



iService Business Intelligence Reports Guide

A guide for users of the iService Customer Interaction Solution.



iService Business Intelligence Reports Guide

This user guide is intended for users of the iService system. It is not intended to provide information relating to software customization or integration. Feedback regarding this guide should be sent to support@1to1service.com.

Information contained within this document is confidential and proprietary to One-to-One Service.com, Inc. and should not be redistributed without prior written permission.

One-to-One Service.com, iService, iCentives, and the One-to-One Service.com logo are registered trademarks of One-to-One Service.com, Inc.

*Copyright 2009-2015 One-to-One Service.com, Inc.
All Rights Reserved
PO Box 2231 • Champaign, IL 61825
Phone 217.398.MAIL (6245) • Fax (815) 366-8167*

Table of Contents

Chapter I Introduction	5
1 Getting Started	5
2 Using Microsoft SSRS	6
Chapter II On-Premise Users: Installing and Updating Reports	10
Chapter III Agent Activity Reports	13
1 Agent List	13
2 Feedback - Executive Summary.....	14
Feedback - Category Analysis	15
Feedback - Agent Summary.....	16
Feedback - Details	17
3 Forwarding Analysis	18
By Agent	18
By Topic	19
By Interaction	20
4 Interactions - by Status or by Type.....	21
5 Interactions by Type - Grouped by Topic.....	23
6 Login Activity	24
7 Response Random Audit	26
8 Response Time	27
9 Topic Change Analysis	32
Chapter IV Contact Info Reports	34
1 Address Report - by Contact Type or by Segment.....	34
Chapter V Interaction Detail Listings Reports	36
1 Agent Activity by Customer Type.....	36
2 Agent Response Details	37
3 Customer Interaction History	38
4 Email Details by Interaction Properties.....	40
5 Interactions by Interaction Properties.....	41
6 Resolved Message Summary	42
Chapter VI Topic Summary and Service Levels	44
1 First Call Resolution	44
2 Interactions Summary By Property with Sorting.....	45
3 Interactions Summary By Property no Sorting.....	46

4	Mailbox Summary	47
5	Interactions by Type - Grouped by Contact or Company.....	48
6	Service Level - by Messages or by Percentage.....	50
7	Service Level - by Operating Hours - by Messages or by Percentage.....	53
8	Service Level - by Percentage for Contact.....	56
9	Topic Summary - by Type or by Status.....	58
10	Time of Day Reports	60

Chapter VII Mass Mailing Reports 68

1	Mass Mailing Call Priority List	68
2	Mass Mailing Clickthrough Summary.....	68
	Mass Mailing Clickthrough Details	69
3	Mass Mailing Summary	70
4	Mass Mailing Delivery	71

Chapter VIII Sales Pipeline Reports 73

1	Sales Pipeline by Product	74
2	Sales Pipeline by Sales Person	75
3	Sales Pipeline by Stage	76
4	Sales Pipeline by Target Close	77

	Index	79
--	--------------------	-----------

1 Introduction

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 .

This Business Intelligence Guide is intended for iService users responsible for generating reports and analyzing service center performance. It is available in the following formats.



[Online Help](#) - This HTML help can be browsed online. You will be automatically directed to the standard, smartphone, or iPad version that is most appropriate for your browser.



[Compiled HTML Help](#) - You can download this Windows Compiled Help file and view it in your browser while offline.



[PDF](#) - Acrobat file for printing



[iPad / iBook](#) - This is an ePub file for viewing on your iPad.

[Getting Started](#)

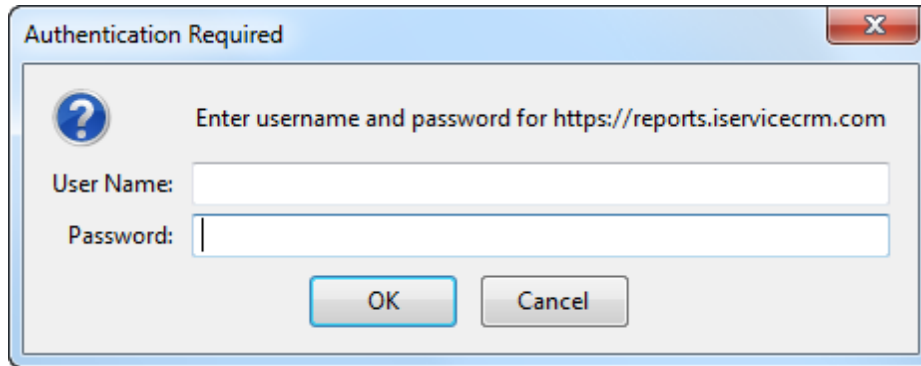
[Using Microsoft SSRS](#)

Note to iService On-Demand Users: If your iService installation is hosted by One-to-One Service.com, the time stamps for all interactions will be stored in Central Daylight Savings Time.

