.All` - Monitor all tenants, not just the one currently loaded (Installation Landlord Only).

`Tab.Admin.Segments` - Controls access to Segment Settings.

Tab. Admin. Service Levels - controls page access to Tenant Settings - [Service Levels](#)^[603]

Tab. Admin. Skills - controls page access to Tenant Settings - [Skills](#)^[611]

Tab. Admin. SMTP Out - controls page access to Tools - Server Process Management - [SMTP Out](#)^[311]

Tab. Admin. User Types - controls page access to Tenant Settings - [User Types](#)^[615]

Tab. Admin. Websites - controls page access to Tenant Settings - [Websites](#)^[623]

Tab. Customer Info. Create - Ability to create new contact (access to the [New Contact](#)^[146] button within the Customer Info).

Tab. Customer Info. Import History - Special access right required to run the Talisma history import when migrating from that CX system (deprecated in v9).

Tab. Customer Info. Modify - Ability to update properties of a contact ([Contact Details](#)^[162] page).

Tab. Customer Info. Modify History - Provides access to the [Edit Properties](#)^[166] button within interaction history.

Tab. FindAnswers. Create - Provides access to the Add Article button on the [Knowledge Base](#)^[184] page.

Tab. FindAnswers. Modify - Provides access to the Edit Article button when viewing a [Knowledge Base](#)^[184] article.

Tab. FindAnswers. Subscribe - Provides access to the Show Subscribers button when viewing a [Knowledge Base](#)^[184] article.

Tab. FindAnswers. Subscribe. Notify - Provides access to the Send Notifications to Subscribers button when viewing subscribers of a [Knowledge Base](#)^[184] article.

Tab. Mailings. Campaigns - controls page access to Tools - Mass Mailing - [Campaigns](#)^[295]

Tab. Mailings. Criteria - controls page access Tools - Mass Mailing - [Criteria](#)^[281]

Tab. Mailings. Lists - controls page access Tools - Mass Mailing - [Lists](#)^[271]

Tab. Mailings. Mailings - controls page access Tools - Mass Mailing - [Mailings](#)^[291]

Tab. Mailings. Mailings. Send - provides access to the SEND button within [mailings](#)^[291]

Tab. Mailings. Messages - controls page access Tools - Mass Mailing - [Messages](#)^[283]

Tab. MessageQueue. Approve - Provides access to the Get Next QA button in the My Queue page. This is required to review and approve answers submitted by QA agents.

Tab. MessageQueue. BCC- Provides access to the bcc line when composing messages and responses

Tab. MessageQueue. CC- Provides access to the cc line when composing messages and responses

Tab. MessageQueue. Delete - Provides access to the Interaction [Delete](#)^[136] option in the More menu of interactions

Tab. MessageQueue. From - Allows users to change the From address when composing a response to a customer question.

Tab. MessageQueue. Search - controls page access to [Search Interactions](#)^[176]

Tab. MessageQueue. Send - Provides access to the Send action button when acting on a customer question. Without this access right the

Send button is converted to a Submit button, and will generate a draft response for review by a QA manager instead of sending an agent response. This is the setting used for the QA CSR user type.

Tab. MessageQueue. Super vi se - controls page access to [Manage Messages](#)²¹⁵

Tab. MessageQueue. Super vi seChat - controls page access to [Manage Chats](#)²²¹

Tab. MessageQueue. Suppr essRef - Provides access to the Suppress Reference Number option within the Send button drop down.

Tab. MyAccount . Phr ases - controls page access to [My Account – Stock Responses](#)²⁶⁶

Tab. Segment s. Aut oResponse - controls page access to Segment Settings - [Notifications](#)⁶⁷¹

Tab. Segment s. Det ai l s - controls page access Segment Settings - [Segment Details](#)⁶⁴⁰

Tab. Segment s. Fi l t e r s - controls page access Segment Settings - [Filters](#)⁶⁹⁹

Tab. Segment s. Mai l boxes - controls page access Segment Settings - [Mailboxes](#)⁶⁵⁵

Tab. Segment s. Phr ases – controls page access to Segment Settings - [Stock Responses](#)⁶⁸⁹

Tab. Segment s. Topi cs - controls page access Segment Settings - [Topics](#)⁶⁹¹

Tab. Top. Admi nTool s - controls page access Segment and Tenant Settings

Tab. Top. AskAQuest i on - controls page access (deprecated in v9)

Tab. Top. Customer Info - controls page access to [Customer Info](#)¹⁴⁶

Tab. Top. FindAnswers - controls page access to the [Knowledge Base](#)¹⁸⁴ page

Tab. Top. MessageQueue - controls page access to [Message Queue](#)¹⁹⁷ pages

Tab. Top. MyAccount - controls page access to the [My Account](#)²⁶⁶ tab

Tab. User Types. CreateAdmin - determines whether the user is allowed to create Administrators. By default, this right is only granted to the SuperUser.

Access rights for standard user types

CSR - This user can only take messages using the Get Next button.

QA CSR - This user has the same access as a CSR, but cannot send responses to questions. They can only submit proposed answers that must be reviewed and approved by a QA Manager before they are delivered.

CSR Manager - This user has the ability to reassign questions, and to assign questions to agent that don't have of the skills required for a question. The ability to reassign questions provides them access to the Manage Messages page, and presents the Get This button for questions that are not assigned to them.

QA Manager - This use has the same access a CSR Manager, except they also can approve or reject proposed answers from a QA CSR.

Administrator - This user has all access rights, except for the ability to create other administrators.

Super User - This user has all access rights, including the ability to create administrators in any segment.

14.1.8 Websites



Your iService system can be configured to support multiple Internet domains, different user interfaces for agents and customers, and other aspects to fit the needs of your user base. For example, if your enterprise has multiple brands supported by a single support team you can create customized portals for self-help that are specific to the appropriate segments. These support websites can be dedicated to a particular segment for customers, while agents handle questions across all of your business segments from a single domain.

These types of configurations are made within the Websites settings page. The full user interface can be customized by selecting alternate forms in the Site Forms panel. For example, you can replace the default page for agents with a custom form that includes any content desired.

The websites page consists of four panels for each website: website domains and segments, website details, website URLs, and password reset settings. These settings are used to create custom configurations tied to a specific URL / domain. The configurations can be used to support different branding for segments, or to support different user interfaces for agents that are optimized for their business processes.

Website Domains and Segments

Your website domains and segments control the URL agents enter to access your iService system, and the content users see in the public interfaces.

Website Domains and Segments

Domain Values

- example1.com
- example1.com

Segments

- Sales

Domains – The domain represents the URL at which the website can be accessed. You can add domains by typing them into the text box to the right and clicking the **Add Domain** button. To remove a domain click the red x next to its name. You must ensure that your DNS settings for the domain are properly mapped to your iService web server. When the iService website receives the page request, it uses the domain to determine the proper database. Domains must be unique within each iService installation.

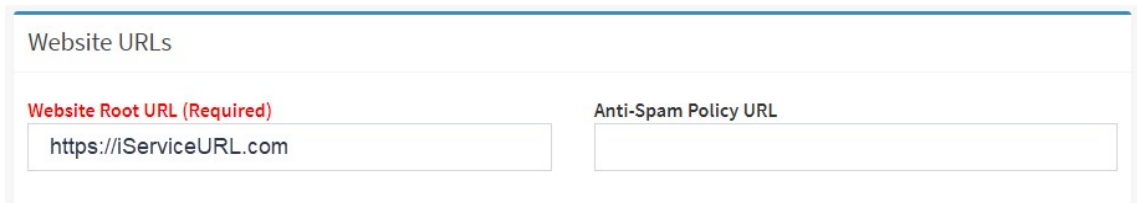
Segments – The segments included within the website are selected from the Segments list. Multiple websites can be created with various combinations of segments.

The segments chosen within a website control the content displayed in the public knowledge base and the customer portal. The built-in

customer portal (/f/customerportal-treeview) provides a web interface where customers can ask questions and search for answers with an integrated knowledge base. You can combine the various segments into a single Customer portal and present your customers the topic trees for all segments. Or, you can make a separate website for each segment and limit the display of articles and topics to that specific segment when customers visit the portal.

Topics will not display in the knowledge base or customer portal unless the website includes at least one standard segment. Also, at least one of the topics in the segment must have Public Visibility to appear in the knowledge base or portal.

Website URLs



The screenshot shows a configuration form titled "Website URLs". It contains two input fields. The first field is labeled "Website Root URL (Required)" and contains the text "https://iServiceURL.com". The second field is labeled "Anti-Spam Policy URL" and is currently empty.

Website Root URL – When variables are inserted into your auto response template or mass mailing, a URL must be generated (e.g., an unsubscribe link or external answer page). You must specify the URL to be used in this section, which is typically one of the domains specified for the website. If using a virtual directory, the root path for your website should be listed rather than just the domain. The URLs generated from the link are as follows:

- URL to Link.aspx (All urls in the bodies of notifications generated from \$link\$)
- URL to blank.gif (Final redirect location when using \$link viewed\$)

- URL to Forward.aspx (When using \$value -forwardexternal(url)\$ in send auto response filter/form action, for new messages or forward to segment sends an agent notification, when agent notification sent on Unqueue, Reassign, creating customer ticket, and creating agent ticket.)
- URL to FindAnswers.aspx (When doing update notification to answer subscribers.)

The link to Forward.aspx when doing forward external from the iService website does not use the value from the website. That url is generated using a value generated by the front end based on the agent's current URL.

Anti-Spam Policy URL – If you enter a URL in this box, it will display a link to this page on the bottom of each iService page with the text "Anti-Spam Policy". Clicking this link will load the page specified, which should provide a description of your policy for ensuring your iService tenant is not used to send unsolicited commercial email.

Password Reset Settings

Password Reset Settings

<p>Outbound Mailbox ?</p> <div style="border: 1px solid #ccc; padding: 2px;">QA2 - Second Segment -- "QA2" ▼</div>	<p>Password Reset Notification Template ?</p> <div style="border: 1px solid #ccc; padding: 2px;">QA2 - Password Reset ▼</div>
--	---

Outbound Mailbox - When a user of the iService Website requests their password, it is sent using the mailbox selected from this list. Mailboxes are created and maintained from the `Segments` - [Mailboxes](#)⁶⁵⁵ tab. The forgot password link will not appear on the login panel if this mailbox is not set.

Password Reset Notification Template – When a user of the iService Website requests their password, it is sent using the auto response notification selected from this list. Auto response notifications are created and maintained from the `Segments` - [Notifications](#)⁶⁷¹ tab.

Only auto responses that are marked as password reset will be displayed in this drop down.

Website Details

The website details panel specifies the forms used in each section of iService. The forms displayed in the user interface have placeholder names that correspond to a custom or built-in form name. You can replace pages in the interface with new pages by updating these form references. This allows you to customize the interface as needed for your business requirements. Some built-in forms have various options that you can configure for different needs.

The panel has two views: Custom Forms and Built-in Forms.

— Custom Forms

Custom forms allow you to create your own placeholder names and associate them with forms. These placeholders are typically referenced by other forms, or can be used as a replacement for the form ID in a URL (i.e., replace /f/113 with /previewdialer-head in the case below).

Website Details

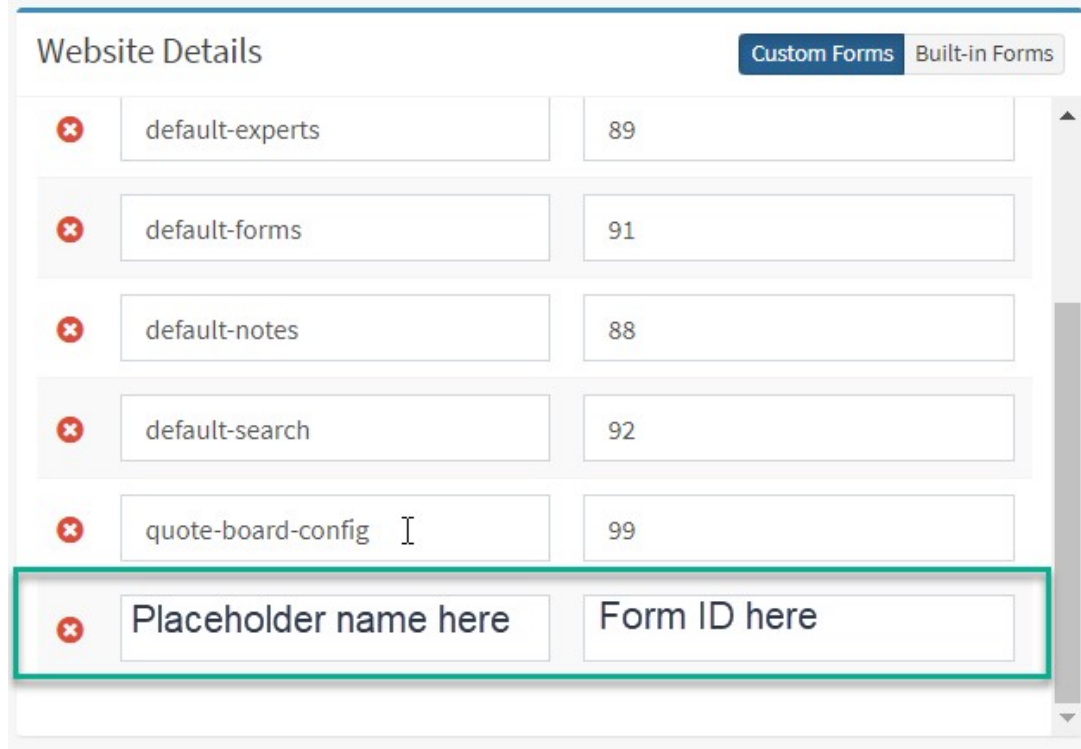
Custom Forms Built-in Forms

Add

	Placeholder Name	Form ID/Builtin Name
✕	<input type="text" value="agentapp-plugins-head"/>	<input type="text" value="111"/>
✕	<input type="text" value="assigned-messages-body"/>	<input type="text" value="200"/>
✕	<input type="text" value="assigned-messages-heac"/>	<input type="text" value="185"/>
✕	<input type="text" value="previewdialer-body"/>	<input type="text" value="112"/>
✕	<input type="text" value="previewdialer-head"/>	<input type="text" value="113"/>

Adding Placeholders

The built-in forms use existing placeholder values, but you can also add your own placeholders. Click the Add button within the Website Details panel to create a new row. Then enter the name for the placeholder and the corresponding form ID.



The screenshot shows the 'Website Details' settings menu. At the top right, there are two tabs: 'Custom Forms' (selected) and 'Built-in Forms'. Below the tabs is a list of placeholders, each with a red 'x' icon, a text input field for the placeholder name, and a text input field for the form ID. The last row is highlighted with a green border, indicating it is the one being added.

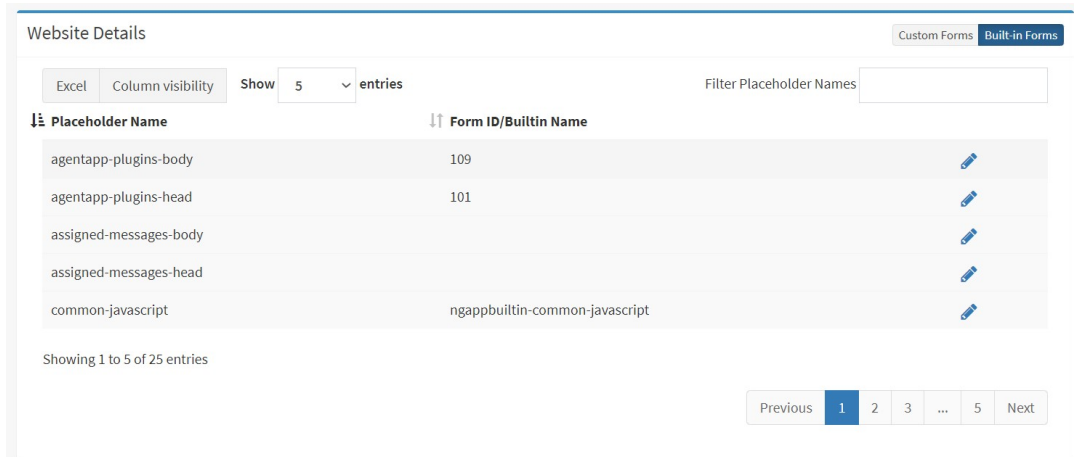
Placeholder Name	Form ID
default-experts	89
default-forms	91
default-notes	88
default-search	92
quote-board-config	99
Placeholder name here	Form ID here

Adding a custom placeholder

You can then load the form using the `/f/placeholdername` format.

Built-in Forms

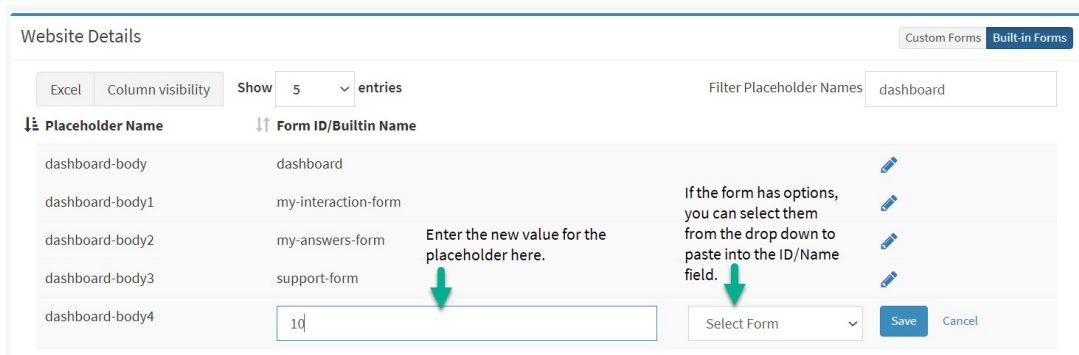
Built-in Forms are pre-written forms that are mapped to the various placeholders that comprise the iService user interface. You can change the forms referenced by these placeholders to change the content and behavior of your iService website.



The Built-in Forms view of Website Details

Replacing a form

To substitute a new form for a placeholder, click the edit pencil and enter the form number or select an option from the drop down menu. Then click save.



In the example above, the dashboard-body4 placeholder refers to a location on the agent home page. By default this value is blank. The example above replaces inserts form 10 into that placeholder.

Default Values

When you modify the form associated with an iService reserved placeholder (the built-in placeholders), a default button can be used to set the value back to the system default.

Custom Forms Built-in Forms

Filter Placeholder Names answer-actions

Form Name in-myqueue-answer-actions-portal

Select Form

Select Form

Default

Full (with Send)

Portal (No Email)

Save Cancel

Previous 1 Next

Use the default value to reset a placeholder back to the system default.

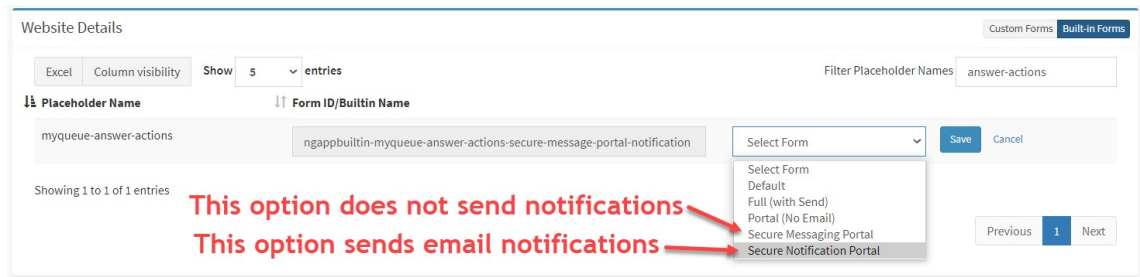
Configuration Options

You can change the behavior of your iService website with the following configuration options.

Standard Email Response vs Secure Message Portal (v8 and prior)

This is deprecated beginning with v9.1. Use the [Answer Panel Buttons](#) ³¹⁵ page to set this configuration.

You can convert a website into a secure messaging portal that does not send email by changing the `myqueue-answer-actions` form to the portal version. After making the change, click the Save button to save the changes.



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The secure message portal can be used with or without email notifications. To send your customer an email notification that an answer is available, choose the Secure Notifications Portal option.

Read more about the [secure message portal](#)³⁴⁰ options and configuration.

Load only stock response names (v8 and prior)

This is deprecated beginning with version 9.0.

To improve performance for segments with a large number of stock responses (> 250), the value for stockresponse-list can be changed from the default `ngappbuiltin-stockresponse-list-full` to `ngappbuiltin-stockresponse-list-names`.

The names only version reduces the size of the page by only loading the names of the stock responses instead of all the bodies. The bodies will be fetched and pasted into the Draft Message when clicked. However, when this option is chosen the tooltip preview for stock responses is not available.

Color code messages by age in Manage Messages page (v8 and prior)

This is deprecated beginning with version 9.0. Use the [Question Color Coding by Agent](#) menu to set these values.

The manage messages page can color code the dates of messages based upon their age. There are two placeholders used for this configuration as shown below.

messagequeue-body	1
messagequeue-head	2

1 - Body -- Place the following into a form named messagequeue-body and place the ID of that form into this placeholder.

```
<script>
var managemessage = { colorCoding: [] };
managemessage.colorCoding.push({minutes: 10, className: '
managemessage.colorCoding.push({minutes: 15, className: '
managemessage.colorCoding.push({minutes: 30, className: '
</script>
```


Update the values for `minutes` as desired. Do not change the color-names.

2 - Head -- Place the following into a form named messagequeue-head and place the ID of that form into this placeholder.

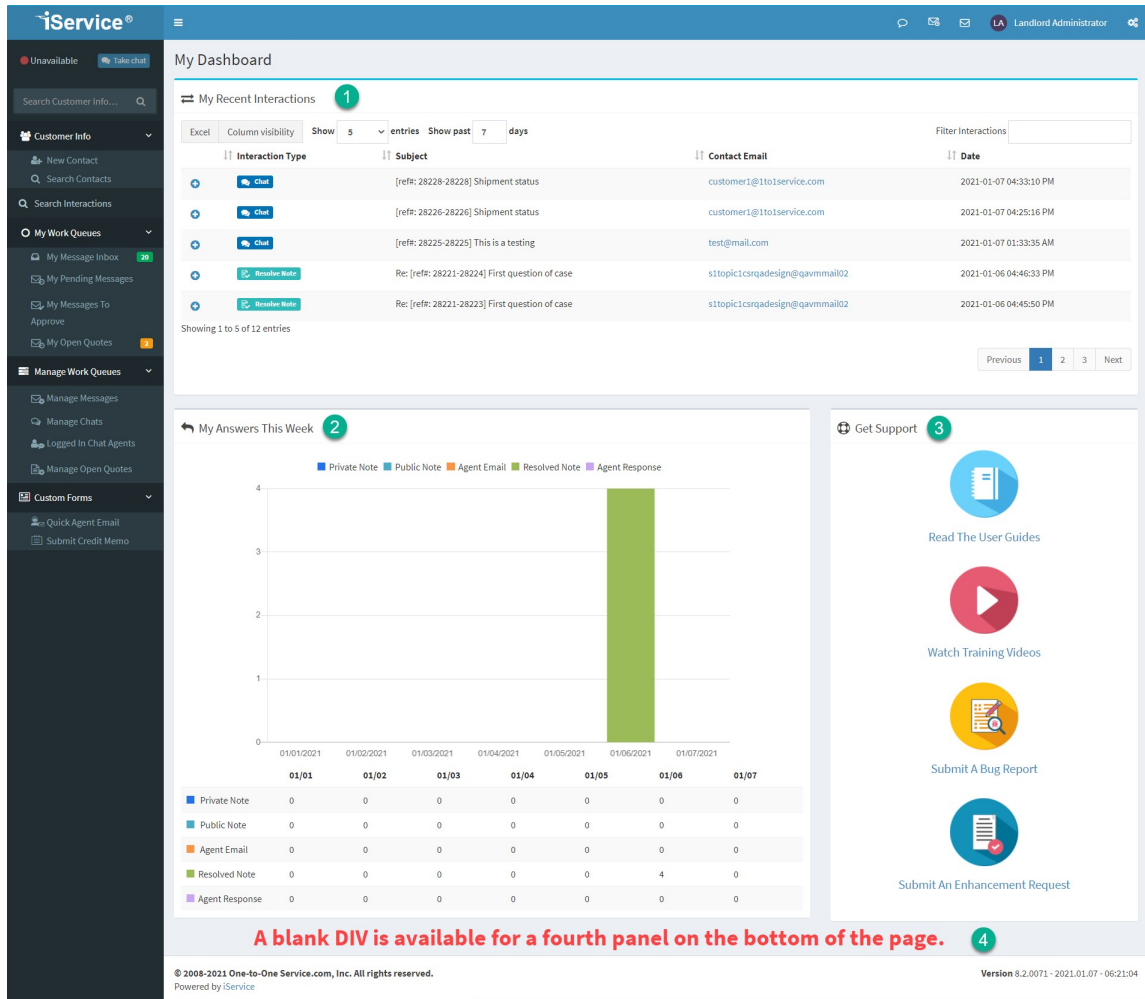
```
<style type="text/css">
#mq-managemessage-message tr.color-normal td.column-date
#mq-managemessage-message tr.color-warning td.column-date
#mq-managemessage-message tr.color-urgent td.column-date
</style>
```

Update the values for `background-color` as desired. Do not change the color- names (normal, warning, urgent).

Home Page Settings (v8 and prior)

This is deprecated beginning with version 9.0. Use the [Dashboard Settings](#)  menu to configure your home page dashboard.

The home page is comprised of four sections that can be filled with default content or your own custom forms. The layout and default forms associated with each placeholder are shown below.



The My Dashboard page

- 1 - The My Recent Interactions panel provides a search results table for all of your interactions as an agent for the time period you select. This includes questions and answers you were part of during the time-frame of the search.
- 2 - The My Answers This Week table shows a break down by the types of answers you provided.
- 3 - The Get Support panel provides links to help content and contact forms for interacting with iService.
- 4 - The fourth DIV on the page is full width. You can insert other form content here is desired.

Set Business Hours for Assigned-Messages Form (v8 and prior)

iService includes a built-in form for monitoring the status of assigned messages (/f/assigned-messages). The form uses Monday - Friday 9:00 to 17:00 as the default business hours.

To change the business hours for your website, create a new form named `assigned-messages-body` and include the following code with your required changes (the example sets hours to 8am - 5pm). Then, use the ID from that form as the value for `assigned-messages-body` in the placeholder list.

The screenshot shows the 'Website Details' page with the 'Built-in Forms' tab selected. A table displays placeholder names and their associated form IDs. The 'assigned-messages-body' placeholder has a red text prompt 'Place the form ID here' in its 'Form ID/Built-in Name' column, with a green arrow pointing to it. The 'Filter Placeholder Names' field is set to 'assigned'.

Placeholder Name	Form ID/Built-in Name
assigned-messages-body	Place the form ID here
assigned-messages-head	

Setting the form ID for the assigned messages form

```
<script>
  iservice.assignedMessages =
  { holidays: [ new Date(0, 0, 1)],
    weeklyHolidays: [0, 6],
    workShifts:
    [ { start: 8,
      end: 17
      } ]
  };
</script>
```

To create multiple shifts, add holidays, etc. consider the example below.

```
<script>
  iservice.assignedMessages =
  {
    // The Date object is constructed by calling the const
    // new Date(year, month, day, hour, minute)
```

```
// year: Is a number like 1990, 2015, etc.
// month: Is a number from 0 (January) to 11 (December)
// day: Is a number from 1 to 31
// hour: Is a number from 0 (12 AM) to 23 (11 PM)
// minute: Is a number from 0 to 59
// Week days are represented by numbers running from 0

// holidays is an array of Date objects with each one
// counted. Notice that we set the year to 0 because h
// about the year value. We just care about the month
holidays: [new Date(0,0,1), //Every Jan 1
           new Date(0,5,4), //Every July 4
           new Date(0,11,25) //Every Dec 25
          ],

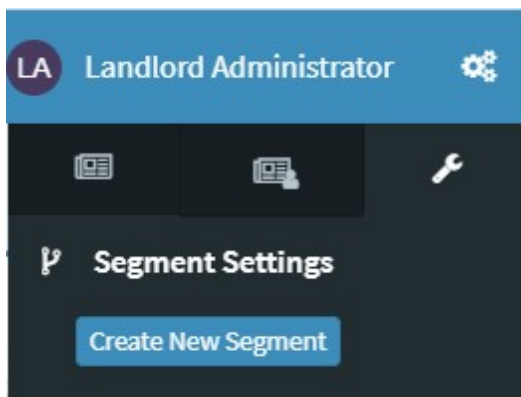
// weeklyHolidays is an array of numbers with each one
weeklyHolidays: [0, 6], // Sundays and Saturdays are 0

// workShifts is an array of JavaScript objects with e
// may have one or more shifts as appropriate. The sta
// running from 0 to 24. For example:
// 0 is 12 AM, 0.5 is 12:30 AM, 20 is 8 PM, 23:33 is 1
workShifts: [{
    start: 8,
    end: 17
  }]
};
</script>
```

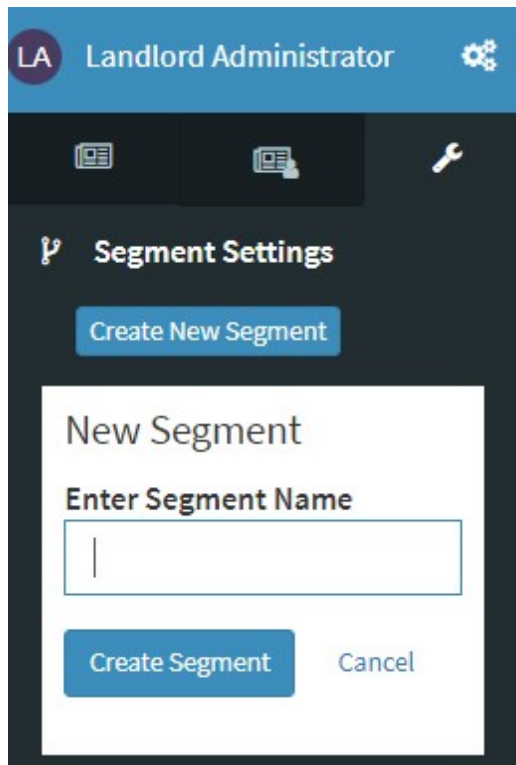
14.2 Segment Level Settings



A tenant is comprised of one or more Segments that contain contacts and accept incoming questions. Your default installation of iService will consist of a single segment ready for configuration. New segments must first be created by a Super User, and then access can be granted to other users that will configure and administer the segment. Segment information consists of Segment Details, Contact Properties, Interaction Properties, Mailboxes, Auto Responses, Stock Responses, Topics, and Filters. To create a new segment, click the Create New Segment button shown below.



Then, enter the name for the segment and click Create Segment. This function is limited to the Super User, because segments cannot be deleted. The name can be changed in the [Segment Details](#) ⁶⁴⁰ page.



Most organizations use the business segments to provide custom configuration for departments. For example, finance might have a segment for processing credit memos, purchase orders, and other interactions specific to their business purpose. Technical support might use a configuration for internal and external support requests. Each department has complete control over the configuration of their segment.

You can also use segments to differentiate brands. Each segment can use their own domain for their mailboxes, and customize their knowledge bases and other aspects of iService to reinforce their brand.

14.2.1 Segment Details



Segments are used to separate configuration details (message queues, custom properties, mailboxes, etc.) within iService into logical groupings. They are most commonly used to separate business units that have different sets of customers, topics, and mailboxes. However, since Segment Contact Properties can be made private they can also be used to provide access control over sensitive details for Agents. There are a number of business rules that are specific to Segments, which are described within the [Business Rules](#)⁵⁵ section.

To learn about settings for segments that contain interactions, read the Standard Segment section below. To learn about segments that do not contain interactions and are only use for hierarchy or storing property values, read the Information Segment section below.

Standard Segment

Standard segments contain the full set of configuration details, such as mailboxes, topics, filters etc. They are designed to accept incoming questions and publish a knowledge base using the defined topic structure.

Example of a standard segment with topics

1. **Name** – This is the name used to reference the Segment. It is the name listed in the Segment List and is a reference name only.
2. **Description** – This is a description for the Segment that is not used outside of the Segments page.
3. **Parent Segment** – Segments may be hierarchical. To make the new segment of child of an existing segment, select the parent from the drop down menu.
4. **Standard Segment** – Standard segments contain mailboxes to accept incoming mail and have their own topic tree for queuing messages. If the Standard Segment box is not checked, the segment will be considered informational only and will be used to define additional contact and organizational details only.
5. **Default Notifications** - Specify the default notifications for each type.
 - Topic Auto Response – If an auto response is selected, it will be used as the default for all topics in the segment that have "-- Segment Default--" selected as their auto response.
 - Contact Creation Message – If a contact creation auto response is selected, it will be used to notify all new contacts created that an account has been created for them.

- Agent Notification Message - The selected auto response template will be used to notify agents when a new message arrives.
 - Find Answers Notification Message - The selected auto response template will be used to notify customers when a Find Answers knowledge base article is updated.
6. **Segment Default Service Level** - The selected [service level](#)⁶⁰³ will be applied by default to all messages, unless a lower service level obtained from a contact property, interaction property, or topic is applicable to the message.
 7. **Segment default mailbox** – there are some cases where iService doesn't know what mailbox to use unless it's specified. For example, when sending an agent email you must select the FROM mailbox. The default mailbox is used whenever a specific mailbox is not known. It's important to use a common name for your default mailbox that could be understood by any recipient (e.g., support@).
 8. **Queue All Unassigned Interactions For Same Contact with Get Next** – Sometimes customers will send multiple messages about the same question. This causes issues when using the Get Next assignment process because more than one agent may be assigned message from that customer. If this box is checked, when an agent clicks the Get Next button they will be given all unassigned messages from that customer. The feature does not impact the assignment algorithm. That is, iService will find the next message based on the service levels set and the agents skills. When that message is selected any additional unassigned messages from that customer will also be assigned to the agent.

Informational Segment (Not a Standard Segment)

Parent Segment Settings

☰ Details ☰ Interaction Properties ☰ Contact Properties

Segment Name

Description

Segment Parent

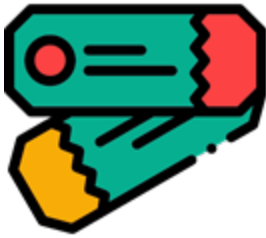
This Segment Manages Interactions (Standard Segment)

Save

Example of an information only segment

Only standard segments contain mailboxes and topics. If the Standard Segment box is not checked, the segment configuration will appear as shown below without the mailbox or topic related tabs.

14.2.2 Interaction Properties



Interaction properties provide the ability to append custom details to your interactions. For example, you might use them to categorize support requests as defect, user error, or enhancement. Interaction properties can also be used as skills. When used in a skill, they help separate questions that require special expertise like Spanish. When displayed within an interaction, the properties panel looks similar to below.

To learn more about how interaction properties are displayed to agents, read this [Understanding Interactions](#) ⁹² chapter.

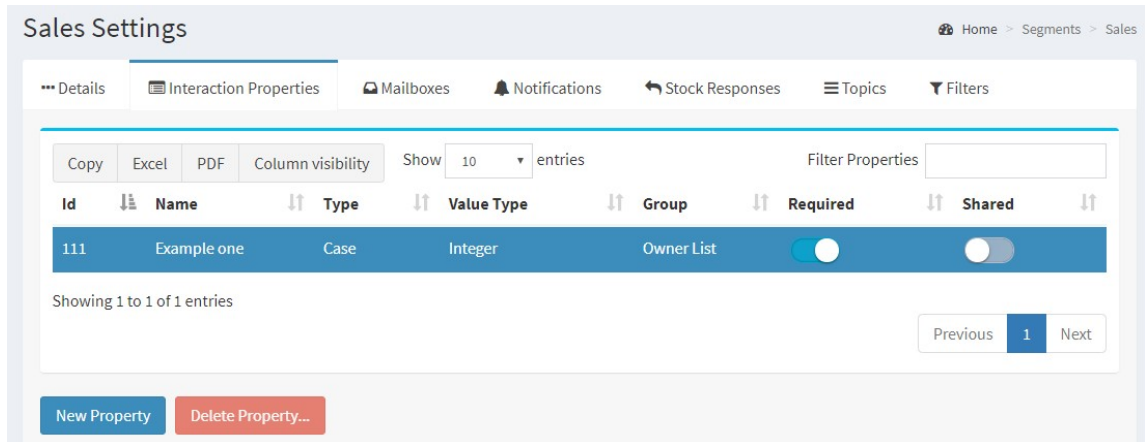
The screenshot shows the iService interface with the 'Interaction Properties' tab selected. A tooltip above the 'Interaction Properties' tab reads: "There are property values set for this interaction." The interface is divided into three main sections:

- Case Properties:** Includes a dropdown for "Change Request Type (Required)", a "Quantity" input field, a "Delivery Date" date picker, and a "Detail" text area.
- Question Properties:** Includes a "Team" section with three input fields, each with a red "x" icon, and a blue "+" icon at the bottom right.
- Answer Properties:** Includes a "Priority" dropdown menu set to "High" and an "isOpen" dropdown menu set to "True".

At the bottom of the form is a "Save" button. Below the form, a message preview is visible: "Hello, I'm looking for a flat screen. Any suggestions?"

