iService Setup Guide

A guide for users of the iService Customer Interaction Solution.

iService Setup 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.

PO Box 2231 • Champaign, IL 61825
Phone 217.398.MAIL (6245) • Fax (815) 366-8167

Table of Contents

1 Welcome

This Setup Guide is intended for iService users responsible for configuring their companies iService tenant. 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. To view it on your iPad, you much transfer the ePub file to your iTunes account. You can right click the link above and save it to your machine or click here to download a .zip version of the file.

2 Version History

The version of your iService system is displayed at the bottom of the iService User Interface as shown below.

© 2008-2017 One-to-One Service.com. All rights reserved.
Powered by iService Version: 7.6.089 - 2017.05.22 - 09:43:12

The version numbering is comprised of four sections.
1) The major release number (7)
2) The minor release number (6)
3) The build number (089)
4) The build date and time (2017.05.22 - 09:43:12).

Version 7.8

New Features

Release 7.8 continues the theme of minor changes to the user interface, but major changes to the backend related to performance, security, and interaction properties.

Case Properties

Prior to v7.8, interaction properties were available for questions, answers, and find answers articles. A new type of property, Case Property, was added to store a single value associated with an entire case. If you have question properties used to track a value associated with the overall discussion, like “Nature of Inquiry,” you’ll probably want to convert them to Case properties. This is because question and answer properties are associated with a specific interaction within a case (i.e., message thread), rather than the entire discussion.

You can see this depicted in the example below. The case begins with a customer email, followed by an autoresponse and agent response. The customer then sends a follow up reply, and the thread continues. Within that case you might have two values saved if you were using a question property to track the nature of the question. You now have the option to use a Case Property that only has a single value stored for the entire conversation.

	Case Property
Customer Email	Question Property
Autoresponse	
Agent Response	Answer Property
Customer Email	Question Property
Autoresponse	
Agent Response	Answer Property

New Interaction Property Value Types

We've added two new database field types for storing interaction property values: Integer and Number. As the name implies, use a property value type of Integer when you require the user to enter a whole number (-1, 0, 1, 2, 3 etc.). This would be used when storing a value for a property like "Quantity." When you need to save a number that can include decimal values, like currency, use the new "Number" property value type.

Both Integer and Number support mathematical operations. If you were previously using a value type of "Text" for numbers, you should consider one of these new formats.

Integrating iService With Other Apps

We've continued to expand on the Zapier integration, adding support for interaction property values within Zapier triggers and improving error handling.

Customer Portal

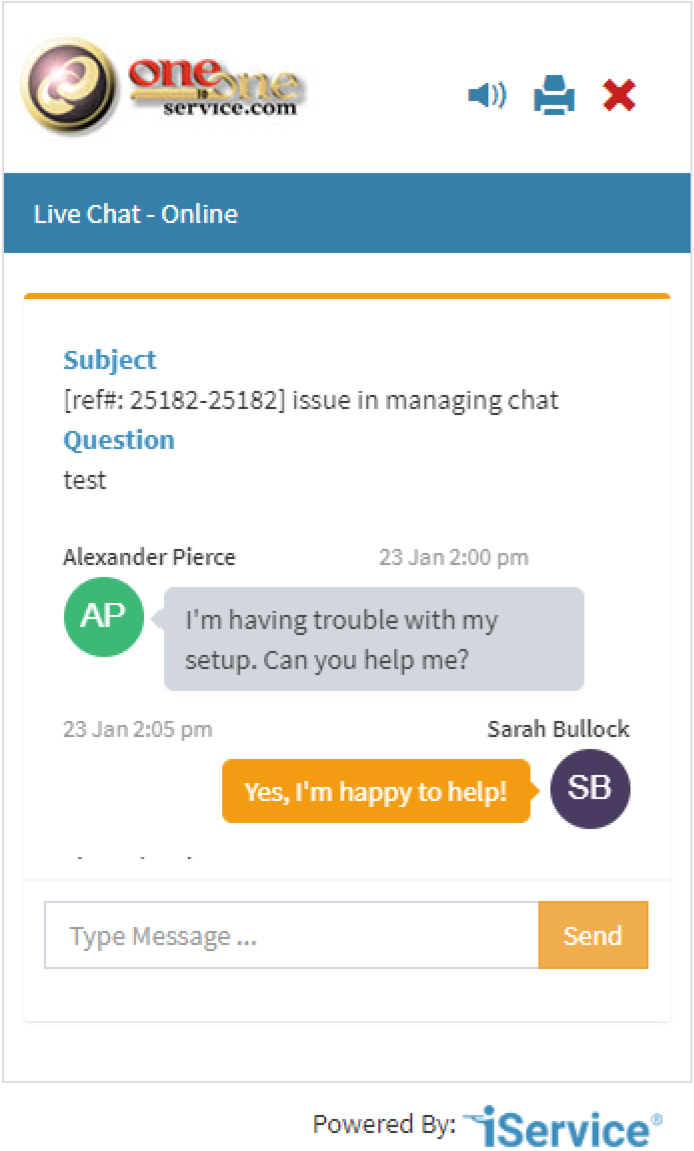
Did you know that you have a customer portal built into your iService tenant that allows customers to submit questions, view answers, and search your knowledgebase? Just append /f/customerportal-treeview to your iService URL to see yours. This is a built-in example that can be customized or used out of the box. The portal is designed so it can be easily branded to fit your website. Check out the example on our website at https://1to1.iservicecrm.com/f/customerportal-treeview.

Some changes to the portal in this release are:

- Added pagination to the My Inbox list of the user's history
- Revised the topic tree layout to make it more intuitive
- Fixed an issue with displaying the article list after login
- Revised the form to support including custom top level menus and incorporating chat

New Customer Chat Form

We've added another customer chat interface that's responsive for mobile devices. You can use the form without changes, or as a template for your own custom chat form.
Append /f/chat2 to your tenant URL to load the form.



Click to enlarge

Support for reCaptcha in iService Form

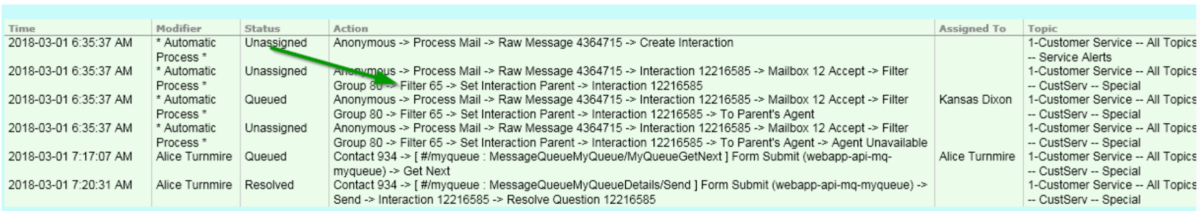
We've added support for the Google reCaptcha service to prevent automated form submissions. We support reCaptcha v2, which you can learn about at https://www.iservice.info/guides/forms/index.html?adding-recaptcha.htm.

Small Features and Bug Fixes

User Interface Changes

Added filter name to the Interaction Status Audit - to make it easier to understand which filter was used. We previously only provided the Filter ID.

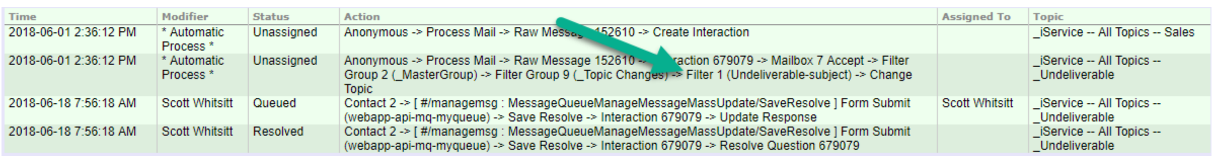
7.7



Time	Modifier	Status	Action	Assigned To	Topic
2018-03-01 6:35:37 AM	* Automatic Process *	Unassigned	Anonymous -> Process Mail -> Raw Message 4364715 -> Create Interaction		1-Customer Service -- All Topics -- Service Alerts
2018-03-01 6:35:37 AM	* Automatic Process *	Unassigned	Anonymous -> Process Mail -> Raw Message 4364715 -> Interaction 12216585 -> Mailbox 12 Accept -> Filter Group 80 -> Filter 65 -> Set Interaction Parent -> Interaction 12216585		1-Customer Service -- All Topics -- CustServ -- Special
2018-03-01 6:35:37 AM	* Automatic Process *	Queued	Anonymous -> Process Mail -> Raw Message 4364715 -> Interaction 12216585 -> Mailbox 12 Accept -> Filter Group 80 -> Filter 65 -> Set Interaction Parent -> Interaction 12216585 -> To Parent's Agent	Kansas Dixon	1-Customer Service -- All Topics -- CustServ -- Special
2018-03-01 6:35:37 AM	* Automatic Process *	Unassigned	Anonymous -> Process Mail -> Raw Message 4364715 -> Interaction 12216585 -> Mailbox 12 Accept -> Filter Group 80 -> Filter 65 -> Set Interaction Parent -> Interaction 12216585 -> To Parent's Agent -> Agent Unavailable		1-Customer Service -- All Topics -- CustServ -- Special
2018-03-01 7:17:07 AM	Alice Turnmire	Queued	Contact 934 -> [#/myqueue : MessageQueueMyQueue/MyQueueGetNext] Form Submit (webapp-api-mq-myqueue) -> Get Next	Alice Turnmire	1-Customer Service -- All Topics -- CustServ -- Special
2018-03-01 7:20:31 AM	Alice Turnmire	Resolved	Contact 934 -> [#/myqueue : MessageQueueMyQueueDetails/Send] Form Submit (webapp-api-mq-myqueue) -> Send -> Interaction 12216585 -> Resolve Question 12216585		1-Customer Service -- All Topics -- CustServ -- Special

Click to enlarge

7.8

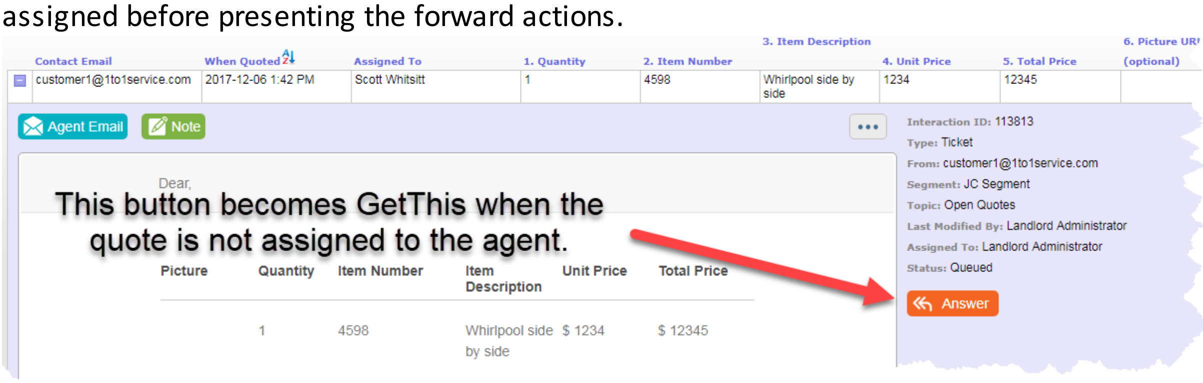


Time	Modifier	Status	Action	Assigned To	Topic
2018-06-01 2:36:12 PM	* Automatic Process *	Unassigned	Anonymous -> Process Mail -> Raw Message 152610 -> Create Interaction		_iService -- All Topics -- Sales
2018-06-01 2:36:12 PM	* Automatic Process *	Unassigned	Anonymous -> Process Mail -> Raw Message 152610 -> Interaction 679079 -> Mailbox 7 Accept -> Filter Group 2 (_MasterGroup) -> Filter Group 9 (_Topic Changes) -> Filter 1 (Undeliverable-subject) -> Change Topic		_iService -- All Topics -- _Undeliverable
2018-06-18 7:56:18 AM	Scott Whitsitt	Queued	Contact 2 -> [#/managemsg : MessageQueueManageMessageMassUpdate/SaveResolve] Form Submit (webapp-api-mq-myqueue) -> Save Resolve -> Interaction 679079 -> Update Response	Scott Whitsitt	_iService -- All Topics -- _Undeliverable
2018-06-18 7:56:18 AM	Scott Whitsitt	Resolved	Contact 2 -> [#/managemsg : MessageQueueManageMessageMassUpdate/SaveResolve] Form Submit (webapp-api-mq-myqueue) -> Save Resolve -> Interaction 679079 -> Resolve Question 679079		_iService -- All Topics -- _Undeliverable

Click to enlarge

Remove GUIDS from displays - For tenants using Google login, we displayed the Google GUID as an email address in various forms. This fix ensures the GUID, which is just a string of values, and other non-email address logins are not shown in email listings or menus when composing email responses.

Remove Answer button when quote is reassigned - After reassigning an open quote, the answer button continued to be displayed. This triggered an error when the agent attempted to modify the quote. Instead, the button now changes to a Get This button so it is properly assigned before presenting the forward actions.



Click to enlarge

Certain characters parsed incorrectly - We had an issue with the characters =C2=A0 within email messages being converted to Ã, in quoted-printable text. We also fixed an issue with emails from Yahoo inserting a stray character.

"Resolved by" list of agents should be in alphabetical order – This drop down list was sorting on ID, instead of alphabetical.

"Interaction is already resolved" when resolving an interaction in my queue – A timing issue was causing this error to display in some installations. The issue was caused by the auto save function running after the agent resolved the interaction.

Technical Changes

During tenant creation, put Blob tables inside a separate filegroup – Prior to 7.8, during tenant creation we created all tables inside a single filegroup. We modified the tenant creation script to create the FilesRawMessages, FilesText, and Files tables in a separate logical filegroup. This allows for database administrators to have the option to decide where to store these large files, separate from the primary database mdf if they choose.

Change InteractionsPropertyDefinitions table for property types - Schema level change:The following binary type columns: [isQuestionNotAnswer] and [isFindAnswer] were removed and rolled up into a single column named [purpose] to define property type attributes. This column is an nvarchar(32), with the following possible values as of 7.8: FindAnswer, Answer, Question, Case.

Serve ckeditor.js locally rather than use CDN – The files required for the CKEditor rich text editor are now located within the iService website, and no longer loaded from a CDN.

X-Frame-Options Header - The header within iService Forms is now set by default to DENY, which will make all forms unable to be displayed inside frames on other pages. Without the $header variable, iService forms cannot be embedded into any website as an iFrame.

$header$ has been extended to allow frames on a case by case basis.
To prevent embedding, omit the $header variables below from the iService form and by default iService forms can't be embedded.
To allow embedding from another form on the same domain, use $header -allowframesame$
To allow embedding into any website (disable security) use $header -allowframeall$

NOTE: Because Chrome does not support this approach, we've not included an option for allow-from, which specifies the domain in which the form can be embedded.

Add Non-clustered index on SmtpOut for mailpopper outbound thread - This was identified as a critically missing index which would be heavily used by iService mailpopper if it existed.

Put index with unique constraint on name column in contactslogins – This index was lost on some tenants after 7.6 updates. It's added back as part of the 7.8 update if missing.

Security Updates – Certain aspects of the iService application were updated to eliminate vulnerabilities and improve security.