1.1 Getting Started

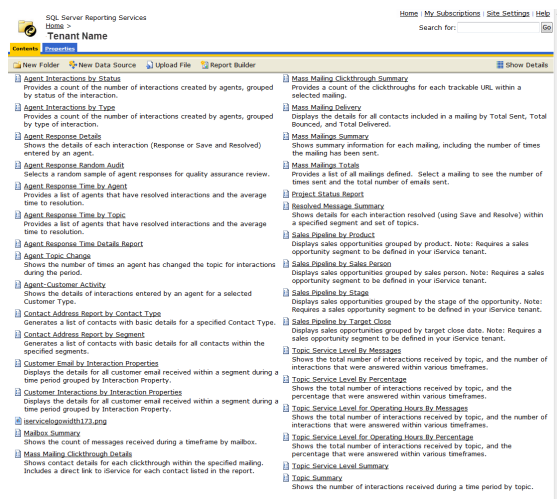
You will access reports differently depending upon whether you are using iService on-Demand (hosted by One-to-One Service.com) or on-premise. If iService is hosted by one-to-one service.com, you will access your reports at <https://reports.iServiceCRM.com/>. You will be prompted for a user name and password 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.



Windows Login Prompt From Browser

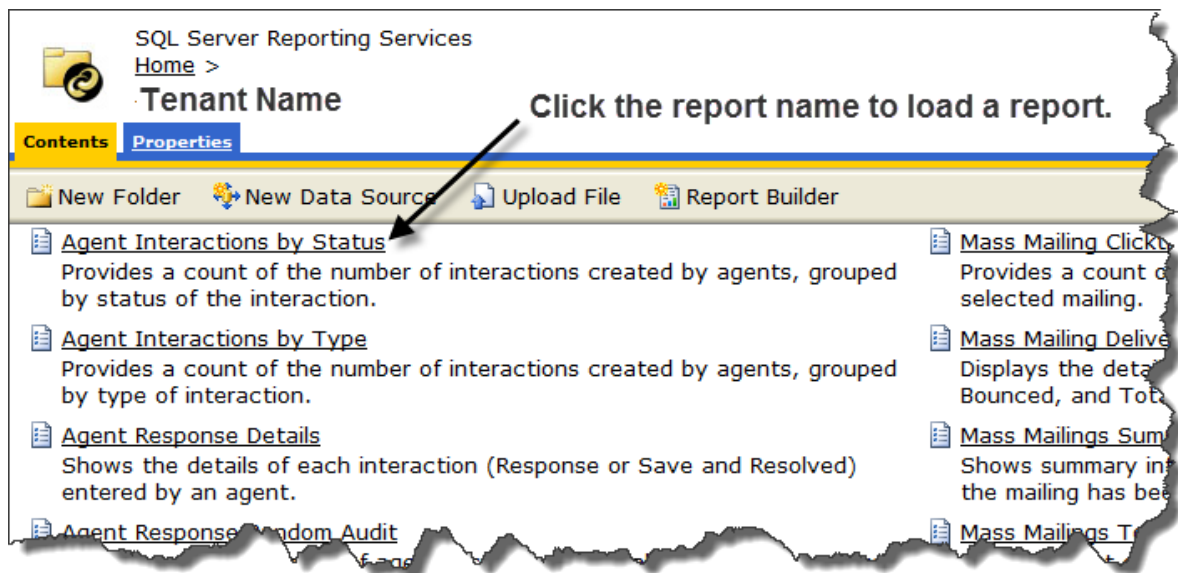
After you login to the reporting website, a list of reports will be presented. The default view of reports is a simple list but your tenant may have reorganized them into folders, or you might be launching them from a separate report portal. The default view is shown below.