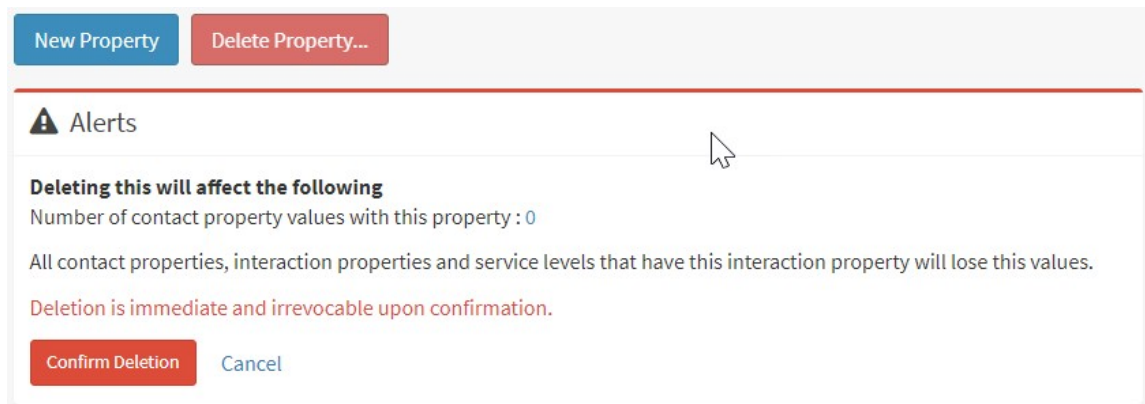
An example of interaction properties on a question

The interaction properties list



The list of interaction properties

Create and delete interaction properties from the properties list panel. The delete property button will open a dialog box requesting confirmation.



Deleting an interaction property

Configuring an interaction property

The screenshot shows a form titled "New Interaction Property". It contains the following fields and controls:

- Property Name** (1): A text input field.
- Property Type** (2): A dropdown menu.
- Value Type** (3): A dropdown menu.
- Optional Settings**: A section containing four toggle switches:
 - Required Property** (4): A toggle switch.
 - Shared Property** (5): A toggle switch.
 - Allow Multiple Values** (6): A toggle switch.
 - Customer Viewable** (7): A toggle switch.
- Create** and **Cancel** buttons.

Configuring an interaction property

1. **Property Name** – This name will be the label displayed within the Topics page and on forms where the property is entered.
2. **Property Type** – There are four types of interaction properties: Case, Question, Answer, and Knowledge Base. The Knowledge Base property type is only used within the knowledge base articles. There will always be only one value saved in the database for case properties, but question and answer properties can have values associated with each individual question or answer.
3. **Value Type** - Values are stored in the database using one of 5 formats: Date, DateTime, Number, Integer (whole number), or Text. If the property will be a list selection, choose that list from the drop down menu. These lists are created at the Tenant level within the [lists page](#)⁶⁰¹. If the property will contain free form text, just select Text. When Text is selected, an option to input multiple lines of text will appear.
4. **Required** - When a property is marked as required, it is outlined in red and a user must enter a value. In general, required interaction properties must be entered before the interaction can be resolved. See [Required Properties](#)⁶⁴⁹ for more details.
5. **Shared Property** – Interaction properties are specific to the segment in which they are created, and appear in the topic menu for association. Turning on the Shared Property switch causes the property to be displayed in the topics page for all segments. They can be used to capture values for interactions in the other segments when they are shared. For example, a property like Urgency might be

relevant to several segments. Making the property shared allows all segments to use the property in their topic configurations.

Interaction Properties ?

Segment2 Properties

- Billable MinutesS2 (Answer)
- BillableS2 (Answer)
- ChangeStatus1 (Question)
- ChangeStatus2 (Question)
- Quote Field (Case)
- System Affected (Question)

Shared Properties From Other Segments

Financial Services

- CM Amount (Answer)
- CM Approver (Case)

← The properties were set as shared.

Properties shared from another segment



It is important to note that once a property value is set on an interaction, it remains even if the interaction is forwarded to a different segment. This does not require the shared setting.

6. **Allow Multiple Values** – This attribute will place a [+] next to the property allowing agents to enter multiple values. For instance, a property of type phone number might allow several different numbers to be entered.
 - **Has Descriptions** – If the value allows multiple values, it might be desirable to provide a description for each value. For instance, an additional detail for types of phone numbers might be created with values of Home, Office, and Mobile. This additional detail would be selected in item 7 – Value Description Type. The list of Additional Details is enabled in item 7 when the Has Description box is checked.

- **Value Description Type** – This is a list of additional details created in Admin Tools > Additional Details. The list will be used as the description for the Multiple Value property.
7. **Customer Viewable** – If the property is customer viewable, it is displayed to the contact in customer portals. It will not be listed in contact forms, and the contact can't change the values.
- **Customer Editable** – If the property is customer editable, it will be displayed to the contact when they use contact forms and can be edited by the contact in customer portals. In order to automatically display a property to a customer on an Ask a Question form, both the Customer Viewable and Customer Editable fields must be selected, and the property must be associated with a topic.

Case Property Example

Perhaps you want to categorize the types of conversations you have with customers using a property with a drop down list of values like Training Needed, Defect, Enhancement Request. This type of property would be related to the entire conversation, and not an individual question or agent answer within the case. In this example the Case Property would be most appropriate because it describes the entire "case", or message thread.

Case properties are the most common type of property used. All properties created within a workflow are case properties with only one value.

Question Property Example

If you want to document something about each question the user submits, like their level of satisfaction, you would use a question property. Question properties can have a different value for every question within the case (message thread).

After you create the interaction property you have the option to associate it with a set of topics as shown in the [Topic section of this user guide](#)⁶⁹¹. When a user selects that topic in the Ask a Question form of a customer portal, the properties associated will be automatically displayed if they are set as both customer viewable AND customer editable. However, the property will be shown to an agent in the Create Ticket page because agent's have access to those properties regardless of the customer view and edit settings. NOTE: While the association of the property with a topic determines when the question property will appear in the standard iService GUI, you can create custom forms that include any interaction property regardless of the topic configuration.

When the question is presented to an agent in the Msg Queue page, the value entered on the original question will be displayed in the Message Properties panel. The agent can change this value, which is associated with the incoming question and NOT their answer.

Answer Property Example

Perhaps you want the agent to designate their response as billable and document the minutes spend working on a solution. This would require an Answer Property, and every response from the agent could have a different value. Their first response could be marked as billable and 10 minutes of time. If the customer replied saying thanks, they could resolve that question and mark their resolution as Not Billable and 0 minutes of time. The answer values are separate for each answer created (agent response, private or public note, agent email, etc), and updating their values has no impact on other answer or question properties.

Required Properties

Interaction properties can be marked a "Required" to ensure that information is consistently captured. Marking a property as required has a different impact depending on the type of property: Question/Case or Answer.

Question and Case Property Rules

When a required property is set on a [question or case](#)⁹², the following rules are enforced.

1. Customer emails are exempt from the required rule since it is can't be enforced consistently without filters.
2. Customer ticket form submissions return a standard error when the property is not included. For manually prepared forms, be sure to include all required fields for the topic for the user to populate. If you create a form that submits to a topic with required properties, the customer will not be able to submit the form if they are excluded from the page.
3. Properties that are not customer editable are not displayed to customers when a customer submits a Customer Ticket form. Therefore the property is not required to create the interaction.
4. Questions created without a required question property (e.g., customer emails or forms submitted where the property was not customer editable) can't be resolved by an agent until a value is set.

The **Agent Ticket forms behave differently** from Customer Ticket forms. Agents do not have to enter the property value until the interaction is resolved.

Answer Property Rules

When a required property is set on an [answer](#)⁹², it must have a value entered before the answer interaction is resolved.

Displaying required interaction properties

Required interaction property labels are displayed in a bold, red color to alert the agent that a value must be entered.

14.2.3 Contact Properties



Contact and account properties provide the ability to append custom details to your contacts and accounts. For example, you can sync values from your other operational systems with iService so agents can use variables to insert account numbers or other frequently used values into responses. You can create an unlimited number of contact properties in your tenant. Since property names are referenced in iService variables, they must be unique across all of your iService segments.

Contact properties are managed in the Segment Settings page of iService and are available for inclusion in agent responses and custom forms using the [\\$value command](#). Select your segment from the settings menu (1) and then select the Contact properties tab (2).

 A screenshot of the iService settings interface. The main content area shows a table of contact properties. A red circle with the number '2' highlights the 'Contact Properties' tab in the top navigation bar. On the right sidebar, a red circle with the number '1' highlights the 'e-shop' segment under 'Segment Settings'.

ID	Name	Type	Value Type
62	Account Creation	Contact	DateTime
14	Account Number	Contact	Text
57	Available2	Agent	Bool
52	Branding	Contact	Text
13	Customer Level	Contact	Customer Level

The Contact Properties menu

Creating a New Property

The screenshot shows the 'Contact Properties' configuration page. At the top, there is a navigation bar with tabs for Details, Interaction Properties, Contact Properties, Mailboxes, Notifications, Stock Responses, Topics, and Filters. Below this is a table of existing properties with columns for ID, Name, Type, Value Type, and Shared. The 'Account Number' property is highlighted. Below the table are buttons for 'New Contact Property' and 'Delete Contact Property'. The main form contains the following fields:

- Property Name:** Account Number (1)
- Value Type:** Text (2)
- Property Type:** Contact (3)
- Multi-Line Text:** Toggle (2)
- Optional Settings:**
 - Shared Property:** Toggle (4)
 - Allow Multiple Values:** Toggle (5)
 - Has Descriptions:** Toggle (5)
 - Customer Viewable:** Toggle (6)
 - Customer Editable:** Toggle (6)
- Save:** Button
- Number of contacts with this value set:** 30 (7)
- This property is used in the following locations:**
 - Service Levels:** None (8)

To create a new contact property, click New Contact Property and complete the following information.

1 - Property Name – This name will be the label that is displayed within the Contact or Organization page. The order of the values will determine the order in which they are displayed within the iService interface in the Contact and Organization pages.

2 – Value Type - Select the type of detail that should be associated with this new property. If the property will be a list selection, choose that list from the drop down menu. These lists are created at the Tenant level within the [Lists](#) ⁶⁰¹ tab. The value types include text, date, dateTime,

number, and integer (a whole number). If text is chosen, an additional switch is presented for multi-line text. When the multi-line text option is on, the input will become a text area with three rows instead of a text input with a single row.

3 - Property Type - There are four types of contact properties: contact only, account only, contact and account, and agent.

Contact Only - The default value is Contact, which is available for every contact, whether the contact is an agent or a customer.

Account Only - Account properties function identically to Contact properties, but are only shown for accounts.

Contact and Account - Some properties might be applicable to both individual contacts and accounts. When you create a Contact and Account property, it will be available for both contacts and accounts.

Agent - An Agent property is a special property used only for iService Agents. If the property is an agent setting, it will display within the [Settings - Agents](#)⁵⁴² page. Agents can view and edit the values for their own agent properties from their Profile page. A common example of an agent property is an Availability property used in a Round Robin filter.

4 - Shared Property – If you want all users of iService to view these contact properties, regardless of their access to this segment, then select the Shared Property switch. Otherwise, leave this box unchecked and only agents that have access to this segment will see these values within contact details.

5 - Allow Multiple Values – This attribute will place a [+] next to the property allowing agents to enter multiple values. For instance, a phone number property allows several different numbers to be entered. **Has**

Descriptions – If the property allows multiple values, it might be desirable to provide a description for each value. For instance, phone numbers are created with a description of Home, Office, and Mobile. This List of descriptions would be selected to describe each value, and is created in the [Lists](#)⁶⁰¹ page.

6 – **Customer Viewable** – If the property is set to customer viewable, it will be displayed to the contact in the portal page. **Customer Editable** – If the property is customer editable, it can be edited by the contact in the portals page. This value is only available when the Customer Viewable option is selected.

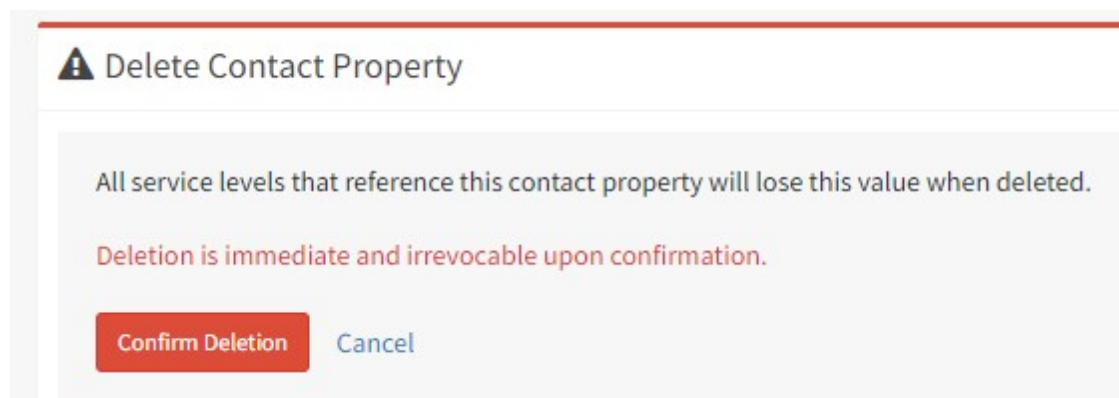
7 – **Number of Contacts with this value set** – This is the number of contacts that currently have a value set for the property. The number is a hyperlink that will load a search result for all contacts with a value for the property.

8 - **Service Levels** - Contact properties can be used to control [service levels](#)⁶⁰³. For example, a VIP property might have values that provide a special service level for certain classes of customer.

– Deleting Contact Properties

Care should be taken when deleting contact properties. Any contacts that have this value assigned will lose their history of the property since it is eliminated from the iService database when deleted. Deleting properties is a two step process: Evaluate the impact of deleting and then confirm deletion.

When you click the Delete Contact button, you will get the following dialogue.



Deleting a contact property

14.2.4 Mailboxes



iService does not have a built-in mail server. All incoming and outgoing email is routed through a separate mail server defined within the mailbox configuration. Mailboxes retrieve messages from generic email accounts (e.g., info@yourcompany.com) using POP, IMAP, or EWS, and convert those messages into questions within the iService database. Incoming and Outgoing mail servers associated with an iService mailbox can be separate and are configured with separate parameters. You should monitor your mailboxes for errors that might indicate a configuration problem.

Working with Mailboxes

Display Name	Reply To Address	Default Topic	Enabled	Errors
Customer Service	demo-cc@1to1service.com	e-shop -- All Topics	<input checked="" type="checkbox"/>	6
Human Resources	hr@1to1service.com	e-shop -- All Topics	<input type="checkbox"/>	0
Technical Support	techsupport@1to1service.com	e-shop -- All Topics	<input type="checkbox"/>	0

The mailbox list

You can add new mailboxes to the mailbox list, but there is no delete mailbox option. Since interactions are often associated with mailboxes, your mailboxes must remain in iService. Mailboxes can be moved between segments directly in the database. Ask your iService administrator for assistance with that process. Mailboxes can also be deleted by your iService administrator, but it will require removal of related interactions.

Set the toggle in the enabled column to enable or disable email retrieval for the mailbox.

Incoming Mail Configuration

iService supports the following protocols for incoming email:

- POP and IMAP (including secure POP and IMAP)
- EWS Basic Authentication (Deprecated by Microsoft but available for legacy use)
- EWS OAuth
- Microsoft Graph API

See below the details on configuring each protocol.

Configuring POP and IMAP

The screenshot displays the 'New Mailbox' configuration interface. The 'Incoming Mail Configuration' section is highlighted with a light blue border and contains the following fields:


1. Protocol: POP
2. Mail Server Name: Ex. pop.example.com
3. Use Encryption:
4. Port Number: 995
5. Username: (empty field)
6. Password: (empty field)
7. Default Topic For Incoming Messages: (dropdown menu)
8. Filter: (dropdown menu)
9. Enable Mail Retrieving:

The 'Outgoing Mail Configuration' section is partially visible and contains the following fields:

- Protocol: SMTP Auth
- SMTP Server Name: (empty field)
- Use Encryption:
- Port Number: 465
- Username: (empty field)
- Password: (empty field)
- Display Name: (empty field)
- Reply To: (empty field)

A large text overlay on the right side of the 'Outgoing Mail Configuration' section reads: "Outbound configuration is explained separately". At the bottom of the 'Incoming Mail Configuration' section are 'Create' and 'Cancel' buttons.

Configuring incoming mail for POP and IMAP

1. **Protocol** – By default, iService will use POP with encryption to retrieve email from the specified mailbox. To use IMAP, select that protocol in the drop down menu.
2. **Mail Server Name** – Mail Server Name is the name of the server on which the mailbox is hosted. For example, mail.yourcompany.com.
3. **Use encryption** - enable this setting to use encryption for POP or IMAP mail retrieval.
4. **Port Number** – Designate the port through which mail will be retrieved. Common port numbers are shown below, but you should verify this with your email administrator.
 - a. For non-SSL POP, this is usually port 110.
 - b. For SSL Pop, this is usually port 995.
 - c. For non-SSL IMAP, this is usually port 143.
 - d. For SSL IMAP, this is usually port 993.
5. **User Name** - User Name is the login name for the mailbox. If the User Name is entered incorrectly, iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect. Please note that the `username` is typically not the same as the `Reply To` address.
6. **Password** - This is the password necessary to login and retrieve email from the mailbox. If the Password is entered incorrectly, an error will be generated and iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log and displayed in the Errors section of the mailbox configuration if this value is incorrect.
7. **Default topic for incoming messages** - Default Topic is the topic to which email from this account will be assigned, unless a filter assigned to this mailbox identifies a different topic.
8. **Filter** - Filters read incoming messages and set their topics based upon Regular Expression pattern matches. Filters are created in the [Segment Settings - Filters](#)  page and selected from this drop down menu.
9. **Enable Mail Retrieving** - The Enable Mail Retrieving toggle is used to enable or disable checking of the mailbox, without deleting the account setup. When on, iService will retrieve email from the mailbox every 60 seconds. When off, email will not be retrieved from

this mailbox. This only affects incoming email and Outgoing Email will function for the specified mailbox as long as the mail popper service is running.


Configuring EWS Basic Authentication

The image shows two configuration forms side-by-side. The left form is titled 'Incoming Mail Configuration' and has seven numbered steps: 1. Protocol (EWS), 2. Path To EWS (URL), 3. Username, 4. Password, 5. Default Topic For Incoming Messages, 6. Filter, and 7. Enable Mail Retrieving. The right form is titled 'Outgoing Mail Configuration' and has a Protocol dropdown set to SMTP. A large text overlay on the right form reads 'Outbound configuration is explained separately'.

Configuring incoming email for EWS basic authentication

1. **Protocol** – To use EWS basic authentication, select the EWS protocol in the drop down menu.
2. **Path to EWS** – When you select EWS for your incoming protocol, this field will change to "Path To EWS" and will be the URL to the Microsoft web service for EWS. This is usually the path shown as the example.
3. **Username** - User Name is the login name for the mailbox. If the User Name is entered incorrectly, iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect. Please note that the `username` is often not the same as the `Reply To` address.
4. **Password** - This is the password necessary to login and retrieve email from the mailbox. If the Password is entered incorrectly, an

error will be generated and iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log and displayed in the Errors section of the mailbox configuration if this value is incorrect.

5. **Default topic for incoming messages** - Default Topic is the topic to which email from this account will be assigned, unless a filter assigned to this mailbox identifies a different topic.
6. **Filter** - Filters read incoming messages and set their topics based upon Regular Expression pattern matches. Filters are created in the [Segment Settings - Filters](#)  page and selected from this drop down menu.
7. **Enable Mail Retrieving** - The Enable Mail Retrieving toggle is used to enable or disable checking of the mailbox, without deleting the account setup. When on, iService will retrieve email from the mailbox every 60 seconds. When off, email will not be retrieved from this mailbox. This only affects incoming email and Outgoing Email will function for the specified mailbox as long as the mail popper service is running.

Configuring EWS OAuth

The screenshot shows the 'New Mailbox' configuration interface. The 'Incoming Mail Configuration' section is highlighted with a white background and contains the following fields:

- 1. Protocol: EWS OAuth (selected in a dropdown menu)
- 2. EWS Application ID: Text input field
- 3. EWS Client Secret: Text input field
- 4. EWS Tenant ID: Text input field
- 5. Username: Text input field
- 6. Default Topic For Incoming Messages: Dropdown menu
- 7. Filter: Dropdown menu
- 8. Enable Mail Retrieving: Toggle switch (currently off)

The 'Outgoing Mail Configuration' section is shown in a greyed-out state with a semi-transparent overlay that reads: "Outbound configuration is explained separately". It includes fields for Protocol (SMTP), SMTP Server Name, Use Encryption (checked), Display Name, and Reply To.

At the bottom of the 'Incoming Mail Configuration' section are 'Create' and 'Cancel' buttons.

Configuring incoming mail for EWS OAuth

1. Protocol – To use EWS OAuth authentication, select the EWS OAuth protocol in the drop down menu.

2/3/4. EWS Application ID / Client Secret / EWS Tenant – When you select EWS OAuth for your incoming protocol, there are three values required that define the tenant for your mailboxes. These values are typically the same for every mailbox you use and are unique for your company's O365 tenant. These values replace the need for a separate password.

5. Username - Username is the login name for the mailbox. If the User Name is entered incorrectly, iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect. Please note that the `username` is often not the same as the `Reply To` address.

6. Default topic for incoming messages - Default Topic is the topic to which email from this account will be assigned, unless a filter assigned to this mailbox identifies a different topic.

7. **Filter** - Filters read incoming messages and set their topics based upon Regular Expression pattern matches. Filters are created in the [Segment Settings - Filters](#) page and selected from this drop down menu.

8. **Enable Mail Retrieving** - The Enable Mail Retrieving toggle is used to enable or disable checking of the mailbox, without deleting the account setup. When on, iService will retrieve email from the mailbox every 60 seconds. When off, email will not be retrieved from this mailbox. This only affects incoming email and Outgoing Email will function for the specified mailbox as long as the mail popper service is running.

Configuring Microsoft Graph API

New Mailbox

The screenshot displays two configuration panels for a new mailbox. The left panel, 'Incoming Mail Configuration', contains the following elements:

- 1** Protocol: A dropdown menu with 'Microsoft Graph API' selected.
- 2** Username: An empty text input field with a red border and a warning message: 'Incoming Username is required field.'
- 3** Default Topic For Incoming Messages: A dropdown menu with 'Select or search for a topic' and a red border and warning message: 'Topic is required field.'
- Optional Settings** section:
 - 4** Filter: A dropdown menu with 'Select a filter'.
 - 5** Enable Mail Retrieving: A toggle switch currently turned off.

The right panel, 'Outgoing Mail Configuration', is dimmed and features a text overlay: 'Outgoing configuration is explained separately'. It contains the same fields as the incoming configuration panel, but they are not active.

Configuring incoming email for Graph API

1. **Protocol** – To use Microsoft Graph API, select that protocol in the drop down menu. Once the protocol is selected, the required fields will be updated as shown.

When using Graph API the credentials are stored

separately from the mailbox configuration. The required keys are entered within the [External APIs page](#)⁵⁸⁷ as a single entry, and all Graph API mailboxes will use those settings.

2. **Username** - Username is the login name for the mailbox. If the User Name is entered incorrectly, iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect. Please note that the `username` is not necessarily the same as the `Reply To` address.
3. **Default topic for incoming messages** - Default Topic is the topic to which email from this account will be assigned, unless a filter assigned to this mailbox identifies a different topic.
4. **Filter** - Filters read incoming messages and set their topics based upon Regular Expression pattern matches. Filters are created in the [Segment Settings - Filters](#)⁶⁹⁹ page and selected from this drop down menu.
5. **Enable Mail Retrieving** - The Enable Mail Retrieving toggle is used to enable or disable checking of the mailbox, without deleting the account setup. When on, iService will retrieve email from the mailbox every 60 seconds. When off, email will not be retrieved from this mailbox. This only affects incoming email and Outgoing Email will function for the specified mailbox as long as the mail popper service is running.

Outgoing Mail Configuration

iService supports the following protocols for sending email:

- SMTP
- SMTP Authentication

- EWS Basic Authentication (Deprecated by Microsoft but available for legacy use)
- EWS OAuth
- Microsoft Graph API

See below the details on configuring each protocol.

Configuring SMTP

Incoming Mail Configuration

Protocol [?](#)

POP

Mail Server Name

Ex. pop.example.com

Use Encryption [?](#)

Port Number [?](#)

995

Username [?](#)

Password [?](#)

Default Topic For Incoming Messages [?](#)

Optional Settings

Filter [?](#)

Enable Mail Retrieving [?](#)

Create Cancel

Incoming configuration is explained separately

Outgoing Mail Configuration

Protocol [?](#)

1 SMTP

SMTP Server Name

2

Use Encryption [?](#)

3

Display Name [?](#)

4

Reply To [?](#)

5

Configuring outgoing email for SMTP

1. **Protocol** – Select the SMTP protocol for outgoing email. The most common protocol is SMTP, which is the standard for sending email on most mail servers.
2. **SMTP Server Name** – A separate server may be used for sending mail than receiving. List the name or address for the SMTP server used to send mail for this mailbox.

3. **Use Encryption** – Select this option to require encryption if required and supported by your server. This is checked by default.
4. **Display Name** – The display name is typically what will display in the From line when users read your email response. For example, a name such as Customer Service might be used. This is also listed in menus that display mailboxes.
5. **Reply To** – This address is the full email address you want to use as the reply to address when sending replies or agent emails from this mailbox. For example, `info@yourcompany.com`.

Configuring SMTP Authentication

Incoming Mail Configuration

Protocol ?
POP

Mail Server Name
Ex. pop.example.com

Use Encryption ?

Port Number ?
995

Username ?

Password ?

Default Topic For Incoming Messages ?

Optional Settings

Filter ?

Enable Mail Retrieving ?

Create Cancel

Outgoing Mail Configuration

Protocol ?
SMTP Auth

SMTP Server Name

Use Encryption ?

Port Number ?
465

Username ?

Password ?

Display Name ?

Reply To ?

Configuring outgoing email for SMTP Auth

1. **Protocol** – Select the SMTP Auth protocol for outgoing email. The SMTP Auth protocol requires additional user authentication parameters not provided for basic SMTP.

2. **SMTP Server Name** – A separate server may be used for sending mail than receiving. List the name or address for the SMTP server used to send mail for this mailbox.
3. **Use Encryption** – Select this option to require encryption if required and supported by your server.
4. **Port** – SMTP Authentication requires a port number for sending email. The common port for SMTP Authentication is 465.
5. **Username** – SMTP Auth requires a username for login.
6. **Password** - SMTP Auth requires a password for login.
7. **Display Name** – The display name is typically what will display in the From line. For example, a name such as Customer Service might be used.
8. **Reply To** – This address is the full email address you want to use as the reply to address when sending replies or agent emails from this mailbox. For example, `info@yourcompany.com`.

Configuring EWS Basic Authentication

Incoming Mail Configuration

Protocol ? **Incoming configuration is explained separately. However, when using EWS the incoming and outgoing are typically using the same protocol.**

Path To EWS

Ex. <https://outlook.office365.com/EWS/exchange.asmx>

Username ?

Password ?

Default Topic For Incoming Messages ?

Optional Settings

Filter ?

Enable Mail Retrieving ?

Create Cancel

Outgoing Mail Configuration

1 Protocol ? EWS

2 Path To EWS

Ex. <https://outlook.office365.com/EWS/exchange.asmx>

3 Username ?

4 Password ?

5 Display Name ?

6 Reply To ?

Configuring outgoing email for EWS basic authentication

1. **Protocol** – Select the EWS protocol to use EWS with basic authentication.
2. **Path to EWS** – When you select EWS for your outgoing protocol, this field will change to "Path To EWS" and will be the URL to the Microsoft web service for EWS. This is usually the path shown as the example.
3. **Username** - User Name is the login name for the mailbox. If the User Name is entered incorrectly, iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect. Please note that the `username` is often not the same as the `Reply To` address.
4. **Password** - This is the password necessary to login and retrieve email from the mailbox. If the Password is entered incorrectly, an error will be generated and iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log and displayed in the Errors section of the mailbox configuration if this value is incorrect.
5. **Display Name** – The display name is typically what will display in the From line. For example, a name such as Customer Service might be used.
6. **Reply To** – This address is the full email address you want to use as the reply to address when sending replies or agent emails from this mailbox. For example, `info@yourcompany.com`.

Configuring EWS OAuth

Incoming Mail Configuration

Protocol [?] Incoming configuration is explained separately. However, when using EWS the incoming and outgoing are typically using the same protocol.

EWS Application ID

EWS Client Secret

EWS Tenant ID

Username [?]

Default Topic For Incoming Messages [?]

Optional Settings

Filter [?]

Enable Mail Retrieving [?]

Create Cancel

Outgoing Mail Configuration

1 Protocol [?] EWS OAuth

2 EWS Application ID

3 EWS Client Secret

4 EWS Tenant ID

5 Username [?]

6 Display Name [?]

7 Reply To [?]

Configuring outgoing email for SEW OAuth

1. **Protocol** – To use EWS OAuth authentication, select the EWS OAuth protocol in the drop down menu.

2/3/4. **EWS Application ID / Client Secret / EWS Tenant** – When you select EWS OAuth for your outgoing protocol, there are three values required that define the tenant for your mailboxes. These values are typically the same for every mailbox you use and are unique for your company's O365 tenant. These values replace the need for a separate password.

5. **Username** - Username is the login name for the mailbox. If the User Name is entered incorrectly, iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect. Please note that the `username` is often not the same as the Reply To address.

6. **Display Name** – The display name is typically what will display in the From line. For example, a name such as Customer Service might be used.

7. **Reply To** – This address is the full email address you want to use as the reply to address when sending replies or agent emails from this mailbox. For example, `info@yourcompany.com`.

Configuring Microsoft Graph API

The screenshot displays two configuration panels side-by-side. The left panel, titled 'Incoming Mail Configuration', shows the 'Protocol' dropdown set to 'Microsoft Graph API'. A large text overlay reads: 'Incoming configuration is explained separately. However, when using Graph API the incoming and outgoing are typically using the same protocol.' Below this, there are fields for 'Username', 'Default Topic For Incoming Messages', and 'Filter', along with an 'Enable Mail Retrieving' toggle. The right panel, titled 'Outgoing Mail Configuration', shows the 'Protocol' dropdown set to 'Microsoft Graph API' (marked with a green circle '1'). Below it are four required fields: 'Username' (marked with a green circle '2'), 'Display Name' (marked with a green circle '3'), and 'Reply To' (marked with a green circle '4'). Each field has a red error message below it: 'Outgoing Username is required field.', 'Display Name is required field.', and 'Reply To is required field.' respectively.

Configuring outgoing email for Microsoft Graph API

1. **Protocol** – To use Microsoft Graph API, select that protocol in the drop down menu. Once the protocol is selected, the required fields will be updated as shown.

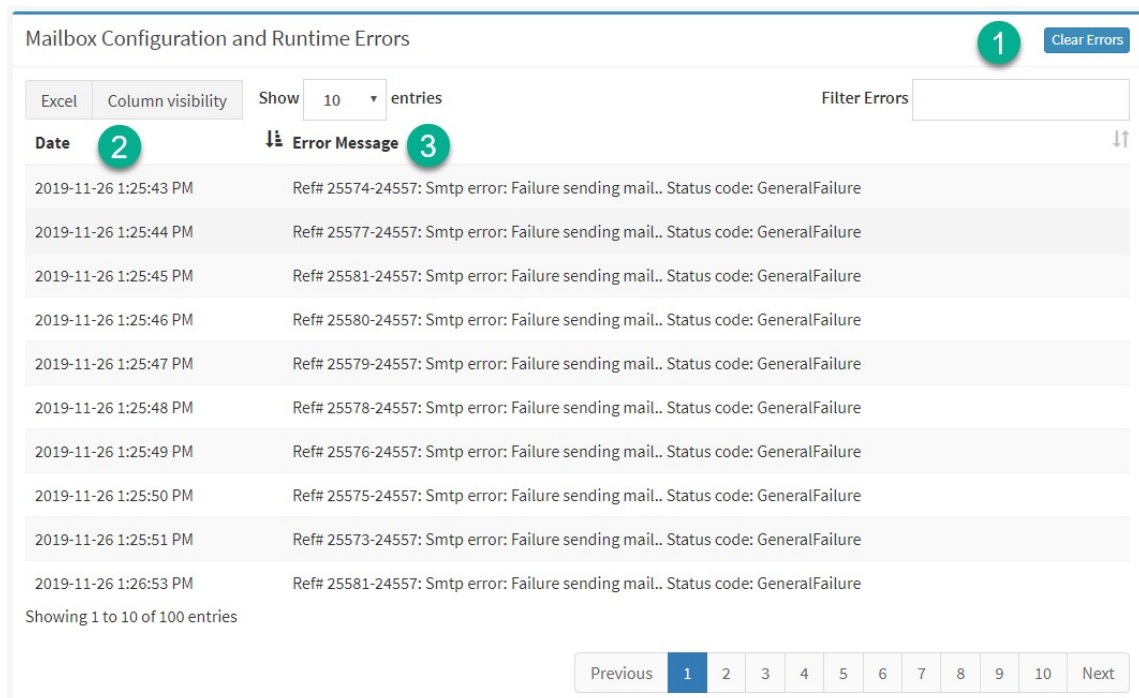
When using Graph API the credentials are stored separately from the mailbox configuration. The required keys are entered within the [External APIs page](#)⁵⁶⁷ as a single entry, and all Graph API mailboxes will use those settings.

2. **Username** - Username is the login name for the mailbox. If the User Name is entered incorrectly, iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect. Please note that the `username` is not necessarily the same as the `Reply To` address.

3 - **Display Name** - The display name is typically what will display in the From line. For example, a name such as Customer Service might be used.

4 - **Reply To** - This address is the full email address you want to use as the reply to address when sending replies or agent emails from this mailbox. For example, `info@yourcompany.com`.

Mailbox errors



Mailbox Configuration and Runtime Errors 1 Clear Errors

Excel Column visibility Show 10 entries Filter Errors

Date 2	Error Message 3
2019-11-26 1:25:43 PM	Ref# 25574-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:25:44 PM	Ref# 25577-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:25:45 PM	Ref# 25581-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:25:46 PM	Ref# 25580-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:25:47 PM	Ref# 25579-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:25:48 PM	Ref# 25578-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:25:49 PM	Ref# 25576-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:25:50 PM	Ref# 25575-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:25:51 PM	Ref# 25573-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure
2019-11-26 1:26:53 PM	Ref# 25581-24557: Smtp error: Failure sending mail.. Status code: GeneralFailure

Showing 1 to 10 of 100 entries

Previous 1 2 3 4 5 6 7 8 9 10 Next

The mailbox errors panel

Clear Errors - To clear the errors from the errors listing, click the "clear errors" button. Many error are temporary, and should be cleared from the table from time to time.

Date - The date and time the error was generated.

Errors - If iService encounters errors retrieving or sending email from the mailbox, details of those errors will be listed in the Mailbox Configuration and Runtime Errors table. These error messages are generally what is reported by the mail server. For performance purposes, only 100 error messages are displayed.

14.2.5 Notifications



Notification messages are templates used to send notices to contacts and agents. There are seven types of notification messages: Contact Creation, Message Acknowledgment, Agent Notification, Password Reset, Secure Notification, Alerts, and Knowledge Base Article Notifications. These templates use HTML formatting and iService variables. Variables are used to substitute information from the iService database.

The fields common to all auto responses are as follows.

Response Name – This is the reference name displayed throughout iService. It is only viewed by iService Agents.

Description – The description is used to describe the purpose of the response, and is only displayed in the Auto Response page.

Subject – The subject line in the email sent to the recipient of the notification.

Response body – This is the body of the notification message sent to the recipient. It may contain variables that will be automatically populated when iService composes the message. The variables available are dependent on the notification type, and are listed below in the [Using Variables in Notifications](#) ⁶⁷⁸ section. Notifications are sent in multi-part format, and the plain text version is automatically derived from the rich text version.

Use No-Reply from address – When checked, the notification will be sent using a reply address of no-reply@domain.com. The domain used will be the domain for the mailbox that would normally be used.

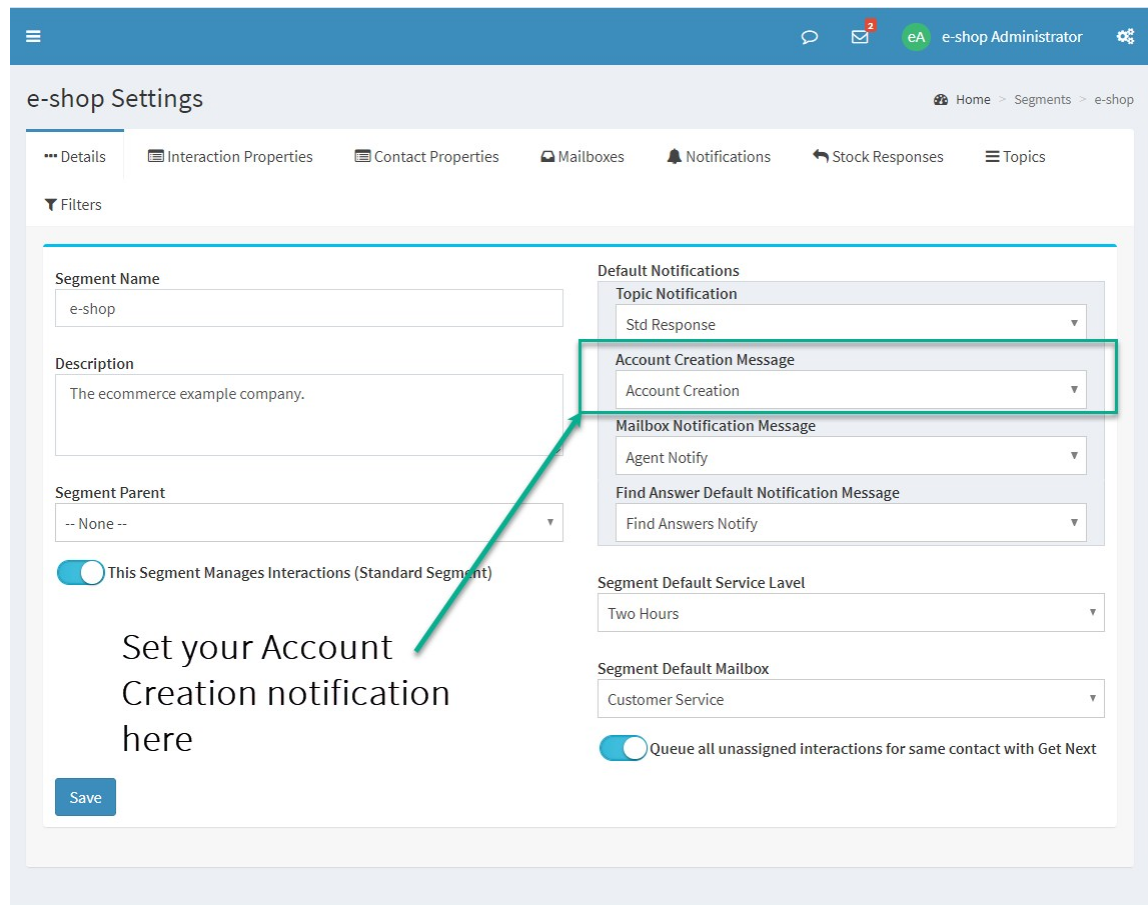
Notification Type – There are seven types of Notification templates. The purpose and use of each is described below.