Issue with images in Interaction Print form – We fixed some issues related to displaying images in the Print form that displays interactions in printer friendly format.

Issue with zero byte message attachments – To reduce database size, some users with very large databases run a process to delete file attachment content after a certain amount of time has passed. In most cases these messages are already resolved, but if not an error was thrown when users tried to resolve them.

Reports

Customer Interactions by Interaction Properties report – Removed the page/tab separators generated for grouping properties.

Pipkins Vantage Point 8.08.06 integration – iService can now generate a statistics file with email metrics for importing into Pipkins.

Agent service level report – This new report calculates agent response times to help analyze how quickly each agent is responding to customer inquiries.

Version 7.7

New Features

Most of the changes in release 7.7 are to the back end with minor changes to the user interface. Here a quick recap of what's in 7.7.

Dynamic Form Display

Not all customer questions are equal. Some are simple questions that need a simple answer, but others are the beginning of a complex workflow that can benefit from a special user interface. Release 7.7 includes changes that make it easy to present your agents customized views based on the type of question they're presented. Each section of iService that presents a view of interactions (history, search, my queue, etc.) can now automatically present a custom form based on attributes of the interaction. Part of these changes include a new interaction tagging process that puts a label on interactions used for triggering custom interfaces.

The first built in example of dynamic form display is the new Quote and Follow up process described below.

Quote and Follow Up Forms

Sending and following up on quotes can be a high-volume and high-value process. The concept is simple - when a question arrives that's a quote request, the agent is presented a custom interface that streamlines the quoting process. When the quote is sent, the form generates a ticket for tracking and following up on the quote. We've included a configuration form that makes it easy to customize these two forms.

This is just one example of presenting your agents the right interface at the right time. You can extend this example to any scenario where you need to present the agent a customized form when viewing an interaction. Read more about the quote and follow up process in our Quote Process Blog post.

Integrating iService With Other Apps

You can now integrate iService with over 1000 applications using our new Zapier triggers and actions. With our Zapier integration, you can connect your iService data to all the other tools your team uses like Salesforce, Marketo, Facebook, Google Sheets, Slack, and other apps without writing a single line of code. Zaps are set up in minutes, and you can use the to do things like add leads to Salesforce, create contacts in iService when a Salesforce contact is created, and add new iService contacts to Marketo campaigns.

Customer Portal

Did you know that you have a customer portal built into your iService tenant that allows customers to submit questions, view answers, and search your knowledgebase? Just append /f/customerportal-treeview to your iService URL to see yours. This is a built in example that can be customized or used out of the box. The portal is designed so it can be easily branded to fit your website. Check out the example on our website at https://1to1.iservicecrm.com/f/customerportal-treeview.

Some changes to the portal in this release are:

- Fixed an issue with the KB article count on topics
- Fixed layout issues in the My Details tab (these pages are only available after you log into iService)
- Simplified the view of history that customer see in the portal. There was no need for them to see various details originally designed for agents.
- Added an article count to the list of KB articles

Small Features and Bug Fixes

- Updated to the latest version of Angular 1.5 to ensure we have all security patches.

- The display of mailbox names was a bit too narrow in some views, so we expanded the Select input field so you can read more of the mailbox name.
- The Customer Info page required the Message Queue access right. We changed it so it requires the Cust Info access right.
- We found an issue with certain types of malware email crashing the email processor. We added fixes for the format in those emails, and changed the order of processing to process the newest messages first. If a message crashes the processor in the future this will ensure all new email is still processed.
- We fixed a bug where replies to agent notifications were not accepted if the agent was the same person as the customer (responding to an agent notify when they submitted the original question as a customer).

Version 7.6

New Features

Customer Info

- The **old .Net customer info section has been replaced** with new pages built using Angular JS and iService Forms variables and actions. We've introduced a new design theme that uses more icons, reduces the number of tabs, and is responsive.
- We created **new contact search form variables** for the search page, and they can be used in other forms where you need to generate lists of contacts.
- The **search results can be customized** to display any contact property.
- The Contact Summary page is based on a new built-in form and can be customized for your needs. It now displays details about the **last interaction with the customer and a summary of all unanswered questions**.

Message Queue

- The Manage Chats page has been replaced with **two new tabs: Active Chats and Logged in Agents**. They provide a real-time view of chat agent status and chat queues. Managers can now end an abusive chat from the Active Chats page.
- The built-in customer **chat form is now responsive** for mobile users.
- You can now **search interactions using attachment names or the ID of a contact** (in addition to a contact's login).

- We **simplified the stock response picker** by removing the option to insert a variable. Just click the name of the response to add it to your message.

- The layout of the My Queue page was updated with additional empty DIVs to make it **easier to customize**.

- Select menus that often have long lists (forward to agent, forward to segment, pick FROM mailbox, etc.) were updated with a **new search and auto complete function**.

- The Manage Message page and search results now include a button to **show the full thread for any message**.

- Required interaction properties are **only enforced when you resolve a message**. Previously you were required to enter a value when changing the topic, forwarding to an agent, etc.

Other Features

- **We now support OpenID**, so your users can connect a Google or Microsoft account to their iService login. Both Google and Microsoft follow best practices for authenticating users and keeping their login safe, and using a single sign on approach improves security.

- A **new Response Time report** replaces multiple reports and shows a break down of the life of a message (time to first assignment, time to final assignment, time from assignment to resolution, total time to resolve). You can either group by Agent or by Topic.

- The **Customer Interaction by Type report** now includes the option to select specific contact types to return results for.

Bug Fixes

- The **indentation of quoted text got ridiculously large** in the rich text editor when there were many back and forth messages. That's fixed now.

- **Some malformed messages failed processing** and did not get into the iService database. We added a new process that retries them, and it appears to have fixed that issue.

- Questions forwarded to another segment were using the original segment's mailbox on replies. This was changed to **ensure the reply uses a mailbox from the new segment**.

- There was some funny behavior with IE that made it impossible to edit the subject or body in certain scenarios. That's fixed now.
- We **removed the logout function from the remaining .NET pages** to fix a logout out issue with new forms. Most users will not miss the .NET logout button because it's in the Find Answers and Admin Tools pages. Users need to logout from Customer Info, Message Queue, or the home page.
- **Agents now load A-Z** instead of Z-A in the Agent Admin page.
- You used to get a **crash when deleting an interaction property** tied to a topic or service level. It's fixed now.
- You used to get a **crash when deleting a contact property** used in a service level. Fixed it.
- **Deleting a skill used on a topic caused a crash**. It works now.
- **Agent Interactions by Type report** will now show results for former agents, even if they are not currently an agent in iService.
- **Time of Day by Date Range report** sometimes returned incorrect results if selecting by hourly increments.
- **Topic Summary by Type report** now sorts alphabetically.

Version 7.5

Features

Category	Description	Details
Admin Tools - Forms	Display details for the last person that updated a form	To improve tracking of form versions, when a form is saved a date/time stamp is written to the database Forms table, along with the contact who saved it. This timestamp/contact is displayed in the forms list next to each form.
Chat - Agent Interface	Add 'Topic' as 2nd line to chat dialog	Added the topic of the chat in the chat dialog as a 2nd line after the customer name.

Chat - Client Interface	New chat customization options	We updated the /f/chat form to use the current versions of common JS and other aspects to bring it up to spec with the rest of iService.
		
		To get topicID to work in url, form the url like the following:
		
		http://localhost:2424/f/84#?topicID=14
		
		It's critical to have the # in there.
		
		For customization of the images and topic list, make a new form and paste the text below. The values for logoURL and faceURL are the defaults and can be replaced with new URLs or base64 encoded images. The values for topic ID and topic name are just examples, and should be replaced with correct values.
		
		$include -formID'webapp-userchat'$
		$if -fieldregex'form'='^js$'$$header -filetype(js)$
		
		var logoURL = '$value -rootpath$images/clientLogo.jpg';
		var faceURL = '$value -rootpath$images/agent.png';
		var topics = [
		  { 'id': '4', 'name': 'Cars' },
		  { 'id': '16', 'name': 'JLRNA' },
		  { 'id': '14', 'name': 'Spaceships' }];
		
		$endif$
		
		See the Chat User Guide for more details on chat configuration.

Interaction History	Create Get This button to directly assign messages to yourself	Create a Get This action that will directly assign a message. This will be in the right panel of interaction history and Manage Messages. Clicking the GetThis button changes the operator to the person that clicks the button and opens the answer panel. Access will be limited to users that have access rights to reassign messages and the ability to pick and choose messages, such as in the Manage Messages page.
Interaction History	New layout for Take Actions panel	Update the Take Actions layout within interaction history with new CSS and buttons. This same layout will carry over to forms that use the history partials panel, such as search results and Manage Messages.
Interaction History	New "Answer" button within Interaction History	The updated history panel now includes an Answer button that opens the standard response panel. This button is displayed when the message viewed is assigned to the agent.

	and Manage Messages	
Interaction History	Make secure response/emails the same color as other answers in history	The secure response is currently grayed out. Make it the same as other answers.
Msg Queue - Manage Msgs	Remove Ref# from subject line in Manage Messages	The ref# takes up too much space in the manage messages page. Removed it from the list display, because the interaction ID is still shown as part of the message properties.
Msg Queue - Manage Msgs	Add routing to /messagequeue form so it can support all 4 message queue tabs.	All the MQ pages will be part of a single form that includes its subtabs using placeholders. We expect performance increases by reducing the number of page loads. This is a pre-requisite for the Manage Messages rewrite. The URL allows deep linking to the inside page sections for the following: • Search - /messagequeue#/search • Manage Messages - /messagequeue#/managemsg • My Queue - /messagequeue#/myqueue • Manage Chats - /messagequeue#/managechat
Msg Queue - Manage Msgs	Optimize the Manage Messages interaction search	Optimized the query used to select the manage messages list. Increased the limit of displayed results to 2500.
Msg Queue - Manage Msgs	MQ - Manage Msgs	Rewrite the Manage Msgs tab as a form with the following enhancements: - Update the count of messages in each topic in real-time using WebSync - Update the message list for selected topic in real-time using WebSync - Include the updated actions panel similar to MyQueue, including the CKEditor Rich Text Editor - Incorporate the Take Actions panel into each message so agents can take single actions without using the Mass Update panel. - Add the Interaction Status Audi to each message as a toggle The Manage Messages page will NOT do an auto save on the draft because of the potential for overwriting unsent drafts of assigned messages.
Msg Queue - Manage Msgs	Do not collapse menus in MQ - Manage Messages	In the old manage messages page, taking actions or clicking topics reloaded the page and did not retain the collapsed / expanded structure of nested topics. This change keeps the current open/closed structure until the user manually changes it.

Msg Queue - My Queue	Replace the send, forward, change topic, save, and spam buttons	Replaced the action buttons with the new images as part of a style migration.
Msg Queue - My Queue	Add GetNextQA into new MQ form	The QA process has been ported to the new message queue forms.
Msg Queue - My Queue	Allow CKEditor to include hyperlinks	Update the CKEditor configuration to allow hyperlilnks and include a hyperlink button as part of the editor controls.
Reports	Push out new GetInteractionBody function through Management Console	This function will look up the body of an interaction, regardless of type. Has dependency on the GetInteractionEmailBody function and Has dependency on new GetTypeID function (dragnet 6671).
Reports	Push out new GetTypeID function through Management Console	This function is similar to the statusID lookup. Mainly will be used to make other functions and reports cleaner and easier to read when relying on it.
Reports	Push out new GetTopicTree table valued function through Management Console	This table valued function takes a segment id and returns a list of topics formatted and sorted in a hierarchical tree view structure with topic names alphabetized, and deleted topics hidden from view.
Reports	Update ReportOptions table for 'Topic Service Level by Operating Hours for Messages' report changes	This allows tenants to have customizable column value defaults in this report.
Web Interface - General	Display actual status instead of Open	We previously combined Unassigned and Queued and display a status of Open instead of the actual status in the database. Changed this to display the actual status.
Web Interface - General	Update Angular version 1.5	We updated from AngularJS 1.2 to 1.5.

Bug Fixes

Category	Description	Details

Msg Queue - My Queue	Some interactions get into an invalid state	In some cases, interactions get into an invalid state which are not allowed by our business rules. Some examples are questions assigned to an agent that are resolved, as well as questions assigned to an agent while in status 'unassigned'. As a result, this causes them to appear in incorrect places such as in the new improved My Queue in 7.5. Note: this ticket is only for fixing the bugs causing the invalid interactions. To fix interactions created prior to 7.5, see 6687.
Admin Tools - Forms	Sort order is lost when new form is selected	Fixed a bug that caused the list of forms in the Form Admin page to lose its sorting order.
Admin Tools - Forms	Remove Diag-BuiltinForms	This page (https://1to1service.iservicecrm.com/f/diag-builtinforms) was removed since the built in forms are accessible from the Forms Admin page.
Chat - Client Interface	Dead chats have no operator	A chat is killed after 2 minutes when the client closes their window. However, the resolved by field is set to automatic process leaving it as unassigned. Change this so the last operator is shown as the operator that was last assigned.
Chat - Client Interface	Customer initial text not shown in built in chat form	When the agent accepts the customer chat, the initial question posed by the customer is not displayed in the customer chat window. It is, however, shown in the agent chat form. This would only repro in Chrome and IE11. The subject and question was displaying in FF 40.0.2. It's now corrected.
Find Answers	Date/Time in ASPX find answers is not the same as angular version	See https://github.com/OneToOneService/iService-Forms/issues/2 for details.
Interaction History	The time shown in the summary of interaction history is not adjusted for browser time zone	The time shown in the summary of interaction history was not adjusted for browser time zone.
Interaction History	Ref# not set when using the Agent Email action from Search page	When sending an Agent Email from Msg Queue - Search results the Ref# is not set. The Ref# should be set in the subject line unless the Suppress Ref value is checked.
Msg Queue - Manage Chats	Operator name overwrites Time in Chat	The operator name extended into the Time in Chat column and overwrote the time displayed.
Msg Queue - Manage Msgs	Send drop down blocked by SPAM button when buttons wrap	When there are enough buttons to cause them to wrap, the second row of buttons cover the Send drop down. This issue occurs in Manage Messages and the Take Action panels (search, history, etc.) It does NOT occur in the MyQueue page.

Msg Queue - My Queue	History can be relatively slow to load if the user has a large history	The time to load a user's history can be slow if there are a large number of interactions in their history. In our beta environment, a user with 8300 root interactions took around 83 seconds to load. The stored procedure was optimized, but performance is still slow with contacts that have unusually large amounts of history. Since it's unlikely many users will have 10,000 questions in iService further optimization is being postponed.
Msg Queue - My Queue	New buttons and CSS for Take Actions panel	The take actions panel has a new UI as shown below.
Msg Queue - My Queue	Space added to variable substitution	When you insert a variable (like $value -customer(name)$), a space was added after the value. The value should display without any spacing.
Msg Queue - My Queue	Auto-assigned messages have an invalid date/time when websync adds message to MyQueue	To repro: 1. As an agent, create agent email to a customer, then go to ng MyQueue page to wait for reply to come in 2. As customer, reply to the email The my queue message list will update in real time with the new message, but the displayed date/time on the new message is 0001-01-01 12:00:00 AM This is now corrected to shown the proper time format.
Msg Queue - My Queue	Fix any old invalid interactions in database	Changes in the MyQueue page are displaying interactions which have invalid states. Prepare a database update that will set the operator for all unsent responses to Unassigned. The first step is to prepare the SQL query and update our tenant. Then move this into the 7.5 update process. Note - This ticket is only for fixing interactions generated before 7.5. To fix the bugs that are causing the invalid interactions from occurring see http://dragnet:8880/ShowItem.aspx?pid=146&itemid=6712 The following should be run by customers as part of implementing v7.5: update i set assignedToContactID = NULL from Interactions as i inner join InteractionTypes as it on it.id = i.type inner join Status as s on s.id = i.statusID where assignedToContactID IS NOT NULL and s.name not in ('Queued','Pending','SentWaitingReply') and it.name in ('Customer Email','Private Email','Ask A Question','Ticket')
Msg Queue - My Queue	Initial get next loads blank message	The initial get next would occassionally load a blank message with CKEditor. Clicking Final Text and Final HTML would not load those views. Reloading the message displayed the content. This was a timing issue with the rich text editor that has been corrected.