Default View of Reports

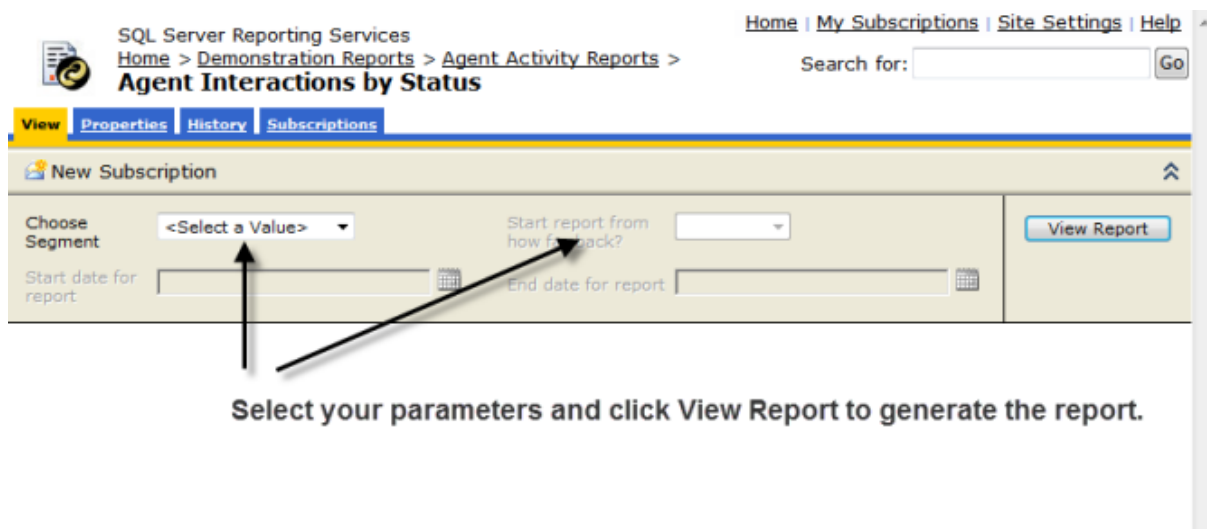
1.2 Using Microsoft SSRS

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.



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](#) | [My Subscriptions](#) | [Site Settings](#) | [Help](#)

[Home](#) > [Demonstration Reports](#) > [Agent Activity Reports](#) > **Agent Interactions by Status**

Search for:

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

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.

A Report Displayed in the Report Viewer

2 On-Premise Users: Installing and Updating Reports

If you are running iService on your own equipment (on-premise), you will need to install the iService reports on a Microsoft SSRS server. Installation of SSRS is outside the scope of iService User Guides because instructions can be obtained directly from Microsoft (<http://msdn.microsoft.com/en-us/library/ms143736>). This guide explains how to add the iService reports to an existing SSRS server.

iService Reports Publisher Script

The iService Reports Publisher Script automates deployment of iService reports to a SQL Server Reporting Services (SSRS) server. Since it depends on the [RS utility](#) to function, this script package requires Reporting Services to be installed on the local computer.

To check if the RS utility is installed, type this at the command prompt:

```
where rs.exe
```

If a path is output similar to below, the script can be run. Otherwise, SSRS must be installed first:

```
C:\Program Files (x86)\Microsoft SQL Server\110\Tools\Binn\rs.exe
```

Requirements:

SQL Server Reporting Services 2005/2008/2008R2/2012

NOTE: Please see the addendum for specific requirements before running the "Topic Service Level for Operating Hours" reports.

Setup Instructions:

1. If necessary, setup and configure your SSRS server. For more information, refer to [Microsoft's SSRS documentation](#).
2. Extract contents of the iService Reports zip file to a computer with SSRS installed (the zip is obtained from the iService Software Download page).
3. Configure the parameters in the `deployreports.bat` for your deployment environment.
4. Run `deployreports.bat`

Configuration Parameters:

The following configuration parameters can be set in the deployreports.bat script file.

TargetURL: The location of the Web Services for your SSRS server. For more information on configuring SSRS Web Service locations, please refer to the [Microsoft documentation](#).

Example 1 (Script run on report server): http://localhost/ReportServer

Example 2 (Script run on external server): https://www.mydomain.com/ReportServer

TargetFolder : The folder on the report server where the script will create the child folder (ReportFolderName). Generally this will be the root folder on the report server.