Contact creation

This notification is sent as a response the first time an interaction is created for a new iService user (customer email, agent email, customer ticket, etc.). This informs the sender that an account was created automatically for them and provides their password. This password is

required for the contact to log into a customer portal and view their interaction history, contact information (profile), and mailing list subscriptions. The notification is also useful to promote usage of the iService knowledge base.

Although multiple notifications of this type may be created, only one will be used by the Segment. The default Contact Creation notification is set in the Segment Settings > Details page. If you don't want your customers to view the iService interface, set the default contact creation notification to -none-.



Setting the account creation notification

Variables Useful in Contact Creation Notifications

Your contact creation notice should always include the password that was created for the contact, and can optionally include other variables to make the notice more meaningful. These variables are described below.

Password variable - The sender will need their password to log into your iService customer portal. The format for the password variable is below.

```
$value -customer(password)$
```

Sender's email address - It's a good idea to show the sender the email address that we received because many people have multiple addresses. The format for the email address received is below.

```
$value -question(fromemail)$
```

Sender's full name or email - If the sender included their full name as a display name in their email, iService will record it as their first and last name. You can use a variable in your greeting that will show the full name, and if not available will show their email address. The format for the contact's full name is below.

```
$value -customer(name)$
```

Most other variables associated with the question that was submitted can also be used in your contact creation notification template.

Message Acknowledgment

Message Acknowledgments are automatically sent to the contact each time an inquiry is received by a topic that has the notification assigned. The acknowledgment informs the contact that their message has been received, and can contain information specific to the topic that might

answer the contact's question. These acknowledgments are associated with topics in the Segment Settings > Topics page.

Customers that have a high volume of interactions with your enterprise might want to be exempted from receiving auto responses. A special property can be selected in the Contact Details page to prevent these notifications. To disable notifications, set that value to False (turn switch off).

The screenshot displays the iService interface for a contact named John Smith. The left sidebar contains navigation options such as 'Customer Info', 'Search Contacts', and 'My Work Queues'. The main content area is titled 'Contact - John Smith' and includes tabs for 'Summary', 'Details', 'Subscriptions', and 'History'. The 'Details' tab is active, showing fields for 'First Name' (John), 'Last Name' (Smith), 'Phone' (Work: 217-555-1212), 'Contact Type' (Vendor), 'Company' (Example Company), and 'Job Title' (Purchasing Manager). A 'Logins' section shows an email login for customer1@1to1service.com. A 'Segment Membership' section shows 'e-shop' as an active segment. At the bottom, a 'Receive Notifications' toggle switch is currently turned on. A green arrow points to this toggle, with the text: 'Turn this off to stop sending message acknowledgments'. A 'Save' button is located at the bottom left of the settings area.

Settings for notifications at the contact level

Variables Useful in Message Acknowledgment Notifications

Your message acknowledgment notice can include variables to make it more meaningful. The most common variables used in message acknowledgments are described below.

Sender's email address - It's a good idea to show the sender the email address that we received because many people have multiple addresses. The format for the email address received is below.

```
$value -question(fromemail)$
```

Sender's full name or email - If the sender included their full name as a display name in their email, iService will record it as their first and last name. You can use a variable in your greeting that will show the full name, and if not available will show their email address. The format for the contact's full name is below.

```
$value -customer(name)$
```

Details about the original question - You can insert many aspects of the original question in your acknowledgment.

```
$value -question(body)$  
$value -question(subject)$  
$value -question(date)$
```

Most other [variables associated with the question](#) that was submitted can also be used in your contact creation notification template.

Agent Notification

Agent notifications are sent to agents only when a) the agent has notifications enabled, and b) the agent has all of the skills and segment access required to answer the question that was received, and c) the topic of the question is configured to send agent notifications. Although multiple notifications of this type may be created, only one will be used by a topic. The default Agent Notification template is set in the [Segment Settings > Details page](#)⁶⁴⁰.

There are two types of agent notifications: system generated agent notifications, and Forward to External Agent notifications.

System generated notifications can be sent to agents to inform them of new messages arriving within iService. These notifications are set within the Segment Settings > Topics page on a topic by topic basis.

Forward to External Agent notifications can be sent by agents from the [actions menu](#)¹⁰⁵. This notification is used to allow people that don't have an iService login to answer questions.

See the [Forms guide](#) for examples of variables used in these templates.

Password Reset

When a contact forgets their password they can request a reminder from the iService web site. The reminder will be sent using the Password Reset auto response. Although multiple auto responses of this type may be created, only one will be used per Website. The default Password Reset auto response is set in the [Settings > Websites](#)⁶²³ tab.

See the [Forms guide](#) for the variables used in these templates.

Secure Notification

When agents respond to contact questions with sensitive information, that information should not be sent using unencrypted email. Instead, a secure notification should be sent informing the contact that an answer is available within the iService system. The contact should return to the iService website and login to read the message from an encrypted page. These auto response templates can be accessed from the [SEND](#)¹⁰⁷ button when agents compose their response.

Alert

iService provides an Alerts system to monitor system status and can generate notices to agents. The Alert auto responses are selected from the Admin Tools > Alerts page when creating alerts that send auto responses.

Knowledge base article update

Users can subscribe to articles within the Find Answers knowledge base so they can be notified when the article is updated. This template is sent to those users to notify them of these changes. The template is selected from the [Segment Details tab](#) ⁶⁴⁰ and is used for all article updates within that segment.

14.2.5.1 Using variables in auto responses

You can embed variables within your auto responses to perform a variety of functions. The substitutions of these variables is handed by the iService Forms component. For details on variables that are available, see the [iService Forms Developer Guide](#).

The following variables may be used within your auto response message. Variables within Message Acknowledgements are obtained from the message to which the auto response is sent. Variables must be enclosed within brackets (e.g., <Name>) or the dollar symbol (\$Name\$). When constructing HTML responses, the \$ symbol is more convenient because variables within brackets will not display within most HTML editors.

Variable Name	Description	Contact Creation	Message Acknowledge	Agent Notify	Password Reset	Secure Notify	Alert
\$value - click here for details	You can display the contact property values (name, address, etc.) associated with the person that is	X	X	X	X	X	

	getting the auto response using the \$value - customer parameter						
\$value - question click here for details	Display details about the original question, such as the subject or body of the message, using \$value - question.	X	X	X	X	X	X
\$value - today \$value - now	Display the date with - today, or the date and time with -now	X	X	X	X	X	X
\$value - forwardexternal click here for details	The \$value - forwardexternal parameter is used to populate a Forward to External Agent auto response with details about the forwarding agent, their comments, the link for			X			

	accessing the message, etc..						
\$value - notifyresponse(id) click here for details	This is used within an Agent Notification to allow agents to reply directly to the notification, rather than logging into iService. This is used to identify the notification interaction and enables the mail processor to connect the agent reply to the original interaction, since the notification interaction ID is not part of the subject line. This can be used within a Forward to External Agent or Agent Notification on			X			

	<p>receipt of new messages. NOTE – do not set the No-Reply option for auto responses that are used for accepting email responses from agents. Otherwise, the message will not be delivered to iService.</p>						
<p>\$value - notifyresponse(body) click here for details</p>	<p>This is where the quoted question appears and where the agent enters their answer. It includes special start and end markers which must not be corrupted by the agent in his reply. This can be used within a Forward to External Agent</p>			<p>X</p>			

	<p>or Agent Notification on receipt of new messages. This variable must be used with the NotifyResponse(ID) variable to match the response to the original question. NOTE – do not set the No-Reply option for auto responses that are used for accepting email responses from agents. Otherwise, the message will not be delivered to iService.</p>						
<p>\$value - notifyresponse(bodyattributes) click here for details</p>	<p>This is used within an Agent Notification to allow agents to reply directly to the</p>						

	<p>notification, rather than logging into iService. This is similar to the - NotifyResponse(Body) variable above, except it does not include Begin and End markers. It is designed to iService will accept all text entered before this variable and include it in the outgoing response. Therefore, it should normally be the first item in the auto response. This can be used within a Forward to External Agent or Agent Notification on</p>						
--	--	--	--	--	--	--	--

	<p>receipt of new messages. This variable must be used with the NotifyResponse(ID) variable to match the response to the original question. NOTE – do not set the No-Reply option for auto responses that are used for accepting email responses from agents. Otherwise, the message will not be delivered to iService.</p>						
\$value - customer(Password)	<p>Displays the user's password necessary to log into the iService interface.</p>	X					

<p>\$value - passwordreset(url) click here for details</p>	<p>The URL at which the recipient must change their password. It has the full URL to the reset confirmation page and is generated by the web front end web site (not the web service back end) and actually has <Reset GUID> embedded into it. Note – there is a space between the word Reset and URL.</p>				<p>X</p>		
<p>\$value - passwordreset(ipaddress) click here for details</p>	<p>The IP address of the user to whom the password reset was sent. Reset IP is optional but can be useful for the user to investigate if someone else</p>				<p>X</p>		

	is trying to hijack their account. Note – there is a space between the word Reset and IP.						
\$value - alert(name) click here to learn more	This will return the name of the Alert.						X
\$value - alert(count) click here to learn more	This will return the total number of items included in the alert.						X
\$value - alertitem(id agent name email subject time date) click here to learn more	This is similar to a /Body tag within HTML. All AlertItem tags must be embedded within these tags. You must replace (*) with the actual tags listed below.						X

14.2.5.2 Agent Notify Example - Reply at Start of Msg

This is an example of a notification template in which the agent can reply using email to answer the customer's question. They simply type a response at the beginning of the notification message and send it back to iService. When received, iService will strip all of the message prior to the

`$notifyresponsebodyatstart$` variable and use it as the agent reply to the customer's question.

Auto Response Body Example:

```
$notifyresponsebodyatstart$
```

```
$NotifyResponseID$
```

Some text could be enter here to provide an explanation to the agent

Example of Notification Sent to Agent:

```
On 4/19/2013 3:49:37 PM, customer@domain.com wrote:  
> This is a question for illustrative purposes.  
>
```

```
==== End Answer ==== f0135a3c-33ac-40dd-b0a3-4ca0dd45dd41
```

```
[Notify#: 25394]
```

Please click reply in our mail client and send a response. DO NOT TY

Example of the agent's response:

```
Hi Customer,
```

```
This is your answer.
```

```
Regards,
```

```
The Agent
```

```
On 4/19/2013 3:49:37 PM, customer@domain.com wrote:  
> This is a question for illustrative purposes.  
>
```

```
==== End Answer ==== f0135a3c-33ac-40dd-b0a3-4ca0dd45dd41
```

```
[Notify#: 25394]
```

Please click reply in our mail client and send a response. DO NOT TY

Example of the message received by the customer:

Hi Customer,

This is your answer.

Regards,

The Agent

On 4/19/2013 3:49:37 PM, customer@domain.com wrote:
> This is a question for illustrative purposes.
>

14.2.5.3 HTML and iService Variables in Auto Responses

It's common to use HTML when composing auto responses, and the Rich Text Editor makes it easy to compose nice looking messages. But, sometimes you need to insert iService variables within the HTML in non-standard locations. For instance, consider the situation where you want to make an alert auto response with a table for the details of unanswered messages.

The `-alertitem` parameter must be used within a `$repeat` command to generate the repeating list of values. A simple example of this command is as follows.

```
$repeat -alertitems$  
    Date of Message: $value -alertitem(date)$  
    Subject of Message: $value -alertitem(subject)$  
    From: $value -alertitem(name)$  
$endrepeat$
```

NOTE: When using this command within an HTML table, the `$repeat` command must be marked as a comment. Since it is embedded within an HTML table outside of the TD, your browser will remove the tag if it is not commented because placing it between a table parameter and row parameter is an invalid location for HTML code.


```

<table border="0" cellpadding="3" cellspacing="1" align="left" width="100%">
<thead>
  <tr>
    <th>Date of Original Msg</th>
    <th>Interaction ID</th>
    <th>Contact Name</th>
    <th>Contact Email</th>
    <th>Subject</th>
    <th>Assigned Agent:</th>
  </tr>
</thead>

<tbody>
  <!-- $repeat -alertitems$ -->
  <tr>
    <td>$value -alertitem(date)$ $value -alertitem(time)$</td>
    <!--Edit the line below for your iService URL-->
    <td><a href="https://1to1service.iservicecrm.com/MessageQueue.a
    <td>$value -alertitem(name)$<br></td>
    <td>$value -alertitem(email)$</td>
    <td>$value -alertitem(subject)$</td>
    <td>$value -alertitem(agent)$</td>
  </tr>
  <!-- $endrepeat$ -->
</tbody>
</table>

```


14.2.6 Stock Responses

Stock responses provide a convenient and efficient way for agents to build answers to commonly asked questions. There are two types of Stock Responses: Segment Level and Agent Level. Responses created at the Segment Level are available to all agents of that segment when viewing a question within that segment. Agent level responses are only shown for the agent that created them, and are created in the My Account>Stock Responses page. The agent responses can be viewed and edited by managers in the [agent admin page](#)⁵⁴².

The screenshot displays the 'e-shop Settings' interface in iService. The left sidebar contains navigation options such as 'Customer Info', 'My Work Queues', and 'Manage Work Queues'. The main content area is titled 'e-shop Settings' and includes a navigation bar with tabs for 'Details', 'Interaction Properties', 'Contact Properties', 'Mailboxes', 'Notifications', 'Stock Responses', 'Topics', and 'Filters'. The 'Stock Responses' tab is active, showing a table with one entry: '81 Coupon Offer 15% off coupon offer'. Below the table are buttons for 'New Stock Response' and 'Delete Stock Response'. The 'New Stock Response' form includes fields for 'Name' (Coupon Offer) and 'Description' (15% off coupon offer). The 'Html Response Body' section features a rich text editor with a toolbar and a text area containing the following content:

Dear \$value -customer(name)\$,

Thanks for participating in our recent technology survey. Attached in a coupon for 15% off of your next purchase. You can take this into any eShop store and use it at the register.



Restrictions: Only one coupon per transaction

If you have any questions about this offer, please contact our customer service team at the numbers below. Or, visit our knowledge based using the link below.

[Special Offer Coupon Details](#)

Regards,

The e-Shop Customer Service Team

Tel: 512-555-1212

866-555-1212

The footer of the interface includes the copyright notice: © 2008-2020 One-to-One Service.com, Inc. All rights reserved. and the version information: Version 8.0.576 - 2020.02.12 - 08:16:30.

The Stock Response panel

The HTML body will be automatically converted to plain text for the plain text version of the response. You can include other stock responses and variables inside of a stock response, if desired.

Important Note Regarding Pasting Content Into a Stock Response

When pasting content into the Stock Response, keep in mind that you are pasting into a rich text editor. **Never paste content directly from a word processing program** (e.g., Microsoft Word), because those programs use embedded proprietary codes to manage their display. These codes are NOT HTML compatible, and although you may not see them in the rich text version of the editor, you will see them in the source of the response. **These codes will cause iService to malfunction when pasted into an agent response with unpredictable display to the end user.**

14.2.7 Topics



Topics are a critical part of iService. They are used to organize answers within the iService knowledge base and to create message queues for routing questions to customer support representatives. Topics are organized into a hierarchical topic tree as "branches" or topic categories that can be publicly visible or private. You can learn more about topics in the [Understanding Topics](#)⁹⁰ chapter.

Because interactions are associated with topics, deleted topics are not removed from the database. Their status is marked as deleted and they're removed from your view of the topic tree. You can display deleted topics and restore them by changing their visibility to public or private. However, there are [various impacts](#)⁶⁹⁷ related to deleting topics that you should consider.



The Show Deleted Topics toggle

The Topic List

The Topic List panel is different from most of the other settings pages in iService. Every topic has a parent, except for the root topic of the segment. Instead of a flat list of values, iService presents existing topics in a way that reflects a tree structure so you can visually see the

hierarchy. The Topic List is a [data table](#)⁵⁸ and operates similar to other data tables in iService.

Topic Name	Parent Name	Visibility	Skills	Properties
_Feedback	e-shop -- All Topics	private	no-route	
_Newsletter Subscription	e-shop -- All Topics	private	no-route	
_Spam	e-shop -- All Topics	private	no-route	
_Undeliverable	e-shop -- All Topics	private	no-route	
Account Questions	e-shop -- All Topics	public	accounts	account number, coupon value

Showing 1 to 5 of 19 entries

The Topic List in Segment Settings

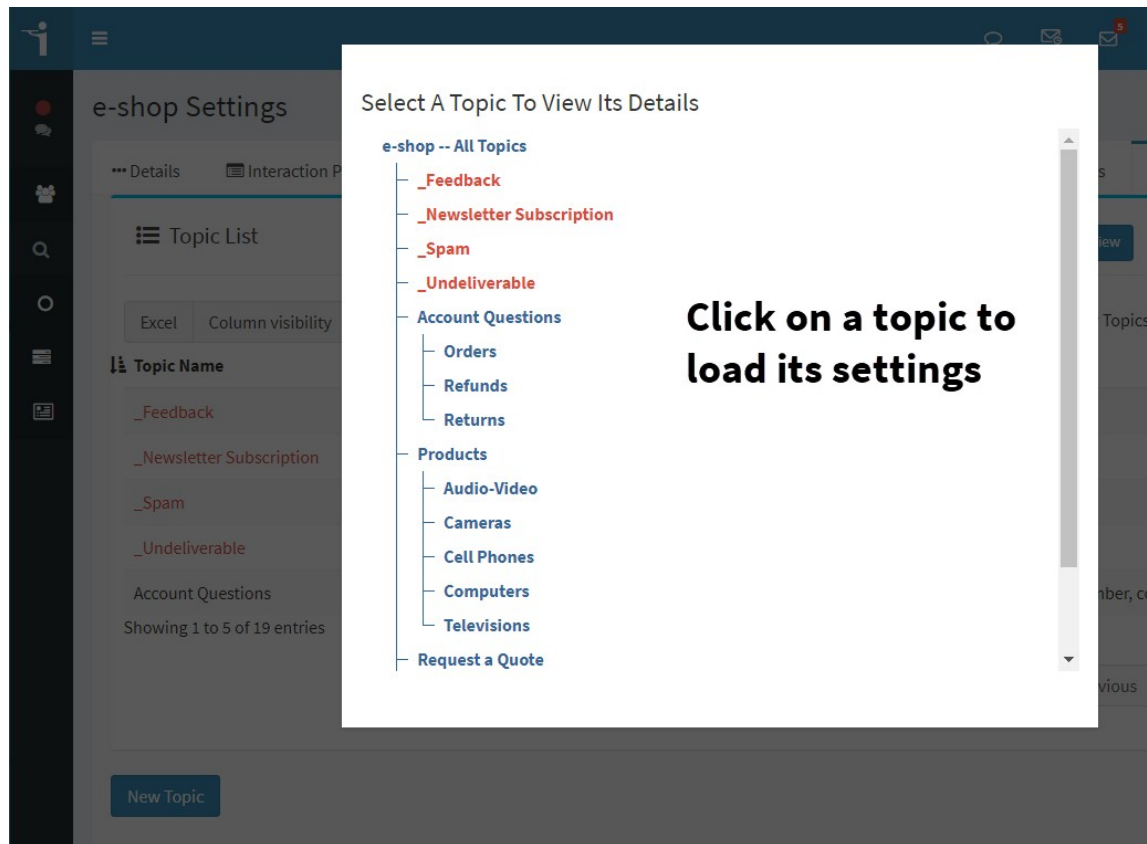
The Topic List table shows the parent for each topic, but the best way to view hierarchy is to click the Tree View button in the top right corner of the topic list.

The Tree View Button



Use the Tree View button to open the top tree display

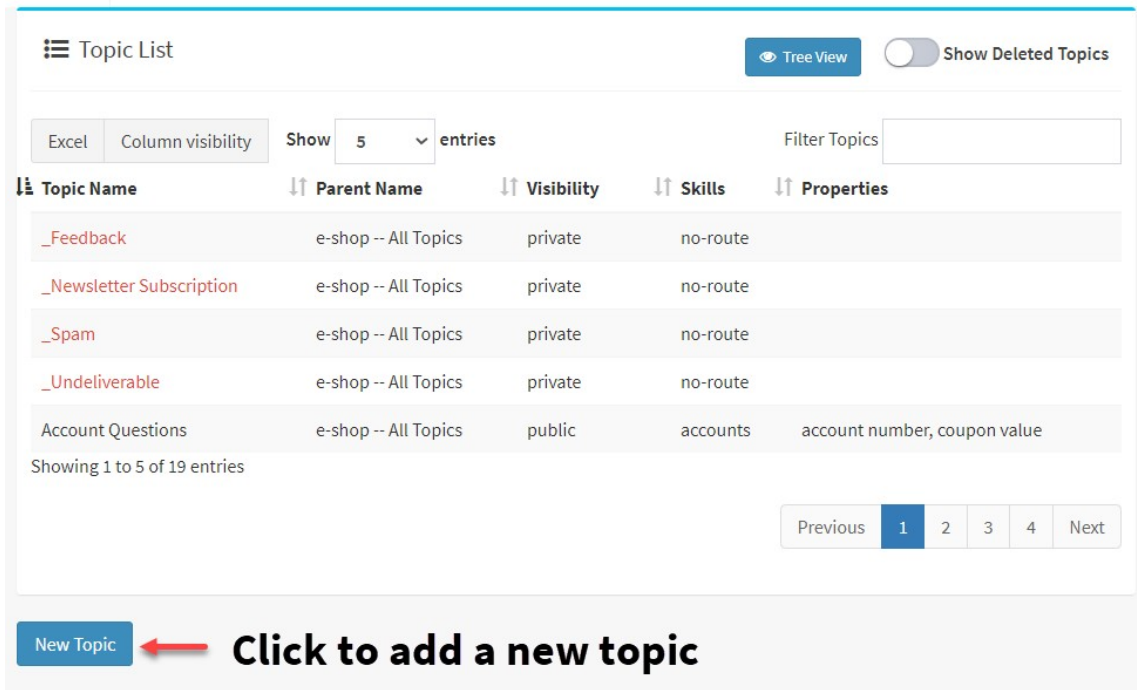
When you click the Tree View button, a lightbox is opened on the page with a graphical display of all your topics. This hierarchical view of topics is used on pages that show the entire topic tree, such as [Manage Messages](#)²¹⁵ or [Manage Chats](#)²²¹. Click a topic in the tree to load its settings panel.



The topic Tree View lightbox

Creating a New Topic

To create a new topic, click on the New Topic button to show the New Topic panel.



The screenshot displays the 'Topic List' settings menu. At the top, there are options for 'Tree View' and 'Show Deleted Topics'. Below this, there are filters for 'Excel', 'Column visibility', and a 'Show 5 entries' dropdown. A 'Filter Topics' search box is also present. The main content is a table with the following columns: Topic Name, Parent Name, Visibility, Skills, and Properties. The table lists several topics, including '_Feedback', '_Newsletter Subscription', '_Spam', and '_Undeliverable', all with a parent name of 'e-shop -- All Topics' and a visibility of 'private'. The 'Account Questions' topic is listed with a visibility of 'public' and properties of 'account number, coupon value'. Below the table, it says 'Showing 1 to 5 of 19 entries' and a pagination control with 'Previous', '1', '2', '3', '4', and 'Next' buttons. At the bottom left, a 'New Topic' button is highlighted with a red arrow and the text 'Click to add a new topic'.

Creating a new topic

Enter the name of the new topic and set its values. The topic name is also displayed in the knowledge base page to internal and external customers, so choose a meaningful name. Click Create to save your new topic.

The various settings are explained in the Topic Details Panel section below.

Topic Details Panel

The details for the selected topic are displayed in the Topic Details panel. After changing any details for the topic, you must click the Save button or changes will not be saved.

Topic Details - Account Questions

Topic Name ?

Parent Topic ?

Visibility ?

Customer Ticket Filter ?

Message Acknowledgment Notification ?

Agent Notification ?

Service Level ?

Skills Required For Get Next ?

- accounts
- Commercial
- customer1
- customer2
- New_User_Add-Notice
- no-route
- operations
- products
- Property
- SAP
- shipping
- Spanish Agent
- system security
- tech

Interaction Properties ?

e-shop Properties

- Account Number (Case)
- Agent Comments (Case)
- Billable (Answer)
- Billable Minutes (Answer)
- Bounce Reason (Question)
- Browser (Question)
- Callback Date (Question)
- Computer Type (Question)
- Coupon Value (Answer)
- Item # (Case)
- Item Description (Case)
- Item Picture (Question)
- Language (Case)
- MaritzCX Relevant (Question)
- Msg Notes (Question)

Shared Properties From Other Segments

Human Resources

- Access Details (Question)
- Department (Question)
- Supervisor (Question)
- System Access (Question)

Power Company

- Date Requested (Question)

Interaction properties from other segments set to shared will appear here.

Editing the details of a topic

Topic Name - The topic name is display in topic menus and all pages where a topic is selected (e.g., Manage Messages). It can also be displayed to customers (if visibility is public), so always use a meaningful name.

Parent Topic - Topics are hierarchical, and the parent topic determines where the topic exists within the hierarchy.

Visibility - Select whether you want the topic to be visible as public (anonymous and customer user types may view this topic), private (viewable by agents only), or deleted (not viewable by any users).

Customer Ticket Filter - If you would like to filter messages that are received through Customer Ticket Forms (i.e., not incoming email), select the appropriate filter from the drop down menu. These filters will be applied to questions that are submitted from a customer ticket form only. To filter questions submitted via email, add a filter to the [Mailbox](#)⁶⁵⁵.

Message Acknowledgment Notification - If you would like an automatic response sent for each message that is received by the topic, select the appropriate auto response from the drop down menu. If you do not want auto responses to be sent for certain topics, then you should select --None--. If --Segment Default-- is selected, then the Default notification set in the [Segment Details](#)⁶⁴⁰ page will be used.

Agent Notification - Select the auto response that should be sent to agents when a new message arrives.

Service Level - You can assign a [service level](#)⁶⁰³ to any topic, and if it is lower than the segment default it will be adopted by all interactions queued within the topic.

Skills Required for Get Next - Select any skills that are required to answer questions sent to the topic. Skills assignment here only affects routing when using the Get Next button. Skills also control the default topics shown to agents in the Manage Messages and Manage Topics pages.

Only topic skills are set from this panel. Interaction Property based skills are attached to any question that has the property value. Those skills are not tied to topics, so they are configured in the [Skills menu](#)⁶¹¹ and do not require any association with a topic.

Interaction Properties – Interaction properties can be presented to customers when they fill out a Customer Ticket form, or to agents when they compose their answer. If you associate interaction properties with the topic, they will automatically be presented in the iService user interface for interactions in that topic.

Default Topics

When a standard segment is created, it is automatically populated with three topics that should not be deleted.

All Topics - "All Topics" is the initial root parent of the topic tree for the segment. It is named All Topics because when viewed from the Topic Tree, all topics within the segment are displayed below it. It can be renamed as desired to reflect how you intend to configure iService (e.g., Other Questions).

_SPAM - The spam topic is used to separate spam messages and improve the accuracy of reports. The [Message Queue - SPAM button](#)⁹² will automatically change the topic of the message to _SPAM, and therefore this topic should not be removed. In addition to the SPAM button, you can create filters to identify messages that are spam and move them to this topic.

_Undeliverable - This topic is used to route bounced messages that do not require a response. It is typically used with a set of [bounce filters](#)⁶⁹⁹ that will identify undeliverable notices and move them into this topic. You should not delete or change this topic.

– Deleting Topics



Topics are the primary method for queuing questions and are referenced in various places. Before you set the visibility of a topic to Deleted, you should consider the following impacts.

Default Mailbox Topics - If a topic is used as the default topic for a Mailbox, new questions will be placed into the deleted topic queue. These will not be routed to agents since the topic is deleted. You will need to ensure that any mailboxes using the topic are switched to another topic.

Change Topic Filters - You might have filters defined that change the topic of an interaction to the topic automatically. You will need to update those filters to use a different topic, or remove the filter altogether.

Unresolved Questions - if you have unresolved questions associated with the topic, they will be removed from the manage messages page. Users may not see these questions and will not be able to select them. You should ensure all of the questions in the topic are resolved before you set it's visibility to deleted.

Workflow Mapping - If you have any workflow forms that create interactions in the topic, you will need to select a new topic from within the workflow configuration.

Custom Forms - If you have any custom forms that save interactions in the topic, you will need to select a new topic from within the form configuration.

14.2.8 Filters



Filters are used to evaluate incoming interactions and take automated actions based upon regular expression matches. An example of a common action is to change the topic for an incoming message based on content in the subject line or body. Filters can be applied to mailboxes (see [Segment Configuration > Mailboxes](#)^[655]) individually, or combined in groups. When applied to a mailbox, filters parse the contents of incoming mail.

When applied directly to topics (see [Segment Configuration - Topics](#)^[691]), filters parse the contents of Agent Tickets and Customer Tickets that are submitted directly to iService rather than via email.

Filters are a segment level setting within the segment setup panel. Click the gears in the upper right corner, select your segment, then select the filters tab.

The Filters and Groups List

The **Filters List** provides a quick overview for each filter, including the fields matched in its regular expression and a list of action steps in the filter. You can delete filters by selecting them and clicking Delete Filter.

The screenshot shows the 'e-shop Settings' interface with the 'Filters' tab selected. The 'Filters' section is active, and a table lists 5 filters. The table has columns for ID, Filter Name, Description, Match In, and Action Steps. The filters listed are:

ID	Filter Name	Description	Match In	Action Steps
62	Forward External	Allow answering from the External Answer page	Subject, Body	forwardExternal
124	Language - Spanish	Identify Spanish questions and require Spanish skill	Body	interactionPropertySet
125	Set Platinum Message	Find Platinum customer and set message to platinum level	Contact Properties	interactionPropertySet
57	Set Property_Item Number	Take item number from email inquiries	Body	interactionPropertySet
69	SPAM User	Looks for users with customer type of spam	Contact Properties	changeTopic, interactionResolve

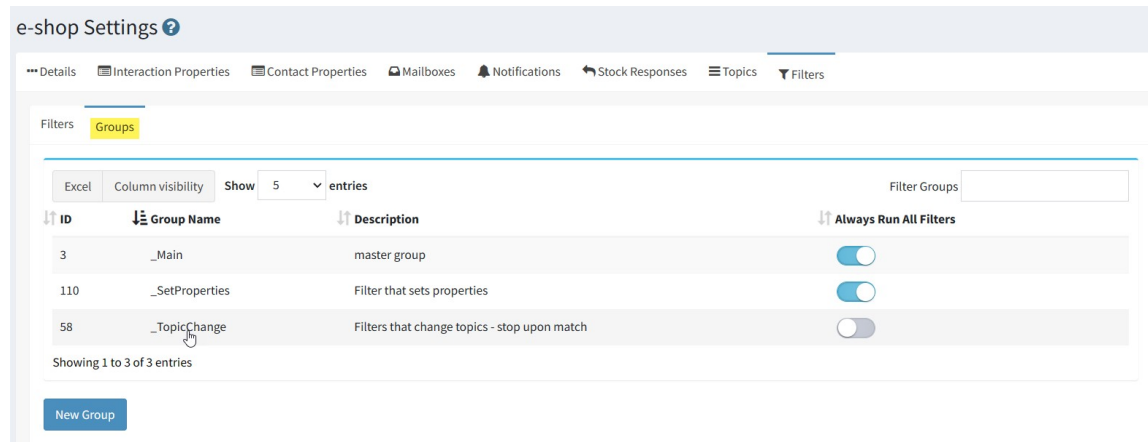
Showing 1 to 5 of 17 entries

Navigation: Previous | 1 | 2 | 3 | 4 | Next

Buttons: New Filter

The filters list

Filters are grouped together before they are applied to mailboxes or topics. The **Filter Groups List** provides summary information for each group. You can delete a group by selecting it from the list and clicking Delete Group.



The Filter Groups List

Creating A New Filter

Filters are created with an Expression (if this pattern exists) and Actions (do these actions). Actions may contain multiple action steps. Filters look for matching expressions within the subject, body, to, from, or contact properties of the sender of an incoming question. When that condition is met, the associated filter action is executed.

To create a new filter, click the New Filter button and complete the configuration as described below.

The screenshot shows the 'New Filter' form with the following fields and sections:

- 1** Name: A text input field for the filter's name.
- 2** Description: A text input field for the filter's description.
- 3** Expression: A text input field for the search pattern.
- 4** Match In: A section with checkboxes for 'Subject', 'Body', 'Mailbox Name', 'From', 'Contact Properties', and 'Text Attachments'. The 'Subject' checkbox is selected.
- 5** Filter Action: A section with a dropdown menu labeled 'Pick a step type' and a search box 'Select or search for a type'. Below the dropdown is an 'Add Steps' button.

At the bottom of the form are 'Create' and 'Cancel' buttons.

Creating a new filter

- 1) Name** - This is the name of the filter. It is used to identify the filter when assigning it to a mailbox or topic. Select a short name that will be easily viewed from a drop down menu.
- 2) Description** - Description is used only within the Filter Administration page to describe the objectives for the filter. Enter a description that will help others understand how the filter is intended to be used.
- 3) Expression** - The Expression box is where you enter the pattern to match. iService will look for matches to these terms when the filter is executed against incoming questions. Regular expression formula's are supported such as including the pipe character (|) to represent an "or" condition. If special characters are included in the search terms they must be preceded with a "\". Example: If e-card was a term to be searched for it would be entered as "e\ -card" in the Terms section because "- " is a special regex character.

iService allows up to 1,024 characters in the Expression field. For more information about Regular Expression, please refer to the following Microsoft link: <http://msdn.microsoft.com/en-us/library/az24scfc.aspx>

4) **Match In** - iService can match text patterns in the following areas:

Subject - This is the Subject of the question entered within a ticket or the subject line of incoming email.

Body - This is the body of the question entered within a ticket or the body of incoming email.

Mailbox Name - This is the mailbox in iService that received the message. It contains both the Display Name and the Reply-To address configured for the mailbox.

From - This is the From Address line within an incoming email (i.e., the sender).

Contact Properties - This option evaluates the expression against all the contact property values of the contact. To limit the match to a specific contact property, use the following as your regular expression.

```
propertyname: value
```

The `propertyname` is a contact property, like customer type. The value is the value you want to match. To match on a sender that has a contact type of SPAM, the expression would be

```
customer type: SPAM
```

Text Attachments - This option evaluates the expression against all of the attachments to the email message. This works best with text files, like files attached to non-delivery records, rather than binary files like MS Excel.

5) **Filter Actions** - There are ten filter action steps that can be performed on incoming questions when an expression match occurs. A single filter can include multiple multiple actions. These actions are explained below.

Action - Change Interaction Parent

This action is used to make the incoming question part of an existing case, rather than create a new case. Replies to existing cases are automatically added into the case based upon the Ref # in the subject of the message. But, if the incoming message does not have that matching reference number, you can still make it part of another case if you can match on an interaction property value previously set for a case.

For instance, let's say you have an interaction property named `Quote #` that contains the ID for a quote sent to a customer. If a customer submits a question about the quote from an iService form and enters the `Quote #` when submitting the form, their question would be associated with the existing case.

▼ New Filter

Name	Description
<input type="text" value="Make quote questions part of the existing case"/>	<input type="text" value="Look for matching quote # in a new question"/>

Expression

Match In

- Subject
- Body
- Mailbox Name
- From
- Contact Properties
- Text Attachments

Filter Action

Change Interaction Parent

Property

Action run when parent is found

[+ Add Steps](#) If the property matches, additional actions can be run.

[+ Add Steps](#)

This filter action will make the new question part of the existing case if the value submitted for Quote # in the question matches an existing case.

A ChangeInteraction Parent Filter

You can combine the Set Interaction Property action with the Change Interaction Property to parse the contents of a new question and use a matching value for this filter. In the example below, the first filter looks for the Quote # in the subject line. If it is found, it saves that value and then runs the Change Interaction Parent filter.

▼ New Filter

Name	Move quote question to original case	Description	Look for a quote number in the subject line and use it to find the existing case
Expression	Quote #:\s*(\d*)		
Match In	The subject line includes the quote # in a format like: Quote #: 54384		
<input checked="" type="checkbox"/>	Subject		
<input type="checkbox"/>	Body		
<input type="checkbox"/>	Mailbox Name		
<input type="checkbox"/>	From		
<input type="checkbox"/>	Contact Properties		
<input type="checkbox"/>	Text Attachments		
Filter Action			
	Set Interaction Property		⬆️ ⬇️
	Property	(e-shop) Quote #	⊗
	Value	/exprmatch 1 Use the value found in the first expression (\d*) as the value for Quote #.	
	Change Interaction Parent		⬆️ ⬇️
	Property	(e-shop) Quote # If the Quote # exists in a case, make this question part of that case.	⊗
	Action run when parent is found		
	+ Add Steps		

Using Set Interaction with Change Interaction Parent

Action - Change Topic

The Change Topic action is used to move a question into a specific topic. When the filter expression finds a match, it will assign the incoming question to a specified topic. This most commonly used to modify the topic that a mailbox would use as its default. You can select any topic in the tenant, regardless of the segment that received the question.