Msg Queue - My Queue	Inbox tabs overlap QA text when page width is reduced	When you reduce the width of the MyQueue page the My Message Inbox tabs overlap on top of the Get Next QA text. See image. This happened in FF, Chrome, and IE11.
Msg Queue - My Queue	Pending tab does not display email address for new pending interaction in new ng MQ	New angular MQ - After sending-expect customer reply, the draft of the pending interaction is missing the email address in the pending tab message list. On reload the address was shown.
Reports	Push out updated GetInteractionEmail Body function through Management Console	This change is a workaround for the multiple plain email body bug in iservice that happens on some malformed messages.
Reports	Agent Interaction Types by Topic - Use SSRSEndDate function for consistency	This report was not using the SSRSEndDate function. The report wasn't wrong or giving bad results, but its been modified to use the function for consistency across reports.
Reports	Update random audit SP	New version of report requires a new stored procedure for performance purposes.
Web Interface - General	New HTML pages are missing CSS	We have CSS in iService to support various messages (Warning, Info, Error, etc.). The new HTML versions of pages were missing that CSS and not rendering the content of broadcast messages properly as a result. Corrected.

Reports Changes Not Affecting iService Core

Category	Description	Details
Reports	Update reports to use the new URL for search (#/search)	The URL for message queue - search is changing in 7.5
Reports	Consolidate the Customer Interactions by Interaction Properties Report & Customer Emails by Interaction Properties Report	These two reports are essentially the same, except that one limits by emails only, while the other does all interactions. Instead, add an option to select various question interaction types (AAQ/Tickets/Customer Emails) into the 'by Interactions' version, and drop the 'by emails' version. By default, all types should be checked.
Reports	Add percentage % columns to Customer Interactions Summary Reports	Include this new column in the property value table

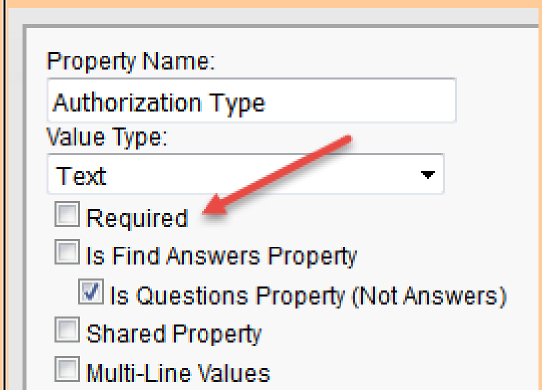
Reports	Change version footer to 7.5	Change version footer to 7.5
Reports	Operating Hour Summary report should have parameters for entering custom defined column buckets	Report should have parameters, in minutes, for each column. Defaults should be as is it is now, but with business days defined as 8 hours (480 minutes, 960 minutes, etc). This default will be changeable in the ReportOptions table
Reports	Add topic to the Agent Response Details Report	Added Topic as a parameter to the Agent Response Details report so the Resolved Message Report can be retired.
Reports	Customer Interactions reports show followup questions as having no property value set	Because question properties are associated with the root interaction (the first message on a thread), we will now look to the root for property values. They were previously shown as blank.
Reports	Deleted topics show up; topics sometimes out of order in topic selection parameter	Users have reported that deleted topics show up in reports. Also, topics are sometimes out of order. Deleted topics should not show up in the topic selection, and topics should be alphabetical in tree view. Make a new function that all reports can use that will be standard and eliminate these issues. Function input should be a segment id, output is list of topics.
Reports	Resolved Message Summary includes agent responses and should only include saved and resolved interactions	Resolved Message Summary includes agent responses and should only include saved and resolved interactions. Added "Topics" to the Agent Response Details report and retired this one.
Reports	Customer Interactions Summary by Interaction Property report is very slow	This report's query was cleaned up and optimized to not look at the IEB or FT tables since it's just a summary of properties.
Reports	Remove Unsent messages from Agent Interactions and Agent Activity reports	The Unsent interaction column doesn't make sense as these are lists of interactions resolved. Updated appropriately.

Reports	Change logic of interaction property value lookup function in reports	This function is used in interaction property value lookups. It previously returned the actual value of each interaction. However, this doesn't follow the behavior intended in the iService application where question properties are associated with the root (first) interaction of a thread. With the updated function in place, followup questions in a thread (AAQ/Customer Emails/Private Emails/Tickets) will now always be counted as having the same property value as whatever the root/initial question in thread is. Find Answers and Unsent Responses will never return property values, and all others will still return the actual value of the interaction.
Reports	Customer Interaction Reports don't pick up emails that do not have a plainbody decode	This affects the Customer Interactions Summary by Interaction Properties report.
Reports	Agent Interaction and Agent Activity reports should find resolve time with interaction attribute rather than old audit table	4 reports changed in total
Reports	Add drilldown from Customer Interactions Summary Reports	These 2 reports should drill down to Customer Interactions by Interaction Properties report, which is essentially a details report.
Reports	Topic Service Level Operating Hours Messages column labeling is incorrect and ambiguous	Labelling is technically incorrect. It is not "less than x time", but rather "less than or equal to x time". Additionally, since operating days is ambiguous depending on the tenant's business, and since time columns are now defineable by the tenant, all columns should be simplified to just minutes . Should be changed from, for example: <2 hours, <4 hours, ..., < 2 days, ..., etc to Within 120 minutes, Within 240 minutes, ..., Within 960 minutes, ..., etc
Reports	Refactor Customer Interaction Property reports for speed improvement	The Customer Interaction Property reports are not coded with optimization in mind, so are slow and often fail if a large date range is selected. To optimize, refactor by: 1. Eliminating multiple unioned queries 2. Move grouping/aggregation out of application/report side, and into sql query side for summary reports 3. Remove non-essential result items out of summary reports 4. For detail reports, move lookups into new functions (ie, GetInteractionBody)

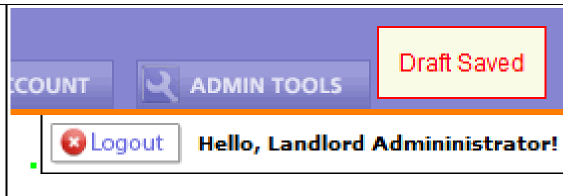
Version 7.4

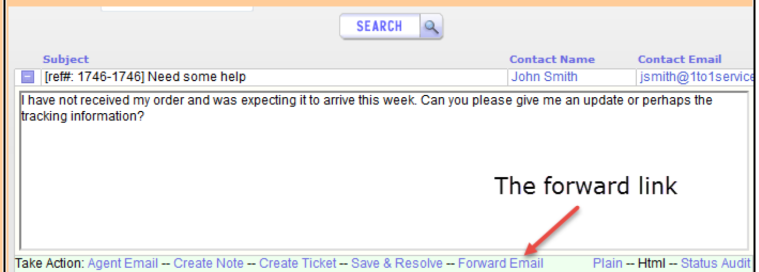
New Features

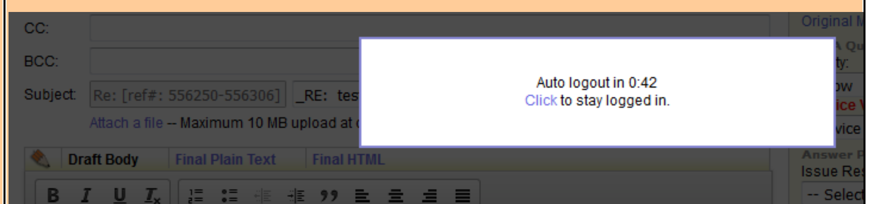
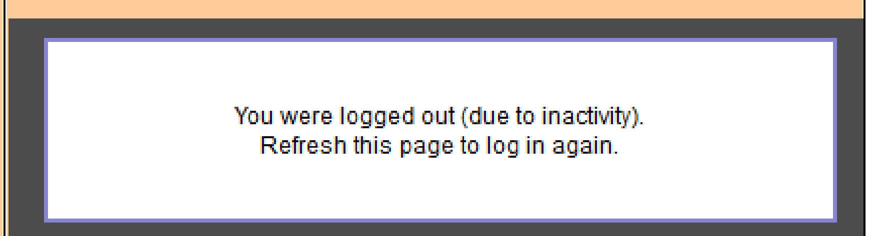
Category	Description	Details
Admin Tools - Forms	Create form action for Forward to Segment	Developed a form action for "Forward to Segment" and implemented it within the My Queue page. This action is now available for custom forms.
Admin Tools - Forms	Update CKEditor to the latest version	Updated CKEditor to the latest version. In addition to the Form Admin page, the editor is used within Message Queue - Search and Message Queue - My Queue.
Admin Tools - Forms	Confirm deletion of form actions	When the Delete Action button is clicked, we now confirm deletion before removing the action and saving the form.
Admin Tools - Forms	Agent Email updates	Updated the built-in agent email form with these changes: - Made the CC picker work like the stock response picker. It will insert additional lists into the spot where the cursor is in the subject line text box. Users will add a comma/semi-colon separator. - Converted the CC line to text box that is 3 lines tall and has a scroll bar. - Added a rich text editor to the Agent Email form message body - Resized the agent email form to better use the white space (target form size of 1280 wide). This supports larger width of the input boxes. - Increased the width of the Stock Response picker - Increased the font size to 16px / 1em

Admin Tools - Interaction Properties	Set interaction properties as required	Added an option to the interaction property details indicating it's required within the user interface pages.  When the property is required, the following business rules are enforced. Questions: - Values must be entered before new interactions are created (Ask a Question forms and Tickets). This can't be enforced with Customer Email, so a filter must be used to set those values on incoming emails. - If an interaction is created in a topic that requires a property, the agent must set the value before they save their draft response. This includes any forwarding of the message. Answers: - Answers (Agent responses, Agent emails, Notes, etc.) must have a value entered before the interaction is resolved. The draft response can be forwarded and saved without entering a value.
Admin Tools - Interaction Properties	Required interaction property text styling	To draw attention to a required interaction property in the interface, the label for it is shown in **bold red** color.
Admin Tools - Websites	Create builtin placehoder names for each main section of the iService UI	Users can customize their iService interface by changing default forms assigned to various pages in the Admin Tools - Websites tab (Site Forms section). See the **Websites** help for details on configuration options within the Websites page.

Admin Tools - Websites	Label the Site Forms columns as placeholder	Added labels to the Site Forms table as: Placeholder Name and Form ID or Builtin Name. The placeholder name is the value referenced with forms, and the Form ID or Builtin Name is the form that will be rendered. The placeholder name can be referenced using the $Include -placeholder command within forms. Also, in most cases the placeholder name can be used to display the form instead of the Form ID using the /f URL.
Interaction History	Color code rows within Interaction History	Color coding has been added to Interaction history to make it easier to find customer questions and agent responses. Questions (Customer Email, Ask a Question forms, Tickets) are shown in **blue**. Answers are shown in **light red**, and system notices (auto responses, etc.) are **grayed out** to make the more important information easier to find.
Interaction History	Display interaction history using CKEditor	The AngularJS sanitizer was updated to ensure the proper amount of HTML is removed when content is sanitized.
Msg Queue - My Queue	Add forward external action to MQ form	The forward external action was converted to a form action and added to the MyQueue form. It is now also available for use in custom forms.
Msg Queue - My Queue	Update Inbox in MyQueue using WebSync	When an agent's Inbox list changes in the MyQueue page, it is updated in real-time using WebSync to push the new list to the browser. For example, if a message is assigned to an agent from the Manage Msg page, the agent will see it in their My Inbox list without needing to reload the page.
Msg Queue - My Queue	Convert Contact Details tab to new form.	Converted the Contact Details tab in MyQueue to an iService form.
Msg Queue - My Queue	Auto save message drafts	Monitor typing within the Message Draft panel, and if the user does not change text for 10 seconds perform a background Save Draft action. Display a small message to the user for a few seconds that says "Draft Saved." This will minimize any data loss if the user changes pages or is auto logged out for inactivity.

		
Msg Queue - My Queue	-- Select a value -- in property fields	When an interaction property has a drop down list but no value selected, present the text -- Select a value --.
Msg Queue - My Queue	Update the backend validation to search for email addresses surrounded by a single quote	Update email address validation to look for 'name@domain.com' or other variations that have a beginning or trailing single quote character that is not supported by mail servers. Notify the user of the issue so they can correct it and resubmit the form.
Msg Queue - My Queue	Create form action for Change Topic	Created a form action for Change Topic that functions similar to the legacy change topic action in MyQueue. This form action is also available for custom forms.
Msg Queue - My Queue	Save and Resolve form action	Created the Save and Resolve action for forms, and configured the action for the My Queue page to resolve the selected interaction. This form action is also available for custom forms.
Msg Queue - Search	Add "Forward Interaction" button to MQ - Search results	Created a new action that will allow users to forward an interaction (regardless of type) to an email address they entered. The link is in the Take Actions section of the interaction history that is used in the MQ - Search results page. This will NOT be in the Customer Info - History page until that page is replaced with the new form based interaction history. Behavior is be as follows: 1 - User searches for interaction and obtains a results panel. 2 - Expand the results to view the details of the interaction. The Take Action section below the interaction details will include a new Forward action. 3 - Clicking the Forward link will expand input boxes where the agent will complete the message details. 4 - Form sends an agent email, and uses the existing thread ref# 5 - Only a single address will be allowed in the TO field. Other addresses will go into the CC line.

		The TO address will be added to Contacts (if new) and the forwarded message will be within their history. 
Reports	Add alphabetical sorting by agents to Agent Response Time by Agent	Agents were previously sorted by contact ID within the Agent Response Time by Agent report. They are now alphabetical.
Web Interface - Browser Issues	Convert registration to form that removes $button	The previous registration page has a $button form that must be replaced before the forms can be used in a custom portal. The $button is no longer needed or supported making custom registration pages portable to custom forms.
Web Interface - General	Preview Dialer	A new built in form provides a simplified interface for sales staff to quickly view contact details and enter call notes. The form can be accessed from /f/diag-builtinforms.
Web Interface - General	Assigned Message Form	A new built in form provides a real-time view of agents, the number of messages assigned to them, and the age of the oldest message in their queue in business hours. The business hours calculation can be customized as needed for each tenant. The form reloads data every few seconds and is designed to provide a dashboard view of

		activity within a tenant. The form can be accessed from /f/diag-builtinforms.
Web Interface - General	Customizable Support Portal	A new built in form provides a customizable Find Answers, Ask a Question, and My Account view for customers. The form can be customized to match a tenants brand and is designed to provide a complete support portal for customers. The form can be accessed from /f/diag-builtinforms.
Msg Queue - My Queue	Warn user of logout for inactivity	To prevent data loss, present a warning message to the user 60 seconds before they are automatically logged out for inactivity. The notice appears within a modal window (lightbox) and includes a link to reset the user's activity counter. The message includes a real-time counter. 
Msg Queue - My Queue	Inactivity counter tool tip	Provide the current inactivity count within a tool tip displayed when the mouse is hovered over the Logout button. Note: because of browser limitations, this only functions within Chrome. In release 7.4, this feature is only on the MyQueue page. 
Msg Queue - My Queue	Logged out notice	When a user is logged out of the new My Queue page because of inactivity, a modal message (lightbox) is displayed indicating they were automatically logged out due to inactivity. 