Example: /

ReportFolderName: The folder name on the report server where reports will be published to, and the name of the folder on the local computer where the reports that will be published currently reside. By default, this is 'iServiceCRM'. If this is changed, you will also need to change the local folder name for the script to find it. If this folder doesn't exist on the server, it will be created by this script. The full path of the published report will be TargetFolder + ReportFolderName + Report

Example: iServiceCRM

DataSourceFolder: The data source folder on the report server.

Example: /Data Sources

DataSourceFolderName: The folder name on the report server where data sources are published.

Example: Data Sources

UserName: The username to authenticate to the report server to publish reports. This username should have appropriate access rights to the TargetFolder.

Password: Password to authenticate to the report server.

ReportFolder: The name of the folder on the local computer where the ReportFolderName resides. Generally this is the same location as the script and won't need to be modified.

Example (for current script folder - extra backslash necessary for escaping): .\\

----- The following parameters define the data source that is generated for the reports -----

DataSourceName: The name of the data source connection for all reports. This will be created in the DataSourceFolder folder on the report server.

ServerName: The name of the SQL server instance that the reports will run against.

DataBaseName: The name of the database on the SQL server that the reports will run against.

dsUserName: The user to authenticate as on the SQL server when running reports.

dsUserPassword: The password to authenticate with.

Addendum

OPERATING HOURS FUNCTION

While most reports will run against a SQL Server 2005 database, two reports require a specific function that requires SQL Server 2008 or later. *These reports will not work with SQL Server 2005 and earlier*.

These reports are:

- Topic Service Level for Operating Hours by Messages
- Topic Service Level for Operating Hours by Percentage

3 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.

3.1 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

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	sme-csr	sme-csr	CSR	SMS
401	sme-mgr1	sme-mgr1	CSR Manager	e-shop, Financial Services, Human Resources, IT Compliance, Power Company, Sales, SMS, Travel, Z-Aksharasoft Solutions, Z-Feedback
402	sme-mgr2	sme-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

3.2 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 contact values for the feedback properties specified in the Setup Required section below. 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.

Setup Required

These reports required that you have a feedback form that uses specific interaction properties. The interaction properties must be named exactly as shown below. You can modify your feedback forms as desired, but will need to revise the standard reports to reflect the new interaction properties you are capturing.

The setup required for Feedback is described within the blog article "[Feedback Makes It Easy To Listen To Your Customers](#)".

Parameter Selection

As shown in the image below, you must 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.

SQL Server Reporting Services
[Home](#) > [Demonstration Reports](#) > [z_Beta](#) >
Feedback - Executive Summary

Select the segment that contains the feedback interactions to evaluate.

Home | [My Subscriptions](#) | [Site Settings](#) | [Help](#)

Search for:

View | **Properties** | **History** | **Subscriptions**

New Subscription

Choose Segment: Start report from how far back?:

Start date for report: End date for report:

Click to expand

Report Example

iService

Feedback - Executive Summary
 Segment: e-shop
 Date Range: 7/20/2011 through 7/19/2012

Total feedback provided during this period: [10](#) (Click total to view a detailed list of feedback responses)

Feedback Categories

- [Speed of the Response](#) A
- [Quality of the Response](#) A+
- [Skills of the Agent](#) A
- [Friendliness of the Agent](#) A+

These are links to a drill through report that shows the make up of responses for each category.

Click a Feedback Category to view more details

Feedback - Answer Speed	4.50
Feedback - Answer Quality	4.80
Feedback - Agent Skills	4.50
Feedback - Agent Friendliness	4.70

Report generated on 07-20-2012 at 9:53:26 AM

iService Version 5.12

Page 1 of 1

Click to expand image

See Also:

[Feedback - Category Analysis](#)

[Feedback - Agent Summary](#)

[Feedback - Details](#)

3.2.1 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](#) 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



3.2.2 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](#) report for that agent to review additional responses.