In the example below, if the subject line includes any of the words phone, android, or iPhone the topic is set to Cell Phones.

The screenshot displays the 'Filter Configuration' interface. It includes the following sections:

- Name:** Topic_Phones
- Description:** Common words related to phone questions
- Expression:** phone|android|iPhone **phone or android or iPhone**
- Match In:**
 - Subject
 - Body
 - Mailbox Name
 - From
 - Contact Properties
 - Text Attachments
- Filter Action:**
 - Change Interaction Topic
 - Topic: Cell Phones
 - Note: Selected topic can be in a different segment than the affected interaction(s).
 - Buttons: Up arrow, Down arrow, and Close (X)
 - + Add Steps

A Simple Topic Change filter

Action - Run Filter

Filters can use an action step to run another filter based on an expression match. This effectively creates an AND condition where the expression must match in the first filter and the second filter that is referenced.

For example, if you want to identify undeliverable notices (Non-delivery Report) and then extract the reason for the bounce, you need to match two separate expressions (first determine the email is an NDR notice, and then extract the bounce reason). This can be done using the Run Filter action to evaluate the second expression.

The first filter determines the incoming email is an NDR record based on the subject line. It changes the topic to `_Undeliverable`, and then runs the second filter to save the bounce reason.

Filter Configuration

Name
Undeliverable-sender

Description
bounce filter

Expression
postmaster|mailer-daemon *These are common senders for NDR notices.*

Match In

- Subject
- Body
- Mailbox Name
- From
- Contact Properties
- Text Attachments

Filter Action

Change Interaction Topic

Topic
Note: Selected topic can be in a different segment than the affected interaction(s).

If the email is an NDR, then set the topic to _Undeliverable.

Run Filter

Filter
 Then, run this filter to save the bounce reason in an interaction property.

[+ Add Steps](#)

The first filter limits actions to bounce notices

Then, a the second filter extracts the bounce reason and saves it into a property. This filter would never be run on its own, because it could match emails that are not NDR records.

Filter Configuration

Name Undeliverable-Bounce Reason	Description This filter sets the reason for the bounce
Expression said:\s*(\d\d\d)	This is a common format for displaying the three digit bounce code in an NDR.
Match In <input type="checkbox"/> Subject <input checked="" type="checkbox"/> Body <input type="checkbox"/> Mailbox Name <input type="checkbox"/> From <input type="checkbox"/> Contact Properties <input checked="" type="checkbox"/> Text Attachments	<pre><noreply@github.com>: host alt2.aspmx.l.google.com[172.253.62.26] said: 550-5.2.1 The user you are trying to contact is receiving mail at a rate that 550-5.2.1 prevents additional messages from being delivered. For more 550-5.2.1 information, please visit 550 5.2.1 https://support.google.com/mail/?p=ReceivingRatePerm l12-20020a05622a050c00b003b569f2ce62si2494369qtx.475 - gsmtip (in reply to RCPT TO command)</pre>
Filter Action Set Interaction Property Property: (e-shop) Bounce Reason Value: /exprmatch 1 Save the value in the first expression (\d\d\d) into the Bounce Reason property.	

The second filter action extracts the bounce reason

The updated interaction will include the bounce reason, which can be used for searching, reporting, or taking special actions.

Details & Attachments • Interaction Properties •

Case Properties

Bounce Reason

550

Save

The updated interaction property

IMPORTANT NOTE: Never add the second filter directly to a group!

When using the Run Filter action, you should NOT include the second filter directly into any group or directly attach it to a mailbox. The second filter should only be run when requested by the first filter.

Action - Forward To External

If you want to use the [external answer page](#)²³⁶, you must enable a GUID for questions that will be answered using that page. This GUID allows anonymous users to answer questions from the external answer page without logging into iService. The GUID is created using the Forward to External filter action.

You can limit this capability to any interaction based on the expression used, and the group or topic to which the filter is assigned. There are no parameters for this filter action other than the expression. If you want all interactions to be available for the External Answer page, use the expression `.*`, which means any matching character.

Filter Configuration

Name

Description

Expression

 Match any character in the subject or body, which would effectively be every interaction.

Match In

- Subject
- Body
- Mailbox Name
- From
- Contact Properties
- Text Attachments

Filter Action

Forward To External

Interaction will be answerable with f/forward-external by external agents.

[+ Add Steps](#)

Using the Forward To External filter

Action - Resolve Interaction

This filter action will resolve the interaction if the filter expression is matched. This should only be used in cases where you know the interaction does not require a response and does not need to be reviewed by an agent.

There are no parameters to set, other than the expression.

Filter Configuration

<p>Name</p> <input style="width: 90%;" type="text" value="SPAM User"/>	<p>Description</p> <input style="width: 90%;" type="text" value="Looks for users with customer type of spam"/>
<p>Expression</p> <input style="width: 90%;" type="text" value="customer Type: spam"/>	
<p>Match In</p> <p><input type="checkbox"/> Subject</p> <p><input type="checkbox"/> Body</p> <p><input type="checkbox"/> Mailbox Name</p> <p><input type="checkbox"/> From</p> <p><input checked="" type="checkbox"/> Contact Properties</p> <p><input type="checkbox"/> Text Attachments</p>	
<p>Filter Action</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Change Interaction Topic</p> <p>Topic</p> <p><small>Note: Selected topic can be in a different segment than the affected interaction(s).</small></p> <input style="width: 90%;" type="text" value="_Spam"/> </div> <div style="background-color: #ffff00; padding: 5px; margin-bottom: 5px;"> <p>Resolve Interaction</p> <p><small>Interaction will be set to Resolved status.</small></p> </div> <p>+ Add Steps</p>	

If the sender has a customer type of SPAM, then change the topic to _SPAM and resolve the question.

Using a filter to resolve an interaction

Action - Round Robin Assignment

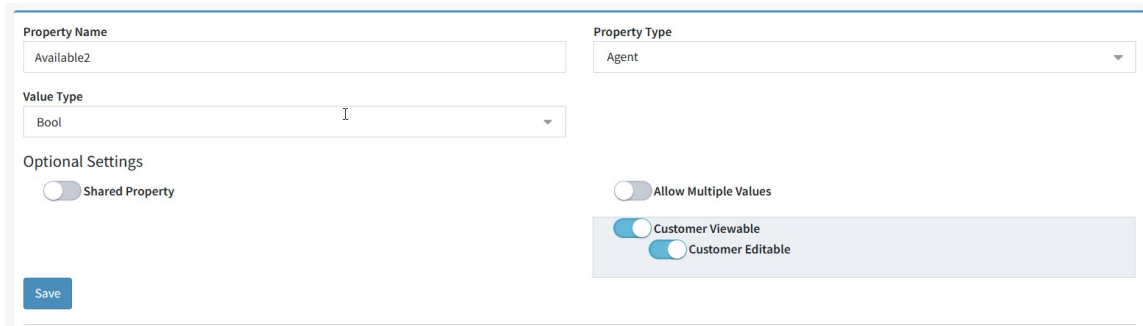
iService can automatically assign incoming questions to agents using a Round Robin method. Sometimes referred to as a pinwheel, this method locates the available agent that has waited the longest for a question to be assigned to them. There are two parts to a Round Robin filter: a department and an agent property.

Create a Department

To configure round Robin assignment you must first create a [department](#)⁵⁵⁴ that will be used to determine the agents eligible for assignment. Agents that are assigned to this department will be included within the rotation of message assignment. The filter does not consider the skills required for assignment, and will assign the question to anyone in the department. Assign agents to the department from the [Agent](#)⁵⁴² settings page.

Create an Agent Property to Track Availability

Create an agent setting that will be used to determine when an agent is available for assignment. This contact property must be configured as an agent property with a Boolean property, as shown below.



The screenshot shows a configuration form for an agent property. The form includes the following fields and options:

- Property Name:** Available2
- Property Type:** Agent
- Value Type:** Bool
- Optional Settings:**
 - Shared Property
 - Allow Multiple Values
 - Customer Viewable
 - Customer Editable
- Save** button

Create a property for agents to set themselves as available for round robin assignment

The round Robin filter action will use this property to determine if the agent is available for assignment. When the agent sets this value to false, they will be excluded from message assignment until they set it back to true.

The screenshot displays the 'Contact - Landlord Administrator' profile page. The top navigation bar includes a menu icon, communication icons, and the user's name 'LA Landlord Administrator'. Below the header, there are tabs for 'Summary', 'Details', 'Subscriptions', and 'History'. The main content area is divided into two sections: 'Contact Information' and 'Agent Settings'. The 'Contact Information' section contains fields for 'First Name' (Landlord), 'Middle Initial', 'Last Name' (Administrator), 'Phone' (Work, 123-456-7890), 'Address1', 'Address2', 'City', 'State', 'Postal Code', and 'Country'. The 'Agent Settings' section includes dropdown menus for 'Empty Inbox When Logged Out' (set to 'Pick A Value'), 'Inactivity Timeout Minutes', 'Notification Address' (set to 'Pick A Value'), 'Receive Notifications' (set to 'Pick A Value'), and 'Available2' (set to 'True').

Agents can set their availability from their profile page

Create the Filter

The completed filter will be as follows. In the example below, the filter will assign every question it encounters since the expression of .* means any character. If you only want certain questions assigned this way, you can limit the action based on the expression.

Filter Configuration

Name
Sales Round Robin

Description
Distribute sales leads among the sales team

Expression
.*

Match In

- Subject
- Body
- Mailbox Name
- From
- Contact Properties
- Text Attachments

Filter Action

Round Robin Assignment

Department
Sales

Agent Setting for Availability
(e-shop) Available2

+ Add Steps

A completed round robin filter

Select Agents / Send Agent Notification

The Select Agents and Send Auto Response options must be used together. The first action, Select Agents, will pick the agents that should be notified of the incoming interaction. The second action, Send Auto Response, specifies the notification template to send to the selected agents. NOTE- this filter will not assign the message, but simply notify those agents selected that it has arrived.

Like all filters, create an expression that matches the conditions in which you want the notifications sent. Then choose the agents and the notification template to send them.

New Filter

Name
Notify management about VIP questions

Description
When a VIP contact submits a question notify the manager

Expression
customer level: VIP

Match In
 Subject

Expression
customer level: VIP

Match In
 Subject
 Body
 Mailbox Name
 From
 Contact Properties
 Text Attachments

Filter Action

Select Agents Select the agents that should receive the notification.
 Landlord Administrator (1to1admin)

Send Agent Notification Select the notification template to send, and the mailbox from which to send it.
Agent Notification (e-shop) Agent Notify
Mailbox Customer Service

[+ Add Steps](#)

Notifying an agent when a certain type of customer submits a question

Action - Select Notification

Notifications are sent based on the [topic](#)⁶⁹¹ associated with a new question or a default value for the segment. You can override the notifications that would normally be sent using the Select Notifications filter action. There are three types of notifications that you can override: Message acknowledgments, Agent Notifications, and Contact Creation notices. Learn more about these in the [Notifications](#)⁶⁷¹ chapter.

Your filter can be set to not send a notification, use the default setting, or send a specific notification template chosen in the filter.

Select Notifications **These settings will override the notifications that would normally occur for the question.**

Message Acknowledgement
Select or search a notification template in the list

Agent Notification
Select or search a notification template in the list

Contact Creation
Select or search a notification template in the list

There are three types of notifications you can override

The example below suppresses the message acknowledgment for contacts that have requested to not receive notifications.

▼ New Filter

Name
Do not send message acknowledgement to certain customer

Description
Override the message ack based on a contact property

Expression
no acknowledgment: true

Match In

- Subject
- Body
- Mailbox Name
- From
- Contact Properties
- Text Attachments

Filter Action

Select Notifications

Message Acknowledgement
-- Send Nothing --

Agent Notification
-- Send Default --

Contact Creation
-- Send Default --

+ Add Steps

If the sender is set to not receive message acknowledgments, do not send a notification.

Suppress notifications for certain contacts

Action - Set Interaction Property

This action will set a specified value for interactions when the expression match occurs. There are two primary ways to set this value: use a constant value, or set the value from content located in the incoming message.

NOTE - when setting values in an interaction property that uses a drop down list, you must ensure the value you set matches a value in the list.

Using a constant value

An incoming message may contain various subject lines such as System Outage Report, Problem Notice, etc. When this match occurs, an interaction property named “Request Type” could set a fixed value such as “Outage”. Interaction properties can be used for skills-based routing, reporting or display to agents.

▼ New Filter

Name	Description
Identify outages and skill for tier 3	When an outage notice arrives set the property for tier 3 support

Expression

System outage notice

Match In

- Subject
- Body
- Mailbox Name
- From
- Contact Properties
- Text Attachments

When the subject line contains the words **System outage notice**, set the property value for Type of Inquiry to **outage**.

Filter Action

Set Interaction Property

Property

(e-shop) Type of Inquiry

Value

outage

This property value can be used to limit assignment to agents that handle outages, or to support metrics and reporting.

+ Add Steps

Setting an interaction property with a preset value

Extracting a value and setting it in a property

Incoming messages might contain information such as account number that you would like to capture from the message. Using a special regular expression format, you can specify the portion of the message to be saved as the interaction property value. An example of this setup is shown below.

Filter Configuration

Name
Set Property_Item Number

Description
Set a property value for the item number

Expression
Item Number:s*([d]*) *After the text "Item Number:" we expect a space and then a series of digits.*

Match In

- Subject *If the subject line of common questions includes a known format with a value, you can extract the value and save it into a property.*
- Body
- Mailbox Name
- From
- Contact Properties
- Text Attachments

Filter Action

Set Interaction Property

Property
(e-shop) Item #

Value
/exprmatch 1 *In regular expression, the () represents an expression match. We select the first expression match for saving.*

[+ Add Steps](#)

Using an expression to save a property value

If the interaction already has a value set, the filter will replace that value. If the property supports multiple values, the filter will create a second value unless you choose the option to overwrite the existing value.

NOTE: The checkbox will only appear when you select an interaction property that is configured to support multiple values.

Action - Webhook (beta)

A webhook is a mechanism that allows iService to send real-time notifications or data to another application or service. It is a way to communicate with other systems (or even within iService) by delivering information automatically whenever a specific event or trigger occurs.

The iService action specifies the URL or endpoint where the receiver application should receive the data from iService. When the webhook

runs in iService, it sends an HTTP POST request to the specified webhook URL, containing the relevant data as the payload. This feature is in beta mode and does not log failures or retry rejections.

The receiver application, upon receiving the webhook request, can then process the data, perform actions based on the received information, or update its state accordingly. Webhooks are commonly used in various scenarios, such as real-time notifications, data synchronization, integrating third-party services, and triggering actions based on external events.

To setup your webhook, you will need the URL for the endpoint that will receive the data from iService. Use the full URL including HTTPS, as shown below.

The Webhook payload includes the data that will be sent to the endpoint you specified. iService sends the data with JSON content type and an example of the format is included by default. You can modify any values from the payload to match what your endpoint requires.

Webhook

Endpoint URL to post data [?](#)

Webhook Payload [?](#)

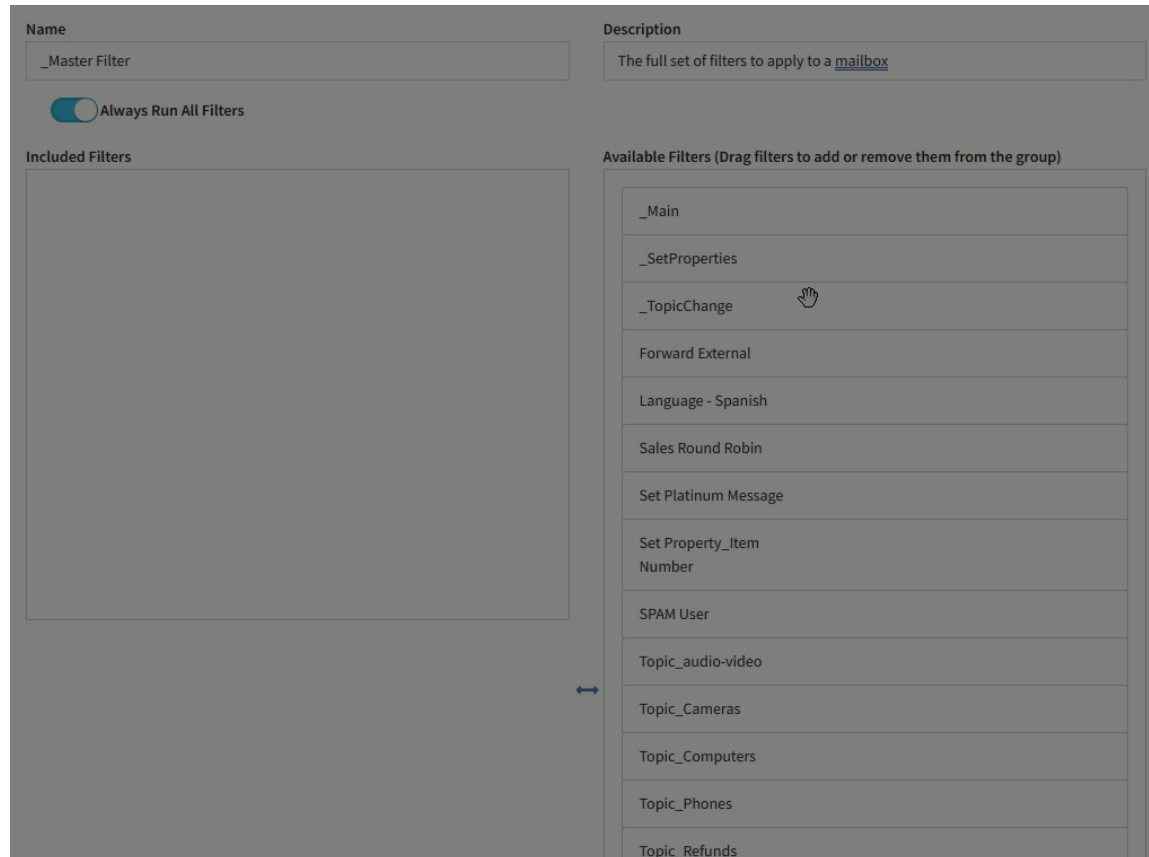
```
{
  "id": "$value -Pjs -interaction(id)$",
  "threadID": "$value -Pjs -interaction(threadID)$",
  "subject": "$value -Pjs -interaction(subject)$",
  "subjectBare": "$value -Pjs -interaction(subjectbare)$",
  "date": "$value -Pjs -interaction(datetime) -isoutc$",
  "topicID": "$value -Pjs -interaction(topicID)$",
  "topicName": "$value -Pjs -interaction(topicname)$",
  "segmentID": "$value -Pjs -interaction(segmentID)$",
  "segmentName": "$value -Pjs -interaction(segmentname)$",
  "customerID": "$value -Pjs -interaction(customerID)$",
  "customerName": "$value -Pjs -interaction(customername)$",
  "fromAddress": "$value -Pjs -interaction(fromemail)$",
  "fromLogin": $value -Pjs -interaction(fromlogin)$,
  "agentName": "$value -Pjs -interaction(operatorname)$",
  "assignedToID": "$value -Pjs -interaction(assignedToID)$",
  "assignedToName": "$value -Pjs -interaction(assignedToName)$",
  "resolvedByName": "$value -Pjs -interaction(resolvedbyname)$",
  "type": "$value -Pjs -interaction(type)$",
  "tags": $value -Pjs -interaction(tags)$,
  "status": "$value -Pjs -interaction(status)$",
  "properties": $value -Pjs -interaction(inboxproperties)$
}
```

A Webhook Filter

Filter Groups

Since mailboxes and topics can only have one filter assigned, groups can be used to combine multiple filters. To create a filter group, click New Filter Group and enter a name for the filter group. Then drag and

drop the filters to be included within the group from the Available Filters box.



The order of the filters will determine the order for matching. For example, if a term within the first filter in the list is identified and the Always Run All Filters box is not checked, the filter action will run and the group will bypass the remaining filters.

Generally, the following filter groups are used.

_Master - This can be assigned to mailboxes and include all desired filters and filter groups.

_TopicChanges - It is suggested to put all filters that change a messages topic into a single filter group, and set the group to NOT Always Run All Filters.

`_SetProperties` - Since you might want to set multiple properties it's suggested that filters which set properties be combined into a group with the Always Run All Filters box checked.

Common Filter Examples

Although filters are completely customized for each tenant, there are a few filters that are commonly used for scenarios such as bounced messages.

Undeliverable Messages

Undeliverable messages can be identified by their subject line and in most cases the sender. Typically, the following two filters are created to match bounced messages and are placed at the top of the topic change filter group.

Check Subject Line

Expression: `Subject Matches - Undelivered Mail Returned to Sender|failure notice|Returned mail|Undeliverable Mail|Delivery Status Notification|Mail could not be delivered|Mail delivery failed|Delayed Mail`

Action: `Change topic to _Undeliverable`

Check From Address

Expression: `From Matches - postmaster|mailer-daemon`

Action: `Change topic to _Undeliverable`

Out of Office Messages

Out of Office messages can be identified by their subject line

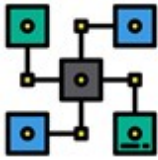
Check Subject Line

Expression: Subject Matches - Automatic reply|Out of Office|
Automatische Antwort|Niet aanwezig|Automatisch antwoord|
Abwesenheit|Ya no escribir a este correo|Abwesend|
Abwesenheitsnotiz|out of the office|kann ihre Mail nicht
empfangen!

Action: Change topic to `_Undeliverable` or `_Out of Office`

Integrations

15 Integrations



iService includes several ways to integrate with other applications and data. iService provides several direct integrations to third party APIs, as well as methods for collecting and distributing data to other applications without the use of APIs. Third party API integration is setup within the External APIs settings page. You can also integrate with other applications using [iService utilities](#)^[728] with iService forms. This allows you to read a CSV file and process the contents against a custom form that performs various iService actions. The actions in your form can include any of the actions supported by iService. You can also use our integration to [Zapier](#)^[747] to transform data between iService and other systems. If you're using [workforce planning tools](#)^[748], iService can provide the statistics you need for measuring and forecasting email volume in your contact center.

Third Party APIs Supported

[Okta](#)^[557] - Okta is an enterprise-grade identity management service that connects any person with any application on any device. It's built for the cloud but is also compatible with many on-premises applications. iService integrates with Okta using OpenID Connect.

[Login with Microsoft](#)^[567] - The Microsoft OpenID integration supports two methods for authentication: personal accounts or Azure accounts.

[Login with Google](#)^[580] - Use this option to login with either the Google consumer or Workspace logins.

[Heartland Payment Gateway](#)^[563] - Collect payments directly in iService using an embedded payment method from the iService integration to Heartland.

[Microsoft Graph API](#)^[567] - Configure your secret keys for Microsoft 365 and use the Graph API to send and receive email.

[OpenAI](#)⁵⁷⁶ - iService includes an integration to the OpenAI API for LLM usage and OpenAI Assistants chatbots.

[Google Calendar](#)⁵⁸⁸ - Integrate with the Google Calendar API to populate a calendar for scheduling or any time based task.

[Zapier](#)⁷⁴⁷ - iService includes an API to the [Zapier](#) service for integrating with other applications.

Calabrio - Calculate workforce planning statistics required by the Calabrio workforce management system.

15.1 iService Utilities



iService includes two types of utilities that can be used for importing contacts and generating interactions from an input file. The iService Batch Form Submission Utility can be used to read a file of information and process it through a predefined iService form. This utility includes a graphical user interface or can be used as a command line utility, and is the recommended method for importing contacts or processing records from a CSV file.

In addition to the iService Batch Form Submission Utility, iService includes an older command line utility (BatchUtility) that performs similar actions but without a predefined form. Because the command line utility does not use a predefined iService form, it requires more definition within the input file itself. However, it is more flexible in that it does not require a pre-existing form.

The batch form submission utility and command line utility can both be used to perform the following actions based on an input file.

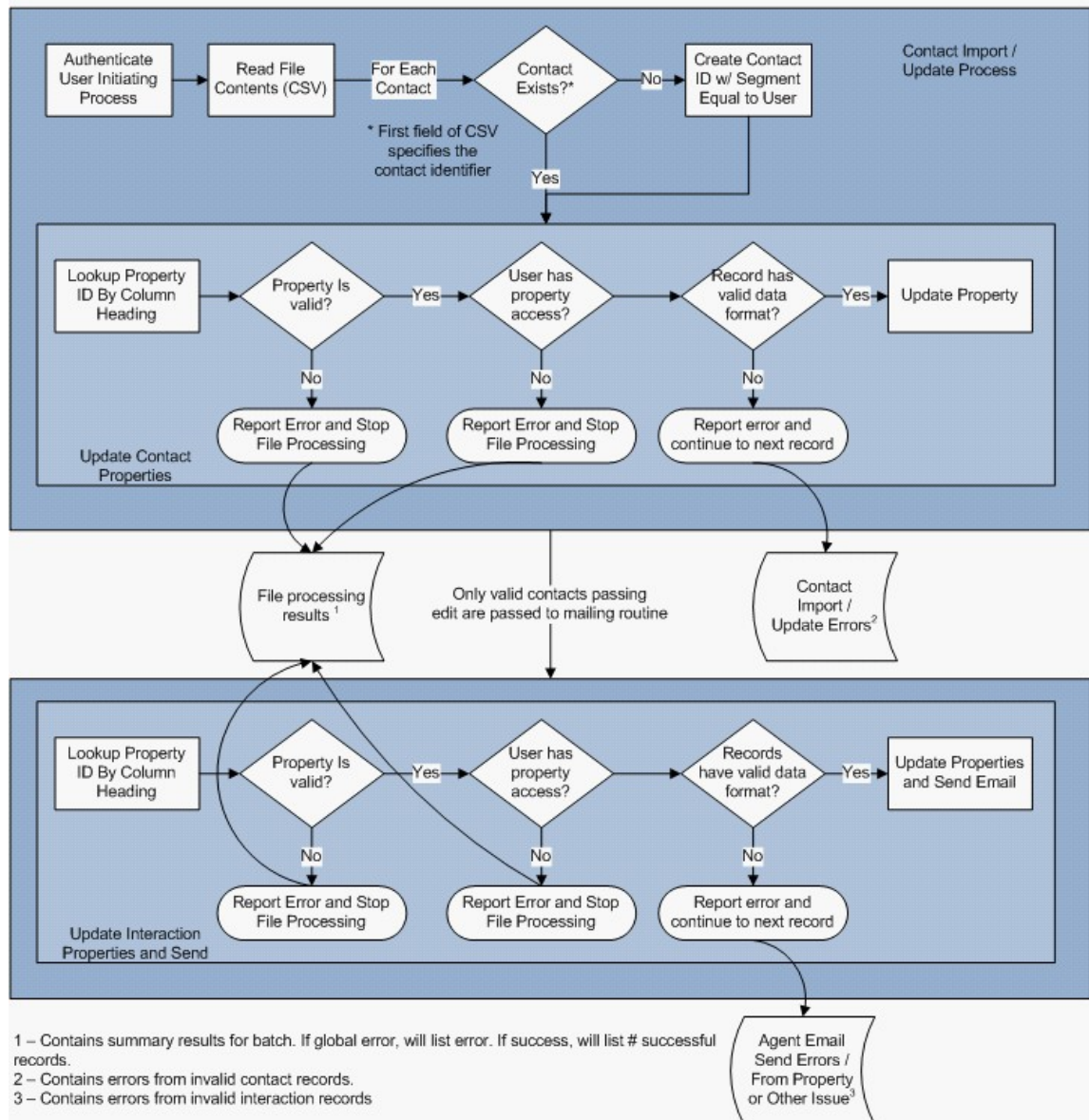
1. Create new contacts
2. Set, update, or remove properties for contacts (e.g., name, email, address, phone, etc.)
3. Send agent emails to contacts and set interaction properties within the email
4. Create notes within contact history
5. Create tickets and queue them for agent handling

The utilities read a comma separated value(CSV) text file that contains the contact information to import and the details related to the interactions to create (agent email, notes, or tickets). The Command Line Utility is designed to be run at the command line or included in a batch file to automate routine execution on a predetermined schedule. The Batch Form Submission utility includes a graphical user interface and is significantly faster than the command line utility.

The utilities perform a variety of error checks to validate the input file. However, it is recommended that you ensure users are familiar with its operation and limitations before making it broadly available. Also, you should test the utility against a test file with limited data before using it on a large scale project. The source code for this utility is provided so that you can modify or extend its functionality. You can also use it as the baseline for other projects.

Example of Logic Used

As shown below, the utility is comprised of two primary functions: Importing and updating contact information, and generating interactions (e.g., agent email, notes, and tickets). The diagram below provides a basic overview of the logic used within the application for agent emails.



The first routine within the utility ensures the contact record exists and updates the contact properties that are included within the input file. This routine validates all of the contact properties included within the input file and [logs error](#)⁷⁴² for any records that cannot be updated. The second routine builds the agent email (or other type of interaction) and validates all of the required interaction properties. If the input file does not contain all of the required fields for the specified type of interaction (see the Input File Requirements section below), the second portion of the routine is skipped and the operation is limited to contact import and update.

Since all of the actions performed by the utility are based on a contact, it's important that the utility be run with the desired iService segment access. The lookup function that attempts to determine whether or not a contact exists uses the iService contact search web service. If the login used with the utility does not have access to the contact, the search results will be blank and the utility will attempt to create a new contact. However, the contact creation will fail because the contact login already exists. Also, when new contacts are created, they will be assigned to the same segments for which the running login has segment access. For instance, if you run the utility using a SuperUser login all new contacts will be assigned membership to all business segments.

15.1.1 Batch Form Submit Utility (BatchFormSubmit.exe)

There are three steps required when using the batch form submission utility.

1. Create the form to which you will submit your information.

The utility reads a row from the input file and submits it to the specified form. Therefore, the first step is to create a form that will accept this input. The layout of the form is not relevant since it will only be used by the utility. An example of a simple form for importing contact information is shown below. This form accepts input for email, first name, last name, and company.

NOTE: If you are importing custom fields, you must create those contact properties within iService before you perform your import. For information on creating contact properties see the [Creating contact properties topic](#)⁶⁵¹.

Form Body

```

<html>
<body>
<form method="POST">

$input -email -id'email'$<br />
$input -contactProperty1'firstname' -id'firstname'$<br />
$input -contactProperty3'lastname' -id'lastname'$<br />
$input -contactProperty7'company' -id'company'$<br />

<input type="submit" id="ok" name="ok" value="Submit" /><br />

</form>
</body>
</html>

```

Form Submit Action

Find/Create Contact	
Find By Email: <input type="text" value="\$form -id'email'\$"/>	OR Find By Contact ID: <input type="text"/>
Property Group: <input type="text"/>	*Specified with \$input ... -group'xxx'\$
<input checked="" type="checkbox"/> Leave existing values when properties in form are blank.	
Result Name: <input type="text" value="contactID"/>	*Can be referenced in other steps as \$result -id'name'\$

The simplest way to create your form for importing contacts is to use the Forms Wizard. For more information on creating forms, view the [iService Forms Developers Guide](#).

2. Add column labels to your input file that match the form.

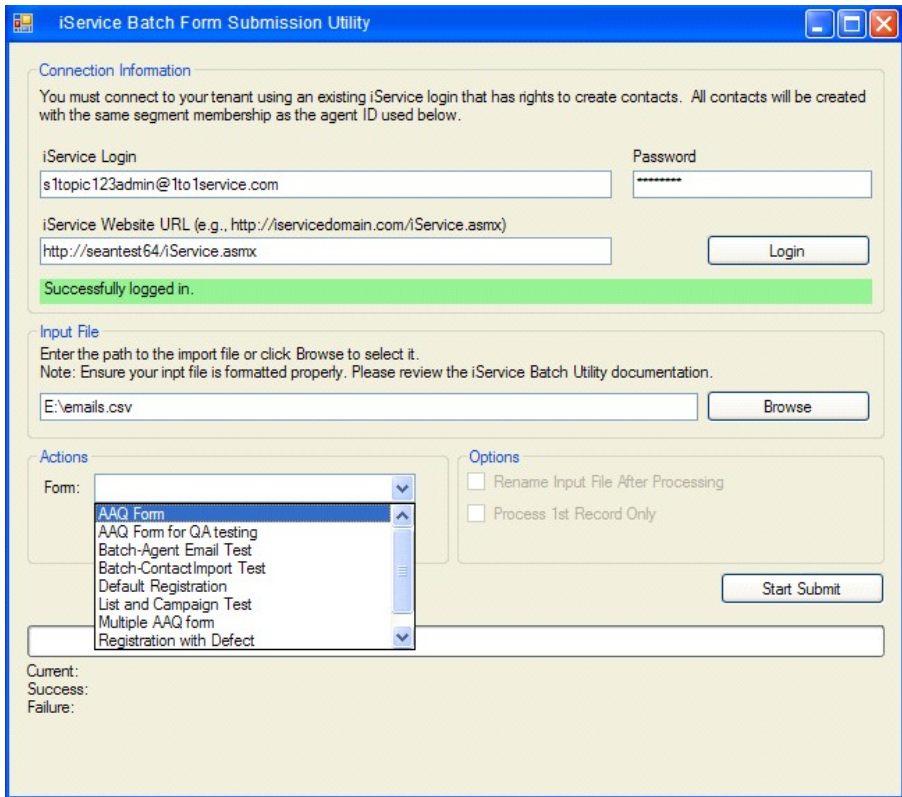
iService will match the column headings of your CSV file to the input fields on the form. The order of the columns does not matter. The column headings for the form created in step 1 above would be as follows. Just append “form-“ to the id of the input field from the form.

	A	B	C	D
1	Form-email	Form-firstname	Form-lastname	Form-company
2	user@domain.com	John	Smith	ACME Corporation

3. Run the iService Batch Form Submission utility as described below.

The Batch Form Submission utility reads a CSV file and submits each row of information to a predefined iService form. The iService form defines the actions taken, such as creating contacts or sending agent e-mail messages.

The first step when using the utility is to complete the login section and enter the credentials of the agent that is submitting the forms. After clicking the login button, you should see the successfully logged in message. The second step is to select the input file either by browsing your computer for it or typing the path directly into the input box. The third step is to select the form to which you are submitting your input file.

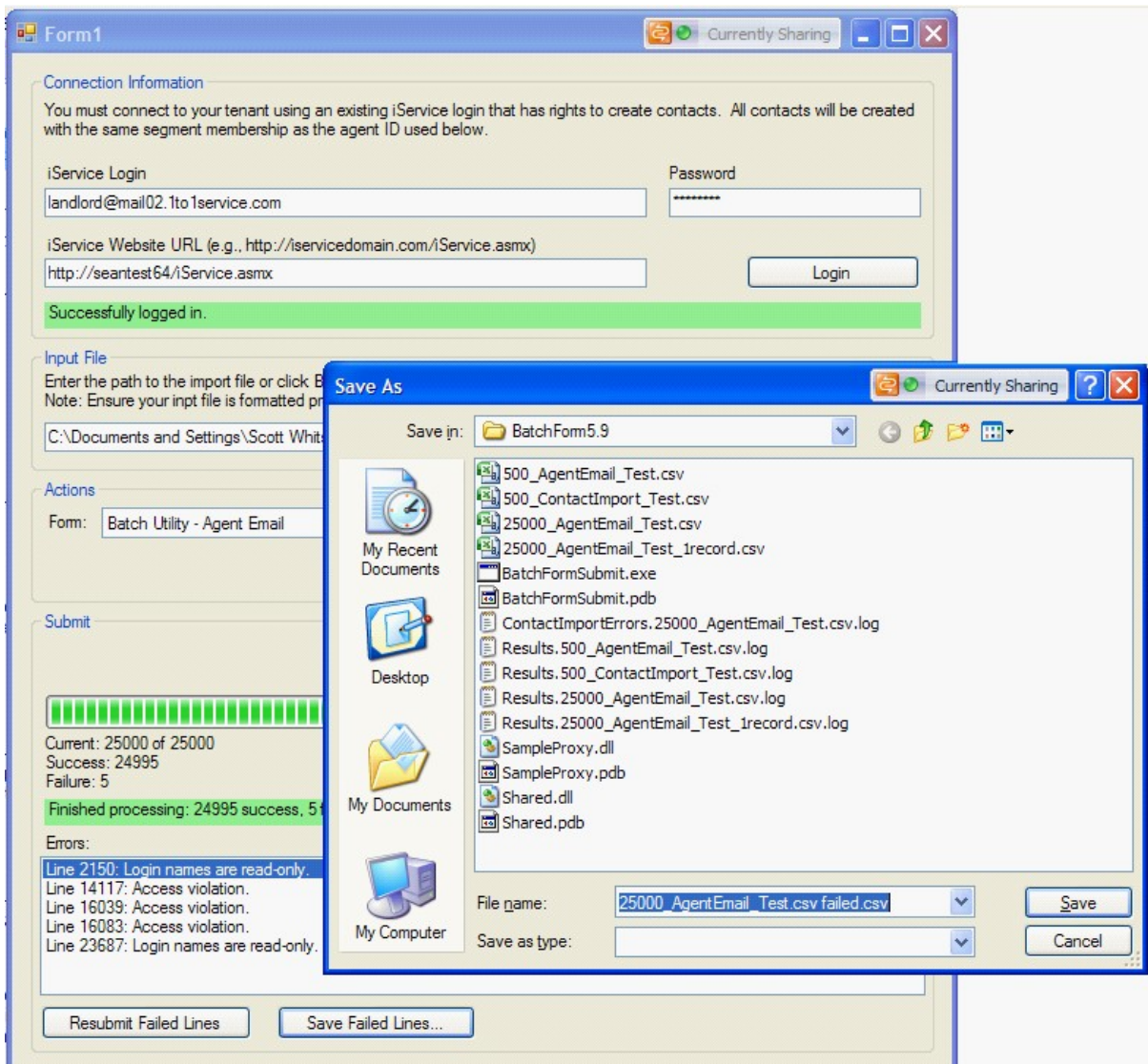


Step 1 - Login

Step 2 - Select the input file

Step 3 - Select the form that will accept the input.