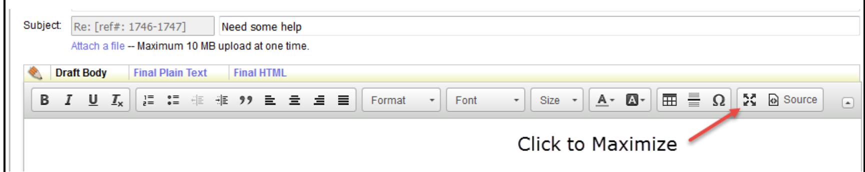
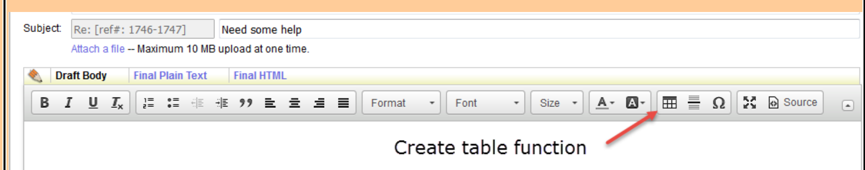
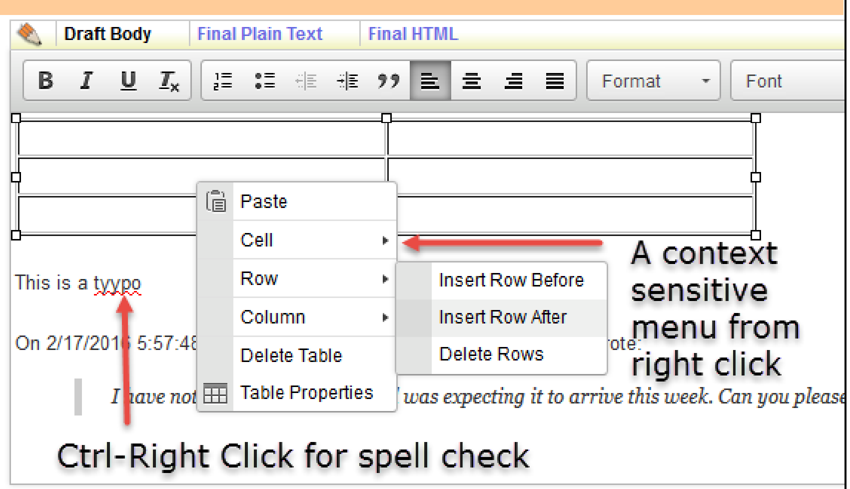
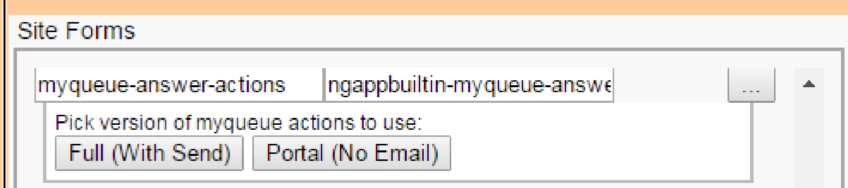
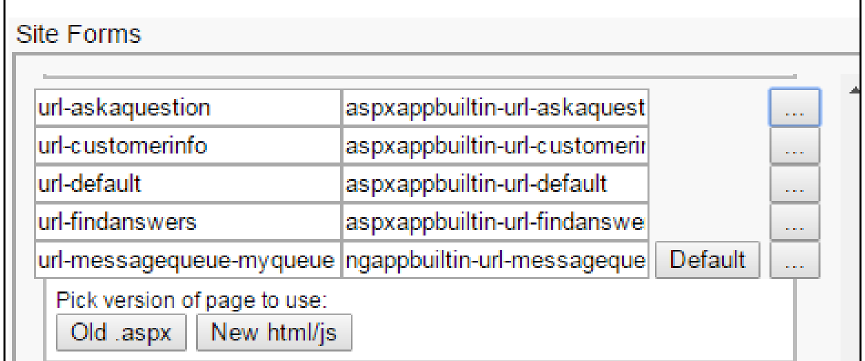
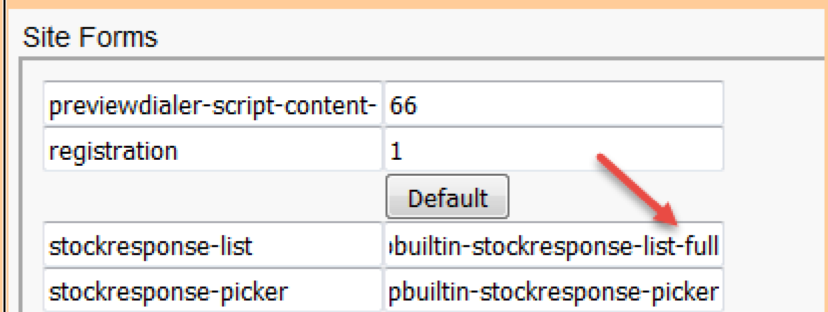
Msg Queue - My Queue	Full page edit	Users can expand the Draft Body to full size for editing larger messages. Click the button a second time to minimize the editor back to the original size. 
Msg Queue - My Queue	New Rich Text Editor controls	The new RTE in the MyQueue page (CKEditor) includes new controls for editing messages. For example, the Create Table Function that is highlighted below.  To support these new features, the edit window includes context menus that are accessed by right clicking within the Draft Body section of the page. One side effect of this functionality (for browsers other than IE) is that users must Ctrl-Right Click to access the browser menu for built-in functions such as spell check. 
Reports	Added reportoptions	The xml type is used to support native mssql XML functions within the report tables. This will support variable datatypes by adding

	table and default code	new rows instead of requiring updates to the iservice db schema. The initial values will be used to support more detailed business hour calculations in reports. CREATE TABLE [dbo].[ReportOptions]([name] [nvarchar](128) NOT NULL, [values] [xml] NOT NULL, CONSTRAINT [PK_ReportOptions] PRIMARY KEY CLUSTERED ([name] ASC) INSERT INTO [dbo].[ReportOptions] ([name] ,[values]) VALUES ('OperatingHours' ,' 09:00:00 17:00:00 1 ')
Admin Tools - Websites	Secure message portal configuration	The MyQueue page can be configured to remove the option for sending email to a customer. The SEND button is replaced with a SUBMIT button that creates a note within the thread history that is viewed by the customer in a secure online portal. This option is configured by updating the `myqueue-answer-actions` panel in the new messsagequeue page as shown below. 
Admin Tools - Websites	Toggle legacy vs new Message Queue page	Release 7.4 includes a new Message Queue - My Queue page that is built using the iService forms architecture. Toggle between the .NET version from 7.3 and the new form based page by setting the appropriate value for `url-messagequeue-myqueue` in the Site Forms section of the Admin Tools - Websites tab. 
Admin Tools - Websites	Load only stock response names	To improve performance for segments with a large number of stock responses (> 250), the value for stockresponse-list can be changed from the default `ngappbuiltin-stockresponse-list-full` to `ngappbuiltin-stockresponse-list-names`.

		This will cause the Message Queue - My Queue page to only load the names of the stock responses instead of all the bodies. The bodies will be fetched and pasted into the Draft Message when clicked.



Bug Fixes

Category	Description	Details
Admin Tools - Agents	Empty inbox changes	The check now runs only for agents that are logged in (previously was checking all agents). The check runs every 30 seconds when the Process Raw Message thread occurs in the mail popper. It compares their inactive time to their allowed inactive time, which is 90 minutes unless overridden in the Agent Admin page. If the agent is beyond their threshold, the process logs the agent out. The empty inbox process will then set any assigned messages to Unqueued for agents that have the Empty Inbox setting. Changing the agent's setting for empty inbox will not impact logged out users until the next time they login.
Admin Tools - Agents	Agent admin tab does not display skills for CSR Manager role	We grant the CSR Manager usertype access to the Agent Admin tab so they can set skills for agents. Beginning with v7.3, the CSR Manager's could not see or set skills. This is corrected in 7.4.
Admin Tools - Interaction Properties	Only show question properties once regardless of interaction type	Previous logic displayed two sets of interaction properties (type = question) when there was a 2nd interaction in a thread of a different type (e.g., root is AAQ and then a customer email arrives). The question properties are meant to act as "case properties" and should only be shown once when viewing an interaction.

Mail Processor	Outlook message files (.msg) attached to inbound email are not recognized by iService and can’t be easily downloaded (except via the original message.eml)	When a message has a .msg attached, we save it as an attachment but were not finding the name or file type properly.
Msg Queue - Manage Msgs	Sort Mailboxes by Name in Dropdown	Dropdown menu of mailboxes displayed in MQ-Manage Msgs and MyQueue were not sorted by name making it hard/confusing to select the correct mailbox. Would like mailboxes sorted by name.
Msg Queue - My Queue	Secure response attachment doesn't seem to save correctly	There was a bug in the ability to access files attached to secure responses made with the new Ckeditor. Clicking on the file attachment opened a blank page instead of downloading
Msg Queue - My Queue	No body on load of message	The message body is missing periodically when Get Next is used to request a message.Loading the Final Plain or HTML seemed to load the message and clear the issue.
Reports	TSL/OH Report fails to export to excel	Issue is that XLS does not support x-png MIME. iService logo should be reverted to older image/png

Version 7.3

ID	Type	Description	Category	Details
5450	Feature	Add CKEdtitor to form action	Admin Tools - Forms	CLEditor does not work with Angular and was removed from the Form Admin page on actions that have bodies (Create note, agent email, aaq, ticket). Added CKEditor back to the Body section of these form actions. CKEditor is now also used

		body for editing		on the actions within Message Queue - Search results.
5452	Feature	Update Set Parent filter action to check for agent assignment	Admin Tools - Filters	When the Set Interaction Parent filter runs, it changes the root thread but does not do the assignment to the agent that owns the thread. This is because the agent assignment check happens before the filter action is run. Updated the filter action so it checks the owner of the new thread and sets the agent similar to what happens when the Ref# is matched on incoming email. Also make a change to allow Send Auto Response to work within a filter.
5459	Feature	New agent email built-in form	Admin Tools - Forms	A new form (/f/webapp-agentemail) is built-in for sending quick agent email messages that includes the following features: - CC list manager -- Similar to an address book - Stock response picker - Option to auto populate interaction properties based on the topic selected - Mapping of Topic to Mailbox -- The from address can be specified for each topic

				- Segment selection within form -- Separate forms should be made for each segment To use, create a new form with the body shown below: $if -fieldregex'form'='^js$'$$header -filetype(js)$ var config = {}; /*--- above is generated by admin mode --- */ $endif$ $include -formID'webapp-agentemail'$ Then, run the form and go to Manage mode. Select a segment and save to create form actions. Reload the form in the forms admin page and the actions will appear with full configuration. To insert your logo, add the following at the bottom on the form body. $if -fieldregex'form'='^css$'$ img.logo { width: __px; height: __px; background-image: url(http://_____); } $endif$ Include the width, height, and URL for the logo as appropriate.
3234	Feature	New contact delete	Web Interface - General	This is a stored procedure that must be run on the DB by a DBA. Agents or contacts that are referenced as an operator on an interaction are

		SP to tenants (was: Allow contact deletion)		not eligible for deletion. The contact delete SPs use the existing interaction delete stored procedures to remove associated interactions.
4402	Feature	Update Website Tab to support default home form and interface customization	Admin Tools - Websites	The websites tab has been re-written as an iService form and allows users to customize their iService tenant by replacing various sections of the website with new form content. A new Site Contents section provides a list of pages and sections within the iService user interface along with the default form used for that section. Users can make their own custom forms and replace the default pages with this new content. The iService logo is now a hyperlink to the Default Home Page for the tenant, and a custom form can be displayed on this page by referencing it in the Site Contents section of the Admin Tools - Websites page.

				Each website can have its own configuration and separate default pages based on the iService domain specified.
4439	Feature	Add actions (create agent email, ticket, note, save and resolve) to MQ - Search results	Msg Queue - Search	In the Customer Info - History display, users can take an action directly on an item in history by expanding the Show Audit link. This enhancement replicates the functionality within the new form based history displayed in the MQ - Search results page. The save and resolve action can only be used by CSR Managers, or CSRs for messages assigned to them.
5477	Feature	Add clustered index to Contacts Sessions table for performance	Database	Name: CI_ContactsSessions_contactID Clustered index, covering just contactID column

5475	Feature	Performance improvement for stock responses and mailboxes	Web Interface - General	Added index to mailbox errors table. Changed the way stock responses loaded from DB to avoid O(n^2) slowdown.
5437	Feature	Update SMTPOut retry cycle and fix issue with deleted topics	Mail Processor	Adjusted the SMTPOut retry cycle to the below timeframes. 00:00:00 – First attempt 00:01:00 – 1st retry 00:05:00 – 2nd retry 00:15:00 - 3rd retry 00:30:00 – 4th retry 01:00:00 – 5th retry 12:00:00 – 6th retry 24:00:00 – 7th retry 36:00:00 – 8th retry 48:00:00 – 9th retry, then permanent fail

				Corrected an issue where replies to agent responses were set to a deleted topic. They now go to the default topic for the mailbox unless modified by filters.
5442	Feature	Revise interaction history audit trail description for Resolving Parent Agent	Interaction History	In the audit trail, changed the wording for auto assignment to say "parent's agent" instead of "resolving parent agent" since the auto assignment occurs regardless of whether the question was resolved. If a question is assigned to an agent, any future messages on that thread are auto assigned so long as they are the current operator.
5461	Feature	Allow $repeat -history(children)$ when used inside $repeat -history(threads)$	Admin Tools - Forms	Allow nesting the -history(children) inside of the -history(threads) command to more efficiently build interaction history. This allows retrieving the full interaction history for all the threads of a contact, and all the details within the children of each thread, in a single pass. This is required to open the history fully expanded.

5456	Bug	Updated fn_GetRandomResponseByAgent to tenants	Reports	Updated to use fn_GetStatusID lookups and fixes to sp_isa_ssrs_RandomAudit
5467	Bug	Stock response not in alphabetical order	Msg Queue - Search	When creating a note in the Msg Queue - Search panel, the stock responses are not shown in alphabetical order.