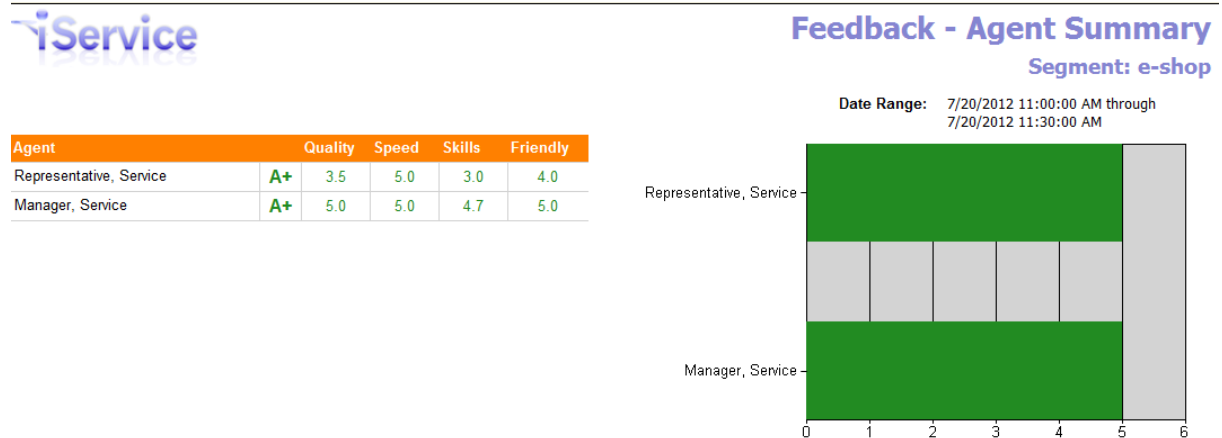
Setup Required

See the [Feedback Summary](#) for setup requirements.

Parameter Selection

Select the agents and the time frame for the report.

Report Example



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 11:20:15 AM

iService Version 5.12

Page 1 of 1

[Click to expand](#)

3.2.3 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](#) 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](#)

3.3 Forwarding Analysis

The Forwarding Analysis report provides insight into how often your agents forward interactions. This is an indication that a) your 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](#) (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 \(summary\)](#)

[By Topic](#)

[By Interaction](#)

3.3.1 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



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](#)

3.3.2 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 be 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

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.

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
	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
Representative, Service		18	9	8	0	1

Clicking one of the numbers within the topic analysis will load a drill through report showing the interactions that comprise this total.

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.

Click to expand

3.3.3 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 be 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-shop Topic: 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 lists 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

3.4 Interactions - by Status or by Type

The Agent Interactions reports 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](#) or [Topic Summary reports](#).

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

SQL Server Reporting Services [Home](#) | [My Subscriptions](#) | [Site Settings](#) | [Help](#)
[Home](#) > [Demonstration Reports](#) > [Agent Activity Reports](#)

Search for:

Agent Interactions by Status


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



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](#) | [My Subscriptions](#) | [Site Settings](#) | [Help](#)
 Home > [Demonstration Reports](#) > z_Beta >
Agent Interactions by Type Search for: Go

View Properties History Subscriptions

New Subscription ^

Choose Segment: e-shop Start report from how far back?: 1 month ago View Report

Start date for report: 6/13/2012 End date for report: 7/12/2012

1 of 1 100% Find | Next Select a format Export

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](#)

3.5 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](#) or [Topic Summary reports](#).

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](#)

3.6 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:				2	1	1	0	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:				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](#)

3.7 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

New Subscription Number of interactions to display per agent.

Select Agents: Account, Demo, Administrator, e Select Sample Size: 5 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

1 of 1 100% Find | Next Select a format Export

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 url 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

3.8 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:

1 of 1 Find | Next



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, Call 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	2554:02:00
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.

The Response Time Report Grouped by Agent

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 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	

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 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	

Total Interactions Resolved: 19
Viewing individual messages

Click a subject line to see the message in a new window in iService.

Chat Status: **Unavailable** [Go Available](#) Chats Waiting: 0 [Take](#) [Logout](#) Hello, Service E. Manager!

My Queue | Manage Msgs | Manage Chats | Search

SEARCH WHERE: IN FIELD: SEARCH FOR: [Add Field](#)

LIMIT BY DATE:
On Or After:
On Or Before:

[SEARCH](#)

Subject	Contact Name	Contact Email	Date	Operator
[ref#: 42404-42404] video cameras gift for wife	Joe Nuval	sr820woods@gmail.com	2016-12-12 8:23:01 PM	unassigned

[Agent Email](#) [Note](#) [Ticket](#) [Forward Copy](#) [More](#)

I would like to find a video camera that takes HD video or a sturdy SLR – can you send me some info?