If errors are encountered during processing, they will be displayed in a text box below the progress bar. Two buttons will display with options to attempt reprocessing, or saving the failed records to a file for later processing. We recommend that you first attempt to reprocess the records, and then save the failed records as shown below.



Multi-value Properties with Descriptions

Some contact and interaction properties are designed to accept multiple values, and set a description for each value. The most common example of this is phone number, where you must designate the number as work, home, mobile, or fax. To set the description for the value, you can add a column to capture the description (e.g., Form-phonedescription) and include the value of work, home, etc. within the csv file for each number. Another alternative for cases where all values have the same description (e.g., all numbers imported are work numbers) is to embed the value into the form body and have the form body pass it directly to the Find/Create Contact action.

Using the batch form utility without the GUI

The Batch Form Submit utility can be run without the graphical user interface, similar to the legacy command line utility that is described in the section below. The syntax is as follows:

```
BatchFormSubmit.exe [-nogui] "input_filename.csv" "URL for Website"
"agent_user_name" "password" -formid ## [-firstrecordonly] [-
renameinput]
```

Example

```
BatchFormSubmit.exe -nogui data.csv https://site.iService
```

15.1.2 Batch Utility (BatchUtility.exe)

The utility can be invoked at the command line and used in an automated routine without any pre-configured forms. The command line parameters are as follows:

```
Usage: BatchUtility.exe "input_filename.csv" "webservice URL" "agent_
[-renameinput]
[-agentemail | -ticket | -notepublic | -notepivate]
```

BatchUtility.exe – This is the name of the utility executable.

Input_Filename.csv – This is the full name and path to the input file that will be processed. For instance, if the file is located in the C:\import directory the parameter might be c:\import\pastdueaccounts.csv.

Webservice URL – The webservices URL path will define the tenant against which the utility will run. For on-premises clients, this might be a test tenant or a production tenant. The URL path must include the full name of the .asmx file. For example, your webservices URL might be https://1to1service.iServiceCRM.com/iservice.asmx.

Agent_User_Name – This is the UserID of the agent that is used to create the contacts and generate interactions. It will be recorded in history for each interaction created. Also, the segment access of this agent will be used when creating new contacts, and will be validated when agent emails are sent. Therefore, you must ensure the agent access for this User ID is appropriate for your mailing.



Contact replies to your agent email are automatically reserved for the agent that sent the email. If you do not want replies to your mailing to be reserved for the UserID used during execution, you must set that agent's properties for Empty Inbox to TRUE. This will cause any replies to the mailing to be re-queued and available for other agents.

Password – This is the iService password for the User ID above. The command line usage allows you to create a batch file that contains multiple instances of the batch mailings, each with their own parameters. This batch file can then be executed on a predefined schedule using a Windows Task Scheduler.

-renameinput – This is an optional parameter that can be added to the command to rename the input file upon completion. The file will be renamed as shown below. Without this parameter the original file will be left in place.

originaldir\YYYYMMDDoriginalname.ext

-agentemail | -ticket | -notepublic | -noteprivate – These parameters indicate whether the input file contains agent emails, tickets, public notes, or private notes.

Input file requirements for the batch utility

When used without forms, the command line utility is designed to read a comma separated value file that contains contact information and interaction details. The contact properties imported are based on the name of each property, while interaction properties are based on the propertyID from the iService database.

The first line of your input file MUST specify the details of each column in the file (i.e., column header). And, the first column that includes a contact property MUST specify the identifier for the contact record. The contact identifier is usually the Login (Email Address) of the contact, but if you use another contact property as a unique identifier (e.g., account number) that could also be used. However, beware that Login and Contact ID are the only database enforced unique field for a contact.

Column Headings for Login/Email

The format for the Login/Email address must be one of the following:

`contact-login` **or** `contact-Login (email)`.

The format for column headings is as follows:

For Contact Properties

`contact-(description) DISPLAY NAME`

Contact indicates the property is a contact property. Description is only used for multi-value properties that have a description (e.g., phone number might include home or mobile). The Display Name is exactly as shown within the iService Customer Info>Contacts>Details tab. Some examples of contact property headings are shown below.

`contact-(home) Phone`
`contact-Company`

For Interaction Properties

`interaction-(description) ID`

Interaction indicates the property is an interaction property. Description is only used for multi-value properties that have a description. The ID is the actual property ID from the database, and can be found in the Admin Tools>Segment>Interaction Properties tab. Some examples of interaction property headings are shown below.

`interaction-(department) 2` - this indicates an interaction property whose ID is 2. However, this property allows more than one value and each value has a label. An example of this might be tracking billable minutes by department. The property captures the number of billable minutes, but a label is used to indicate the corresponding department.

`interaction-4` - this indicates an interaction property whose ID is 4.

Required properties for agent email

Agent emails require the following values, and the column headings MUST match the definition below or file processing will fail.

- `emailtopicID` – The ID number of the topic for the message. This can be found in the Admin Tools>Segments>Topics tab by highlighting the desired topic.
- `emailbody` – The body of the email. Typically, this will be a stock response that is predefined rather than a full text body. If a stock response is used, it must be entered in the standard variable format as `$stock#$` or `$stock#'name' $`. The # represents the ID of the stock response, and the name represents the display name of the stock response. In all cases, the ID of the stock response must be present and if a name is used it must be inside single quotes.
- `emailsegmentID` – The ID of the segment in which the agent email is sent.
- `emailmailboxID` – The ID of the mailbox used to send the email. It must be a mailbox within the selected segment.
- `Emailsubject` – The subject line of the agent email message.
- `Emailaddress` – The email address of the recipient. This email address must exist as a Login (Email) property value, but will be created by iService if it does not already exist.

Optional Fields

- `AddRef` – If this field is included and the value is FALSE, the message Ref# will not be included in the subject line of the agent

email when sent. If this value is not included, the standard message format including the Ref# in the subject line will be used.

- `Emailnote` – Information stored in the Private Comments section of the agent email. This is an optional parameter.

Required properties for notes

Adding a note to contact history requires most of the same values as Agent Emails.

- `emailtopicID` – same as agent email.
- `emailbody` – same as agent email.
- `Emailnote` – same as agent email.
- `emailsegmentID` – same as agent email.
- `Emailsubject` – The subject line of the note.

The following fields are **NOT** used when creating notes for history.

- `Emailaddress`
- `emailmailboxID`

Required properties for tickets

Creating a ticket requires most of the same values as Agent Emails.

- `emailtopicID` – same as agent email.
- `emailbody` – same as agent email.
- `Emailnote` – same as agent email.
- `emailsegmentID` – same as agent email.

- `Emailsubject` – The subject line of the ticket.
- `Emailaddress` – same as agent email.

The following fields are **NOT** used when creating Tickets.

- `emailmailboxID`

Using the batch utility with forms

There are two ways to use the command line utility: with forms and without forms. Using forms provides a significant increase in processing speed, and simplifies the requirements of the CSV input file. To use the command line utility with forms, follow the first two steps outlined in the Batch Form Submission Utility section above. Once the form and input file are prepared, use the following command to execute the utility.

```
BatchUtility.exe input_filename.csv webservice URL agent_
```

The `-formid` parameter tells the utility to process the CSV input file through iService forms. The id of the iService form can be found from the Admin Tools–Forms page.

The `-renameinput` parameter is optional and will rename the input file by pre-pending the current date to the file. This is useful if you have an automated process that runs daily against files with an identical name.

The input file when using the batch form submission process is much simpler than using the legacy not-forms approach. Simply name the column headings of your .CSV file using the format `form-ID`, where the ID is the corresponding field within the form to which you are submitting the .CSV file. For instance, if your iService form has a field with an ID of "FirstName", the column heading within the .CSV file would be `form-FirstName`.

15.1.3 Error Logging and Troubleshooting



There are two types of errors that might occur in processing these files: File processing errors and record processing errors. A file processing error occurs when iService is unable to open or read the contents of your input file. These are usually a problem with the path to the file, or the column headings within the file. These types of errors cause the utility to abort before any records are processed. Record processing errors occur while the utility is actively reading and processing rows from your file. These errors are caused by a problem with the data in the file, and only affect some records in the file. Common examples for both are shown below.

File Processing Errors

There are various conditions that will cause the overall utility to fail and not process any records. These include an invalid tenant, invalid file format/path/name, incorrect userID and password etc. Also, the field identifiers in the input file might be incorrect and thus none of the records can be processed. These types of errors are logged into the File Processing Results log file. When a File Processing Error occurs, none of the records will be processed.

Common File Processing Error Examples

HTTPS vs HTTP

This error message indicates that the iservice.asmx page was not found in the location specified. If the website requires https and your path only includes http, you will receive the following error.

```
Error processing filename: Login failure: The request fai
```

No Website Found

If you type the web site address wrong you will receive the following error.

```
Error processing filename: Login failure: The request fai
```

Incorrect Filename or Path

If the file for processing is not at the location or is misspelled, the following error is generated.

```
Error processing filename: Failed to open file: Could not
```

Input File is Open or Locked

If the csv file you are using is open in Excel or otherwise locked, you will get the following error.

```
Error processing filename: Failed to open file: The proce
```

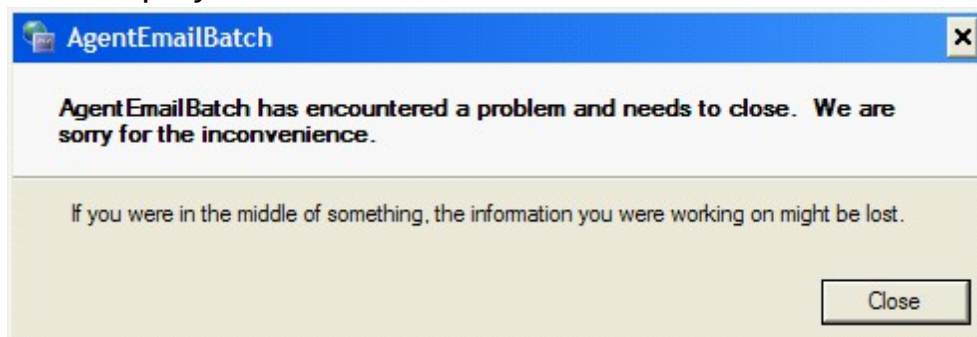
Incorrect Login or Password

If you enter the username or password incorrectly, you will get the following error.

```
Error processing filename: Login failure: Login name/pass
```

Missing DLL

The AgentEmailBatch.exe utility requires the shared.dll file to be in its directory. If this dll is not present, you will get the following Windows error display:



After closing this window, you will see an error similar to the following in your DOS Command Line.

```
Unhandled Exception: System.IO.FileNotFoundException: Cou  
File name: 'Shared, Version=1.0.0.0, Culture=neutral, Pub
```

Invalid Column Headers

The batch utility uses the column headings to identify the values for each record. If you misspell a column heading or use a value that is invalid, you will receive an error like the following.

```
Error processing filename.csv: Line 1: : Invalid column h
```

Log for File Processing Errors

The naming convention for the log file is `FileProcessing.inputfilename.log`.

Two examples of these errors are as follows:

```
At: 2009-12-22 08:53:05
```

```
Error processing TestFile.csv: Login failure: Login name/:
```

```
At: 2009-12-22 09:11:03
```

```
Error processing TestFile.csv: Line 1: Invalid column hea
```

As shown above, the log file is appended with each additional error.

Record Processing Errors

Record processing errors are divided into two categories: Contact Import Errors and Agent Email Errors. When a Record Errors occurs, the offending record will be skipped but the other records in the file will be processed.

Common Record Processing Error Examples

Incorrect Value for Boolean Property Type

This error message indicates that the record contained a value that is not true, false, or empty. If the property type you are using for the interaction property is Boolean, then the value for the record must be true, false, or left empty. You will receive an error like the following.

```
Error processing filename.csv: Line 2: 'addref' column va
```


Invalid Topic ID

Every interaction must have a topic ID that corresponds to a valid topic within your iService tenant. If you have an invalid topicID value, you will receive an error like the following.

```
Error processing filename.csv: Line 3: Error sending agen
```

Invalid Segment ID

Every interaction must have a segment ID that corresponds to a valid segment within your iService tenant. If you have an invalid segment ID value, you will receive an error like the following.

```
Error processing filename.csv: Line 4: Error sending agen
```

Missing Required Fields

Similar to the invalid value error above, you will receive an error for any record that is missing one of the required fields. If you missing values for required fields, you will receive an error like the following.

```
Error processing filename.csv: Line 8722: Missing one or :
```

Email Address Does Not Belong to Customer

The process for sending an email or creating a ticket requires selection of one of the contacts email addresses. Since the contact may have more than one email address, it is not necessarily the same as the Contact-Login. If have a mismatch between the contacts login and their email address, you will receive an error like the following.

```
Error processing filename.csv: Line 4: Error sending agen
```

Attempting to Update Agent Records / Login Names are Read-Only

Agents are not allowed to change the login of other agents unless they have sufficient access rights. If your input file contains agents that have rights equal to or above the accounts used with the batch utility, you will receive an error like the following.

```
Error processing filename.csv: Line 2: Error updating pro
```

Log for Record Processing Errors

Contact Import Errors

If records within the input file can't be processed because of errors relating to the contact create or update process, details of those errors will be written to a contact import errors log file. This file will include the row# for each error, along with a description of the error. This file will ONLY contain error records.

The naming convention for this file is

```
ContactImportErrors.inputfilename.log.
```

Agent Email Errors

If records within the input file passed the contact validation but did not pass the interaction creation validation, they will be written to the agent email error log. This file will include the row number of the record along with the error reason, and will ONLY contain error records.

The naming convention for this file is

```
AgentEmailErrors.inputfilename.log.
```

15.1.4 Automation with Scheduled Tasks**Batch Utility With Scheduler**

The Batch Utility was created as a command line program so it can be easily invoked from within a batch file. The Windows Server Task Scheduler can then be used to run the batch file according to whatever schedule is desired.

An example of the contents of such as batch file is shown below.

```
Batchutility.exe TestFile1.csv https://1to1.iservicecrm.com/iservice  
Batchutility.exe TestFile2.csv https://1to1.iservicecrm.com/iservice
```

This batch would process against two files, TestFile1 and TestFile2, located in the same directory as the batch file. The file can be located in any directory that is accessible from the location of the batch file.

Using the task scheduler and a batch file allows you to generate files using a reporting tool, such as SQL Server Reporting Services, and save those files

into the directory specified by the batch file. The file will then be executed by the Windows Task Scheduler as required (daily, weekly, etc.) and the files will be automatically processed.

The optional `-renameinput` parameter will rename the file upon completion, thus allowing your report writing software to place a new file into the directory without a file naming conflict.

Batch Form Utility With Scheduler

The Batch Form Utility can also be run from within a batch file and scheduled for regular execution. The syntax for the Batch Form submission is explained [here](#).

15.2 Zapier



with other applications. This allows you to quickly integrate with over 10,000 other applications that have also created an API to Zapier. The iService API includes functions for triggers, actions, and searches. The process works by configuring a trigger in one application and an action in another application. For example, and integration with Google calendar can automatically create tickets and iService when the event arrives. In that example you use a trigger provided by Google for the event, and an action and iService to create the ticket.

Zapier access is free, and you can find the iService triggers and actions at <https://zapier.com/apps/iservice/integrations>.

15.3 Integrating with Workforce Management Systems



Enterprises with large call centers often use workforce management systems to help predict required staffing levels. iService tracks extensive metrics that can be imported into your workforce management system to predict staffing requirements for messaging. Although the requirements for importing messaging details vary by system, the inputs are generally very similar. iService includes processes to capture these metrics and make them available to your workforce management system. iService currently supports calculations for the Pipkins and Calabrio workforce management systems.

This API requires a queue system that will fetch the calculated value, convert them into final format, and then post them to the workforce management system API. For iService On-Demand users, this process is managed for you via our hosting AWS environment. We use AWS SQS for the process and track any failures or issues that occur in the process. If you are an On-Premises user, you can create your own queue and posting process for your tenant using whatever method your organization has adopted for message queuing.

Agent and Queue Statistics Calculated

The `integration-api-workforce-management` API calculates statistics about your incoming and outgoing activity by queue (topic) as well as by agent. The calculations include the following.

Queue Statistics

These values specify the volume of incoming questions and outgoing answers generated by topic during the time frame specified. A separate record is created for each queue (topic) during the time step.

Value Name	Description	iService Details
intervalStartDateTime	string(\$date-time) Start date and time of the reported interval	Date + Time Step

Value Name	Description	iService Details
queueId	stringmaxLength: 100 minLength: 1 Unique queue ID in the CC platform. Not shown in the reports, but important for the queue mapping. Set to same value as queueName if not available	Topic ID
queueName	stringmaxLength: 100 minLength: 1 Queue name as defined in the CC platform	Topic Name
offeredContacts	integer(\$int32) Total number of incoming contacts to this queue	Aggregate of all Questions that arrived inside time step, regardless of current status.
answeredContacts	integer(\$int32) Total number of answered contacts on this queue	Aggregate of all Answers resolved inside time step.
contactTime	integer(\$int32) Total contact duration for contacts put on this queue and subsequently answered, including hold time (in seconds)	The total time passed, in seconds, for CH from the time answers were created until they were resolved.

Agent Activity Statistics

These values specify the volume of answers generated by topic for each agent during the time frame specified. A separate record is created for each agent and the queues (topics) from which they created answers during the time step.

Value Name	Description	iService Details
intervalStartDateTime	string(\$date-time) Start date and time of the reported interval	Date + Time Step

Value Name	Description	iService Details
queueId	stringmaxLength: 100minLength: 1 Unique queue ID in the CC platform. Not shown in the reports, but important for the queue mapping. Set to same value as queueName if not available	iService Topic ID
queueName	stringmaxLength: 100minLength: 1 Queue name as defined in the CC platform	iService Topic Name
agentId	stringmaxLength: 100minLength: 1 Unique agent ID in the CC platform. Not shown in the reports, but important for the agent mapping. Set to same value as agentName if not available	iService Agent ID
agentName	stringmaxLength: 100minLength: 1 The agent's login as defined in the CC platform	iService Agent Name
contactTime	integer(\$int32) Total contact duration for contacts put on this queue and subsequently answered by the agent, including hold time (in seconds)	Total time in seconds from creation of the answer until it is sent.
answeredContacts	integer(\$int32) Total number of answered contacts on this queue	Total number of answers created by the agent during the time step.
completedContacts	integer(\$int32).nullable: true	Total number of answered and wrapped-up contacts on this queue

Agent Login Statistics

These values specify the time an agent was logged in and their activity during the time step specified. A separate record is created for each agent.

Value Name	Description
intervalStartDateTime	string(\$date-time) Start date and time of the reported interval
agentId	string maxLength: 100 -- minLength: 1 Unique agent ID in the CC platform. Not shown in the reports, but important for the agent mapping. Set to same value as agentName if not available

Value Name	Description
agentName	string maxLength: 100 -- minLength: 1 The agent's login as defined in the CC platform.

Value Name	Description

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Value Name	Description
loginTime	integer(\$int32) Total logged-in time during the interval (s)

Value Name	Description

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Value Name	Description	i S e r v i c e D e t a i l s
		t i n e l i n i t e c t c 1 5 r i r u t e s r a x
directOutContacts	integer(\$int32)	T C

Value Name	Description
	Number of outgoing direct contacts (not routed contacts)

Value Name	Description

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Value Name	Description	i S E r v i c e D e t a i l s
		t e s .

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Remove this text from the manual
template if you want it completely blank.

Reports

16 Reports

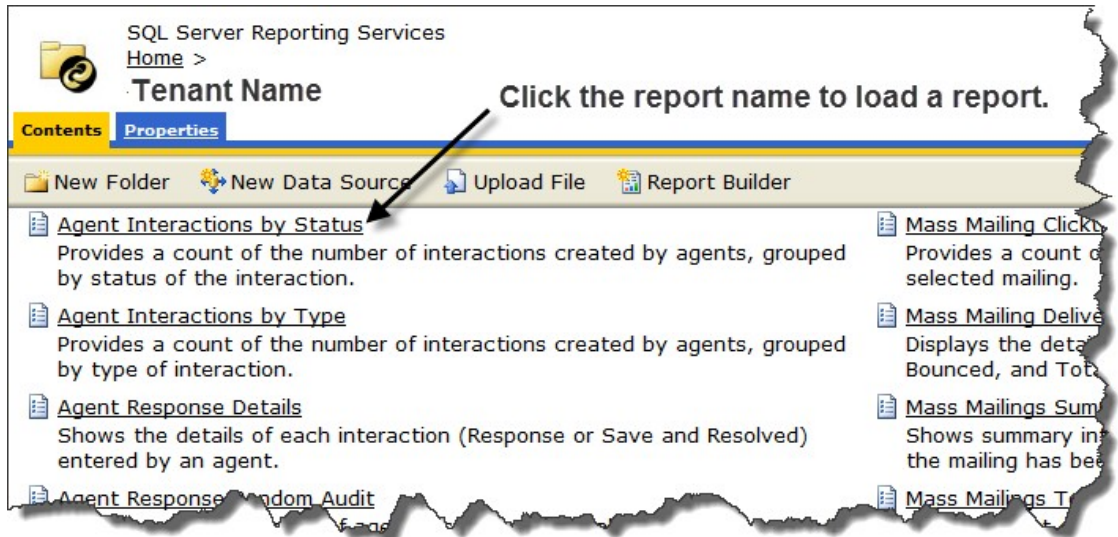
iService Business Intelligence provides insight into your marketing, sales, and service operations. It consists of over 40 reports that provide summary and detailed information about various aspects of your iService installation. This user guide provide a description of the various reports and explains the metrics and insight you can gain from each of them.

The reports are built using Microsoft SQL Server Reporting Services (SSRS), an included component with the Microsoft SQL Server database. The reports are ready to run as is, and the source files are available for editing and customization if you have in-house staff with expertise in SSRS .

You will access reports differently depending upon whether you are using iService on-Demand (hosted by One-to-One Service.com) or on-premise. If iService is hosted by one-to-one service.com, you will access your reports at <https://reports.iServiceCRM.com/reports>. You will be prompted for a user name and password which should be provided by your company's iService administrator. This login is not the same as your iService login, because users of reports are often different than agents that log into iService.

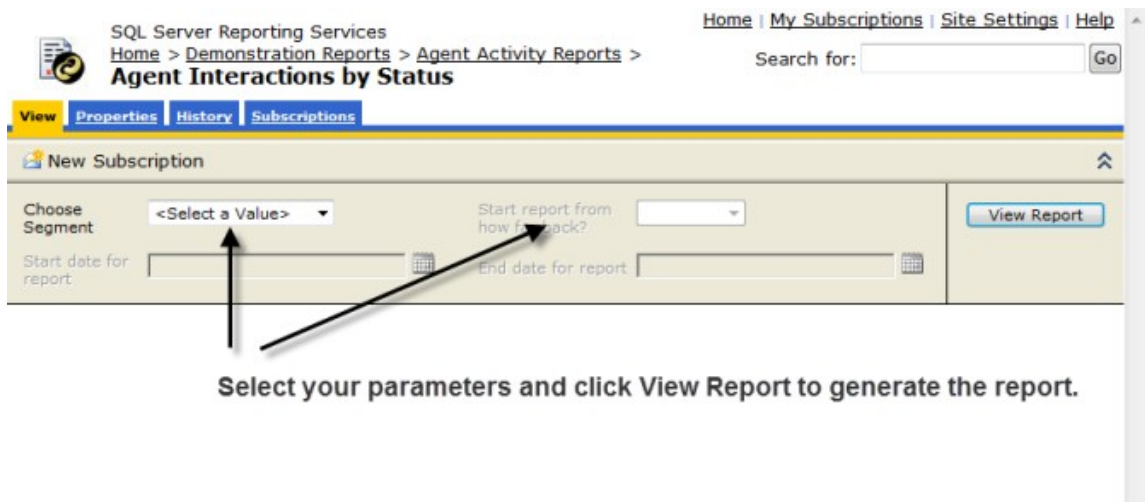
— Using Microsoft SSRS Report Manager

To load a report, click on a report name from the SSRS report listing as shown below.



A Standard Report Listing in the SSRS Report Viewer

The Report will load and present various parameters you can set for the report, such as the segment and time frame for the report. These parameters will be different for each report but should be self explanatory.



Select your parameters and click View Report to generate the report.

Selecting Parameters for a Report

After you load the report, you can export it to a variety of formats. To export a report, select the desired format and then click the Export link. The export formats supported are:

- XML File
- CSV (Comma Separated Value)

- TIFF File (an image)
- Acrobat (PDF) File
- Web Archive
- Excel

SQL Server Reporting Services
 Home > Demonstration Reports > Agent Activity Reports > **Agent Interactions by Status**

Home | My Subscriptions | Site Settings | Help

Search for: Go

View Properties History Subscriptions

New Subscription

Choose Segment: e-shop Start report from how far back? 3 months ago View Report

Start date for report: 4/11/2012 End date for report: 7/10/2012

1 of 1 100% Find | Next Select a format Export

iService **Agent Interactions Report**
 By Status of Interaction
 Segment: e-shop

To export a report, select the format and then click Export.

Date Range: 4/11/2012 through 7/10/2012

Agent	Total Interactions	Sent	Sent, Expect Customer Reply	Unsent	Public Note	Private Note
Administrator, e-shop	12	1	0	0	11	0
Administrator, Landlord	23	9	0	0	14	0
Manager, Service	10	7	0	1	2	0
Representative, Service	7	6	0	0	0	1
Trainee, e-shop	1	0	0	1	0	0
Total Interactions for all Agents	53	23	0	2	27	1

Legend:

Sent - Agent Email and Message Queue responses sent by the agent, excluding those sent with the "Expect Customer Reply" box checked.

Sent, Expect Customer Reply - Agent Email and Message Queue responses sent by the agent with the "Expect Customer Reply" box checked.

Unsent - Draft responses prepared by the agent but not sent. These are typically in the agent's My Message Inbox when the report is run.

Public Note - Notes created by the agent that were designated as Public. These may be entered from the Customer Info or Message Queue tab and include the notes saved when the Save and Resolve action is selected or the SPAM button is used.

Private Note - Notes created by the agent that were designated as Private. These may be entered from the Customer Info or Message Queue tab.

The date range of this report is based on the date and time the agent's interaction was completed, not the incoming question to which they may be responding.

Report generated on 07-11-2012 at 4:39:14 PM *iService Version 5.12* Page 1 of 1

A Report Displayed in the Report Viewer

On-Premise Users

If your company runs iService on its own equipment (on premise), your local system administrator will provide you access instructions. Information regarding installing and upgrading reports for on premise installations can be found within the **iService Technical User Guide**.

16.1 Agent Activity Reports

Agent activity reports provide insight into how your agents are handling interactions and using iService. They provide information about the number of messages each agent handles, the amount of time it takes them to answer them, and other actions they perform within iService. In some reports, such as the Random Audit Report, details of the interactions are included.

16.1.1 Agent List

The Agent List report shows a list of all agents configured in a tenant. It displays the agent contact ID, name, email address, UserType, and the segments they can access.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

There are no parameters for the report

Report Example

Home > Demonstration Reports > Agent List Home | My Subscriptions | Site Settings | Help

2 of 2 Find | Next

iService Agent List

ID	Name	Email	Type	Segments
378	remotetester2	remotetester2	CSR Manager	e-shop
379	remotetester3	remotetester3	CSR Manager	e-shop
169	Representative, Sales	sales-rep@1to1service.com	CSR	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, Travel, Z-Aksharasoft Solutions, Z-Feedback
393	sms	sms	Administrator	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, SMS, Travel, Z-Aksharasoft Solutions, Z-Feedback
400	sms-csr	sms-csr	CSR	SMS
401	sms-mgr1	sms-mgr1	CSR Manager	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, SMS, Travel, Z-Aksharasoft Solutions, Z-Feedback
402	sms-mgr2	sms-mgr2	CSR Manager	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, SMS, Travel, Z-Aksharasoft Solutions, Z-Feedback
36	Specialist, SAP	it-staff-sap@1to1service.com	CSR	e-shop, Human Resources, IT Compliance
203	stevedubrick@1to1service.com	stevedubrick@1to1service.com	Administrator	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, Travel, Z-Aksharasoft Solutions, Z-Feedback
52	Support, James	power-csr@1to1service.com	CSR	Power Company
17	Supporter, John	it-staff@1to1service.com	CSR	e-shop, Human Resources, IT Compliance
127	Topper, Julie	demo-csr7@1to1service.com	CSR	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales
157	Trainee, e-shop	demo-trainee@1to1service.com	QA CSR	e-shop
153	Trainee, FS	fs-trainee@1to1service.com	CSR Trainee	Financial Services
122	Walker, John	demo-csr2@1to1service.com	CSR	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, Travel, Z-Feedback
409	z-training sales 1	z-training sales 1	CSR	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, SMS, Travel, Z-Aksharasoft Solutions, Z-Feedback, Z-Training-SalesSetup, Z-Training-SupportSetup
410	z-training sales 2	z-training sales 2	CSR Manager	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, SMS, Travel, Z-Aksharasoft Solutions, Z-Feedback, Z-Training-SalesSetup, Z-Training-SupportSetup
407	z-training support 1	z-training support 1	CSR	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, SMS, Travel, Z-Aksharasoft Solutions, Z-Feedback, Z-Training-SalesSetup, Z-Training-SupportSetup
408	z-training support 2	z-training support 2	CSR Manager	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, SMS, Travel, Z-Aksharasoft Solutions, Z-Feedback, Z-Training-SalesSetup, Z-Training-SupportSetup
Agent Count: 60				

Report generated on 05-26-2017 at 4:35:43 PM iService Version 7.6 Page 2 of 2

The Agent List Report

16.1.2 Deleted Interactions

The Deleted Interactions report shows a list of all interactions that were manually deleted from a tenant for a specified time period. It displays all of the details from the DeletionAudit table. This audit table is only populated for interactions that are deleted using the [Delete Interaction](#)¹³⁶ button in the user interface. Interactions deleted using the database stored procedures directly are NOT recorded in this table and have no automatic audit trail.

Setup Required

There is no setup required. The report simply displays the details from the DeletionAudit table as shown in the example below.

Parameter Selection

Select the segment and report period.

Report Example

The report output includes the following fields from the DeletionAudit table.

ID - table ID

Segment - The name of the segment for the item deleted (if available)

timeStamp - DateTime2 field with the time the user did the delete

modifierContactID- contact ID that performed the delete

objectID - the ID of the object deleted

objectType - type of item deleted, like customer email or agent response

objectDescription - for interactions, this will be the subject line

description - the form action that was run (same as status audit)

16.1.3 Feedback - Executive Summary

Feedback reports provide insight into feedback ratings provided through your iService Feedback forms. The report finds all interactions within the selected segment that contains values for the feedback properties. It includes an executive summary with aggregated information, and drill-through reports to evaluate each feedback category, agent performance, and a list of the feedback interactions themselves.

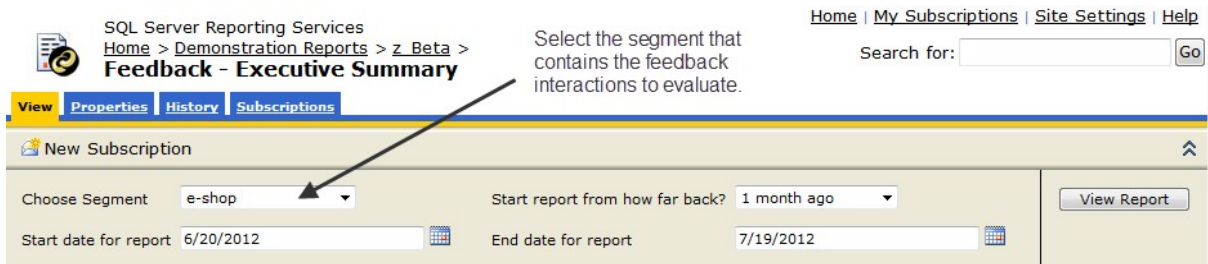
The summary report provides a rating to each of four categories: Speed, Quality, Skills, and Friendliness.

Setup Required

These reports require a feedback form that uses specific interaction properties.

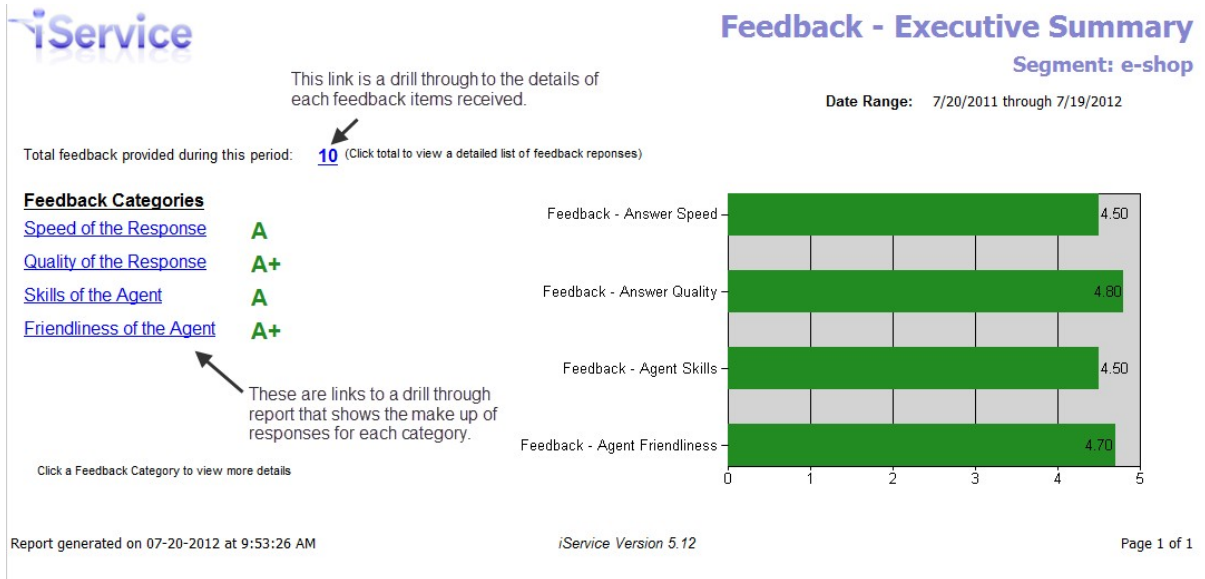
Parameter Selection

As shown in the image below, select the segment that contains the desired feedback interactions for analysis. This is the segment that contains the submitted feedback interactions, which can be different from the segment that contains the interaction properties.



Click to expand

Report Example



Click to expand image

See Also:

[Feedback - Category Analysis](#) ⁷⁶⁸

[Feedback - Agent Summary](#) ⁷⁶⁹

[Feedback - Details](#) ⁷⁷⁰

16.1.3.1 Feedback - Category Analysis

The Feedback - Category Analysis report is a drill-through from the Feedback summary. It shows how many feedback interactions comprise each of the categories. This is helpful in understanding whether a few feedback submissions have skewed your feedback averages.

Setup Required

See the [Feedback Summary](#) ⁷⁶⁷ for setup requirements.

Parameter Selection

This is a drill-through report from the Feedback summary, but can also be run as a stand-alone report. The parameters are obtained from that report.

Report Example



16.1.3.2 Feedback - Agent Summary

The Feedback - Agent Summary report provides a rating for each agent that has had a response rating during the time frame selected. It shows the average rating for each agent within each of the feedback categories. This helps you identify agents that might need additional training. You can drill-through to the specific interactions for that agent (Feedback - Details report) to investigate poor ratings.

If you have agents that rate poorly, you might consider running the [Random Audit](#) ⁷⁸⁰ report for that agent to review additional responses.

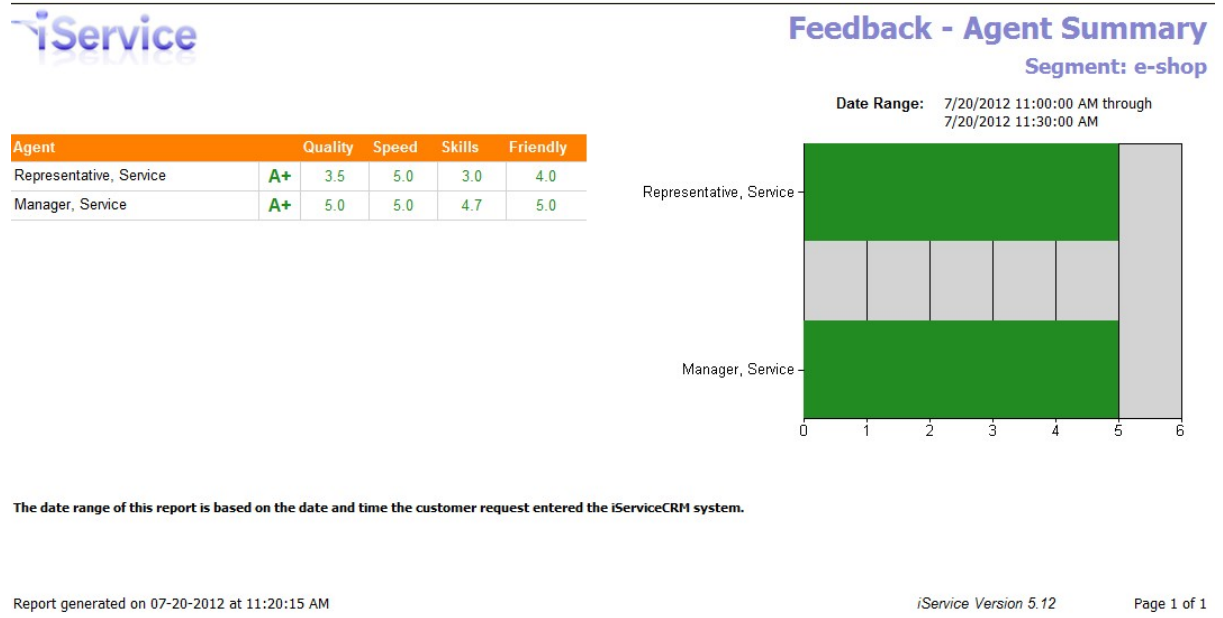
Setup Required

See the [Feedback Summary](#) ⁷⁶⁷ for setup requirements.