Version 7.2

ID	Type	Description	Category	Details
3371	Feature	Reply all in the pending tab	Msg Queue - My Queue	When an agent responds to a message and checks expect reply, a copy is placed in the pending tab. If the agent CC'd other people when they sent their response, we now show the reply all link on the response in the pending tab. Clicking that link populates all of the recipients that were cc'd on the original response. Note - we are not populating the response in the pending tab with the original questions cc, because the agent made a conscious decision to select all, some, or none of them in the original agent response.
4405	Feature	Form admin interface cleanup	Admin Tools -	Cleanup in the new form admin page.

			Forms	
541 7	Featu re	Push out new random audit objects to database	Manage ment Console	The Random Agent Audit report was rewritten, and new db objects are included in the schema.
440 3	Featu re	Rewrite form admin page	Admin Tools - Forms	Re-write form admin page to provide a better user experience with loading and saving forms. The form admin page is now built using the iService forms technology.
442 4	Featu re	Web service optimization	Web Interface - General	Changes were made to perform "lazy loading" of data from SQL Server, which has increased system performance. Less data is now loaded for most web service requests.
340 0	Featu re	Update Agent Response CC line to accept longer address lists	Msg Queue - My Queue	This enhancements applies to all pages within the iService user interface that send agent response or agent emails. Change CC Line Char Length – We converted the CC line from its current database field type to a new field that supports a longer length. This requires a conversion of the existing data, which is performed automatically during the update in the management console. Every interaction that has a value for cc from past interactions will be converted into this new field. There is no data transformation, so the performance impact is minor. Strip Invalid Char From Pasted Address List – We use the standard .NET libraries for sending email via SMTP. We've written code to replace the semi-colons with commas and also to handle the spaces that might be inserted when someone pastes into this text box. Formats for the CC and BCC line must follow RFC 5322 section 3.4, except that a semi-colon is allowed as a separator between addresses in addition to the standard comma separator. Allowed

				characters in name A-Z, 0-9, ! # $ % ' * + - / = ? ^ _ ` { } ~ Names may include spaces and tabs Parenthesis are allowed, but open and closing must be matched. Allowed characters in email address A-Z, 0-9, ! # $ % ' * + - / = ? ^ _ ` { } ~ A period is allowed, but only if surrounded by other characters that are not periods. Addresses must not have spaces or tabs Any character can be used outside of the as long as the full string is enclosed in quotes.
5422	Feature	Push out updated version of dbo.fn_GetThreadAgeWorkHours for new TSL/OH report	Management Console	The SQL function fn_GetThreadAgeWorkHours has been updated
3365	Feature	Update search urls for message queue drill through	Reports	The drill through URLs have changed for search and reports need to be updated.
3357	Feature	Service Level From Assigned Time Report	Reports	Service Level From Assigned Time report. This is the same report as the current service level, but it calculates response from initial assignment to resolved time. The current report is from arrival time to resolved time. Updated the legend for the report to indicate that any Forward External messages included in the query are reflected within the totals for the agent that performed the forward action. The resolve time will be the date/time the external agent resolved the interaction.
4429	Bug	Adding a new website does not appear in the list	Admin Tools - Websites	Adding a new website does not automatically appear in the list without next clicking on a different website name in the list, which seems to update the list with the newest addition. This occurs in IE11 and Chrome.
5419	Bug	Filter actions strip casing from interaction property	Admin Tools - Filters	Corrected to retain formatting.

		value before hitting database		
542 5	Bug	Mailbox errors not displayed in list	Admin Tools - Mailbox es	In the Admin Tools - Mailboxes page the error count was not correct in certain scenarios.
542 3	Bug	Submission Success Redirect URL field does not save	Admin Tools - Forms	The Submission Success Redirect URL does not appear to save after submitting changes on a form.
329 4	Bug	Send autoresponse action inside a filter bug-autoresponse dropdown does not show the autoresponse list, only the ID	Admin Tools - Filters	When you try and set the send autoresponse action within a filter, the dropdown list of autoresponses should show the names of the available agent notification autoresponses. The dropdown list only shows the id of the autoresponse that was saved.
441 6	Bug	Change drop down for mail retrieval to be a checkbox in management console	Manage ment Console	The Async mode was removed from the mail popper, so the current options are Disabled and Serial. Since the options are now On or Off, we should change the dropdown to a checkbox. The save button should save all changes on this screen.
339 6	Bug	"Get Next All for Contact" causes all interactions in the queue to change to the topic of the first interaction	Msg Queue - My Queue	"Get Next All for Contact" causes all interactions in the queue to change to the topic of the first interaction.
184 8	Bug	Mailpopper is not aware of mailbox changes until restarted was: Mailpopper does not appear to check for mailboxes change before popping when in a async mode	MailPop per Monitor	The mailpopper requires a restart to be aware of any changes to mailboxes, whether additions or modifications.
339 7	Bug	In IE8, Interaction search results always appear as	Msg Queue - Search	See attachment for the original detailed description on how to reproduce

		'No matching results.' for any search done using a date range		
4404	Bug	Get Next QA count incorrect	Msg Queue - My Queue	The Get Next QA count is incorrect because it is counting messages that are assigned. This fix changes the count to only the unassigned messages.
3398	Bug	First Response functions to add to tenant for reporting	Reports	The following functions need to be added to standard iService tenants in order to use first response reports. fn_GetFirstResponseTimestamp fn_GetFirstResponseInteractionID fn_GetFirstResponseAgentID
4437	Bug	Unable to save new mailings	Admin Tools - Mailing	When trying to save a new mailing the Access Denied message is displayed.
4438	Bug	Overflow problem in content editable DIV in IE11 within action steps.	Admin Tools - Forms	Large body overflows the div.
5416	Bug	Corrected issues with the Random Audit Report	Reports	Adjust sampling approach and performance issues.
4433	Bug	Change filter match expression for TO to Mailbox Name	Admin Tools - Filters	The TO filter expression actually matches the display name of an iService monitored mailbox, rather than the actual email address in the message. This change is to update the Filters page to change the label for this criteria. No changes were made to the filter processing.

Version 7.1

ID	Type	Description	Category	Details
3348	Task	Updated documentation for Contact	(None)	Documentation for Contact delete, contact mass delete, and Interaction delete, and interaction mass delete stored procedures are now available on request.

		delete, contact mass delete, and Interaction mass delete stored procedures		
3308	Task	Add Computer Access Skills stored procedure rewrites to improve old Find Answers page performance	Find Answers	Includes 2 SP changes and 2 new table-valued functions. SubComputeAccess Wrapper: ALTER PROCEDURE [dbo].[iService_SubComputeAccess] @agentID int AS INSERT INTO #access (segmentID) SELECT segmentID FROM dbo.fn_ComputeAgentSegmentAccess(@agentID) And here's the new table valued function that's called: CREATE FUNCTION [dbo].[fn_ComputeAgentSegmentAccess] (@agentid int) RETURNS TABLE AS RETURN (WITH ChildSegments AS (SELECT ags.segmentID FROM AgentsSegments AS ags WHERE ags.contactID = @agentid UNION SELECT ds.segmentID FROM DepartmentsSegments ds INNER JOIN AgentsDepartments ad ON ds.departmentID = ad.departmentid WHERE ad.contactID = @agentid) SELECT segmentID FROM ChildSegments UNION SELECT ID AS segmentID FROM Segments s WHERE s.parentSegmentID IN (SELECT segmentID FROM ChildSegments)) SubComputeSkills wrapper: ALTER PROCEDURE [dbo].[iService_SubComputeSkills] @agentID int AS INSERT INTO #haveskills ([skillID])

				SELECT skillid FROM dbo.fn_ComputeAgentSkillAccess(@agentID) New table-valued function: CREATE FUNCTION [dbo].[fn_ComputeAgentSkillAccess] (@agentid int) RETURNS TABLE AS RETURN (SELECT ags.skillID FROM AgentsSkills AS ags WHERE ags.contactID = @agentid UNION SELECT ds.skillID FROM DepartmentsSkills ds INNER JOIN AgentsDepartments ad ON ds.departmentID = ad.departmentid WHERE ad.contactID = @agentid)
3339	Feature	Truncate HTML for large history items	Interaction History	When a message thread gets too large it can't be viewed within the browser. Retain the original_email.eml file for audit trail purposes, but truncate the displayed message after 5 MB. File attachments are not considered in the message size.
3314	Feature	Get all unassigned msg from same contact on Get Next	Msg Queue – My Queue	Provide a configuration option to get all message from the contact when clicking Get Next. In some cases, customers will send 3-4 copies of a message to try and get a faster response. This ends up making the Get Next option less useful because more than one agent gets the same message. This does not change the assignment algorithm, but when the message is selected we also assign any open/unassigned message from that same contact to the agent. This setting is configured for each segment on the Admin Tools-Segment-Details tab.
3352	Feature	Add function for calculati	Reports	We have an increasing number of reports that rely on pulling historical assignment information from audit trails. Writing custom queries for these is

		ng historical assignment information		unwieldy and have slow performance – this has been abstracted to a sql function. Input: interaction #, first/last Output: The interaction # of the final agent assignment before resolution, based within the same interaction thread that the input interaction # references. If 'first' is specified, returns the item of the first assignment in audit trail. If last is specified, returns the time of the last assignment
3338	Feature	Incorporate new chat form into Built In forms	Chat - Client Interface	A standard customer facing chat form is now included within the Built In Forms and can be used with minimal changes. See the Chat User Guide for usage details.
3357	Feature	Service Level From Assigned Time Report	Reports	Service Level From Assigned Time is the same report as the current service level, but it calculates response from initial assignment to an agent to resolved time. The current report is from arrival time to resolved time.
3359	Feature	Update copyright to include 2015.	Web Interface - General	© 2008-2015 One-to-One Service.com. All rights reserved.
3182	Feature	Agent Response Time from Assignment	Reports	The current response time reports count the time between arrival and resolution. This report counts the time between assignment and resolution.
3344	Feature	Leave all selected interactions	Msg Queue - Manage Msgs	If a list of selected interactions in the Manage Msgs page included a contact with a bad email address, the update failed and the selections were lost. Now, the original selections are saved so the

		marked when mass update fails		offending message can be removed and the batch can be resubmitted.
3336	Feature	Update CLEditor to latest version	Rich Text Editor	Updated CLEditor to version 1.4.5. This update corrects various issues with IE 11.
3331	Feature	Add spinner image to Msg Queue - Search page and show text when no results	Msg Queue - Search	Add a wait spinner to the Search page. If there are no search result, add a line where the results would be that says "No matching search results."
3323	Feature	Form based Msg Queue Search	Msg Queue - Search	Replace the old asp.NET Msg Queue - Search with the new iService form based search.
3324	Feature	Form based history	Interaction History	Replace history in Msg Queue-Search and Msg Queue-My Queue with the new iService form based history version.
3332	Feature	Update form history to show Audit Trail and HTML	Msg Queue - Search	The new form history in Search and MyQueue now allows display of either plain text or HTML, and includes the full status audit.
NA	Feature	New form commands	Admin Tools - Forms	New form commands have been added to support the upcoming product redesign. Although not used extensively in release 7.1, they are available for use

				within custom forms. For details on these new commands see the iService Form Developer User Guide.
3327	Bug	"Manage Messages" page does not support relative subdirectories when generating hyperlinks.	(None)	The "Contact Name" and "Contact Email" links generated on the Manage Messages page did not correctly generate the target hyperlink location if iService was installed in a virtual folder on IIS. For example, if iService was located at http://mytenant.iservicecrm.com/iservice, the contact email and contact name would incorrectly link to http://mytenant.iservicecrm.com/CustomerInfo.aspx instead of http://mytenant.iservicecrm.com/iservice/CustomerInfo.aspx. This is now corrected.
3309	Bug	Reference minified versions of Angular and Websync libraries instead of oversized developer versions	(None)	Updated the Angular and Websync code to the minified versions. These are the libraries: fm.js -> fm.min.js fm.websync.js -> fm.websync.min.js angular.js -> angular.min.js (on google server) angular-sanitize.js -> angular-sanitize.min.js (on google server)
3328	Bug	Manage Chats tab not hidden	Msg Queue - Manage Msgs	Enforce the Tab.MessageQueue.SuperviseChat option in a UserType, eliminating the “Manage Chats” tab if not checked.

3337	Bug	Typo on Topic Service Level Report For Operating Hours By # of Messages AND by Percentage reports	Reports	< 3 Business Days column has an extra "S"
3329	Bug	Adding a private note in mass update to an unassigned interaction causes it to be partially assigned to an agent, however it does not appear in the agent's My Queue	Msg Queue – My Queue	To reproduce: 1. Open an unassigned customer email interaction from the customer history page 2. Add a private note to the interaction 3. The interaction will now appear to be assigned to the agent, however it does not appear in the agent's My Queue
3326	Bug	Interaction	Msg Queue	The issue occurs when an agent takes the EXACT steps outlined below, and has

		Message Display's "Reply All" field remains populated when message send is clicked more than once. This corrupts the Reply All field in the next interaction retrieved.	- My Queue	to do with how iService handles the display of interaction #2 (step F below) if an agent clicks send/resolve multiple times for interaction #1 (step c/d below) interaction #1 continues to be displayed. When interaction #2 is retrieved with Get Next, the reply-all field is still filled in from the previous interaction that was opened. a) agent had 2 interactions in their queue, both with reply all's populated b) agent clicks on reply all for interaction c) agent sends message d) agent attempts to send message twice and receives error that the interaction has already been resolved (agents not sure if this is what happened in other cases) e) agent clicks on Get Next f) 2nd interaction is assigned to the agent g) agent selects message h) agent clicks Reply All i) the email addresses from prior reply all field populate
3297	Bug	Unable to open Admin Tools - Agent - Agent Details in IE 11	Admin Tools - Agents	When you attempt to open the Agent Details for any agent, IE 11 returns a “This Page Can't Be Displayed” error. It is not a 404, but some type of connection issue (Dev Tools says DNS error). This only occurs in IE11 and seems related to CLEditor version.
3290	Bug	$include with invalid form ID causes internal	Admin Tools - Forms	If you use an ID for a form that does not exist within the $include command, an Internal Error is generated. The bad reference will now fail silently.

		error crash		
3343	Bug	Bounce message on Manage Msg page aborts processing and unchecks interactions	Msg Queue - Manage Msgs	Check 10 interactions and send a response from Manage Msg. If one of the selected interactions is marked as bounced, an error is returned (Select interaction is marked as bounced) and all 10 are unchecked. This fix leaves all of them checked so you can just uncheck the bad message instead of having to remark all of them.