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

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](#)

[Interaction status audit](#) [Interaction Thread](#)

© 2008-2017 One-to-One Service.com. All rights reserved.
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: 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 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

Total Interactions Resolved: 19

Legend:

Click a topic to see the breakdown by agent

- 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#: 42337-42371] ship to canada?	1	0:00:00	3591:59:34	0:19:31	3592:19:05
		Nuval, Joe	Re: [ref#: 42337-42371] 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

3.9 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	

Navigation: 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

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.

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:

View | Properties | History | Subscriptions

New Subscription

Choose Segment: e-shop | Select Contact Type: Vendor |

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@itoiservice.com
John	Smith	Purchasing Manager	Acme Corporation	123 Main		champaign	IL	61825		217-555-1212		customer1@itoiservice.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

Home | [My Subscriptions](#) | [Site Settings](#) | [Help](#)
 Search for:

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@itoiservice.com

Report generated on 07-13-2012 at 9:36:51 PM iService Version 5.12 Page 2 of 2

Click to expand

5 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.

5.1 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: Select the customer type:

Start report from how far back?: Starting Date:

Ending Date:

3 of 3 100% Find | Next Select a format Export

Agent-Customer Activity Report

Company: ACME Enterprises
Customer: Williams, John
Phone: 217-555-1212

NOTE: The report is only effective if contacts have their customer type properly set.

Agent: Manager, Service
Type: Prospect
Period: 7/22/2011 - 7/22/2012

Date	Type	Primary Content	Private Comments
8/10/2011 11:40:55 AM	Agent Response	<p>Dear John,</p> <p>Thanks for contacting e-shop.</p> <p>To return an item to a store:</p> <ol style="list-style-type: none"> 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. <p>If you have any additional questions, feel free to contact us.</p> <p>Regards,</p> <p>e-Shop Customer Support http://shop.iservicecrm.com/dotnetnuke/CustomerService.aspx</p> <p>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</p>	
3/12/2012 10:07:04 AM	Agent Response	<p>Dear John,</p> <p>Thanks for contacting e-shop.</p> <p>I have reset your password.</p> <p>If you have any additional questions, feel free to contact us.</p> <p>Regards,</p> <p>e-Shop Customer Support http://shop.iservicecrm.com/dotnetnuke/CustomerService.aspx</p>	

Click to expand

5.2 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
 Start report from how far back?: 3 months ago
 Start date for report: 4/23/2012
 End date for report: 7/22/2012
 View Report

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	Response 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

5.3 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? Start date for report
 End Date

7 of 10 100% Find | Next Select a format Export



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](#)

5.4 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: 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 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](#)

5.5 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 > [Demonstration Reports](#) > [Contact Information and Interaction Details](#) >
Customer Interactions by Interaction Properties

Search for:

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

5.6 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:

View | [Properties](#) | [History](#) | [Subscriptions](#)

New Subscription

Choose Segment:

Start report from how far back?:

End date for report:

Body Width Max if Limited:

Choose Topics:

Start date for report:

Display Full Body Text:

1 of 1 | 100% | Find | Next | Select a format | Export

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](#)

6 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](#) 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.

6.1 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](#)

6.2 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**

1 of 1 100% Find | Next Select a format Export

iService 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](#)

6.3 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](#) 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

Start report from how far back?: 1 year ago

StartDate: 7/23/2011

EndDate: 7/22/2012

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](#)

6.4 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

SQL Server Reporting Services
Home > zTemp512Staging >
Mailbox Summary

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?: 1 year ago View Report

Start date for report: 7/23/2011 Ending date for report: 7/22/2012

1 of 1 100% Find | Next Select a format Export

Mailbox Summary Report
Segment: e-shop

Date Range: 7/23/2011 through 7/22/2012

Mailbox	Message Count
Customer Service (c...@iService.com)	149

Report generated on 07-23-2012 at 10:07:00 AM iService Version 5.12 Page 1 of 1

Click to expand

6.5 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](#)

6.6 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: e-shop Topics: All Topics, Account Questions, O
 Start report from how far back?: 3 months ago Start date for report: 4/16/2012
 End date for report: 7/15/2012

1 of 1 100% Find | Next Select a format Export



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.

[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: e-shop Topics: All Topics, Account Questions, O
 Start report from how far back?: 3 months ago Start date for report: 4/16/2012
 End date for report: 7/15/2012

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](#)

6.7 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: 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% 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% 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 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.