Parameter Selection

Select the agents and the time frame for the report.

Report Example



Click to expand

16.1.3.3 Feedback - Details

The Feedback - Details report provides a listing of the feedback interactions submitted. It shows the details for each feedback including comments. This is a drill-through to the specific interactions.

Setup Required

See the [Feedback Summary](#) ⁷⁶⁷ for setup requirements.

Parameter Selection

This is a drill-through report from the Feedback summary. The parameters are obtained from parent report.

Report Example

iService		Feedback - Details					
		Segment: e-shop					
		Date Range: 7/20/2012 11:00:00 AM through 7/20/2012 11:30:00 AM					
Reference Number	Agent	Answer Quality	Answer Speed	Agent Skills	Agent Friendliness	Preventative Measures	Comments
38161	Representative, Service	5	5	5	5	Not that I can think of ...	Great helper
38158	Representative, Service	2	5	1	3	It would help you have more information on your site.	The agent didn't answer my question at all!
38155	Manager, Service	5	5	5	5	Maybe be more explicit about what browsers you support, and support the MAC.	Nice person, but not the answer I wanted.
38152	Manager, Service	5	5	5	5	Provide better shipping details on the site.	Great response and very quick ... the way I like it!
38149	Manager, Service	5	5	4	5	Not much I can think of.	Very professional
Total		5					

The date range of this report is based on the date and time the customer request entered the iServiceCRM system.

Report generated on 07-20-2012 at 11:18:29 AM iService Version 5.12 Page 1 of 1

Click to expand

16.1.4 Forwarding Analysis

The Forwarding Analysis report provides insight into how often your agents forward interactions. This is an indication that a) your routing filters can be improved, b) you have external agents that would benefit from being iService Agents, or c) your agents are putting messages back into the queue that they don't want to answer.

It begins with a [summary](#)⁷⁷¹ (By Agent) for selected agents and a time frame, and includes a drill through to analyze agent activity further by topic and by interaction.

See Also:

[By Agent](#)⁷⁷¹ (summary)

[By Topic](#)⁷⁷²

[By Interaction](#)⁷⁷³

16.1.4.1 By Agent

This is the summary report that lists the agents selected and the number of forwards they completed during the period. It displays a column for each type of forwarding function within iService.

Setup Required

There is no setup required. The report uses standard iService audit trail information.

Parameter Selection

You must select the agents, segment, and time frame for the report.

Report Example

iService **Interaction Forwarding Analysis by Agent**
Segment: e-shop

This report shows the number and type of forwards the agent completed during the period. Click the + to see the breakdown by topic.

Date Range: 7/20/2011 through 7/19/2012

Agent	Topic	Total Forwarded Interactions	Removed From Queue	Forward to Agent	Forward to Different Segment	Forward to External Agent
+ Administrator, e-shop		10	3	6	0	1
+ Administrator, Landlord		9	2	6	0	1
+ Manager, QC and Training		1	0	1	0	0
+ Manager, Service		11	2	8	0	1
+ Representative, Service		18	9	8	0	1

Legend:

Agent - this column lists the agent that performed the forward action.

Topic - the topic column is blank until you expand an agent to see a further breakdown of their forwarding activity. It then displays the number of forwards by topic for that particular agent.

Total Forwards - this column displays the total number of interactions that were afforded by the agent during the period.

Removed From Queue - This column displays the number of interactions that the agent removed from their queue. These interactions were re-queued for other agents. This could be an indication that messages are being incorrectly assigned to the agent, or the agent is putting back messages that they do not want to answer.

Fwd to Agent - This column displays the number of interactions the agent assigned directly to another agent.

Fwd to Segment - this column displays the number of interactions that the agent forward to another segment. Please note that this function can be used to test filters by forwarding an interaction back to its existing segment. This might explain a large number of forwards for an agent with access to the Message Queue - Supervise page.

Fwd to External - this column displays the number of interactions at the agent forwarded to an external agent.

The date range of this report is based on the date and time the agent performed the forward action.

Report generated on 07-20-2012 at 10:15:09 AM

iService Version 5.12

Page 1 of 1

Click to expand

16.1.4.2 By Topic

The Forwarding Analysis - By Topic report provides a summary of messages forwarded by the selected agent with columns for each type of forward. This is a drill-through report from the By Agent report, and shows activity only for the selected agent. It shows the number of forwarded messages by topic, which helps to determine whether messages are not being properly queued and must be re-queued by agents.


Setup Required

There is no setup required. The report uses standard iService audit trail information.

Parameter Selection

This is a drill-through report from the Forwarding Analysis by Agent report. The parameters are obtained from parent report, but can also be entered manually to evaluate a single agent.

Report Example



Interaction Forwarding Analysis by Agent

Segment: e-shop

Date Range: 7/20/2011 through 7/19/2012

The By Topic analysis shows the number of forwards the agent completed, by the destination topic. In the example below, the Service Manager forwarded three interactions directly to an agent for questions that were in Technical Support.

Agent	Topic	Total Forwarded Interactions	Removed From Queue	Forward to Agent	Forward to Different Segment	Forward to External Agent
<input type="checkbox"/> Administrator, e-shop		10	3	6	0	1
<input type="checkbox"/> Administrator, Landlord		9	2	6	0	1
<input type="checkbox"/> Manager, QC and Training		1	0	1	0	0
<input type="checkbox"/> Manager, Service		11	2	8	0	1
	All Topics	1	0	1	0	0
	All Topics-->_Newsletter Subscription	2	1	1	0	0
	All Topics-->Account Questions	2	1	1	0	0
	All Topics-->Account Questions-->Returns	2	0	1	0	1
	All Topics-->Products-->Televisions	1	0	1	0	0
	All Topics-->Technical Support	3	0	3	0	0
<input type="checkbox"/> Representative, Service		18	9	8	0	1

Legend:

- Agent - this column lists the agent that performed the forward action.
- Topic - the topic column is blank until you expand an agent to see a further breakdown of their forwarding activity. It then displays the number of forwards by topic for that particular agent.
- Total Forwards - this column displays the total number of interactions that were afforded by the agent during the period.
- Removed From Queue - This column displays the number of interactions that the agent removed from their queue. These interactions were re-queued for other agents. This could be an indication that messages are being incorrectly assigned to the agent, or the agent is putting back messages that they do not want to answer.
- Fwd to Agent - This column displays the number of interactions the agent assigned directly to another agent.
- Fwd to Segment - this column displays the number of interactions that the agent forward to another segment. Please note that this function can be used to test filters by forwarding an interaction back to its existing segment. This might explain a large number of forwards for an agent with access to the Message Queue - Supervise page.
- Fwd to External - this column displays the number of interactions at the agent forwarded to an external agent.

The date range of this report is based on the date and time the agent performed the forward action.

Clicking one of the numbers within the topic analysis will load a drill through report showing the interactions that comprise this total.

Click to expand

16.1.4.3 By Interaction

The Forwarding Analysis - By Interaction report provides a detailed listing of messages forwarded by the selected agent with columns for each type of

forward. This is a drill-through report from the By Topic report, and shows activity only for the selected agent and the selected topic. It shows the number of forwarded messages by the agent for the selected topic, which helps to determine whether messages are not being properly queued and must be re-queued by agents. It also highlights agents that might be putting difficult questions back into the queue that they don't want to handle.

Clicking on a single interaction will open iService with that interaction selected (iService login is required).


Setup Required

There is no setup required. The report uses standard iService audit trail information.

Parameter Selection

This is a drill-through report from the Forwarding Analysis by Topic report. The parameters are obtained from the parent report.

Report Example



Interaction Forwarding Analysis by Interaction

Segment: e-shopTopic: Technical Support

Agent: Manager, Service ← This example shows the interactions that were forwarded by the Service Manager.

Date Range: 7/20/2011 through 7/19/2012

Interaction	Subject	Customer	Removed From Queue	Forward to Agent	Forward to Different Segment	Forward to External Agent
38025	[ref#: 38025-38025] Can't Login	Smith, John	0	1	0	0
38032	[ref#: 38032-38032] Technical Support	Smith, John	0	1	0	0
38092	[ref#: 38092-38092] Login problem	Williams, James	0	1	0	0

Legend:

Interaction - this column lists the specific interaction ID and can be clicked on to view in the iServiceCRM MessageQueue history.

Subject - this column lists the subject of the interaction and can be clicked on to view in the iServiceCRM MessageQueue history.

Customer - this column the customer who submitted the interaction and can be clicked on to view in the iServiceCRM Customer Info History panel.

Removed From Queue - This column displays the number of times this interaction was removed from the agents queue. that the agent removed from their queue. These interactions were re-queued for other agents. This could be an indication that messages are being incorrectly assigned to the agent, or the agent is putting back messages that they do not want to answer.

Fwd to Agent - This column displays the number of times this interaction was assigned directly to another agent by the agent identified in the report.

Fwd to Segment - this column displays the number of times the agent forward this interaction to another segment. Please note that this function can be used to test filters by forwarding an interaction back to its existing segment. This might explain a large number of forwards for an agent with access to the Message Queue - Supervise page.

Fwd to External - this column displays the number of times the agent forwarded this interaction to an external agent.

The date range of this report is based on the date and time the agent performed the forward action.

Report generated on 07-20-2012 at 10:21:51 AM

iService Version 5.12

Page 1 of 1

Click to expand

16.1.5 Interactions - by Status or by Type

The Agent Interactions report provides a count of interactions handled by the selected agents with columns for each type of interaction (by Type) or each interaction status (by Status). They show how active each of the selected agents were during the time frame specified. The time frame for the report is based upon the date / time the agent completed their interaction (sent email, created a note, etc.).

To see summary information based upon when interactions were received, see either the [Interactions by Type - Grouped by Topic](#)⁷⁷⁷ or [Topic Summary reports](#).⁷⁸⁸

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment and time frame for the report.

Report Example

By Status

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 Search for:


Agent Interactions by Status

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Choose Segment: Start report from how far back?:
 Start date for report: End date for report:

1 of 1 100% Find | Next Select a format Export



Agent Interactions Report

By Status of Interaction

Segment: e-shop

Date Range: 6/13/2012 through 7/12/2012

Agent	Total Interactions	Sent	Sent, Expect Customer Reply	Unsent	Public Note	Private Note
Administrator, e-shop	5	0	0	0	5	0
Manager, Service	1	1	0	0	0	0
Representative, Service	1	1	0	0	0	0
Trainee, e-shop	1	0	0	1	0	0
Total Interactions for all Agents	8	2	0	1	5	0

Legend:

Sent - Agent Email and Message Queue responses sent by the agent, excluding those sent with the "Expect Customer Reply" box checked.

Sent, Expect Customer Reply - Agent Email and Message Queue responses sent by the agent with the "Expect Customer Reply" box checked.

Unsent - Draft responses prepared by the agent but not sent. These are typically in the agent's My Message Inbox when the report is run.

Public Note - Notes created by the agent that were designated as Public. These may be entered from the Customer Info or Message Queue tab and include the notes saved when the Save and Resolve action is selected or the SPAM button is used.

Private Note - Notes created by the agent that were designated as Private. These may be entered from the Customer Info or Message Queue tab.

The date range of this report is based on the date and time the agent's interaction was completed, not the incoming question to which they may be responding.

Report generated on 07-13-2012 at 11:58:35 AM iService Version 5.12 Page 1 of 1

[Click to expand](#)

By Type

SQL Server Reporting Services
[Home](#) > [Demonstration Reports](#) > [z_Beta](#) >
Agent Interactions by Type

Home | My Subscriptions | Site Settings | Help
 Search for: Go

View | Properties | History | Subscriptions

New Subscription ^

Choose Segment: Start report from how far back?:

Start date for report: End date for report:

1 of 1 100% Find | Next Select a format Export

iService **Agent Interactions Report**
By Type of Interaction
Segment: e-shop

Date Range: 6/13/2012 through 7/12/2012

Agent	Total Interactions	Agent Response	Secure Agent Response	Save and Resolve	Agent Email	Secure Agent Email	Unsent Response	Public Note	Private Note
Administrator, e-shop	200	0	0	200	0	0	0	0	0
Manager, Service	40	40	0	0	0	0	0	0	0
Representative, Service	40	40	0	0	0	0	0	0	0
Total Interactions for all Agents	280	80	0	200	0	0	0	0	0

Legend:
 Agent Response - Responses sent from the Message Queue pages, except for those marked as Send Secure (with notification).
 Secure Agent Response - Responses sent from the Message Queue pages that were marked as Send Secure (with notification).
 Save and Resolve - Interaction resolved by selecting the Save and Resolve action from the Message Queue pages.
 Agent Email - Agent Email messages sent from the Customer Info page, except those marked as Send Secure (with notification).
 Secure Agent Email - Agent Email messages sent from the Customer Info page that were marked as Send Secure (with notification).
 Unsent Response - Draft responses that have not been sent by the agent. These are typically in the agent's My Message Inbox.
 Public Note - Notes created by the agent that were designated as Public. These may be entered from the Customer Info or Message Queue tab and include the notes saved when the Save and Resolve action is selected or the SPAM button is used.
 Private Note - Notes created by the agent that were designated as Private. These may be entered from the Customer Info or Message Queue tab.

The date range of this report is based on the date and time the agent's interaction was completed, not the incoming question to which they may be responding.

Report generated on 07-13-2012 at 1:58:19 PM iService Version 5.12 Page 1 of 1

Click to expand

16.1.6 Interactions by Type - Grouped by Topic

The Agent Interactions by Type - Grouped by Topic report provides a count of interactions handled by agents with columns for each type of interaction. The report is modeled after the Topic Summary Report, but counts the number of agent interactions created during the time frame, rather than the number of question interactions received.

To see summary information based upon when interactions were received, see either the [Interactions by Type - Grouped by Topic](#)⁷⁷⁷ or [Topic Summary reports](#).⁷⁸⁸

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment and time frame for the report.

Report Example



Agent Interactions Report
By Type of Interaction, Grouped by Topic

Segment: e-shop

This report is similar to the Topic Summary Report, except it counts the number of answers during a period rather than incoming questions.

Date Range: 3/13/2012 through 7/13/2012 3:02:06 PM

Topic	Total Interactions	Agent Response	Secure Agent Response	Save and Resolve	Agent Email	Secure Agent Email	Unsent Response	Public Note	Private Note
All Topics	15	4	0	6	4	0	1	0	0
All Topics-->_Feedback	5	0	0	4	0	0	1	0	0
All Topics-->_Newsletter Subscription	5	3	0	2	0	0	0	0	0
All Topics-->_Spam	2	0	0	2	0	0	0	0	0
All Topics-->_Undeliverable	1	0	0	1	0	0	0	0	0
All Topics-->Account Questions	4	1	0	3	0	0	0	0	0
All Topics-->Account Questions-->Orders	1	0	0	0	0	0	0	1	0
All Topics-->Account Questions-->Orders-->Refunds	3	2	0	1	0	0	0	0	0
All Topics-->Account Questions-->Returns	17	9	0	8	0	0	0	0	0
All Topics-->Products	4	3	0	0	0	0	0	0	1
All Topics-->Products-->Audio-Video	4	3	0	1	0	0	0	0	0
All Topics-->Products-->Cameras	5	2	0	3	0	0	0	0	0
All Topics-->Products-->Cell Phones	1	0	0	1	0	0	0	0	0
All Topics-->Products-->Computers	3	1	0	2	0	0	0	0	0
All Topics-->Products-->Televisions	5	1	0	4	0	0	0	0	0
All Topics-->Shipping	6	4	0	2	0	0	0	0	0
All Topics-->Technical Support	12	8	0	4	0	0	0	0	0
Total Interactions for all Agents	93	41	0	44	4	0	2	1	1

Legend:

- Agent Response - Responses sent from the Message Queue pages, except for those marked as Send Secure (with notification).
 - Secure Agent Response - Responses sent from the Message Queue pages that were marked as Send Secure (with notification).
 - Save and Resolve - Interaction resolved by selecting the Save and Resolve action from the Message Queue pages.
 - Agent Email - Agent Email messages sent from the Customer Info page, except those marked as Send Secure (with notification).
 - Secure Agent Email - Agent Email messages sent from the Customer Info page that were marked as Send Secure (with notification).
 - Unsent Response - Draft responses that have not been sent by the agent. These are typically in the agent's My Message Inbox.
 - Public Note - Notes created by the agent that were designated as Public. These may be entered from the Customer Info or Message Queue tab and include the notes saved when the Save and Resolve action is selected or the SPAM button is used.
 - Private Note - Notes created by the agent that were designated as Private. These may be entered from the Customer Info or Message Queue tab.
- The date range of this report is based on the date and time the agent's interaction was completed, not the incoming question to which they may be responding.**

Click to expand

16.1.7 Login Activity

The Agent Login Activity report shows when agents logged into iService and how many interactions they handled. This report helps identify when

agents are working within iService, and provides insight into the amount of work they are getting done during each period.

The report aggregates time online by agent and groups it with subtotals for each day during the report period, along with a total for the entire report period. It calculates these times based on the login date/time and the logout date/time, which could be an actual clicking of the logout link or an automatic logout because of inactivity.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the agents and the time frame for the report. The time frame is based upon the date/time that the agent logged into iService, not when they were logged in. For example, if an agent logged into iService at 11pm on January 5 and logged out at 7am on January 6, their login session would NOT be included in a report that begins on January 6. It is only included if the period covers the actual login event.

Report Example



Agent Login Activity Report

Date Range: 12/10/2012 12:00:01 AM through 12/11/2012 11:59:59 PM

This report calculates the time agents were logged into iService during the timeframe specified.

Agent(s): Administrator, Landlord, Manager, Service

Agent Name: Administrator, Landlord

Login Date	Login Time	Logout Time	Time Online	Total Messages	Agent Responses	Save & Resolved	Agent Emails	Notes	Tickets Created	Unsent Response
12/10/2012	10:36:40 PM	12:17:49 AM	1:41	2	1	1	0	0	0	0
			Daily Total:	2	1	1	0	0	0	0

Time Online			Total Messages	Agent Responses	Save & Resolved	Agent Emails	Notes	Tickets Created	Unsent Response
Totals for Administrator, Landlord:			1:41	2	1	1	0	0	0

Agent Name: Manager, Service

Login Date	Login Time	Logout Time	Time Online	Total Messages	Agent Responses	Save & Resolved	Agent Emails	Notes	Tickets Created	Unsent Response
	12:09:38 PM	1:39:48 PM	1:30	0						
			Daily Total:	0						

Time Online			Total Messages	Agent Responses	Save & Resolved	Agent Emails	Notes	Tickets Created	Unsent Response
Totals for Manager, Service:			1:30	0					

Legend:

Login Date - The date that the agent logged into iService.

Login Time - The time that the agent logged into iService.

Logout Time - The time that the agent logged out of iService, either intentionally or due to inactivity.

Time Online - The session timespan, in hours and minutes.

The date range of this report is based on the date and time that the agent logged into iService.

Click to expand image

16.1.8 Response Random Audit

The Response Random Audit report selects a sample of responses for the selected agents. It is used as a quality assurance tool to evaluate the work of agents.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the agents, the number of responses for each agent, and time frame for the report.

Report Example

Number of interactions to display per agent.

Select Agents: Account, Demo, Administrator, e | Select Sample Size: 5 | View Report

Start report from how far back?: 3 months ago | Start date for report: 4/13/2012

End date for report: 7/12/2012

Agent Name: Manager, Service

Segment	Topic	Incident Opened	Response Sent	Response
e-shop	All Topics-->Technical Support	4/19/2012 10:13:17 AM	4/19/2012 11:08:08 AM	We are addressing this On 4/19/2012 10:13:17 AM, John Williams <customer2@1to1service.com> wrote: > I would like to speak to someone at your company about becoming a distributor for your products. Who would be the best person to talk to? > JW > > Powered by Mach5 Mailer: http://mach5-mailer.com
e-shop	All Topics-->Account Questions	5/31/2012 12:15:48 PM	6/7/2012 9:38:17 AM	test On 5/31/2012 12:15:48 PM, Scott Whitsitt <scott@1to1service.com> wrote: > testing again
e-shop	All Topics-->Technical Support	5/30/2012 3:12:11 PM	5/30/2012 3:13:55 PM	Dear John Williams, Thanks for contacting e-shop. Please keep in mind that passwords are case sensitive. If you need to reset your password, there is a Forgot Password link on all of our login pages. Click this link and enter the email address you use for login. Our system will then send you a URL that can be used to reset your password. If you have any additional questions, feel free to contact us. Regards, e-Shop Customer Support http://eshop.1to1service.com/CustomerService.aspx Your feedback on our support process is very important to us. If you can take a few seconds to complete our feedback form by clicking the uri below we'd appreciate it very much. https://eshop.iservicecrm.com/Form.aspx?formID=54&ref=38025 On 5/30/2012 3:12:11 PM, John Williams <customer1@1to1service.com> wrote: > I'm having trouble logging in with my password.

Click to expand

16.1.9 Response Time

The agent response time report shows a breakdown of the time required to resolve interactions. It can be run for messages (Customer e-mails, tickets, and AAQ forms) or chats, and can group by agents or topics. It provides insight into how long it takes to get messages assigned agents, and how long agents take to provide the response.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment and then the topics within that segment to be included. Select the type of responses to include in the report (Chat or Messages).

Specify the report time-frame.
 Select whether to group by agent or topic.

Report Examples

Message response time grouped by Agent

When grouped by agent, expanding an agent row shows a breakdown of that agent's messages by topic.

Home > Demonstration Reports > Agent Response Time Home | My Subscriptions | Site Settings | Help

Choose Segment: Select the Topics to Include:

Include Responses to: Start report from how far back?:

Start date for report: End date for report:

Group By:

Agent Response Time Report
 Customer Emails, Tickets, and AAQ, Grouped by Agent
 Segment: e-shop

Interactions Resolved within Date Range: 4/26/2017 12:00:01 AM through 5/25/2017 11:59:59 PM

Topics Included: All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Agent	Topic	Customer	Subject	Total Interactions	Avg Time to First Assignment	Avg Time from First to Final Assignment	Avg Time from Final Assignment to Resolution	Avg Time to Resolve
Administrator, e-shop		<All Customers>	<All Subjects>	7	289:52:50	2263:59:07	0:10:01	254:02:00
Administrator, Landlord		<All Customers>	<All Subjects>	9	1143:20:30	1454:08:24	37:10:29	2634:39:23
Case, Justin		<All Customers>	<All Subjects>	1	0:00:00	0:01:02	0:00:14	0:01:16
Manager, Service		<All Customers>	<All Subjects>	2	61:41:40	190:39:31	0:00:02	252:21:13

Click to drill down into details for this Agent.

Total Interactions Resolved: 19

Legend:

Avg Time to First Assignment - The amount of time from the arrival of a question or chat until it was assigned to an agent for the first time.
Avg Time from First to Final Assignment - The amount of time from the first assignment of a question or chat until it was assigned to the resolving agent. If the agent who was first assigned was also the resolving agent, this column will be 0:00.

Avg Time from Final Assignment to Resolution - The amount of time from when the question or chat was assigned to the resolving agent until it was resolved.

Avg Time to Resolve - The total amount of time from the arrival of the question or chat until it was resolved. This is the sum total of time to first assignment, from first to final assignment, and final assignment to resolution.

Chart - This is a graphical representation of the total time to resolve the interaction. The chart is comprised of three segments:

Blue	Time to first Assignment
Yellow	Time from First to Final Assignment
Red	Time from Final Assignment to Resolution

Total Interactions Resolved - The total number of all incoming questions or chats resolved by all agents within the selected topics during the selected time range.

Notes:

- All time columns are expressed in hours:minutes:seconds.
- In rolled up topic or agent rows (represented as a shade of purple), times represent the average for the drill down rows within them. In detail rows (represented as white), times represent individual questions or chats.
- The date range of this report is based on the date and time the agent resolved the question, not the date of the incoming question to which they may be responding.
- The results *exclude* questions or chats created by an agent and resolved by the same individual agent who created it.

Expand an agent to see their responses by topic.



Agent Response Time Report
Customer Emails, Tickets, and AAQ, Grouped by Agent

Segment: e-shop

Interactions Resolved within Date Range: 4/26/2017 12:00:01 AM through 5/25/2017 11:59:59 PM

Topics Included:

All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Agent	Topic	Customer	Subject	Total Interactions	Avg Time to First Assignment	Avg Time from First to Final Assignment	Avg Time from Final Assignment to Resolution	Avg Time to Resolve
Administrator, e-shop	<All Selected Topics>	<All Customers>	<All Subjects>	7	289:52:50	2263:59:07	0:10:01	2554:02:00
	All Topics	<All Customers>	<All Subjects>	2	0:59:58	0:21:09	0:00:27	1:21:34
	All Topics-->Account Questions-->Orders	<All Customers>	<All Subjects>	1	978:12:57	2566:28:19	0:22:14	3545:03:30
	All Topics-->Account Questions-->Returns	<All Customers>	<All Subjects>	1	978:05:44	2566:35:39	0:22:14	3545:03:37
	All Topics-->Products	<All Customers>	<All Subjects>	1	8:06:34	3592:04:29	0:02:09	3600:13:12
	All Topics-->Products-->Cameras	<All Customers>	<All Subjects>	2	31:22:22	3561:01:34	0:11:20	3592:35:16
Administrator, Landlord	<All Customers>	<All Customers>	<All Subjects>	9	1143:20:30	1454:08:24	37:10:29	2634:39:23
Case, Justin	<All Customers>	<All Customers>	<All Subjects>	1	0:00:00	0:01:02	0:00:14	0:01:16
Manager, Service	<All Customers>	<All Customers>	<All Subjects>	2	61:41:40	190:39:31	0:00:02	252:21:13

Total Interactions Resolved: 19

Drilling into topic details

Expand a topic to see its responses.



Agent Response Time Report
Customer Emails, Tickets, and AAQ, Grouped by Agent

Segment: e-shop

Interactions Resolved within Date Range: 4/26/2017 12:00:01 AM through 5/25/2017 11:59:59 PM

Topics Included:

All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Agent	Topic	Customer	Subject	Total Interactions	Avg Time to First Assignment	Avg Time from First to Final Assignment	Avg Time from Final Assignment to Resolution	Avg Time to Resolve
Administrator, e-shop	<All Selected Topics>	<All Customers>	<All Subjects>	7	289:52:50	2263:59:07	0:10:01	2554:02:00
	All Topics	<All Customers>	<All Subjects>	2	0:59:58	0:21:09	0:00:27	1:21:34
	All Topics-->Account Questions-->Orders	<All Customers>	<All Subjects>	1	978:12:57	2566:28:19	0:22:14	3545:03:30
	All Topics-->Account Questions-->Returns	<All Customers>	<All Subjects>	1	978:05:44	2566:35:39	0:22:14	3545:03:37
	All Topics-->Products	<All Customers>	<All Subjects>	1	8:06:34	3592:04:29	0:02:09	3600:13:12
	All Topics-->Products-->Cameras	<All Customers>	<All Subjects>	2	31:22:22	3561:01:34	0:11:20	3592:35:16
		Haroldson, James	[ref#: 42368-42368] Need a camera for travelling	1	0:21:30	3592:10:39	0:22:14	3592:54:23
		Nuval, Joe	[ref#: 42404-42404] video cameras gift for wife	1	62:23:14	3529:52:29	0:00:27	3592:16:10
Administrator, Landlord	<All Customers>	<All Customers>	<All Subjects>	9	1143:20:30	1454:08:24	37:10:29	2634:39:23
Case, Justin	<All Customers>	<All Customers>	<All Subjects>	1	0:00:00	0:01:02	0:00:14	0:01:16
Manager, Service	<All Customers>	<All Customers>	<All Subjects>	2	61:41:40	190:39:31	0:00:02	252:21:13

Total Interactions Resolved: 19

Viewing individual messages

Click a subject line to see the message in a new window in iService.

The screenshot shows the iService web interface. At the top, there's a navigation bar with 'iService' logo and various utility buttons like 'CUSTOMER INFO', 'MESSAGE QUEUE', 'FIND ANSWERS', 'ASK A QUESTION', 'MY ACCOUNT', and 'ADMIN TOOLS'. Below this, a status bar shows 'Chat Status: Unavailable', 'Go Available', 'Chats Waiting: 0', and 'Take'. A user greeting 'Hello, Service E. Manager!' is visible on the right.

The main content area features a search interface with 'SEARCH WHERE: entire', 'IN FIELD: -- Interaction ID --', and 'SEARCH FOR: 42404'. There are also date limit fields and a 'SEARCH' button. Below the search bar is a table with columns: Subject, Contact Name, Contact Email, Date, and Operator. The table contains one entry: '[re#: 42404-42404] video cameras gift for wife', 'Joe Nuval', 'sr820woods@gmail.com', '2016-12-12 8:23:01 PM', and 'unassigned'.

Below the table are action buttons: 'Agent Email', 'Note', 'Ticket', and 'Forward Copy'. The selected message content is displayed in a large text area: 'I would like to find a video camera that takes HD video or a sturdy SLR – can you send me some info?'. Below the message is the sender's information: 'Joe Nuval, Director of Client Solutions, One-to-One Service.com, CORPORATE WEB SITE: www.1to1service.com | HELP SITE: www.iservice.help, 217-903-4457'. To the right of the message is a metadata panel with details: 'Interaction ID: 42404, Type: Customer Email, From: joe.nuval@iservice.info, Segment: e-shop, Topic: Cameras, Resolved By: e-shop Administrator, Status: Resolved, Attachments: Original Message.eml'. At the bottom of the message view are buttons for 'Interaction status audit' and 'Interaction Thread'.

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 Powered by iService Version: 7.6.092 - 2017.05.25 - 10:25:06

Drill down to the actual message in iService

Message response time grouped by Topic

This report is identical to the grouped by Agent report, but has a different drill through order. When grouped by topic, expanding a topic row shows a breakdown of that topic's messages by agent.

Home > Demonstration Reports > Agent Response Time Home | My Subscriptions | Site Settings | Help

Choose Segment: e-shop Select the Topics to Include: All Topics, _Feedback, _Newsle View Report

Include Responses to: Customer Emails, Tickets, and AAQ Start report from how far back?: 1 month ago

Start date for report: 4/26/2017 12:00:01 AM End date for report: 5/25/2017 11:59:59 PM

Group By: Topic

1 of 1 Find | Next



Agent Response Time Report

Customer Emails, Tickets, and AAQ, Grouped by Topic

Segment: e-shop

Interactions Resolved within Date Range: 4/26/2017 12:00:01 AM through 5/25/2017 11:59:59 PM

Topics Included: All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Topic	Agent	Customer	Subject	Total Interactions	Avg Time to First Assignment	Avg Time from First to Final Assignment	Avg Time from Final Assignment to Resolution	Avg Time to Resolve
All Topics		<All Customers>	<All Subjects>	8	260:54:14	63:30:14	0:03:59	324:28:28
All Topics-->_Feedback		<All Customers>	<All Subjects>	1	3401:00:20	125:58:51	0:00:03	3526:59:14
All Topics-->_Spam		<All Customers>	<All Subjects>	1	3182:03:11	605:30:47	0:00:00	3787:33:58
All Topics-->Account Questions		<All Customers>	<All Subjects>	1	1744:55:10	342:52:44	0:00:03	2087:47:57
All Topics-->Account Questions-->Orders		<All Customers>	<All Subjects>	1	978:12:57	2566:28:19	0:22:14	3545:03:30
All Topics-->Account Questions-->Returns		<All Customers>	<All Subjects>	2	489:10:26	3634:45:04	166:53:29	4290:49:00
All Topics-->Products		<All Customers>	<All Subjects>	1	8:06:34	3592:04:29	0:02:09	3600:13:12
All Topics-->Products-->Cameras		<All Customers>	<All Subjects>	2	31:22:22	3561:01:34	0:11:20	3592:35:16
All Topics-->Shipping		<All Customers>	<All Subjects>	2	0:00:00	3591:59:34	0:19:24	3592:18:58

Click a topic to see the breakdown by agent

Total Interactions Resolved: 19

Legend:

- Avg Time to First Assignment** - The amount of time from the arrival of a question or chat until it was assigned to an agent for the first time.
- Avg Time from First to Final Assignment** - The amount of time from the first assignment of a question or chat until it was assigned to the resolving agent. If the agent who was first assigned was also the resolving agent, this column will be 0:00.
- Avg Time from Final Assignment to Resolution** - The amount of time from when the question or chat was assigned to the resolving agent until it was resolved.
- Avg Time to Resolve** - The total amount of time from the arrival of the question or chat until it was resolved. This is the sum total of time to first assignment, from first to final assignment, and final assignment to resolution.
- Chart** - This is a graphical representation of the total time to resolve the interaction. The chart is comprised of three segments:

Blue	Time to first Assignment
Yellow	Time from First to Final Assignment
Red	Time from Final Assignment to Resolution

Total Interactions Resolved - The total number of all incoming questions or chats resolved by all agents within the selected topics during the selected time range.

Notes:

- All time columns are expressed in hours:minutes:seconds.
- In rolled up topic or agent rows (represented as a shade of purple), times represent the average for the drill down rows within them. In detail rows (represented as white), times represent individual questions or chats.
- The date range of this report is based on the date and time the agent resolved the question, not the date of the incoming question to which they may be responding.
- The results *exclude* questions or chats created by an agent and resolved by the same individual agent who created it.

Report generated on 05-26-2017 at 8:11:07 PM

iService Version 7.6 Page 1 of 1

Response time grouped by Topic

Expand a topic to see the count by agent.



Agent Response Time Report

Customer Emails, Tickets, and AAQ, Grouped by Topic

Segment: e-shop

Interactions Resolved within Date Range: 4/26/2017 12:00:01 AM through 5/25/2017 11:59:59 PM

Topics Included: All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Topic	Agent	Customer	Subject	Total Interactions	Avg Time to First Assignment	Avg Time from First to Final Assignment	Avg Time from Final Assignment to Resolution	Avg Time to Resolve
All Topics		<All Customers>	<All Subjects>	8	260:54:14	63:30:14	0:03:59	324:28:28
All Topics-->_Feedback		<All Customers>	<All Subjects>	1	3401:00:20	125:58:51	0:00:03	3526:59:14
All Topics-->_Spam		<All Customers>	<All Subjects>	1	3182:03:11	605:30:47	0:00:00	3787:33:58
All Topics-->Account Questions		<All Customers>	<All Subjects>	1	1744:55:10	342:52:44	0:00:03	2087:47:57
All Topics-->Account Questions-->Orders		<All Customers>	<All Subjects>	1	978:12:57	2566:28:19	0:22:14	3545:03:30
All Topics-->Account Questions-->Returns		<All Customers>	<All Subjects>	2	489:10:26	3634:45:04	166:53:29	4290:49:00
All Topics-->Products		<All Customers>	<All Subjects>	1	8:06:34	3592:04:29	0:02:09	3600:13:12
All Topics-->Products-->Cameras		<All Customers>	<All Subjects>	2	31:22:22	3561:01:34	0:11:20	3592:35:16
All Topics-->Shipping	<All Agents>	<All Customers>	<All Subjects>	2	0:00:00	3591:59:34	0:19:24	3592:18:58
	Administrator, Landlord	<All Customers>	<All Subjects>	2	0:00:00	3591:59:34	0:19:24	3592:18:58

Click the agent to see the list of messages

Total Interactions Resolved: 19

Grouped by Topic drill through

Click a message to view it in a new browser window.



Agent Response Time Report

Customer Emails, Tickets, and AAQ, Grouped by Topic

Segment: e-shop

Interactions Resolved within Date Range: 4/26/2017 12:00:01 AM through 5/25/2017 11:59:59 PM

Topics Included: All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Topic	Agent	Customer	Subject	Total Interactions	Avg Time to First Assignment	Avg Time from First to Final Assignment	Avg Time from Final Assignment to Resolution	Avg Time to Resolve
All Topics		<All Customers>	<All Subjects>	8	260:54:14	63:30:14	0:03:59	324:28:28
All Topics-->_Feedback		<All Customers>	<All Subjects>	1	3401:00:20	125:58:51	0:00:03	3526:59:14
All Topics-->_Spam		<All Customers>	<All Subjects>	1	3182:03:11	605:30:47	0:00:00	3787:33:58
All Topics-->Account Questions		<All Customers>	<All Subjects>	1	1744:55:10	342:52:44	0:00:03	2087:47:57
All Topics-->Account Questions-->Orders		<All Customers>	<All Subjects>	1	978:12:57	2566:28:19	0:22:14	3545:03:30
All Topics-->Account Questions-->Returns		<All Customers>	<All Subjects>	2	489:10:26	3634:45:04	166:53:29	4290:49:00
All Topics-->Products		<All Customers>	<All Subjects>	1	8:06:34	3592:04:29	0:02:09	3600:13:12
All Topics-->Products-->Cameras		<All Customers>	<All Subjects>	2	31:22:22	3561:01:34	0:11:20	3592:35:16
All Topics-->Shipping	<All Agents>	<All Customers>	<All Subjects>	2	0:00:00	3591:59:34	0:19:24	3592:18:58
	Administrator, Landlord	<All Customers>	<All Subjects>	2	0:00:00	3591:59:34	0:19:24	3592:18:58
		Nuval, Joe	Re: [ref#: 42337-423711] ship to canada?	1	0:00:00	3591:59:34	0:19:31	3592:19:05
		Nuval, Joe	Re: [ref#: 42337-423711] ship to canada?	1	0:00:00	3591:59:34	0:19:17	3592:18:51

Click on a message to view it in a new window in iService

Total Interactions Resolved: 19

Expanded message list

16.1.10 Topic Change Analysis

The Topic Change report shows a count of all the interactions for which an agent changed their topic during the time frame specified. This report helps to understand whether filters are properly designed, because an excessive number of topic changes indicates messages are not being properly queued. The topic listed is the destination topic, not the original topic.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, topics and agents to include in the report.