Version 7.0

ID	Type	Description	Category	Details
3163	Task	Remove InteractionsCompositionsAudit	(None)	The InteractionsCompositionsAudit table was dropped from the database schema since it is no longer used. This provides a performance improvement.
3162	Task	Update stored procedures and add schema changes for Interaction deletes	Interaction History	The iServiceInteractionsMassDelete and iServiceInteractionDelete stored procedures have been updated to fully delete interactions more efficiently.
CHAT	Feature	Create a new Live Chat feature	Chat	A new feature, iService Live Chat, allows agents to interaction live with website visitors. See the Chat User Guide for details.
3234	Feature	Allow contact deletion	Web Interface - General	Created the necessary stored procedures to delete contacts. Agents or contacts that are references as an operator on an interaction are not eligible for deletion. The contact delete SPs use the existing interaction

				delete stored procedures and purge all interactions associated with the contact.
20 89	Featu re	Update Agent Admin and Show Available Button	Chat - Agent Interface	There are 3 parts to this milestone: 1. Changed the Agent Admin page so it uses Angular and Websync to update the agent listing in real time. 2. Added a column to the Agent Admin page named Available, and populated it from the database 3. Added a button to the agent interface to update the available status in the database, which in turn updates the Agent Admin page.
31 91	Featu re	Update Action drop down menu for alerts, filters, and forms	Admin Tools - Filters	The list of actions within the Forms, Filters, and Alerts tabs are now segregated according to where they are applicable.
31 96	Featu re	Add scrolling and sorting to MyQueue Inbox	Msg Queue - My Queue	Added sorting and scrolling to the new MyQueue Inbox view.
32 01	Featu re	New UserType for Manage Chats page	Chat - Server	Tab.MessageQueue.SuperviseChat- this is the usertype that provides access to the Manage Chats tab where you can see the chat queue. There is no limit to the number of agents that can see this, as it does not provide the ability to engage in actual chat sessions.
32 02	Featu re	Rename supervise and chat tabs	Chat - Agent Interface	Renamed these tabs to Manage Msgs and Manage Chats
32 05	Featu re	Update stock response filters sections	Chat - Agent Interface	The stock response section within Agent Chat includes two boxes. Filter - the first box should have a label of filter. This box should only include stock responses in the initial display of the page where the Stock Response

				Description matches the value entered. The value entered will be saved to a cookie so the agent doesn't have to enter it each time. Keywork Search - the second box will do a keyword search in the response name and response body.
3239	Feature	Sort search by Interaction Type alphabetically	Msg Queue - Search	In the Msg Queue - Search page, when Interaction Type and Interaction Status are selected sort the drop down list in alphabetical order.
3247	Feature	Remove Chrome Frame tags	Web Interface - General	Chrome Frame will not be supported after Jan 2014, and browsers are now displaying a message that is should be uninstalled. It is now removed from the 7.0 release. Users will need to find another solution for old versions of IE.
3238	Feature	Send agent email via form with message from my Message Inbox	Msg Queue - My Queue	New variables within iService forms allowed us to create a form for forwarding any type of interaction. This form can be found on the iService Apps page at http://1to1service.com/Resources/iServiceApps.aspx.
1875	Feature	Allow Stock Responses in Auto Responses	Admin Tools - Autoresponses	Allow stock responses to be inserted into autoresponses and converted when the response is sent. This is very helpful for things like the closings and a footer, which might change from time to time. Without this, each response must be manually edited.
2115	Feature	Add Pid for customer data	Admin Tools - Forms	Allow a contact to be specified using the Pid (parameter ID) for customer information. This will be needed to display the customer data in the Preview Dialer we intend to build. It would function like: $value - customer(name) Pid'x'$ where the x is the value passed to the form.
2121	Feature	Add support for $value -	Admin Tools - Forms	Add support for $value -interaction - Pid$ so we can display things like details of a question submitted.

		interaction -Pid$		
2095	Feature	Convert pages that use variables to forms	Msg Queue - My Queue	Make all iService systems that process $variables$ to use the forms evaluation engine. Systems affected include: Cust Info - Agent Email Cust Info - Note Cust Info - Ticket Message Queue - Supervise Message Queue - My Queue Mass Mailing - Messages Auto response generation
3211	Feature	Save plain text chat history in FilesText	Chat - Server	Record the plain text version of chat history similar to emails.
3134	Feature	Update help links	Admin Tools - Help	Removed the Admin Tools - Help page and the folder containing all the legacy help. Internal help links within iService are now directed to the appropriate page within iService.info.
2122	Feature	Record availability state changes in the database for reporting	Chat - Server	When an agent clicks the Available / Not available button record the action in the iService database in a manner that is easily reported on.
999	Feature	Highligh messages in the Manage Msgs page by age.	Msg Queue - Manage Msgs	You can now have messages highlighted based upon their age by adding the following css to your website. This can be customized for any tenant or website within a tenant. https://1to1.iservicecrm.com/1to1service/css/alestyle.css
3159	Bug	agents without segment access cannot see message assigned by automatic	Msg Queue - My Queue	for messages that get forwarded from one segment to another, and a customer replies to an agent response, the customer's email is tied to the original mailbox/topic the original message came in on, even though the message was already forwarded to another segment/mailbox. Agents who

		process in Message Queue-My Queue		do not have access to the original message's segment cannot see the message in My Queue even though the message is assigned to them. The message gets assigned to them by automatic process, resolve to parent resolving agent.
32 70	Bug	Sort stock responses in alpha order (Manage Messages and My Queue)	Msg Queue - My Queue	The stock response picker was not displaying the responses in alphabetical order. Corrected this in the My Queue page.
21 03	Bug	Send Agent Email action is working without authenticat ion, and marks recipient as operator	Admin Tools - Forms	The form action "Send Agent Email" was not requiring agent authentication, and it was recording the operator as the recipient rather than the operator.
32 48	Bug	Message not processing properly	Mail Processor	Customers reported a message format that was not being processed properly. The message format is now properly converted.
31 90	Bug	Forward Air message issue	Msg Queue - My Queue	Certain messages were breaking the display within the My Queue page.
20 30	Bug	My Queue with more than 10 messages does not display Get Next update	Msg Queue - My Queue	In the My Queue page, if a user has more than 10 messages assigned the Get Next button did not load the selected message. It displayed the list of messages with no message details shown. This was fixed by converting the pagination to a scrolling list. We display the first 10 msg and then the scroll bar should appear.
21 09	Bug	Fwd External template	Msg Queue - My Queue	The Forward External page did not list the external auto response template

		not displayed		because a %20 was inserted into the URL variable needed.
32 07	Bug	Link command not forwarding	Admin Tools - Mailing	The following command generates a link, but there is no redirect. $linka testurl -text 'this is text for the trackable url' -url 'http://www.1to1service.com'$ produces this URL https://1to1service.iservicecrm.com/Link.aspx?id=&contact=2&value=&hash=723E3DBCA3F3CB729E76126AE4AE596D But, there is not redirect.
31 71	Bug	Index changes	(None)	A number of indexes need to be added to tables to improve performance: --For faster RawMessages delete CREATE NONCLUSTERED INDEX IX_NCI_rawMessageID_intID ON [dbo].[InteractionsEmails] ([rawMessageID]) INCLUDE ([interactionID]) GO CREATE NONCLUSTERED INDEX IX_NCI_smtpMesageID ON [dbo].[InteractionsResponses] ([smtpMessageID]) GO CREATE NONCLUSTERED INDEX IX_NCI_interactionID ON [dbo].[MassMailingLinks] ([interactionID]) INCLUDE ([ID]) GO CREATE NONCLUSTERED INDEX NC_index_RMFid_id ON [dbo].[InteractionsAttachments] ([rawMessageFragmentID]) INCLUDE ([ID]) GO --For faster FilesText delete CREATE CLUSTERED INDEX IX_CI_interactionID ON [dbo].[InteractionsCompositions] ([interactionID]) GO CREATE NONCLUSTERED INDEX IX_NCI_bodyFileID ON [dbo].[InteractionsCompositions] ([bodyFileID]) GO CREATE NONCLUSTERED INDEX IX_NCI_bodyHtmlFileID ON [dbo].[InteractionsCompositions] ([bodyHtmlFileID]) GO CREATE NONCLUSTERED INDEX

				IX_NCI_noteFileID ON [dbo].[InteractionsCompositions] ([noteFileID]) GO
3184	Bug	Mass mailing converted	Admin Tools - Mailing	Since the variables changed in 7.0, we automatically convert the variables that are currently used within Mass Mailing - Messages to the new format. For example, $FirstName$ is replaced with a $value -customer command.
3186	Bug	Convert Website variable to $value	Admin Tools - Websites	Replaced the variables from the Admin Tools - Websites tab with the new $value variables in the DB update.
3193	Bug	Text only emails send blank from Mass Mailing	Admin Tools - Mailing	If you create a mass mailing message without an HTML body, it was sent as a blank message.
3152	Bug	Invalid name in Stock response generates internal error	Msg Queue - My Queue	A typo within the -name parameter of a stock response generated an internal error during preview.
3160	Bug	Update iService HEAD to avoid displaying IE in compatibility mode	Web Interface - General	Instruct IE to use the Edge value

Version 6.1

ID	Type	Description	Category	Details
1921	Feature	Broadcast Messages from the Management Console	Chat - Server	This enhancement allows administrators to send messages to any logged in iService agent from the iService Management Console. See the Management Console User Guide for details.

2104	Feature	Enable Full HTML Page edit on the Mailing - Messages RTE	Admin Tools - Mailing	Update that allows saving the full HTML page within the Rich Text Editor for Mailing-Messages. The docType declaration is not included.
2048	Feature	MSG - Update display format for messages	Management Console	Provided CSS to help users layout their messages in HTML. See the iService [Management Console guide]() for details.
2072	Feature	Add RTE to Mailing-Messages page	Admin Tools - Mailing	Added Rich Text Editor to the Admin Tools-Mailing-Messages page for editing and viewing the HTML version of messages.
2078	Feature	Format Mailbox tab layout	Admin Tools - Mailboxes	Updated the mailbox tab layout to reflect selection of POP or IMAP, and to make the changes needed for SMTP Auth to be clear.
2049	Feature	_IMAP Support	Mail Processor	Provided support for IMAP using Afterlogic MailBee.
2066	Feature	MSG - Add UserType to control broadcast message display.	Web Interface - General	To better control the display of broadcast messages, we created a UserType that controls whether the message is displayed to the user.
1982	Bug	Internal error on form submission that is missing a description	Admin Tools - Forms	When a form with a multi-value contact property, like Phone, was created without a description this caused the form to try and create a blank description which triggered an internal error. This is now corrected.
2042	Bug	_Check marks not removed on postback in supervise page	Msg Queue - Supervise	When you selected messages to mass update and then perform an action (e.g. assign the message to an agent(s)), the check marks remained on postback. These are now removed when the mass update is posted.

2052	Bug	$Reset URL$ does not generate password reset link	Admin Tools - Autoresponses	The variable $Reset URL$ was not generating the password reset link. It generated a URL with an invalid GUID. The workaround was to use the Reset GUID with the full URL as below. https://1to1service.iservicecrm.com/PasswordReset.aspx?confirm=$Reset GUID$. This is now corrected and $Reset URL$ can be used.
2053	Bug	Subscriptions not updating in forms	Admin Tools - Forms	Custom subscriptions management forms were not removing lists when unselected by the user.
2054	Bug	Registration sets random password	Web Interface - General	The built-in registration page within iService was overwriting the users selected password.
2033	Bug	IE9 without Compatibility Mode does not update MyQueue draft response panel when pasting stock response	Rich Text Editor	In IE9 on Windows 7 Pro, if you don't turn on compatibility mode the RTE will not refresh the draft response as you paste in stock responses. If you do turn on compatibility mode, the panel updates every time. Corrected.
2086	Bug	Attachment not showing within Message Queue views.	Mail Processor	A certain format of PDF attachments were not being displayed by iService within the Message Queue views.
2087	Bug	eFax messages not processed	Mail Processor	Some eFax messages were not being processed by iService, although they were popped successfully.
1368	Bug	Date stamp display on Agent Response is incorrect	Interaction History	We previously displayed the time of an Agent Response in history using the creation time, rather than the sent/resolved time. Updated the display in history to show the date/time the response was sent.

				The time created is in the audit trail if needed.
2028	Bug	Unable to remove files from Find Answers	Find Answers	Un-checking a file attachment and saving the article did not remove the file attachment from a find answers article.

Version 6.0

ID	Type	Description	Category	Details
1868	Feature	_Rich Text Editor and HTML as primary view for messages	Msg Queue - My Queue	We have moved away from plain text as the primary view of email since most all email today is viewable and managed as Rich Text. This enhancements adds a new rich text editor (RTE) to allow agents to compose Rich Text and HTML, and presents the original Rich Text email to the agent for responding. It affects all areas of iService where interactions are composed, and most areas where they are presented for viewing. This enhancement is based on the jquery cleditor. This major enhancement includes the following subparts. 1922 - Integrate a RTE into the iService website (jquery files etc) 1894 - Convert stock responses to a singled RTE body 1923 - Display and edit the HTML mail rather than plain text in My Queue

				1924 - Convert incoming inline images from file attachments back to inline image 1925 - Remove the HTML Original Message View (since it is now part of 1926 - Compose HTML response from Supervise 1927 - Compose HTML email from Cust Info - Agent Email 1928 - Compose HTML notes from Cust Info - Notes 1929 - Compose HTML ticket from Cust Info - Tickets 1930 - Add RTE to forms so it can be used for interaction bodies (actions must support RTE input) Design Question, should we put the RTE on the Action Body itself.
1870	Feature	Upgrade to VS2010 and .NET 4	Web Interface - General	We've update the iService solution to VS 2010 and .NET 4. Please note that you must have .NET 4 installed on your Windows server to run version 6 or greater of iService.
1924	Feature	RTE - Retain in-line images within the displayed message body	Rich Text Editor	When an incoming message includes images embedded, we currently save them as attachments and display a placeholder in the message. This enhancement will convert those in line messages into HTML so they can be displayed in the body of the message. This works by saving them to the iService database and inserting a link to those images into the message that is displayed in iService. Similarly, we allow the user to paste images into the response and

				automatically convert those messages into HTML tags that can be displayed in-line by the user rather than as attachments. NOTE: pasting images into the text area is limited to certain browsers and currently is only supported by Firefox.
1994	Feature	Document example for including RTE in a form body	Admin Tools - Forms	We have provided an example of including Cleditor in a form body. This example is included in the iService Forms Developer User Guide.
1910	Feature	Convert $logged / $FormID in commands to $value	Admin Tools - Forms	Display only commands are now based on the $Value command instead of having a separate command for each type. We have converted each of the dollar logged in commands to the new format which is $Value - loggedin(name)$, etc.The $FormID command is also converted to $Value -formID$. See details within the Forms Developer User Guide.
1971	Feature	Update web service to allow plain text agent email creation	Cust Info - Contact Agent Email	We previously upconverted message content to Rich Text to ensure all SMTP messages were multi-part. This caused an issue for some users that were generating plain-text messages with specific formatting. We now allow the web service to send a Plain Text only version of message agent emails.
2007	Feature	Make the Draft Body taller in MyQueue	Msg Queue - My Queue	Since we are now displaying images and rich text in the draft body, we needed to make the edit window larger.

1930	Feature	RTE - Add RTE to forms so it can be used for interaction bodies (actions must support RTE input)	Rich Text Editor	Since we are now composing primarily in the RTE environment, we needed the ability to include the HTML body into form generated interactions. This will required that actions support HTML bodies coming from the user as well as plain text (e.g., the RTE can be embedded within text areas of the form body). If your form body includes an RTE to allow rich text input, add the parameter -isHTML to the action to which that input is posted so it is properly handled.
1929	Feature	RTE - Compose HTML ticket from Cust Info - Tickets	Rich Text Editor	Embedded the RTE into the Cust Info - Tickets page.
1925	Feature	RTE - Remove the HTML original message tab from my queue	Rich Text Editor	Since we are displaying the HTML message by default, we've removed the fourth tab from the my queue page that was displayed for HTML bodies.
1926	Feature	RTE - Compose HTML response from Supervise	Rich Text Editor	Since we are using the HTML body as the primary message, we've embed the RTE into the supervise page. This page functions similarly to the my queue page.
1928	Feature	RTE - Compose HTML notes from	Rich Text Editor	Embedded the RTE into the notes page on Customer Info.