Click to expand

6.8 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

6.9 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

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.

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

6.10 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.

1 of 1 Find | Next



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.

<https://reports.iservicecrm.com/Reports/Pages/>

iService Version 7.6

Page 1 of 1

Chat Time of Day Report

Click a number in the Number of Chats column to load the details for that time period.

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

Page 1 of 1

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.

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

7 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](#).

7.1 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

7.2 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](#).

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

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/service_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

7.2.1 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](#) and the [Mass Mailing Summary report](#).

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

Start report from how far back?	Other	Start Date for Mailing Range	7/1/2009	View Report
End Date for Mailing Range	7/22/2012	Please Select a Mailing	May 6 2010 8:15AM -- Newsletter	
Type	User Defined Clickthrough Links			

1 of 1 100% Find | Next Select a format Export



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/1service_documentation.asp
joenuval@1to1service.com	Nuval, Joe	One-to-One Service.com	217-555-1234	Manual	http://www.1to1service.com/1service_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](#)

7.3 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

Start report from how far back? Other Start date for report 5/1/2010 View Report

End date for report 7/22/2010

1 of 1 100% Find | Next Select a format Export

iService **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

7.4 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? Start Date for Mailing Range
End Date for Mailing Range Please Select a Mailing
Type

1 of 1 100% Find | Next Select a format Export



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

8 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:

<u>Property Name (Must be exact)</u>	<u>Property Type</u>
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](#) - this report displays a summary of sales opportunities grouped by product.

[Sales Pipeline by Sales Person](#) - this report displays a summary of sales opportunities grouped by sales person.

[Sales Pipeline by Stage](#) - this report displays a summary of sales opportunities grouped by stage within the sales pipeline.

[Sales Pipeline by Target Close](#) - this report displays a summary of sales opportunities grouped by target close date.

8.1 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](#) for setup details.

Parameter Selection

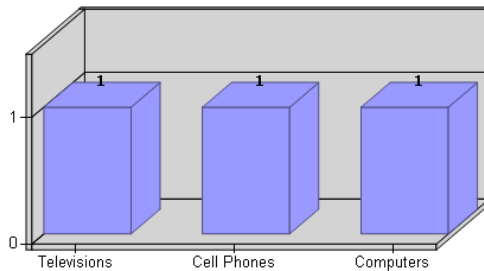
Select the segment that contains the contacts with sales opportunities.

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

Page 1 of 1

[Click to expand](#)

8.2 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](#) for setup details.

Parameter Selection

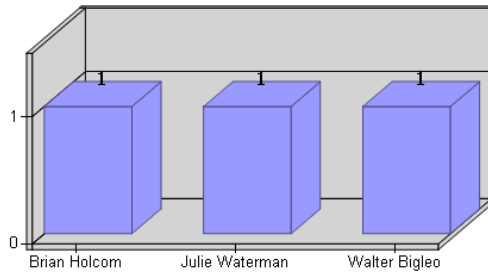
Select the segment that contains the contacts with sales opportunities.

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

iService Version 5.12

Page 1 of 1

click to expand

8.3 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.