Report Example

Choose Segment	e-shop	Topics:	All Topics, Account Questions, O	View Report
Agents	10, Customer, Account, Demo, A	Start report from how far back?	3 months ago	
Start date for report	1/1/2012	End date for report	7/12/2012	

1 of 1 100% Find | Next Select a format Export



Agent Topic Changes Report
By Agent
Segment: e-shop

Topics Included: All Topics, Account Questions, Orders, Refunds, Platinum Accounts, Returns, Disconnection, Other, Products, Audio-Video, Cameras, Cell Phones, Computers, Networking, Shop iPhone, Shop iPod, Shop Mac, Televisions, Shipping, Technical Support, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable

Date Range: 1/1/2012 through 7/12/2012

Agent	Number of Topic Changes
** Changed by Filter **	53
Administrator, e-shop	3
Representative, Service	5
Trainee, e-shop	1
Total number of topic changes for agents	62

Legend:

Agent - The agent that changed the topic during the period of the report.

Number of Topic Changes - The total number of times the agent changed the topic of an interaction during the period of the report. This includes changes to Tickets, Customer Emails, and Ask a Question interaction types.

The topic change events within this report are based on the date and time the agent performed the topic change action, and are retrieved from the Interaction Audit trail.

Click to expand

16.2 Topic Summary and Service Levels

Topic Summary and Service Levels reports provide insight into the overall operation of your service center. These reports **count the number of interactions** in various ways and provide summary information. They do not display actual interaction detail. To generate listings with interaction details, see the [Interaction Detail Listings](#)⁸¹¹ reports.

Important Note About Dates: The Topic Summary and Service Level Reports count question interactions (customer emails, tickets, and ask a question forms) and are based on the date and time the interaction was received or created. This is not the date that a question was answered or resolved.

16.2.1 First Call Resolution

The First Call Resolution report counts the number of agent interactions associated with customer questions. It provides insight into the amount of back and forth that is required to resolve a customer's question.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment and the time frame for the report. Since the report is based on agent responses, it only includes threads that had an agent response during the reports time frame.

Report Example



First Call Resolution by Topic

Segment: iService

Date Range: 6/18/2012 12:00:01 AM through 12/17/2012 11:59:59 PM

Topic	Total Threads	Number of Agent Responses Required to Resolve Thread							
		First Response	First Response %	Second Response	Second Response %	Third Response	Third Response %	Four or more Responses	Four or more Responses %
\All Topics-->Technical Support	78	47	60.26 %	18	23.08 %	5	6.41 %	8	10.26 %
\All Topics-->Technical Support-->Critical	20	11	55.00 %	7	35.00 %	1	5.00 %	1	5.00 %
\All Topics-->Sales	9	6	66.67 %	3	33.33 %	0	0.00 %	0	0.00 %
\All Topics-->General Inquiry	4	4	100.00 %	0	0.00 %	0	0.00 %	0	0.00 %
\All Topics-->Technical Support-->Email Processing	1	1	100.00 %	0	0.00 %	0	0.00 %	0	0.00 %
\All Topics-->Technical Support-->Reports	1	1	100.00 %	0	0.00 %	0	0.00 %	0	0.00 %
\All Topics-->Sales-->Facebook Notices	5	5	100.00 %	0	0.00 %	0	0.00 %	0	0.00 %
\All Topics-->Technical Support-->Customer Change Request	1	1	100.00 %	0	0.00 %	0	0.00 %	0	0.00 %
Total:	119	76	63.87 %	28	23.53 %	6	5.04 %	9	7.56 %

The date range of this report is based on the date and time of the agent responses, not the incoming question to which they may be responding.

Click to expand

16.2.2 Interactions Summary By Property with Sorting

The Customer Interactions Summary by Property with Sorting report counts all interactions received by the selected segment during the time frame specified that contain the specified interaction property. It allows you to designate another level of sorting, or you can set the sorting to be the same as the group by property.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, the time frame, the property to group by, and the property to sort by.

Report Example

Please Choose the Segment: e-shop | Select the property to group by: Browser | View Report

Select the property to sort by: OperatingSystem | Start report from how far back?: 1 year ago

StartDate: 7/23/2011 | EndDate: 7/22/2012

Customer Interactions Summary
 Grouped by Interaction Properties, with Sorting
 Segment: e-shop
 Date Range: 7/23/2011 through 7/22/2012

Browser: Firefox

Interaction Property	Count
Windows	6
Subtotal	6

Browser: internet explorer

Interaction Property	Count
linux / unix	2
Subtotal	2

Browser: opera

Interaction Property	Count
linux / unix	2
Subtotal	2

Browser: safari

Interaction Property	Count
macintosh	6
Subtotal	6

Report generated on 07-23-2012 at 2:51:56 PM | iService Version 5.12 | Page 1 of 1

Click to expand

16.2.3 Interactions Summary By Property no Sorting

The Customer Interactions Summary by Property with no Sorting report counts all interactions received by the selected segment during the time frame specified that contain the specified interaction property. It does not include sorting within property values.

For instance, if you have a two properties on used on a topic (browser type and operating system), you will need to use the summary with sorting to see the detailed breakdown within the grouped by property. For example, you might group by Browser type but want to see how many questions about Safari were related to Windows versus Mac. Use the [report with sorting](#)⁷⁸⁹ to get that level of detail.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, the time frame, and the property to group by.

Report Example

Please Choose the Segment: e-shop | Select the property to group by: Browser | View Report

Start report from how far back?: 1 year ago | StartDate: 7/23/2011

EndDate: 7/22/2012

1 of 1 | 100% | Find | Next | Select a format | Export

iService **Customer Interactions Summary**
Grouped by Interaction Property
Segment: e-shop
Date Range: 7/23/2011 through 7/22/2012

Interaction Property: Browser

Interaction Property	Count
opera	2
internet explorer	2
Firefox	6
safari	10
Subtotal	20

Report generated on 07-23-2012 at 3:00:10 PM | iService Version 5.12 | Page 1 of 1

Click to expand

16.2.4 Mailbox Summary

The Mailbox Summary Report counts all customer emails that were received by the selected segment during the time frame specified. It displays their total by mailbox. Please note that this report only includes customer email received, it does not include any tickets or ask a question forms.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment and the time frame. All mailboxes for the segment that received email will be included.

Report Example

Mailbox	Message Count
Customer Service (c...@1to1service.com)	149

Report generated on 07-23-2012 at 10:07:00 AM iService Version 5.12 Page 1 of 1

Click to expand

16.2.5 Interactions by Type - Grouped by Contact or Company

The Interactions by Type - Grouped by Contact or Company displays the total interactions received by contact, or by company with subtotals for each contact at that company. This report provides insight into the contacts that submit the most questions, which can indicate an opportunity for training or a potential customer issue that requires intervention. When viewed by company, it provides insight into your most active clients and can be an indication of the cost associated with supporting that client. The contacts listed within the report can be clicked to open the history tab for that client.

Clicking the columns headings of the report can be used to sort in ascending or descending order.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, the time frame, and whether to group to Contact or Company.

Report Example

By Customer



Customer Interactions by Type
Grouped by Contacts
 Segment: e-shop

Click a column heading to sort on that column.

Click a name or email to drill through to the history for the selected contact.

Date Range: 8/1/2012 12:00:01 AM through 10/31/2012 11:59:59 PM

Name	Email	Company	Total Interactions	Customer Email	Ticket	AAQ
Doe, John	customer1@1to1service.com	Acme Corporation	19	12	0	7
Williams, John	customer2@1to1service.com	ACME Enterprises	13	13	0	0
Five, Customer	customer5@1to1service.com	XYZ Industries	12	12	0	0
Williams, James	customer7@1to1service.com	eShop	6	6	0	0
Account, Feedback			4	0	0	4
Nuval, Joe	joenuval@1to1service.com	One-to-One Service.com	4	1	0	3
Agnes, James	customer4@1to1service.com		3	3	0	0
Davis, Julie	customer6@1to1service.com	Amdocs	3	3	0	0
White, Barbara	customer3@1to1service.com	Amdocs	3	3	0	0
Grand Total			67	53	0	14

Legend:

Name - The name of the contact that sent the interaction. If there is no name, their email / login will be displayed.

Email - The email address or login of the person that submitted the interaction.

Total Interactions - The total number of interactions received from the contact during the period of the report, and within the segment specified.

Customer Email - The number emails the contact submitted during the period of the report, and within the segment specified.

Ticket - The number of tickets created by an agent for the contact during the period of the report, and within the segment specified.

AAQ - The number of Ask a Question interactions (either via the standard Ask a Question page or a custom form) submitted by the contact during the period of the report, and within the segment specified.

The date range of this report is based on the date and time the customer request entered the iServiceCRM system.

Click to expand

By Company



**Customer Interactions by Type
Grouped by Company**

Segment: e-shop

The Company version of this report lists each company in descending order of interaction totals.

Date Range: 9/1/2012 12:00:01 AM through 9/24/2012 11:59:59 PM

Company: Acme Corporation

Name	Email	Company	Total Interactions	Customer Email	Ticket	AAQ
Doe, John	customer1@1to1service.com	Acme Corporation	6	4	0	2
Williams, John	customer2@1to1service.com	ACME Corporation	5	5	0	0
Grand Total			11	9	0	2

Company: Americo

Name	Email	Company	Total Interactions	Customer Email	Ticket	AAQ
Five, Customer	customer5@1to1service.com	Americo	4	4	0	0
Davis, Julie	customer6@1to1service.com	Americo	1	1	0	0
White, Barbara	customer3@1to1service.com	Americo	1	1	0	0
Grand Total			6	6	0	0

Company: eShop

Name	Email	Company	Total Interactions	Customer Email	Ticket	AAQ
Williams, James	customer7@1to1service.com	eShop	2	2	0	0
Grand Total			2	2	0	0

Company: One-to-One Service.com

Name	Email	Company	Total Interactions	Customer Email	Ticket	AAQ
Nuval, Joe	joenuval@1to1service.com	One-to-One Service.com	2	0	0	2
Grand Total			2	0	0	2

Company: None

Name	Email	Company	Total Interactions	Customer Email	Ticket	AAQ
Agnes, James	customer4@1to1service.com		1	1	0	0
Grand Total			1	1	0	0

Legend:

Name - The name of the contact that sent the interaction. If there is no name, their email / login will be displayed.

Email - The email address or login of the person that submitted the interaction.

Total Interactions - The total number of interactions received from the contact during the period of the report, and within the segment specified.

Customer Email - The number emails the contact submitted during the period of the report, and within the segment specified.

Ticket - The number of tickets created by an agent for the contact during the period of the report, and within the segment specified.

AAQ - The number of Ask a Question interactions (either via the standard Ask a Question page or a custom form) submitted by the contact during the period of the report, and within the segment specified.

The date range of this report is based on the date and time the customer request entered the iServiceCRM system.

Click to expand

16.2.6 Service Level - by Messages or by Percentage

The Topic Service Level Reports counts all interactions that were received by the selected segment during the time frame specified. It displays their total by topic and the service level achieved across various time categories. There are two versions of this report. The by messages version displays the number of messages but within each response time category, while the by percentage version displays the percentage of messages answered within each time category.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, the topics to measure, and the time frame.

Report Example

By Messages

SQL Server Reporting Services [Home](#) | [My Subscriptions](#) | [Site Settings](#) | [Help](#)
[Home](#) > [Demonstration Reports](#) > [Interaction Summary and Service Level Reports](#) >
Topic Service Level By Messages Search for:

View [Properties](#) [History](#) [Subscriptions](#)

New Subscription

Segment: Topics:

Start report from how far back?: Start date for report:

End date for report:

1 of 1 100% Find | Next Select a format Export

iService **Topic Service Level Report**
By # of Messages
 Date Range: 4/16/2012 through 7/15/2012

Elapsed Time Before Message was Answered or Resolved

Topic	Total Messages	Within Four Hours	Within Eight Hours	Within Twelve Hours	Within One Day	Within Two Days	Within Three Days	Within Four Days	More Than Four Days	No Resolution
All Topics	5	0	0	0	0	0	0	1	4	0
All Topics-->_Feedback	6	1	0	0	1	0	0	0	2	2
All Topics-->_Newsletter Subscription	3	0	0	0	0	0	0	1	1	1
All Topics-->_Spam	2	1	0	0	0	0	0	0	1	0
All Topics-->Account Questions	2	0	0	0	0	0	0	0	2	0
All Topics-->Account Questions-->Returns	6	3	0	0	0	0	0	0	3	0
All Topics-->Products	3	2	0	0	0	0	0	0	1	0
All Topics-->Products-->Audio-Video	1	0	0	0	0	0	0	0	1	0
All Topics-->Products-->Cameras	2	1	0	0	0	0	0	0	1	0
All Topics-->Products-->Computers	1	1	0	0	0	0	0	0	0	0
All Topics-->Products-->Televisions	3	1	0	0	0	0	0	0	1	1
All Topics-->Shipping	1	0	0	0	0	0	0	0	1	0
All Topics-->Technical Support	8	5	0	0	0	0	0	0	2	1
Total # of Messages for All Topics	43	15	0	0	1	0	0	2	20	5

Legend:

This report returns the number of customer requests which were received during the specified time period and answered or resolved for each topic within the specified time frame.

No Resolution - this indicates a customer request which has not yet been answered or resolved.

The date range of this report is based on the date and time the customer request entered the iServiceCRM system.

Report generated on 07-16-2012 at 12:24:37 PM

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Click to expand

By Percentage

SQL Server Reporting Services [Home](#) | [My Subscriptions](#) | [Site Settings](#) | [Help](#)
[Home](#) > [Demonstration Reports](#) > [Interaction Summary and Service Level Reports](#) >
Topic Service Level By Percentage Search for:

View [Properties](#) [History](#) [Subscriptions](#)

New Subscription

Segment: Topics:
 Start report from how far back?: Start date for report:
 End date for report:

1 of 1 100% Find | Next Select a format Export

Topic Service Level Report By Percentage

Date Range: 4/16/2012 through 7/15/2012

Topic	Total Messages	Within Four Hours	Within Eight Hours	Within Twelve Hours	Within One Day	Within Two Days	Within Three Days	Within Four Days	More Than Four Days	No Resolution
All Topics	5	0%	0%	0%	0%	0%	0%	20%	80%	0%
All Topics-->_Feedback	6	16%	0%	0%	16%	0%	0%	0%	33%	33%
All Topics-->_Newsletter Subscription	3	0%	0%	0%	0%	0%	0%	33%	33%	33%
All Topics-->_Spam	2	50%	0%	0%	0%	0%	0%	0%	50%	0%
All Topics-->Account Questions	2	0%	0%	0%	0%	0%	0%	0%	100%	0%
All Topics-->Account Questions-->Returns	6	50%	0%	0%	0%	0%	0%	0%	50%	0%
All Topics-->Products	3	66%	0%	0%	0%	0%	0%	0%	33%	0%
All Topics-->Products-->Audio-Video	1	0%	0%	0%	0%	0%	0%	0%	100%	0%
All Topics-->Products-->Cameras	2	50%	0%	0%	0%	0%	0%	0%	50%	0%
All Topics-->Products-->Computers	1	100%	0%	0%	0%	0%	0%	0%	0%	0%
All Topics-->Products-->Televisions	3	33%	0%	0%	0%	0%	0%	0%	33%	33%
All Topics-->Shipping	1	0%	0%	0%	0%	0%	0%	0%	100%	0%
All Topics-->Technical Support	8	62%	0%	0%	0%	0%	0%	0%	25%	12%

Legend:
 This report returns the percentage of customer requests which were received during the specified time period and answered or resolved for each topic within the specified time frame.
 No Resolution - this indicates a customer request which has not yet been answered or resolved.
 The date range of this report is based on the date and time the customer request entered the iServiceCRM system.

Report generated on 07-16-2012 at 12:26:15 PM iService Version 5.12 Page 1 of 1

[Click to expand](#)

16.2.7 Service Level - by Operating Hours - by Messages or by Percentage

The Topic Service Level by Operating Hours Reports counts all interactions that were received by the selected segment during the time frame specified. It displays their total by topic and the service level achieved across various time categories, but **excludes non-operating hours within its calculation of service level**. There are two versions of this report. The by messages version displays the number of messages but within each response time category, while the by percentage version displays the percentage of messages answered within each time category.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, the topics to measure, your operating hours, and the time frame.

Report Example

By Messages

New Subscription

Segment: Topics: [View Report](#)

Start report from how far back?: Start date for report:

End date for report: Opening Hour (CST):

Closing Hour (CST):

1 of 1 | 100% | Find | Next | Select a format | Export



iService On-Demand stored interaction dates in Central time. If you operate iService On-Premise be sure to adjust your hours. This report assumes Monday - Friday operating days.

Topic Service Level Report For Operating Hours By # of Messages

Date Range: 7/23/2011 through 7/22/2012

Elapsed Time Before Message was Answered or Resolved

Topic	Total Messages	< 2 Hours	< 4 Hours	< 6 Hours	< 1 Business Day	< 2 Business Days	< 3 Business Days	< 4 Business Days	5 or more Business Days	No Resolution
All Topics	25	7	1	0	0	1	0	0	16	0
All Topics-->_Feedback	20	1	0	1	0	0	0	0	3	15
All Topics-->_Newsletter Subscription	14	1	0	0	0	0	0	1	11	1
All Topics-->_Spam	2	1	0	0	0	0	0	0	1	0
All Topics-->_Undeliverable	3	0	0	0	0	0	0	0	3	0
All Topics-->Account Questions	5	1	0	0	0	1	0	0	3	0
All Topics-->Account Questions-->Orders	7	2	0	0	0	0	0	0	5	0
All Topics-->Account Questions-->Platinum Accounts	25	2	0	0	0	0	0	0	23	0
All Topics-->Account Questions-->Returns	34	8	3	0	0	0	0	0	23	0
All Topics-->Products	4	1	0	1	0	0	0	1	1	0
All Topics-->Products-->Audio-Video	9	1	0	0	0	0	0	0	8	0
All Topics-->Products-->Cameras	14	2	1	0	0	1	0	0	10	0
All Topics-->Products-->Cell Phones	9	2	0	0	0	0	0	0	7	0
All Topics-->Products-->Computers	4	1	1	0	0	0	0	0	2	0
All Topics-->Products-->Televisions	14	1	1	0	0	0	0	0	12	0
All Topics-->Shipping	21	3	0	0	0	0	0	0	18	0
All Topics-->Technical Support	21	8	0	0	0	0	0	0	13	0
Total # of Messages for All Topics	231	42	7	2	0	3	0	2	159	16

Legend:

This report returns the number of customer interactions which were received during the specified time period, grouped by topic. It calculates the time required to resolve the interaction based on the date/time the resolution to the interaction was completed (i.e., response sent to customer or interaction resolved without sending a response.) The elapsed time included in this report excludes non-operating hours (07:30:00 to 16:00:00 Central Time).

No Resolution - this indicates a customer request which has not yet been answered or resolved.

The date range of this report is based on the date and time the interaction was created, not the date and time it was resolved. For a report based on the resolved dates and times, see the Agent reports.

Click to expand

By Percentage

New Subscription

Segment: e-shop Topics: All Topics, Account Questions, O

Start report from how far back?: 1 year ago Start date for report: 7/23/2011

End date for report: 7/22/2012 Opening Hour (CST): 07:30:00

Closing Hour (CST): 16:00:00

1 of 1 100% Select a format Export



iService On-Demand stored interaction dates in Central time. If you operate iService On-Premise be sure to adjust your hours. This report assumes Monday - Friday operating days.

Topic Service Level Report For Operating Hours By Percentage

Date Range: 7/23/2011 through 7/22/2012

Elapsed Time Before Message was Answered or Resolved

Topic	Total Messages	< 2 Hours	< 4 Hours	< 6 Hours	< 1 Business Day	< 2 Business Days	< 3 Business Days	< 4 Business Days	5 or more Business Days	No Resolution
All Topics	25	28.00 %	4.00 %	0.00 %	0.00 %	4.00 %	0.00 %	0.00 %	64.00 %	0.00 %
All Topics-->_Feedback	20	5.00 %	0.00 %	5.00 %	0.00 %	0.00 %	0.00 %	0.00 %	15.00 %	75.00 %
All Topics-->_Newsletter Subscription	14	7.14 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	7.14 %	78.57 %	7.14 %
All Topics-->_Spam	2	50.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	50.00 %	0.00 %
All Topics-->_Undeliverable	3	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	100.00 %	0.00 %
All Topics-->Account Questions	5	20.00 %	0.00 %	0.00 %	0.00 %	20.00 %	0.00 %	0.00 %	60.00 %	0.00 %
All Topics-->Account Questions-->Orders	7	28.57 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	71.43 %	0.00 %
All Topics-->Account Questions-->Platinum Accounts	25	8.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	92.00 %	0.00 %
All Topics-->Account Questions-->Returns	34	23.53 %	8.82 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	67.65 %	0.00 %
All Topics-->Products	4	25.00 %	0.00 %	25.00 %	0.00 %	0.00 %	0.00 %	25.00 %	25.00 %	0.00 %
All Topics-->Products-->Audio-Video	9	11.11 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	88.89 %	0.00 %
All Topics-->Products-->Cameras	14	14.29 %	7.14 %	0.00 %	0.00 %	7.14 %	0.00 %	0.00 %	71.43 %	0.00 %
All Topics-->Products-->Cell Phones	9	22.22 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	77.78 %	0.00 %
All Topics-->Products-->Computers	4	25.00 %	25.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	50.00 %	0.00 %
All Topics-->Products-->Televisions	14	7.14 %	7.14 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	85.71 %	0.00 %
All Topics-->Shipping	21	14.29 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	85.71 %	0.00 %
All Topics-->Technical Support	21	38.10 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	61.90 %	0.00 %

Legend:

This report returns the number of customer interactions which were received during the specified time period, grouped by topic. It calculates the time required to resolve the interaction based on the date/time the resolution to the interaction was completed (i.e., response sent to customer or interaction resolved without sending a response.) The elapsed time included in this report excludes non-operating hours (07:30:00 to 16:00:00 Central Time).

No Resolution - this indicates a customer request which has not yet been answered or resolved.

The date range of this report is based on the date and time the interaction was created, not the date and time it was resolved. For a report based on the resolved dates and times, see the Agent reports.

Report generated on 07-23-2012 at 9:52:19 AM

iService Version 5.12

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Click to expand

16.2.8 Service Level - by Percentage for Contact

The Topic Service Level by Percentage by Contact counts all interactions that were received by the selected segment during the time frame specified from contacts matching the email address specified. It is identical to the Topic Service Level by Percentage except it is limited to the contacts matching the email address entered.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, the topics to measure, the email address for the contacts to include, and the time frame.

NOTE: The report accepts most SQL input masking parameters used with the SQL "Like" command, so you can include all addresses from a specific domain if desired. For example, %@1to1service.com will count the responses to all contacts that have @1to1service.com within their email address. For a full list of parameters that can be used, see the following URL. [http://msdn.microsoft.com/en-us/library/aa933232\(v=sql.80\).aspx](http://msdn.microsoft.com/en-us/library/aa933232(v=sql.80).aspx)

Report Example

SQL Server Reporting Services
 Home > Demonstration Reports >
Topic Service Level By Percentage for Contact

View Properties History Subscriptions

New Subscription

Segment: e-shop Topics: All Topics, _Undeliverable, _Sp...

Limit to Contact Email: customer1@1to1service.com Start report from how far back?: 1 year ago

Start date for report: 12/18/2011 12:00:01 AM End date for report: 12/17/2012 11:59:59 PM

1 of 1 100% Find | Next Select a format Export



Topic Service Level Report

By Percentage for Specific Contact

Contact Email Address: customer1@1to1service.com

Date Range: 12/18/2011 12:00:01 AM through 12/17/2012 11:59:59 PM

Topic	Total Messages	Within Four Hours	Within Eight Hours	Within Twelve Hours	Within One Day	Within Two Days	Within Three Days	Within Four Days	More Than Four Days	No Resolution
All Topics	4	25%	0%	0%	25%	0%	0%	25%	25%	0%
All Topics->Account Questions->Orders	2	50%	0%	0%	0%	0%	0%	0%	50%	0%
All Topics->Account Questions->Returns	15	33%	0%	0%	0%	0%	0%	0%	66%	0%
All Topics->Products	2	50%	0%	0%	0%	0%	0%	0%	50%	0%
All Topics->Products->Cameras	6	33%	0%	0%	0%	0%	0%	16%	50%	0%
All Topics->Shipping	11	18%	0%	0%	0%	0%	0%	0%	81%	0%
All Topics->Technical Support	9	22%	0%	0%	0%	22%	0%	0%	55%	0%

Click to expand

16.2.9 Topic Summary - by Type or by Status

The Topic Summary Report counts all interactions that were received by the selected segment during the time frame specified. It displays their total by topic with a break out either by the type of interaction (customer emails, tickets, and ask a question forms), or by status of interaction (unassigned, answered, etc.).

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment and the time frame.

Report Example

By Type

Select a Segment: Start report from how far back?:
 Start date for Report: End Date for Report:

1 of 1 100% Find | Next Select a format Export

iService **Topic Summary Report**
 By Type of Interaction
 Segment: e-shop

Date Range: 7/23/2011 through 7/22/2012

Topic	Total Messages	Customer Emails	Tickets	Ask a Question
All Topics	26	25	0	1
All Topics-->_Undeliverable	3	3	0	0
All Topics-->_Spam	2	0	0	2
All Topics-->Products	4	1	1	2
All Topics-->Account Questions-->Returns	34	29	1	4
All Topics-->Shipping	21	10	1	10
All Topics-->Technical Support	21	6	0	15
All Topics-->Products-->Cameras	14	10	1	3
All Topics-->Products-->Cell Phones	9	5	0	4
All Topics-->Products-->Computers	4	3	0	1
All Topics-->Products-->Televisions	14	13	0	1
All Topics-->Account Questions	5	1	0	4
All Topics-->Products-->Audio-Video	9	8	0	1
All Topics-->Account Questions-->Platinum Accounts	25	25	0	0
All Topics-->Account Questions-->Orders	7	0	0	7
All Topics-->_Newsletter Subscription	14	1	0	13
All Topics-->_Feedback	20	0	0	20
Total # of Messages	232	140	4	88

The date range of this report is based on the date and time the customer request entered the iServiceCRM system.

Report generated on 07-23-2012 at 2:30:56 PM

iService Version 5.12

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Click to expand

By Status

New Subscription
View Report

Select a Segment: e-shop
Start report from how far back?: 1 year ago

Start date for Report: 7/23/2011
End Date for Report: 7/22/2012

1 of 1
100%
Find | Next
Select a format
Export

Topic Summary Report By Status of Interaction

Date Range: Segment: e-shop

7/23/2011 through 7/22/2012

Topic	Total Messages	Messages Unassigned	Messages Answered	Answered Externally	Messages Assigned	Assigned Externally	Messages Resolved	Resolved by Filter
All Topics	26	0	0	12	0	0	14	0
All Topics-->_Undeliverable	3	0	0	0	0	0	3	0
All Topics-->_Spam	2	0	0	0	0	0	2	0
All Topics-->Products	4	0	0	4	0	0	0	0
All Topics-->Account Questions-->Returns	34	0	0	12	0	0	22	0
All Topics-->Shipping	21	0	0	7	0	0	14	0
All Topics-->Technical Support	21	0	0	12	0	0	9	0
All Topics-->Products-->Cameras	14	0	0	4	0	0	10	0
All Topics-->Products-->Cell Phones	9	0	0	2	0	0	7	0
All Topics-->Products-->Computers	4	0	0	1	0	0	3	0
All Topics-->Products-->Televisions	14	0	0	2	0	0	12	0
All Topics-->Account Questions	5	0	0	2	0	0	3	0
All Topics-->Products-->Audio-Video	9	0	0	4	0	0	5	0
All Topics-->Account Questions-->Platinum Accounts	25	0	0	3	0	0	22	0
All Topics-->Account Questions-->Orders	7	0	0	3	0	0	4	0
All Topics-->_Newsletter Subscription	14	1	0	3	0	0	10	0
All Topics-->_Feedback	20	15	0	0	0	0	5	0
Total # of Messages	232	16	0	71	0	0	145	0

Legend:

- Messages Unassigned - Customer requests which have not yet been resolved or assigned to an agent.
- Messages Answered - Customer requests which have been resolved with a response sent by an agent.
- Answered Externally - Customer requests which have been resolved with a response sent by an external (non-iService) contact.
- Messages Assigned - Customer requests which have not yet been resolved, but are currently in an agents personal queue.
- Assigned Externally - Customer requests which have not yet been resolved, but are currently passed to an external agent contact.
- Messages Resolved - Customer requests in which the "Save and Resolve" option was used to close an issue that didn't require an email response.
- Resolved by Filter - Incoming email messages for which a filter responded or resolved the interaction instead of queueing for an agent.

The date range of this report is based on the date and time the customer request entered the iServiceCRM system.

Report generated on 07-23-2012 at 10:01:27 AM iService Version 5.12 Page 1 of 1

Click to expand

16.2.10 Time of Day Reports

There are three sets of time of day reports: Chat Time of Day Report (for chats), Time of Day Report (for messages), and Time of Day by Individual Dates. All reports show a breakdown of when messages arrive during the day, and how long it takes to answer them. **Use this report to understand your peak staffing needs.**

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Chat Time of Day: Select a segment, topics to include, and the time frame to include.

Time of Day: Select the segment, topics to include, whether to show charts, whether to show half-hour increments, start and end time during the day, and the time frame to include in the report.

Time of Day by Individual Dates: Select the segment, topics to include, whether to show charts, whether to show half-hour increments, start and end time during the day, and individual dates to include in the report. This report does not use a date range; instead pick specific dates.

Report Examples

Chat Time of Day Report

The time to respond represents how long the customer waited before they were connected with an agent.



Chat Time of Day Report

Segment: e-shop

Date Range: 5/26/2016 12:00:01 AM through 5/25/2017 11:59:59 PM

Topics Included:

All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Hour of Day	Number of Chats	Percent of Day	Number of Chats Chart	Average Time to Respond	Average Time to Respond Chart
0:00 - 0:59	-	0.0 %			
1:00 - 1:59	-	0.0 %			
2:00 - 2:59	-	0.0 %			
3:00 - 3:59	-	0.0 %			
4:00 - 4:59	-	0.0 %			
5:00 - 5:59	-	0.0 %			
6:00 - 6:59	-	0.0 %			
7:00 - 7:59	-	0.0 %			
8:00 - 8:59	-	0.0 %			
9:00 - 9:59	1	1.5 %		0:00:06	
10:00 - 10:59	6	9.2 %		0:00:52	
11:00 - 11:59	5	7.7 %		0:07:44	
12:00 - 12:59	6	9.2 %		0:00:31	
13:00 - 13:59	3	4.6 %		0:15:58	
14:00 - 14:59	21	32.3 %		0:00:36	
15:00 - 15:59	2	3.1 %		0:01:38	
16:00 - 16:59	8	12.3 %		0:03:08	
17:00 - 17:59	5	7.7 %		0:01:02	
18:00 - 18:59	1	1.5 %		0:00:06	
19:00 - 19:59	7	10.8 %		0:00:13	
20:00 - 20:59	-	0.0 %			
21:00 - 21:59	-	0.0 %			
22:00 - 22:59	-	0.0 %			
23:00 - 23:59	-	0.0 %			
Total	65				

Legend:

Hour of Day - The hourly time slot across the range of dates selected in the report

Number of Chats - The number of chat interactions created during the hourly time slot. Click on chat count to drill-down into a detailed list of the chats

Percent of Day - The percentage of chat interactions created during the hourly time slot in relation to all other hourly time slots throughout the day

Number of Chats Chart - A visual representation of the "Number of Messages" column

Average Time to Respond - The average time in Hours:Minutes:Seconds for an agent to take chat interactions created during the hourly time slot

Average Time to Respond Chart - A visual representation of the "Average Time to Respond" column

The date range of this report is based on the date and time the customer chat request entered the iService system.

Click a number in the Number of Chats column to load the details for that time period.

iService **Chat Time of Day Details**

Segment: e-shop

Date Range: 5/26/2016 12:00:01 AM through 5/25/2017 11:59:59 PM

Hour: 10:00 - 10:59

Topics Included:

All Topics, Feedback, Newsletter Subscription, Spam, Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Interaction	Topic	Date Requested	Time Requested	Date Responded	Time Responded	Time to Respond
41837	All Topics-->Products	Aug 10, 2016	10:36:17 AM	Aug 10, 2016	10:36:20 AM	0:00:03
42518	All Topics-->Account Questions-->Orders	Feb 28, 2017	10:50:19 AM	Feb 28, 2017	10:53:59 AM	0:03:40
42519	All Topics-->Shipping	Feb 28, 2017	10:51:09 AM	Feb 28, 2017	10:51:11 AM	0:00:02
42520	All Topics-->Account Questions-->Returns	Feb 28, 2017	10:52:47 AM	Feb 28, 2017	10:52:52 AM	0:00:05
42571	All Topics-->Products-->Cell Phones	Apr 20, 2017	10:08:11 AM			
42574	All Topics	Apr 20, 2017	10:16:46 AM	Apr 20, 2017	10:17:17 AM	0:00:31
Total:		6				

Legend:

Interaction - The interaction chat ID

Topic - The topic of the chat interaction

Date Requested - The date that the customer opened the chat request

Time Requested - The time that the customer opened the chat request

Date Responded - The date that the agent answered the chat request by clicking on the "Take" button

Time Responded - The time that the agent answered the chat request by clicking on the "Take" button

Time to Respond - The length of time in Hours:Minutes:Seconds from when the customer opened the chat request until the agent answered the chat request.

The date range of this report is based on the date and time the customer chat request entered the iService system.

Report generated on 05-27-2017 at 12:59:31 PM

iService Version 7.6

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Chat Time of Day Details

Time of Day Report - Messages

The time to respond represents how long the customer waited before they received an answer from the agent. This is the total resolve time for the message.

iService **Time of Day by Date Range Report**
Segment: e-shop

Date Range: 8/27/2016 through 5/26/2017

Topics Included: Time Range: 0:00 to 24:00

All Topics, [_Feedback](#), [_Newsletter Subscription](#), [_Spam](#), [_Undeliverable](#), [Account Questions](#), [Orders](#), [Refunds](#),
[Returns](#), [Products](#), [Audio-Video](#), [Cameras](#), [Cell Phones](#), [Computers](#), [Televisions](#), [Shipping](#),
[Technical Support](#)

Hour	# of Messages	% of Day	# of Messages Chart	Avg Time to Resolve	Avg Time to Resolve Chart
0:00 - 0:59	-	0.0 %			
1:00 - 1:59	-	0.0 %			
2:00 - 2:59	-	0.0 %			
3:00 - 3:59	-	0.0 %			
4:00 - 4:59	-	0.0 %			
5:00 - 5:59	-	0.0 %			
6:00 - 6:59	-	0.0 %			
7:00 - 7:59	-	0.0 %			
8:00 - 8:59	-	0.0 %			
9:00 - 9:59	-	0.0 %			
10:00 - 10:59	4	2.8 %		289:20:55	
11:00 - 11:59	4	2.8 %		13:25:26	
12:00 - 12:59	7	4.8 %		525:27:23	
13:00 - 13:59	17	11.7 %		575:21:50	
14:00 - 14:59	43	29.7 %		0:13:37	
15:00 - 15:59	1	0.7 %		2:47:39	
16:00 - 16:59	13	9.0 %		364:45:58	
17:00 - 17:59	28	19.3 %		162:34:14	
18:00 - 18:59	8	5.5 %		66:25:19	
19:00 - 19:59	10	6.9 %		2173:20:51	
20:00 - 20:59	10	6.9 %		1977:58:49	
21:00 - 21:59	-	0.0 %			
22:00 - 22:59	-	0.0 %			
23:00 - 23:59	-	0.0 %			
Total	145				

Legend:

Hour - The time slot across the range of dates selected in the report

of Messages - The number of *customer email*, *ticket*, and *ask a question* interactions received or created during the hourly time slot. Click on message count to drill-down into a detailed list of the messages

% of Day - The percentage of *customer email*, *ticket*, and *ask a question* interactions received or created during the hourly time slot in relation to all other hourly time slots throughout the day

of Messages Chart - A visual representation of the "# of Messages" column

Avg Time to Resolve - The average time in Hours:Minutes:Seconds for an agent to resolve *customer email*, *ticket*, and *ask a question* interactions received or created during the time slot

Avg Time to Resolve - A visual representation of the "Avg Time to Resolve" column

The date range of this report is based on the date and time the customer request entered the iService system.


Report generated on 05-27-2017 at 1:05:52 PM

iService Version 7.6

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Time of Day Report (Messages)

Click a number in the # of Messages column to load the details for that time period.