		Cust Info - Notes		
2014	Feature	Update error message for forms that require login	Admin Tools - Forms	When a form generates a ticket, it requires agent login. If not logged in, the error displayed was "Access Violation". We have improved this by indicating "Your login information does not match our records."
2017	Feature	Add SMTP Auth to mailboxes page	Admin Tools - Mailboxes	Updated the mailboxes page to capture the required attributes for sending email using SMTP Authentication. This method is only used if the Use SMTP Auth checkbox is selected. Checking this box requires the following data: SMTP Port, SMTP User Name, and SMTP Password
1966	Feature	Allow agent reply to notification at beginning of email	Admin Tools - Autoresponses	We've developed a new type of auto response that allows agent's to reply without using the begin marker that requires the agent to type into a specific section of the email. This new auto response only has an end marker, after which you should insert your instructions to the agent. iService will capture everything prior to the END marker and use it for the body of the response sent to the customer. The format for this new auto response variable is $notifyresponsebodyatstart$ and it also requires the use of the $NotifyResponseID$. See the iService Configuration Guide for more details.
1967	Feature	Need RTE on Admin	Admin Tools -	The Admin Tools - Auto Response page now has a

		Tools - Auto Response	Autoresp onses	singled RTE enabled message body.
19 27	Feat ure	RTE - Compose HTML email from Cust Info - Agent Email	Rich Text Editor	Embedded the RTE within the agent e-mail page with functionality similar to My Queue page.
18 50	Bug	Replace NULL within Master Database Tenant Table for mailBoxMo de	Manage ment Console	In the tenants database, the default setting for mailBoxMode was NULL... which translated to Async. This is now replaced with an explicit Aysnc setting.
19 90	Bug	Filter on decoded message, rather than raw message	Mail Processo r	We were previously running message filters against the raw message, rather than in the decoded message body, because we we did not store the decoded message body. We now filter against the decoded message body which is critical for email received in Base64 format that do not suppor regular expression matching.
19 32	Bug	Rename the iService service and monitor to iService instead of iService 4	MailPop per Monitor	The dlls for iService are now named iService without a version number.
18 46	Bug	Request web service	Manage ment	When importing tenants now ask for the web services URL

		URL when importing tenants and set MailboxPop Mode	Console	location, which can be different for each tenant if desired.
19 86	Bug	Internal error when msg has two attachment s with same name	Admin Tools - Autoresp onses	When a message had two attachments with the same name, an internal error was generated when we tried to compose the auto response. This has been corrected.
19 79	Bug	Internal Error deleting skill that is assigned to a past agent	Admin Tools - Skills	If you attempted to delete a skill that was assigned to a contact that was previously an agent, an internal error is generated. This is now corrected.
19 77	Bug	Prevent reassignme nt from supervise when message is resolved	Msg Queue - Supervis e	The supervise page currently allows a message to be assigned that has previously been resolved. When the message is reassigned, it creates a new unsent response. This happens when a supervisor does not refresh their page to see that the message is resolved. Port this change to 5.12.
19 68	Bug	Original Message variable not displaying plain text in auto response	Admin Tools - Autoresp onses	The original message variable is not displaying a message body for auto responses sent to AAQ. See the attached image.
18 52	Bug	Error when draft	Msg Queue -	If you saved a draft response in the supervised page and then

		response is saved from Supervise page and message is assigned	Supervise	assigned the message to an agent, it did not appear in the agents inbox. Even after using the reset.aspx, reloading the browser, and clicking, the message was not appearing in the agent's inbox. The only way to get the message was to unassign it and then reassign it. This has been corrected.
1894	Bug	RTE-Convert stock responses to use a single rich text body	Web Interface - General	Converted the stock response admin tab into a single RTE enabled text area, rather than separate plain and HTML bodies. The HTML version is down converted to plain text automatically.
1905	Bug	Internal Error when -group is used in action but not form	Admin Tools - Forms	If you included a value in the Group parameter section of an action but the form body did not include that group, an internal error was generated. This is now corrected and the invalid group parameter is ignored.

3 System Overview

iService® is designed to connect customers with your company in several ways.

Email Response - Customers submit questions via email or the integrated Ask a Question web forms. These questions are routed to customer service agents using skills based routing techniques where they can be answered using the iService web interface. iService eliminates the need to use email clients such as Outlook and allows customer service agents to work from any location where they have access to a web browser. The system allows multiple agents to work at a time, automatically distributing messages among them based upon message priority and the agent's skills.

Web Self-help - Answers composed by service representatives can be easily added to a knowledge base that customers can browse for self-help purposes, or shared among service representatives to promote a consistent and high quality service level.

Email Marketing - The system includes a complete outbound email marketing component with list management, click through tracking, and detailed reports. See the iCentives Mass Mailing User Guide for details.

Contact Management - The centralized database provides an enterprise view of all customer interactions, including telephone calls and tickets that are entered into the system. You can extend the contact information about each contact with an unlimited number of additional fields (account number, etc.).

Business Intelligence - iService includes a set of Microsoft SQL Server Reporting Services reports that provide detailed metrics about the activities of your agents, the types of questions your customers ask, and your service levels. See the Business Intelligence Reports Guide for details.

Integrated Forms - iService Forms allow you to customize the user interface presented to customers and operators, as well as build workflow applications using the various iService actions and variables. See the Forms Developer Guide for details.

Mobile Support - Using iService Forms, you can easily create mobile support and marketing sites.

Live Chat - iService Live Chat allows you to conduct interactive chats with customers while they are on your website. See the Chat User Guide for details.

3.1 Multi-Tenant Architecture (Application Service Providers Only)

iService is a multi-tenant application that allows administrators to easily add new on-demand customers of the service without the need to install new software, create new web sites, etc. All customers operate using a single instance of the software, which simplifies the upgrade and maintenance process. The multi-tenant feature can also be used to operate test, training, and production versions of iService for on-premise users.

Within the iService Management Console, administrators can create “tenants” that have their own fully configurable system. Differences between client sites are supported through tenant configuration options, many of which can be maintained through the standard iService web interface. The data for each tenant is contained within its own database, and a master database maintains information about all tenants.

See the iService Management Console user guide for more information.

3.2 Application Components

iService is composed of various components that are designed for different types of users. These components include:

1. **iService Management Console** - This is a Windows applications (typically installed on the database server) used to create new tenants and manage various aspect of the

tenant that cannot be managed through the web interface. (see the iService Management Console user guide for more information).

2. **Mail Monitor** - This is a Windows application that provides a real-time view of the threads running for each iService tenant. (see the iService Management Console user guide for more information).

3. **Mail Popper Service** – This component operates as a Windows Service and is responsible for retrieving mail from monitored mailboxes, getting those messages into the iService database, and performing various email management tasks (sending auto-responses, filtering messages, etc.). For additional details regarding the Mail Processor, see the iService Administrators Guide.

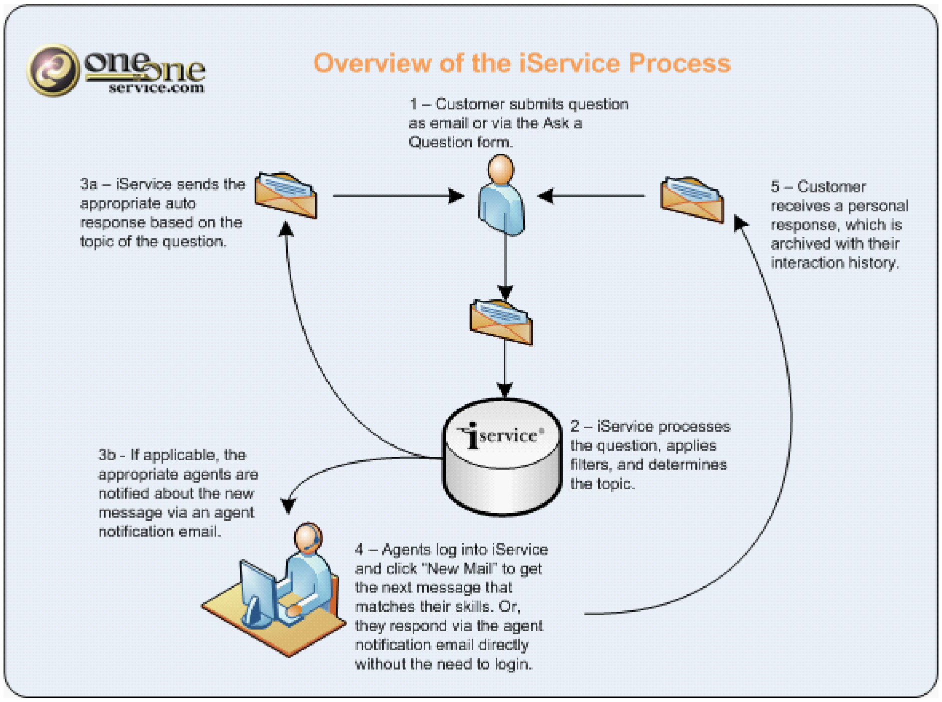
4. **iService Database** – iService uses an MS SQL Server database to store its configuration information and interaction details. Each installation has a master database and separate databases for each tenant.

5. **Web Services** – iService is designed around the concept of a Service Oriented Architecture (SOA), and is comprised of web services that interact with the iService Database. These web services perform functions such as creating contacts, inserting call notes, sending email responses, etc. The web services are used by the iService tenant web site to provide the desired user experience. The web services allow users of iService to integrate with other applications or extend the functionality as necessary to achieve desired business results.

6. **iService Tenant Web Site** – iService users will perform all of their customer interaction functions using the iService web interface. This site is used by administrators that configure the site, as well as agents that are responsible for interacting with customers, prospects, etc.

3.3 Question Routing

One of the key elements of iService is its ability to route incoming emails, agent created tickets, and other types of items using a skills-based routing approach. This routing process is customizable, but the default configuration is shown below.



3.4 iService Common Terms and Definitions

Throughout this document, there are several common terms used to refer to various parts of the system. Definitions for these terms are shown below.

Additional Details – Additional details are lists of values (e.g., browser type, credit card type, etc.) that can be added to customer and interaction properties. These lists enforce data integrity by ensuring consistent entries as opposed to freely entered text valued. They are created at the Tenant level and referenced within Contact Properties and Interaction Properties at the Segment level.

Agent – An iService User that has access to customer support representative or administrative functions of the system, such as the Customer Info, Message Queue, or Admin Tools pages. Agents are configured in the Admin Tools > Agents tab.

Contacts – A contact is synonymous to a person. They are external users of the iService product and are sometimes referred to as customers.

Contact Properties – Contact information, such as contract status or software version, that is configurable and unique to each iService segment. These are user definable fields that may be shared with other Segments or made private (i.e., specific to the Segment). These properties are configured in the Admin Tools > Segment > Contact Properties tab.

Customer Types – Each contact within iService may have one or more customer types that can be used for searching, reporting, and organizing contact lists. The standard customer types are customer, vendor, agent and SPAM. Additional types can be added as needed.

Default Mailbox – Each Segment has a default mailbox unless it is an Information Only segment. The default mailbox is used when information must be sent by iService and no specific mailbox is specified. For example, email responses sent to questions submitted via the Ask a Question page uses the default mailbox.
Departments – Departments are used to group agents and simplify the assignment of skills and segments.
Information Only Segment – An Information Only segment can be used to capture details about a contact, and limit access to those details to certain authorized Agents. These segments are defined within iService as not Standard.
Installation – A single instance of the iService software. The installation of iService may contain one or many tenant databases.
Interaction Properties – These are additional values that are associated with interactions. When a customer asks a question, they select a topic that is most relevant for the subject of their question. For some topics, like technical support, it is useful to capture additional information such as the browser the contact was using when they experienced an error. These properties can also be designated as answer properties and populated by the agent providing the response. These details are only relevant to the topics to which they are assigned and are configurable at the Segment level.
Mailbox – iService has the ability to retrieve incoming email from email addresses and convert them into messages that can be routed internally for answering. These email addresses, which are usually generic (info@, for example), are referred to as mailboxes.
Segments – A grouping of information within iService that supports separate levels of security and presentation. Segments are often used to separate Contacts and Document Collections of different business units. See the Business Rules section below for more details.
Segment Administrators – Segment Administrators are Users that have the privilege level of Administrator. They are responsible for configuring the iService system for their business segment.
Standard Contact Details – Contact information, such as name and phone number, which is standard with each iService installation. This information is always shared among iService Segments and is displayed in the contact details tab for all contacts.
Super User – Each Segment contains a Super User (Landlord) that has the ability to create Tenant Administrators. This is the only account with the rights to create Administrators.
Tenant – iService is a multi-tenant application that allows a single instance of the application to be used by multiple end users (separate companies). A tenant is the highest level of organization within iService. It contains all of the Segments for a business. All information within a Tenant is clearly isolated from other tenants and stored in its own database. Tenants are completely unaware than they are using the same version of software as other on-demand or hosted Tenants. In-house implementations operate with a single tenant.
User – A person that uses the iService CRM system (including contacts and agents).

3.5 Business Rules

The iService system has business rules that define how the system functions. These business rules are enforced at the web services level, which allows the user interfaces to operate somewhat independent of one another and to be used directly be other applications. The most important of these business rules are defined below.

Contacts –

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

Departments –

- Departments are used to simplify the management of agents.
- Agents that are assigned to a department (e.g., sales, support, human resources) will inherit the attributes of the department. That is, Departments may be assigned skills and segment access, and this privilege will be delegated to all of the agents in that department.

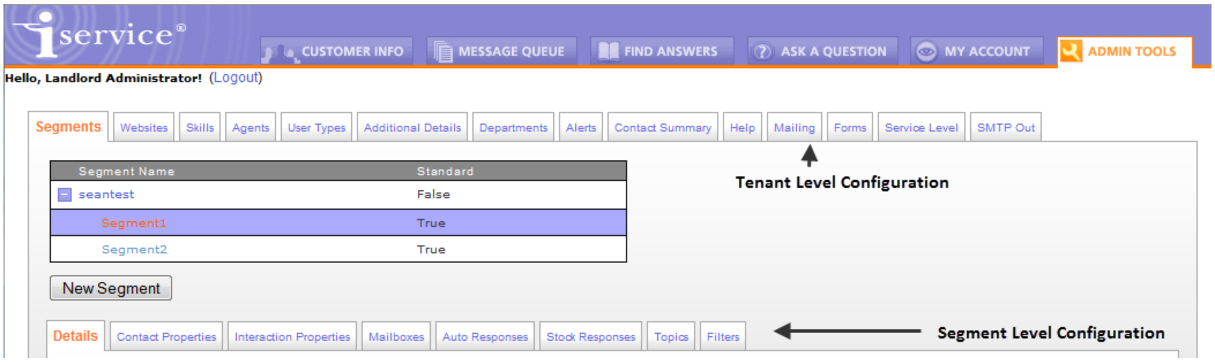
Segments –

- A Segment is a grouping of information within iService that supports separate levels of security and presentation. Segments are often used to separate Contacts of different business units.
- Segments are defined as Standard or Information Only. Information only segments do not have topic trees or mailboxes. They are used to manage access to contact properties and provide hierarchy in the segment configuration only. Interactions (customer email, notes, etc.) cannot be entered into an information only segment.
- Each Standard Segment must have a Default Mailbox. A mailbox may exist in only one segment of the tenant.
- Each Standard Segment has a Topic Tree that is used to categorize incoming questions, and present articles in the iService knowledge base (Find Answers tab).
- Agents are routed calls from any assigned Segment if they have the necessary skills to answer the call.
- Details within the Global Segment (default fields) are shared across Segments. For instance, a phone number entered for a Contact in Segment 1 is visible when the same

Contact is viewed by an agent that only has access to Segment 2, as long as the Contact is associated with Segment 2 in addition to Segment 1.
- Segments may have additional Contact Properties that are separate from the Standard Contact Properties. These contact properties are viewable based upon whether they are shared or private. If the property is shared, all users with access to the contact can view them. If the property is not shared, only users with access to the Segment may view those properties.
- Customer Info Search Results are limited based on the Segments to which the Agent has access. (i.e., searches performed within the Customer Info – Search tab).
- Find Answers Search Results are limited based on the Segments to which the Agent or Contact have access.
- All interactions (customer emails, tickets, agent emails, etc.) are tied to a specific Segment and topic within that Segment.
- Parent Segments are automatically granted access to the information (contacts and details) from their child segments.
- Each tenant has a global hidden segment that is not visible to administrators. This segment contains the standard contact details that are shared with all segments.
- Contact properties and interaction properties may be populated for a Contact or Interaction even if they are not a member of the segment that the properties are in.