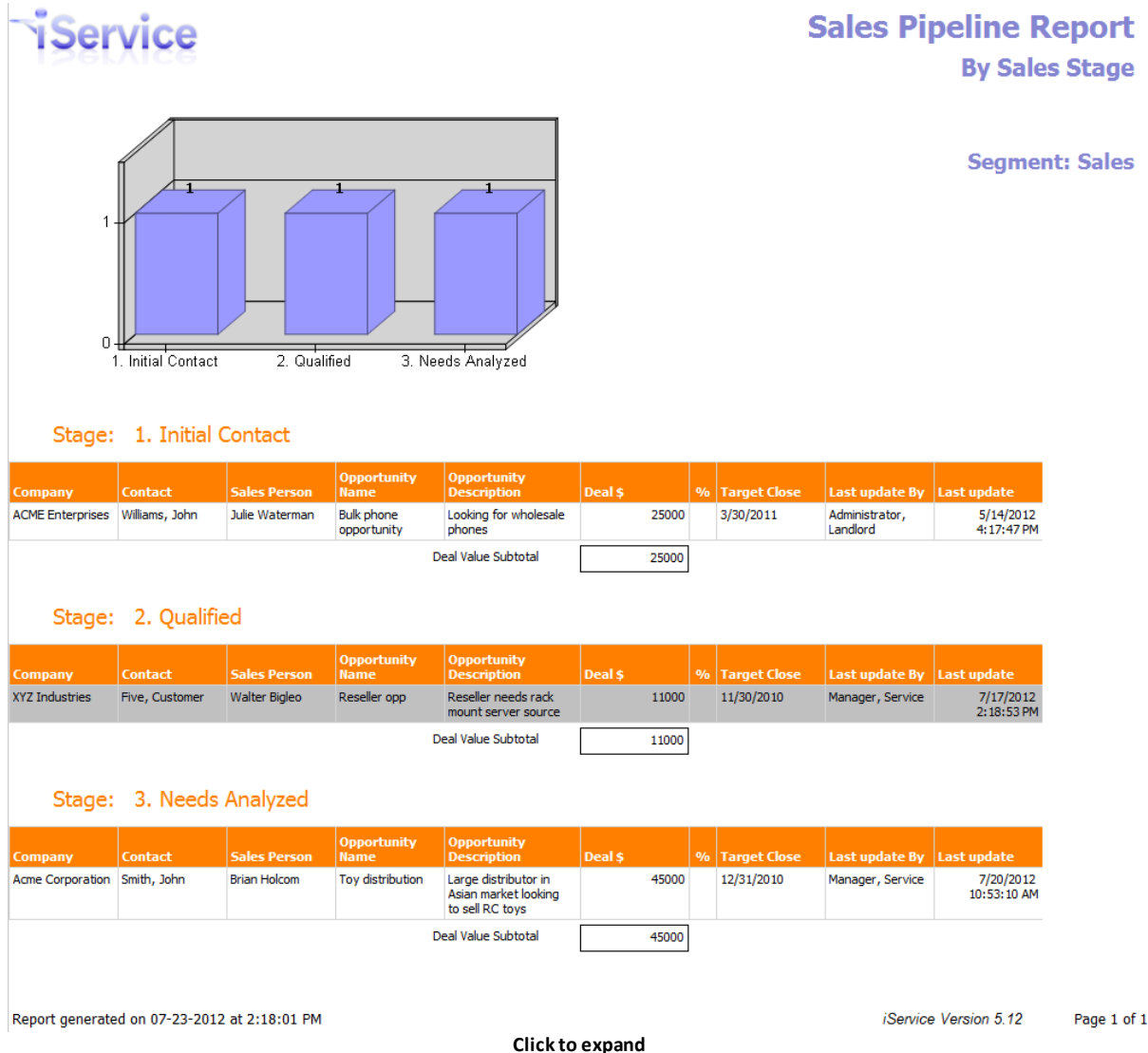
Setup Required

See the [sales pipeline overview](#) for setup details.

Parameter Selection

Select the segment that contains the contacts with sales opportunities.

Report Example



8.4 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](#) 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](#)

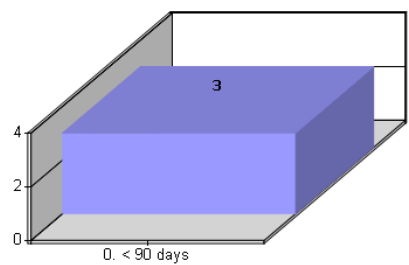
1 of 1
100%
Find | Next
Select a format
Export



Sales Pipeline Report

By Target Close Date

Segment: Sales



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
iService Version 5.12
Page 1 of 1

[Click to expand](#)

Index

- A -

access reports 5
Acrobat (PDF) File 6
actual interaction details 36

- C -

contact information within your iService system
34
CSV (Comma Separated Value) 6

- D -

default view of reports 5
detailed listings of questions and answers 36

- E -

Excel 6
export 6
export a report 6

- L -

list of reports 5
login 5

- N -

non-operating hours 53
number of messages each agent handles 13

- R -

reporting website 5

- T -

TIFF File 6
time stamps 5

- U -

user name and password 5

- W -

Web Archive 6

- X -

XML File 6

To view this documentation in other formats and access additional support resources, visit the iService support and documentation website.

<http://www.iService.info>

To learn more about One-to-One Service.com, visit our corporate website.

<http://www.1to1Service.com>



One-to-One Service.com, its logo, iService, and iCentives are registered trademarks of One-to-One Service.com.