Time of Day Report Details

Segment: e-shop

Date Range: 8/27/2016 through 5/26/2017
12:00 - 13:00

Topics Included:

All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds,
 Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping,
 Technical Support

Interaction	Topic	Date Received	Time Received	Date Resolved	Time Resolved	Time to Resolve
42316	All Topics-->Account Questions-->Orders	Dec 12, 2016	12:02:16 PM	Dec 12, 2016	6:59:08 PM	6:56:52
42319	All Topics-->Shipping	Dec 12, 2016	12:03:31 PM	Dec 12, 2016	7:50:17 PM	7:46:46
42323	All Topics-->Products	Dec 12, 2016	12:05:07 PM	May 11, 2017	12:18:19 PM	3600:13:12
42326	All Topics-->Account Questions-->Returns	Dec 12, 2016	12:05:56 PM	Dec 12, 2016	8:33:07 PM	8:27:11
42329	All Topics-->Account Questions-->Refunds	Dec 12, 2016	12:08:08 PM	Dec 12, 2016	6:59:16 PM	6:51:08
42332	All Topics-->Shipping	Dec 12, 2016	12:45:16 PM	Dec 12, 2016	12:54:01 PM	0:08:45
42563	All Topics-->Technical Support	Apr 10, 2017	12:37:04 PM	Apr 12, 2017	12:24:53 PM	47:47:49
Total:		7				

Report generated on 05-27-2017 at 1:08:36 PM iService Version 7.6 Page 1 of 1

Time of Day - Details

Time of Day by Individual Dates

This version of the time of day report shows each day separately, and includes graphs that show aggregate values per time period.



Time of Day by Individual Dates Report

Segment: e-shop

Dates Selected:

12/12/2016, 4/10/2017

Topics Included:

Time Range: 0:00 to 24:00

All Topics, Feedback, Newsletter Subscription, Spam, Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support


Hour	12/12/2016			4/10/2017			Total				
	# of Messages	% of Day	Avg Time to Resolve	# of Messages	% of Day	Avg Time	# of Messages	Total # of Messages Chart	% of Day	Avg Time to Resolve	Avg Time to Resolve Chart
0:00 - 0:59	-	0.0 %		-	0.0 %				0.0 %		
1:00 - 1:59	-	0.0 %		-	0.0 %				0.0 %		
2:00 - 2:59	-	0.0 %		-	0.0 %				0.0 %		
3:00 - 3:59	-	0.0 %		-	0.0 %				0.0 %		
4:00 - 4:59	-	0.0 %		-	0.0 %				0.0 %		
5:00 - 5:59	-	0.0 %		-	0.0 %				0.0 %		
6:00 - 6:59	-	0.0 %		-	0.0 %				0.0 %		
7:00 - 7:59	-	0.0 %		-	0.0 %				0.0 %		
8:00 - 8:59	-	0.0 %		-	0.0 %				0.0 %		
9:00 - 9:59	-	0.0 %		-	0.0 %				0.0 %		
10:00 - 10:59	-	0.0 %		-	0.0 %				0.0 %		
11:00 - 11:59	-	0.0 %		-	0.0 %				0.0 %		
12:00 - 12:59	6	22.2 %	605:03:59	1	100.0 %	47:47:49	7		25.0 %	525:27:23	
13:00 - 13:59	-	0.0 %		-	0.0 %				0.0 %		
14:00 - 14:59	-	0.0 %		-	0.0 %				0.0 %		
15:00 - 15:59	-	0.0 %		-	0.0 %				0.0 %		
16:00 - 16:59	5	18.5 %	1:44:56	-	0.0 %		5		17.9 %	1:44:56	
17:00 - 17:59	4	14.8 %	881:47:40	-	0.0 %		4		14.3 %	881:47:40	
18:00 - 18:59	-	0.0 %		-	0.0 %				0.0 %		
19:00 - 19:59	2	7.4 %	1796:39:24	-	0.0 %		2		7.1 %	1796:39:24	
20:00 - 20:59	10	37.0 %	1977:58:49	-	0.0 %		10		35.7 %	1977:58:49	
21:00 - 21:59	-	0.0 %		-	0.0 %				0.0 %		
22:00 - 22:59	-	0.0 %		-	0.0 %				0.0 %		
23:00 - 23:59	-	0.0 %		-	0.0 %				0.0 %		
Total	27			1			28				

Legend:

Hour - The hourly time slot across the range of dates selected in the report

Time of Day by Individual dates

Click a number in the # of Messages column to load the details for that time period.



Time of Day Report Details

Segment: e-shop

Date Range: 12/12/2016 through 12/12/2016

16:00 - 17:00

Topics Included:

All Topics, _Feedback, _Newsletter Subscription, _Spam, _Undeliverable, Account Questions, Orders, Refunds, Returns, Products, Audio-Video, Cameras, Cell Phones, Computers, Televisions, Shipping, Technical Support

Interaction	Topic	Date Received	Time Received	Date Resolved	Time Resolved	Time to Resolve
42337	All Topics-->Shipping	Dec 12, 2016	4:17:01 PM	Dec 12, 2016	7:51:29 PM	3:34:28
42340	All Topics-->Technical Support	Dec 12, 2016	4:17:01 PM	Dec 12, 2016	8:08:18 PM	3:51:17
42342	All Topics-->Products-->Cameras	Dec 12, 2016	4:19:01 PM	Dec 12, 2016	5:05:54 PM	0:46:53
42347	All Topics-->Products-->Cameras	Dec 12, 2016	4:43:01 PM	Dec 12, 2016	5:06:24 PM	0:23:23
42349	All Topics	Dec 12, 2016	4:59:01 PM	Dec 12, 2016	5:07:40 PM	0:08:39
Total:	5					

Report generated on 05-27-2017 at 1:23:43 PM iService Version 7.6 Page 1 of 1

Time of Day Details

16.3 Interaction Detail Listings Reports

Interaction Details reports provide detailed listings of questions and answers within iService. These reports display the actual interaction details rather than summary counts.

16.3.1 Agent Activity by Customer Type

The Agent Activity by Customer Type Report lists all interactions that created by the selected agent for the specified customer type. This report is useful to view all of the agent responses or notes created by an agent.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, the customer type to for which to list interactions, and the time frame.

Report Example

Please select the agent Manager, Service Select the customer type Prospect View Report

Start report from how far back? 1 year ago Starting Date 7/22/2011

Ending Date 7/21/2012

iService Agent-Customer Activity Report

Company: ACME Enterprises **Agent:** Manager, Service
Customer: Williams, John **Type:** Prospect
Phone: 217-555-1212 **Period:** 7/22/2011 - 7/22/2012

NOTE: The report is only effective if contacts have their customer type properly set.

Date	Type	Primary Content	Private Comments
8/10/2011 11:40:55 AM	Agent Response	Dear John, Thanks for contacting e-shop. To return an item to a store: 1. Bring the item you wish to return to any of our stores. 2. If available, bring the packing slip that came with the item. 3. If you do not have the original packing slip, you can print out the Order History for the item you are returning. If you have any additional questions, feel free to contact us. Regards, e-Shop Customer Support http://shop.iservicecrm.com/dotnetnuke/CustomerService.aspx On 6/29/2011 10:42:36 AM, John Williams <customer2@1to1service.com> wrote: > How do I get an RMA number for returns? > > John > > > > Powered by Mach5 Mailer: http://mach5-mailer.com	
3/12/2012 10:07:04 AM	Agent Response	Dear John, Thanks for contacting e-shop. I have reset your password. If you have any additional questions, feel free to contact us. Regards, e-Shop Customer Support http://shop.iservicecrm.com/dotnetnuke/CustomerService.aspx	

Click to expand

16.3.2 Agent Response Details

The Agent Response Details Report lists all responses, agent emails, and save and resolve actions completed by the selected agent during the specified time frame. The report displays the actual interaction created by the agent along with its date/time. This report can be used to generate a

copy of what the agent sent to a customer with date/time stamps as proof of sending.

Setup Required

There is no setup required. The report uses standard iService interaction property information.

Parameter Selection

Select the agents, response types, and the time frame.

Report Example

Please Select Agents: 10, Customer, Account, Demo, Response Types: Agent Responses View Report

Start report from how far back?: 3 months ago Start date for report: 4/23/2012

End date for report: 7/22/2012

2 of 4 100% Find | Next Select a format Export

Agent Response Details Report

Date Range: Report Range: 4/23/2012 through 7/22/2012

Agent Name: Administrator, Landlord

Segment / Topic	Incident Opened	Reponse Sent	Response Type	Response
e-shop All Topics-->Products-->Televisions	ID: 37970 Date: 4/19/2012 10:13:18 AM Customer E-mail: customer5@1to1service.com	ID: 37984 Date: 4/27/2012 11:50:00 AM	Agent Response	Dear Customer, Thanks for contacting e-shop. Your issue is now resolved. If you have any additional questions, feel free to contact us. Regards, e-Shop Customer Support http://shop.iservicecrm.com/dotnetnuke/CustomerService.aspx Your feedback on our support process is very important to us. If you can take a few seconds to complete our feedback form by clicking the url below we'd appreciate it very much. https://eshop.iservicecrm.com/Form.aspx?formID=54&ref=37970 On 4/19/2012 10:13:18 AM, Customer Five <customer5@1to1service.com> wrote: > Do you carry flat screen TVs and the mounting brackets for them? Also, > would you be able to install the TV in my home? Thank you, John > > > Powered by Mach5 Mailer: http://mach5-mailer.com >
e-shop All Topics-->Account Questions-->Returns	ID: 37926 Date: 4/19/2012 10:13:15 AM Customer E-mail: customer1@1to1service.com	ID: 37991 Date: 4/27/2012 11:21:30 AM	Agent Response	Dear Customer, Thanks for contacting e-shop. We have made your changes. If you have any additional questions, feel free to contact us. Regards, e-Shop Customer Support http://shop.iservicecrm.com/dotnetnuke/CustomerService.aspx Your feedback on our support process is very important to us. If you can take a few seconds to complete our feedback form by clicking the url below we'd appreciate it very much.

Click to expand

16.3.3 Customer Interaction History

The Customer History Report lists the history for a specified customer (based on an email address or login entered on the report), grouped by Thread ID. It is designed to present an exportable or printable version of the history that can be easily customized to include any type of interaction.

Setup Required

There is no setup required. The report uses standard iService information.

Parameter Selection

Enter the customer email or login, the types of interactions to include, and the time frame for the report.

The interaction Types are as follows:

Agent E-Mails - These are emails sent by the agent to the customer that do not resolve an incoming question.

Agent Responses - These are agent responses to customer questions.

Ask A Question Forms - These are questions submitted by customers via an ask a question form.

Customer E-Mails - These are incoming questions received via email.

Mass Mailings - These are mass mailing messages sent to the customer.

Public Notes - These are agent notes designated as Public.

Private Notes - These are agent notes designated as Private.

System Generated Messages - This category includes auto responses, agent notification, alert notices and other internal interactions generated by the iService system.

Tickets - These are tickets created by an agent on behalf of a customer.

Report Example

Please enter contact e-mail: Select Interaction Types: Agent E-Mails, Agent Responses

Start Report from how far back? 1 month ago Start date for report 7/5/2012 12:00:01 AM

End Date 9/4/2012 11:59:59 PM

7 of 10 100% Find | Next Select a format Export

iService Customer Interaction History Report

Date Range: 7/5/2012 12:00:01 AM through 9/4/2012 11:59:59 PM

Interaction Types: Agent E-Mails, Agent Responses, Ask A Question Forms, Customer E-Mails, Mass Mailings, Public Notes, Private Notes, Tickets

Customer E-Mail: customer1@1to1service.com Interactions are grouped by message thread.

Interaction Thread: 38149

Segment / Topic	ID	Date	Type	Body
e-shop All Topics-->Account Questions-->Orders	38149	7/20/2012 10:50:22.193 AM - 05:00 UTC	Ask A Question	What is my order status?
e-shop All Topics-->Account Questions-->Orders	38164	7/20/2012 10:52:27.773 AM - 05:00 UTC	Agent Response	Dear John Smith, Thanks for contacting e-shop. It has shipped. If you have any additional questions, feel free to contact us. Regards, e-Shop Customer Support http://eshop.1to1service.com/CustomerService.aspx Your feedback on our support process is very important to us. If you can take a few seconds to complete our feedback form by clicking the url below we'd appreciate it very much. https://eshop.iservicecrm.com/Form.aspx?formID=54&ref=38149 On 7/20/2012 10:50:22 AM, John Smith <customer1@1to1service.com> wrote: > What is my order status?

Report generated on 09-05-2012 at 10:26:04 AM iService Version 5.12 Page 7 of 10

Click to expand image

16.3.4 Email Details by Interaction Properties

The Email Details by Interaction Properties Report lists the details for all Customer Email that contain the specified interaction properties. The report will only display customer emails that contain values for the selected interaction properties, and is limited to displaying Customer Email interactions only.

Setup Required

There is no setup required. The report uses standard iService interaction property information.

Parameter Selection

Select the segment, the property for grouping, the property for sorting within the grouped interactions, and the time frame.

Report Example

SQL Server Reporting Services
Home > zTemp512Staging >
Customer Email by Interaction Properties

Home | My Subscriptions | Site Settings | Help
Search for: Go

View Properties History Subscriptions

New Subscription

Please Choose the Segment: e-shop
Select the property to group by: Browser
View Report

Select the property to sort by: OperatingSystem
Start report from how far back?: Other

StartDate: 7/1/2009
EndDate: 7/21/2012

Display Full Body Text: Yes
Length: 100

1 of 1 | 100% | Find | Next | Select a format | Export

iService **Customer Email Report**
By Interaction Properties

Segment: e-shop Date Range: 7/1/2009 through 7/21/2012

Browser: Safari

Email Date	Contact Email	Subject	Body	Topic	OperatingSystem	Status
2/22/2010 9:17:51 AM	customer5@1to1service.com	[ref#: 3733-3733] Can't login to my account	I can't seem to log into my account. Can you please help me?	All Topics-->Technical Support	Macintosh	Resolved

Report generated on 07-22-2012 at 1:22:17 PM *iService Version 5.12* Page 1 of 1

Click to expand

16.3.5 Interactions by Interaction Properties

The Customer Interactions by Interaction Properties Report lists the details for all interactions that contain the specified interaction properties. It groups those interactions based upon the values entered for the property selected. The report will only display interactions that contain values for the selected interaction properties. This report is similar to the Email Details by Interaction Properties report, except that it will list all interactions (customer email, tickets, and ask a question forms) rather than just customer emails.

Setup Required

There is no setup required. The report uses standard iService interaction property information.

Parameter Selection

Select the segment, the property for grouping, the property for sorting within the grouped interactions, and the time frame.

Report Example

SQL Server Reporting Services Home | My Subscriptions | Site Settings | Help

Home > Demonstration Reports > Contact Information and Interaction Details > **Customer Interactions by Interaction Properties** Search for: Go

View | Properties | History | Subscriptions

New Subscription ^

Please Choose the Segment: Select the property to group by:

Select the property to sort by: Start report from how far back?:

StartDate: EndDate:

Display Full Body Text: Length:

1 of 4 100% Find | Next Select a format Export

iService **Customer Interactions Report**
By Interaction Properties

Segment: e-shop Date Range: 7/15/2011 through 7/14/2012

Browser: Firefox

Interaction Date	Contact Email	Subject	Interaction Type	Body	Topic	Browser	Status
3/22/2012 1:33:21 PM	Smith, John	[ref#: 37789-37789] Technical Support	Ask A Question	I can't login to my portal.	All Topics-->Technical Support	Firefox	Resolved
3/22/2012 1:33:21 PM	Smith, John	[ref#: 37789-37789] Technical Support	Ticket	I can't login to my portal.	All Topics-->Technical Support	Firefox	Resolved
5/30/2012 3:30:27 PM	Smith, John	[ref#: 38032-38032] Technical Support	Ask A Question	I can't log into the site. My password doesn't work.	All Topics-->Technical Support	Firefox	Resolved
5/30/2012 3:30:27 PM	Smith, John	[ref#: 38032-38032] Technical Support	Ticket	I can't log into the site. My password doesn't work.	All Topics-->Technical Support	Firefox	Resolved
6/10/2012 6:08:18 PM	10, Customer	[ref#: 38075-38075] Technical Support	Ask A Question	I cannot login to my account, do you have any instructions on how to fix this?	All Topics-->Technical Support	firefox	Resolved
6/10/2012 6:08:18 PM	10, Customer	[ref#: 38075-38075] Technical Support	Ticket	I cannot login to my account, do you have any instructions on how to fix this?	All Topics-->Technical Support	firefox	Resolved

Report generated on 07-15-2012 at 9:18:28 PM iService Version 5.12 Page 1 of 4

Click to expand

16.3.6 Resolved Message Summary

The Resolve Message Summary Report lists all interactions that were resolved by agents for the selected topics during a specified time frame. The report only lists interactions that were resolved using the Save and

Resolve function. These were essentially closed by the agent without sending a response to the customer.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the segment, the topics, whether to include the full message, and the time frame.

Report Example

SQL Server Reporting Services
 Home > Demonstration Reports > Contact Information and Interaction Details >
Resolved Message Summary

Home | My Subscriptions | Site Settings | Help
 Search for: Go

View | Properties | History | Subscriptions

New Subscription

Choose Segment: e-shop | Choose Topics: All Topics, Account Questions, O | [View Report](#)

Start report from how far back?: 1 month ago | Start date for report: 6/15/2012

End date for report: 7/14/2012 | Display Full Body Text: Yes

Body Width Max if Limited: 100

1 of 1 | 100% | Find | Next | Select a format | Export

iService **Resolved Message Summary Report**
 Segment: e-shop
 Date Range: 6/15/2012 through 7/14/2012

Resolution Type: Resolved

Topic	Resolved	Agent Name	Sender	Original Subject	Original Body
Returns	06/22/2012	demo-admin@1to1service.com	customer7@1to1service.com	[ref#: 37962-37962] Return policy	What is your return policy? I purchased a product that I do not need and would like to return it. Thank you, James Powered by Mach5 Mailer: http://mach5-mailer.com
All Topics	06/22/2012	demo-admin@1to1service.com	customer1@1to1service.com	[ref#: 38069-38069] Please let us know when you are ready	We are ready to begin the project as soon as you give us the go ahead. Please let both of us know when you'd like us to begin. Regards, Customer One

Report generated on 07-15-2012 at 9:20:43 PM iService Version 5.12 Page 1 of 1

Click to expand

16.4 Contact Info Reports

Contact Info reports provide access to the contact information within your iService system, and information about your most active customers. The reports display contact details, rather than interaction details.

16.4.1 Address Report - by Contact Type or by Segment

The Contact Address Report provides a detailed listing of contact information. You can select contacts for the report either by their contact type or by segment. The standard report includes the following fields.

First Name, Last Name, Job Title, Company, Address1, Address2, City, State, Postal Code, Country, Phone, Website and Email Address.

This report is useful for exporting a list of contacts to Excel or other formats supported by SSRS. When combined with the contact import features supported by the [iService Batch Form Submission utility](#), this is an effective way to update information within your database.

Setup Required

There is no setup required. The report uses standard iService contact information.

Parameter Selection

For the by Contact Type, select the types to include. For the by segment report, select the segment for which you would like to a full list of contact information.

Report Example

By Contact Type

SQL Server Reporting Services
 Home > Demonstration Reports > Contact Information and Interaction Details >
Contact Address Report by Contact Type

Home | [My Subscriptions](#) | [Site Settings](#) | [Help](#)
 Search for: Go

View | Properties | History | Subscriptions

New Subscription

Choose Segment: e-shop | Select Contact Type: Vendor | [View Report](#)

1 of 1 | 100% | Find | Next | Select a format | Export

iService **Contact Address Report by Contact Type**
 Segment: e-shop

This report is ideal for exporting a customer list to Excel or CSV format. However, it requires that your contacts have their customer type completed.

This report shows contacts of the type: Vendor

First Name	Last Name	Job Title	Company	Address	Address 2	City	State	Postal Code	Country	Phone	Web Site	Email
Guy	Kawaki	Sales Associate	CDW	321 Main St		Urbana	IL	61802		321-654-0987		gh@1to1service.com
John	Smith	Purchasing Manager	Acme Corporation	123 Main		champaign	IL	61825		217-555-1212		customer1@1to1service.com

Report generated on 07-13-2012 at 9:16:19 PM iService Version 5.12 Page 1 of 1

Click to expand

By Segment

SQL Server Reporting Services
 Home > Demonstration Reports > Contact Information and Interaction Details >
Contact Address Report by Segment

Search for: Go

View Properties History Subscriptions

New Subscription

Choose Segment: Travel

2 of 2 100% Find | Next Select a format Export

iService **Contact Address Report by Segment**
 Segment: Travel

This report shows all contacts within the specified Segment

First Name	Last Name	Job Title	Company	Address	Address 2	City	State	Postal Code	Country	Phone	Web Site	Email
Billy	Williams	Sales Rep	General Sales, Inc.	5967 N Market		Chicago	IL	60606	USA			bwilliams@1to1service.com

Report generated on 07-13-2012 at 9:36:51 PM iService Version 5.12 Page 2 of 2

Click to expand

16.5 Mass Mailing Reports

Mass Mailing reports provide insight into your outbound email activity performed through the iCentives mailing feature. This feature is accessible from the Admin Tools - Mailing tab only by agents with appropriate access rights. To learn more about the mass mailing features, see the [iCentives Mass Mailing User Guide](#).

16.5.1 Mass Mailing Call Priority List

The Mass Mailing Call Priority Report provides details about contacts that took an action on a selected mailing. This report combines click through information with contact details to streamline follow-up sales calls on a marketing campaign.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the mailing from the drop down list.

Report Example

Mass Mailing Call Priority List
For: Mar 2 2010 11:59PM -- Newsletter

The calls to action are displayed in the Link Name and URL section of the report.

Contact	Company	Job Title	Company Web Site	Phone	Time	Link Name	Link URL
whitsitt, scott	One-to-One Service.com	CEO			3/3/2010 7:21:15 AM	viewed	https://e-shop.iservicecrm.com/images/blank.gif
Five, Customer	XYZ Industries	Manager		217-555-1213	3/16/2010 9:47:32 AM	viewed	https://e-shop.iservicecrm.com/images/blank.gif

Report generated on 07-23-2012 at 11:07:45 AM iService Version 5.12 Page 1 of 1

Click to expand

16.5.2 Mass Mailing Clickthrough Summary

The Mass Mailing Clickthrough Summary Report provides click through totals for a selected mailing. It displays the total for each link variable in the mailing, and includes a drill through to the [mass mailing click through details report](#)⁸²³.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the mailing from the drop down list, or access the report as a drill through from the [mass mailing summary report](#)⁸²³.

Report Example

Mass Mailing Clickthrough Summary Report
For Mailing: May 6 2010 8:15AM -- Newsletter

Click the Link Name to load a drill through report showing the contacts that took the action.

Link Name	Link URL	Number
Manual	http://www.1to1service.com/iservice_documentation.asp	2
viewed	https://e-shop.iservicecrm.com/images/blank.gif	3

Report generated on 07-23-2012 at 11:13:12 AM iService Version 5.12 Page 1 of 1

Click to expand

16.5.2.1 Mass Mailing Clickthrough Details

The Mass Mailing Clickthrough Details Report provides detailed information about contacts that clicked on various links within a mailing message. It is accessed as a drill through from both the [Mass Mailing Clickthrough Summary report](#)⁸²² and the [Mass Mailing Summary report](#)⁸²³.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

This is a drill through report. It includes three types of clickthroughs: Unsubscribes, Message Views, and User Defined Links. The report displays the same information for each type of clickthrough.

Report Example

Mass Mailing Clickthrough Details Report

Note: This example shows details for user defined links. The display is the same for unsubscribes and views. **For Mailing: May 6 2010 8:15AM -- Newsletter**

This report displays click through data of the type: **User Defined Clickthrough Links**

Email	Contact	Company	Phone	Link Name	Link URL
amagill+test@1to1service.com	Magill, Aaron			Manual	http://www.1to1service.com/service_documentation.asp
joenuval@1to1service.com	Nuval, Joe	One-to-One Service.com	217-555-1234	Manual	http://www.1to1service.com/service_documentation.asp

Total User Defined Clickthrough Links: 2

Report generated on 07-23-2012 at 12:29:48 PM iService Version 5.12 Page 1 of 1

Click to expand

16.5.3 Mass Mailing Summary

The Mass Mailing Summary Report provides a summary for all mailings during the specified time frame. It includes drill through links to see details about message delivery and message clickthrough.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select a time frame to generate a list of mailings.

Report Example

Mass Mailings Summary Report
Date Range: 5/1/2010 through 7/22/2010

Mailing Name	Description	Date Sent	Total Messages Sent	Total Delivered	Total Bounces	Total Views	Total Unsubscribed	Total Click Throughs
Newsletter	General newsletter for customers	5/5/2010 7:48:13 PM	6	4	2	0	0	1
Newsletter	General newsletter for customers	5/6/2010 8:15:49 AM	19	16	3	3	0	2
Total # of Messages Sent for Tenant During Date Range:			25					

Report generated on 07-23-2012 at 1:19:00 PM

Drillthrough to Message Delivery Report

Drillthrough to Clickthrough Detail Report

iService Version 5.12 Page 1 of 1

Click to expand

16.5.4 Mass Mailing Delivery

The Mass Mailing Delivery Report provides a count and detailed listing of the messages included within a mailing. It includes three options: Sent, Delivered, Bounced.

Setup Required

There is no setup required. The report uses standard iService interaction information.

Parameter Selection

Select the mailing from the drop down list, or access the report as a drill through from the [mass mailing summary report](#).

Report Example

Start report from how far back? Other Start Date for Mailing Range 5/1/2010 View Report

End Date for Mailing Range 7/22/2012 Please Select a Mailing Dec 22 2010 1:51PM -- Current Customer Notice

Type Total Messages Sent

1 of 1 100% Find | Next Select a format Export

iService **Mass Mailing Delivery Report**

For Mailing: Dec 22 2010 1:51PM -- Current Customer Notice

This report displays: Total Messages Sent ← Display is updated based upon the type of messages selected, but the report content is the same for all three reports.

Email	Contact	Company	Phone
customer1@1to1service.com	Smith, John	Acme Corporation	217-555-1212

Total Messages Sent: 1

Report generated on 07-23-2012 at 1:25:58 PM iService Version 5.12 Page 1 of 1

Click to expand

16.6 Sales Pipeline Reports

Sales Pipeline reports provide insight into your sales activity, if tracked within iService. These reports require the use of specific contact properties for tracking purposes. These contact properties must match the names exactly as shown below:

Property Name (Must be exact)	Property Type
Opportunity Amount	Text
Opportunity Description	Text - Allow multi-line
Opportunity Name	Text
Opportunity Stage	Usually a list is selected from Additional Details. The sales stages should match your sales methodology and begin with a number, such as: 1.Initial contact, 2.Application of Initial Fit Criteria, 3.Sales lead, 4.Need identification, 5.Qualified prospect, 6.Proposal, 7.Negotiation, 8.Closing, 9.After sales service. These are used to generate the Sales Pipeline by Stage report.
Product	Usually a list of your products or product categories from Additional Details. This list is used to generate the Sales Pipeline by Product

	report and therefore should be a relatively short list.
Sales Person	Usually a list of sales people from Additional Details.
Target Close Date	Date

The reports available include:

[Sales Pipeline by Product](#)⁸²⁶ - this report displays a summary of sales opportunities grouped by product.

[Sales Pipeline by Sales Person](#)⁸²⁷ - this report displays a summary of sales opportunities grouped by sales person.

[Sales Pipeline by Stage](#)⁸²⁸ - this report displays a summary of sales opportunities grouped by stage within the sales pipeline.

[Sales Pipeline by Target Close](#)⁸²⁹ - this report displays a summary of sales opportunities grouped by target close date.

16.6.1 Sales Pipeline by Product

The Sales Pipeline by Product Report provides details about sales opportunities within your pipeline. It groups the opportunities by product, and includes a summary for each opportunity including the last time there was correspondence with the contact or note added.

Setup Required

See the [sales pipeline overview](#)⁸²⁵ for setup details.

Parameter Selection

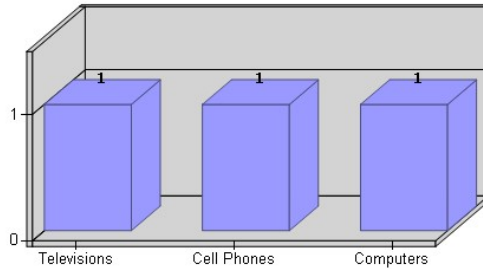
Select the segment that contains the contacts with sales opportunities.

Report Example



Sales Pipeline Report
By Product

Segment: Sales



Product: Cell Phones

Company	Contact	Sales Person	Opportunity Name	Opportunity Description	Deal \$	%	Stage	Target Close	Last update By	Last update
ACME Enterprises	Williams, John	Julie Waterman	Bulk phone opportunity	Looking for wholesale phones	25000		1. Initial Contact	3/30/2011	Administrator, Landlord	5/14/2012 4:17:47 PM
Deal Value Subtotal					25000					

Product: Computers

Company	Contact	Sales Person	Opportunity Name	Opportunity Description	Deal \$	%	Stage	Target Close	Last update By	Last update
XYZ Industries	Five, Customer	Walter Bigleo	Reseller opp	Reseller needs rack mount server source	11000		2. Qualified	11/30/2010	Manager, Service	7/17/2012 2:18:53 PM
Deal Value Subtotal					11000					

Product: Televisions

Company	Contact	Sales Person	Opportunity Name	Opportunity Description	Deal \$	%	Stage	Target Close	Last update By	Last update
Acme Corporation	Smith, John	Brian Holcom	Toy distribution	Large distributor in Asian market looking to sell RC toys	45000		3. Needs Analyzed	12/31/2010	Manager, Service	7/20/2012 10:53:10 AM
Deal Value Subtotal					45000					

Report generated on 07-23-2012 at 2:15:14 PM

iService Version 5.12

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Click to expand

16.6.2 Sales Pipeline by Sales Person

The Sales Pipeline by Sales Person Report provides details about sales opportunities within your pipeline. It groups the opportunities by sales person, and includes a summary for each opportunity including the last time there was correspondence with the contact or note added.

Setup Required

See the [sales pipeline overview](#) ⁸²⁵ for setup details.

Parameter Selection

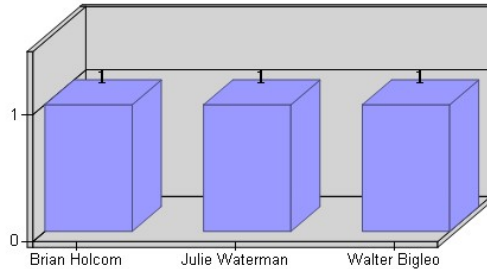
Select the segment that contains the contacts with sales opportunities.

Report Example



Sales Pipeline Report
By Sales Person

Segment: Sales



Sales Person: Brian Holcom

Company	Contact	Sales Person	Opportunity Name	Opportunity Description	Deal \$	%	Stage	Target Close	Last update By	Last update
Acme Corporation	Smith, John	Brian Holcom	Toy distribution	Large distributor in Asian market looking to sell RC toys	45000		3. Needs Analyzed	12/31/2010	Manager, Service	7/20/2012 10:53:10 AM
Deal Value Subtotal					45000					

Sales Person: Julie Waterman

Company	Contact	Sales Person	Opportunity Name	Opportunity Description	Deal \$	%	Stage	Target Close	Last update By	Last update
ACME Enterprises	Williams, John	Julie Waterman	Bulk phone opportunity	Looking for wholesale phones	25000		1. Initial Contact	3/30/2011	Administrator, Landlord	5/14/2012 4:17:47 PM
Deal Value Subtotal					25000					

Sales Person: Walter Bigleo

Company	Contact	Sales Person	Opportunity Name	Opportunity Description	Deal \$	%	Stage	Target Close	Last update By	Last update
XYZ Industries	Five, Customer	Walter Bigleo	Reseller opp	Reseller needs rack mount server source	11000		2. Qualified	11/30/2010	Manager, Service	7/17/2012 2:18:53 PM
Deal Value Subtotal					11000					

Report generated on 07-23-2012 at 2:17:12 PM

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click to expand

16.6.3 Sales Pipeline by Stage

The Sales Pipeline by Stage Report provides details about sales opportunities within your pipeline. It groups the opportunities by sales stage, and includes a summary for each opportunity including the last time there was correspondence with the contact or note added.

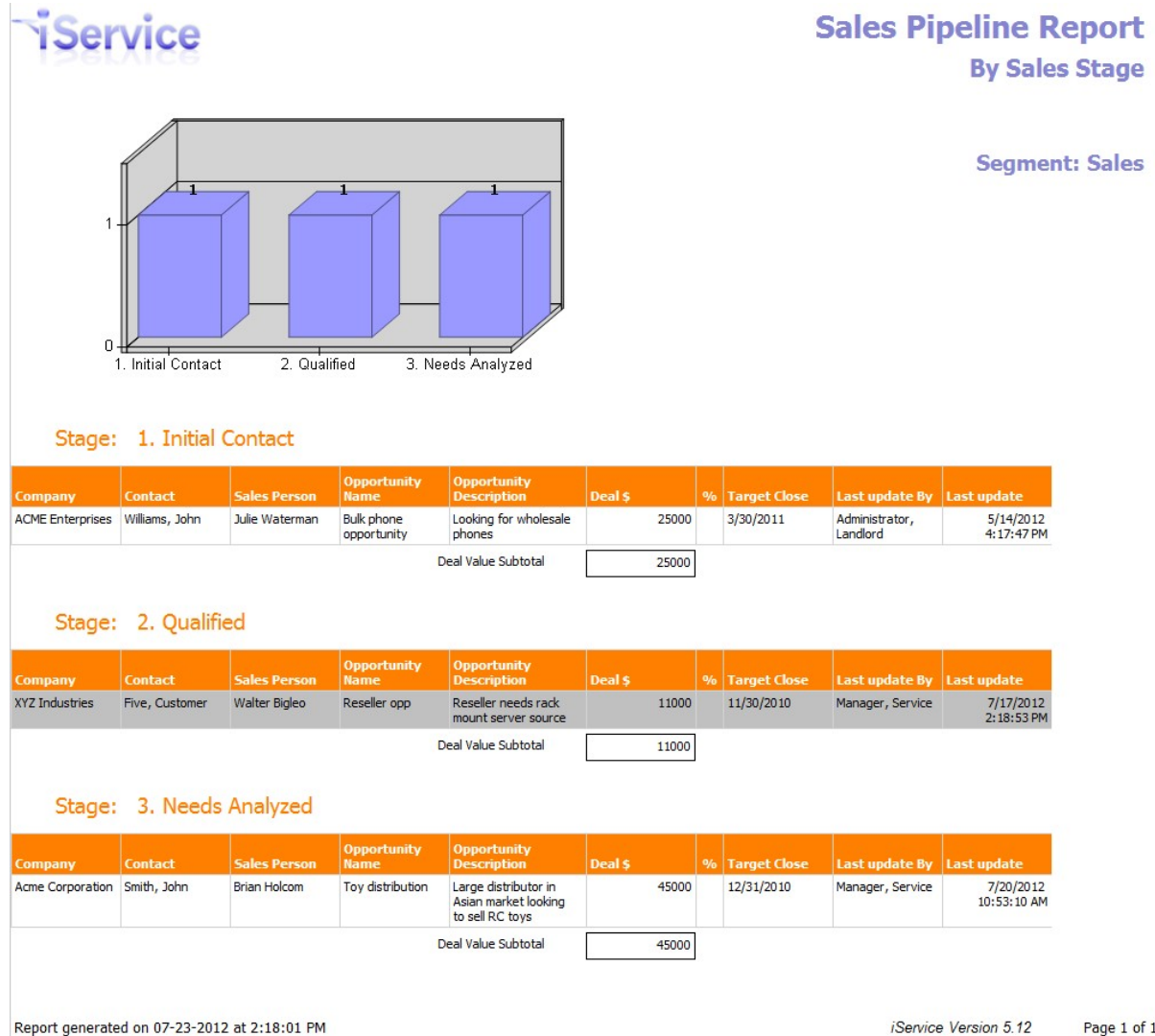
Setup Required

See the [sales pipeline overview](#) ⁸²⁵ for setup details.

Parameter Selection

Select the segment that contains the contacts with sales opportunities.

Report Example



Click to expand

16.6.4 Sales Pipeline by Target Close

The Sales Pipeline by Target Close Report provides details about sales opportunities within your pipeline. It groups the opportunities by target close date, and includes a summary for each opportunity including the last time there was correspondence with the contact or note added.

Setup Required

See the [sales pipeline overview](#) ⁸²⁵ for setup details.


Parameter Selection

Select the segment that contains the contacts with sales opportunities.

Report Example

Please Choose the Segment Sales
Please select Stages to include 1. Initial Contact, 2. Qualified, 3.
View Report

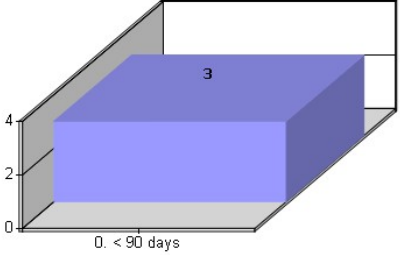
1 of 1
100%
Find | Next
Select a format
Export



Sales Pipeline Report

By Target Close Date

Segment: Sales



0. < 90 days

Target Close Date: < 90 days

Company	Contact	Sales Person	Opportunity Name	Opportunity Description	Deal \$	%	Stage	Target Close	Last update By	Last update
Acme Corporation	Smith, John	Brian Holcom	Toy distribution	Large distributor in Asian market looking to sell RC toys	45000		3. Needs Analyzed	12/31/2010	Manager, Service	7/20/2012 10:53:10 AM
ACME Enterprises	Williams, John	Julie Waterman	Bulk phone opportunity	Looking for wholesale phones	25000		1. Initial Contact	3/30/2011	Administrator, Landlord	5/14/2012 4:17:47 PM
XYZ Industries	Five, Customer	Walter Bigleo	Reseller opp	Reseller needs rack mount server source	11000		2. Qualified	11/30/2010	Manager, Service	7/17/2012 2:18:53 PM
Deal Value Subtotal					81000					

Report generated on 07-23-2012 at 2:19:04 PM
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/app/interaction 176

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