Tenants –
- A tenant is a separate database within iService that contains all the configuration information and database tables necessary to use the iService system.
- Tenant information is completely isolated from other tenants. As a result, it is not possible for a user logged into one tenant to see any information from other tenants.
- Reporting is designed to be on a tenant by tenant basis, without the ability to generate reports that combine more than one tenant.
- Tenants have the ability to configure their iService system any way they choose, without regard to how other tenants configure and use their systems.
- Tenants share a common website, but may customize the interface via a customized Cascading Style Sheet (css).

4 Tenant Configuration

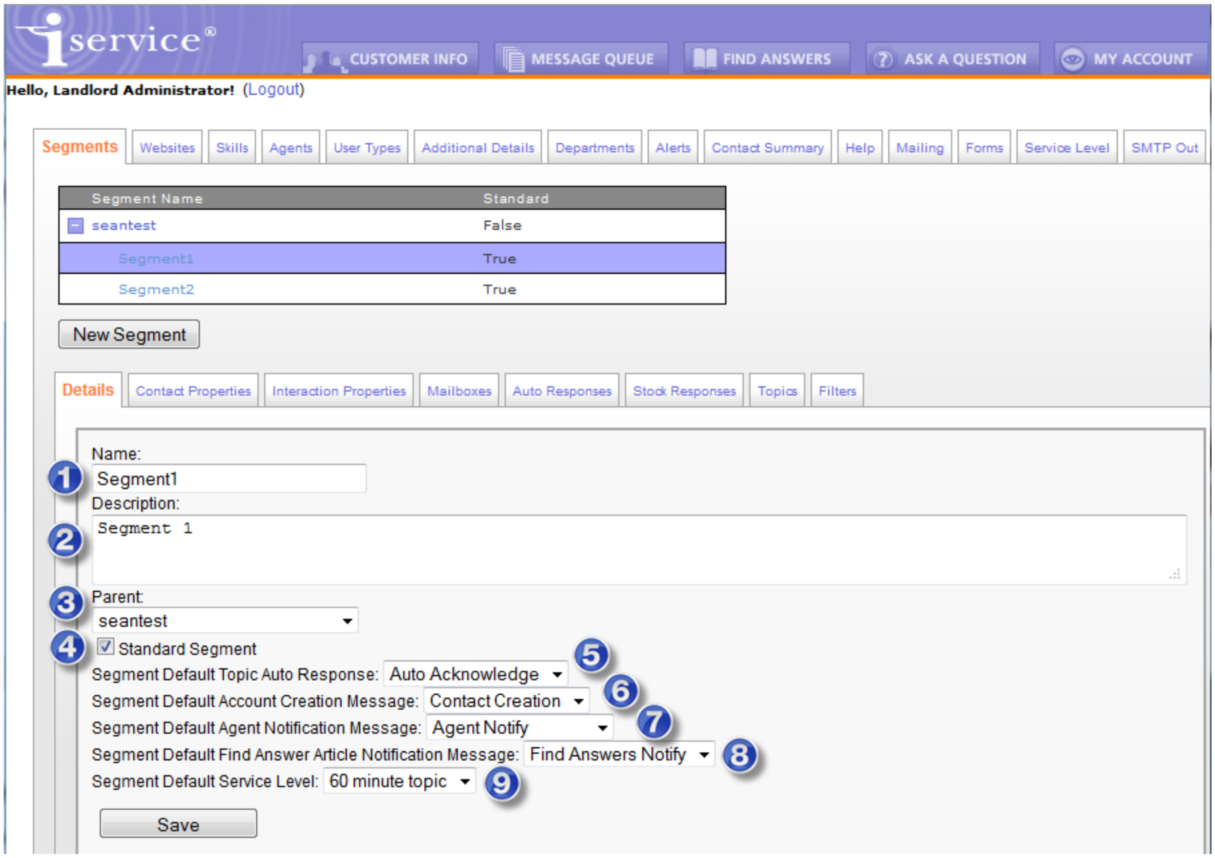


The Tenant Configuration Tabs Within Admin Tools

The tenant configuration process is split into two components: Tenant Configuration and Segment Configuration. Tenant level information is available to all segments and is configured independent of the segments. For instance, skills used for routing can be referenced by all segments and are therefore part of tenant configuration.

4.1 Segments

Segments are used to isolate business units that have unique needs or otherwise need to be managed independently. There are two types of segments: Standard and Informational. A standard segment contains mailboxes, topics, and other elements of a fully functional customer interaction system. Informational segment (i.e., not a Standard Segment) do not contain mailboxes or topics and as a result cannot receive or send email. Informational segments are used to store contact or interaction properties, or to provide structure to your overall iService configuration.



Click to Expand

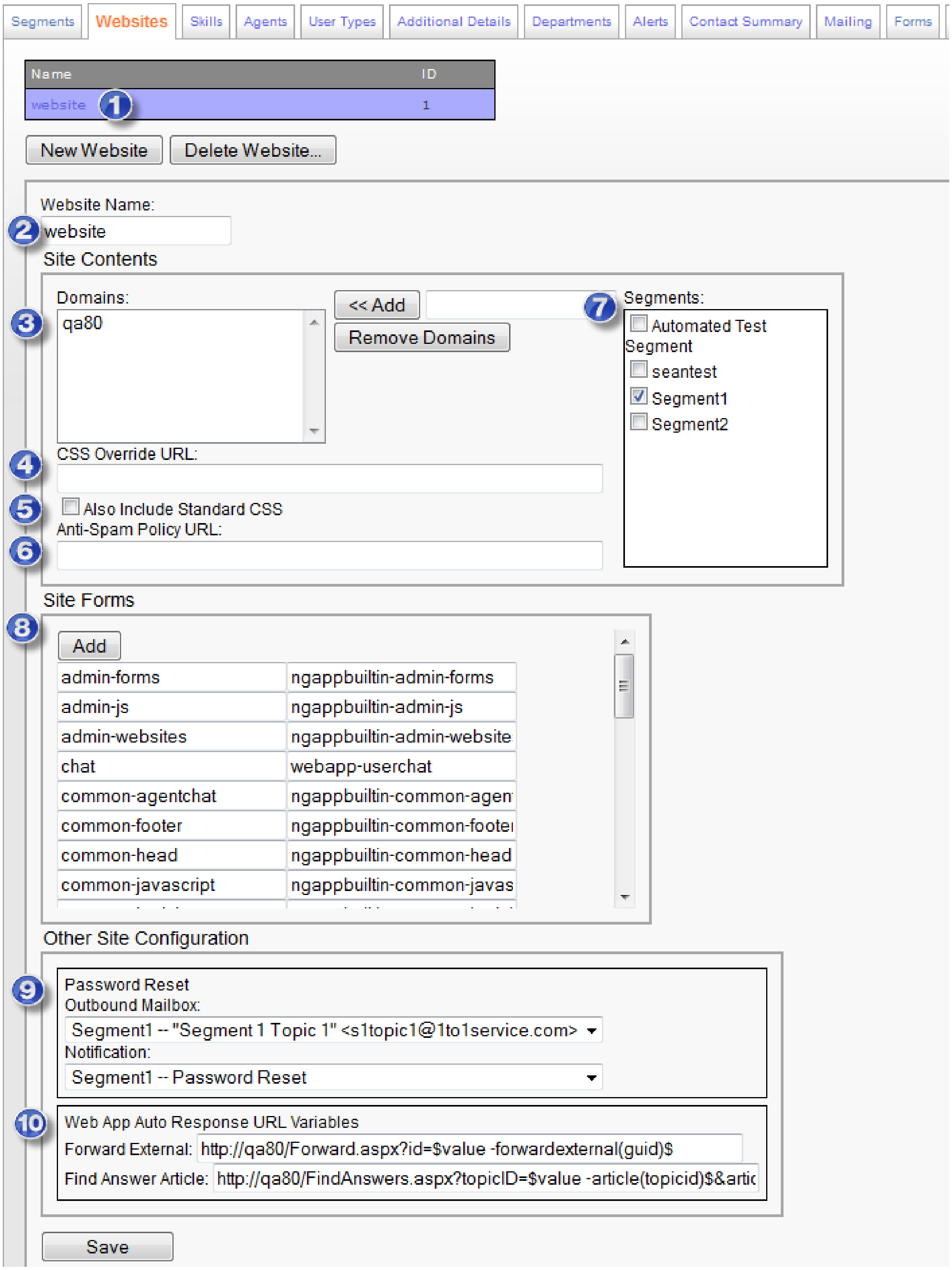
Additional information on the various configuration options for Segments can be found in the section entitled, "Segment Configuration" later in this document.

4.2 Websites

The Find Answers and Ask a Question tabs of iService provide a web interface where customers can ask questions and search for answers within an integrated knowledge base. These questions and answers are associated with a topic that is unique to each Segment. Since a Tenant may have multiple segments, it is sometimes desired to combine the various segments into a single self service site. An unlimited number of self service websites can be defined within the Websites tab.

These websites can also be separately branded by using a different CSS file for each website. And with custom forms, the full user interface that both agents and customers see can be further customized by selecting alternate forms in the Site Forms panel.

The websites tab consists of three panels for each website: Site Contents, Site Forms, and Other Site Configuration. They are used to create custom configurations tied to a specific URL / domain. The configurations can be used to support different branding for segments, or to support different user interfaces for agents that are optimized for their business processes.



Click to Expand

1 - Website Name Panel
The Website Name panel provides a listing of all websites that have been defined. Selecting a site from the list updates the lower panel where its details can be edited.

2 - Name – This is the name of the website as displayed in the list.

Site Contents Fields
3 - Domains – The domain represents the URL at which the website can be accessed. You can add domains by typing them into the text box to the right and clicking the <<Add button. To remove a domain, highlight it in the list and click Remove Domains.

4 - CSS Override URL – A cascading style sheet (CSS) is used to define the format of the iService website used by agents and contacts. Most of the look and feel of the iService web site can be controlled via CSS (Cascading Style Sheet). The standard style sheet can be modified by a customized CSS. Once a custom style sheet is created it must be saved in a location where it can be loaded by your website. Enter the full URL string for the customized style sheet in the CSS Override URL text box.

5 - Also Include Standard CSS – The "Also Include Standard CSS" checkbox will cause the standard CSS to be used for all values that are not referenced within the custom CSS. The recommended approach is to begin with a copy of the standard iService style sheet (css/iservice.css) and remove all entries other than those that will be customized.

6 - Anti-Spam Policy URL – If you enter a URL in this box, it will display a link to this page on the bottom of each iService page with the text "Anti-Spam Policy". Clicking this link will load the page specified, which should provide a description of your policy for ensuring your iService tenant is not used to deliver unsolicited email.

7 - Segments – The segments included within the website are selected from the Segments list. Multiple websites can be created with various combinations of segments. **Note – There will be no topics in the Find Answers tab or topics the Ask a Question tab unless the website includes at least one standard segment. Also, at least one of the topics in the segment must have Public Visibility to appear.**

Site Forms Fields
8 - Site Forms Fields – The iService web interface has default tabs for navigating through customer information, answering questions, viewing find answers knowledge base articles, and other core functions. Each of these tabs has a default page, but those pages can be replaced by new forms or modified be selecting various options. You can create different user interfaces for users by creating new websites that have different site forms configured for these pages. To learn more about Site Forms, read the Site Forms chapter.

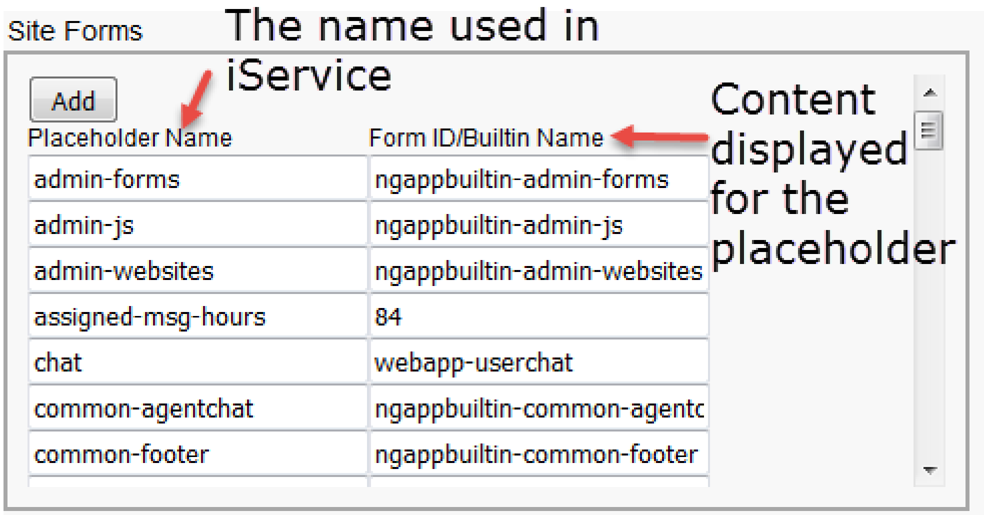
Other Site Configuration Fields
9 - Password Reset: Outbound Mailbox and Notification Template – When a user of the iService Website requests their password, it is sent using the mailbox selected from this list.

Mailboxes are created and maintained from the Segments > Mailboxes tab. When a user of the iService Website requests their password, it is sent using the auto response notification selected from this list. Auto response notifications are created and maintained from the Segments > Auto Responses tab. Only auto responses that are marked as password reset will be displayed in this drop down.

10 - Web App Auto Response URL Variables – When variables are inserted into your auto response template, a URL must be generated (e.g., the Forward External variable that creates a link for answering a question). You must specify the URL to be used in this section, which is typically the domain followed by the URL text shown above.

4.2.1 Site Forms

The Site Forms section of the websites page allows you to customize the interface for users by specifying new forms for the various sections of iService. The forms use a "placeholder" approach where each section of the iService user interface has a placeholder name and an assigned page for that placeholder. You can change the content for each placeholder by specifying a new value.

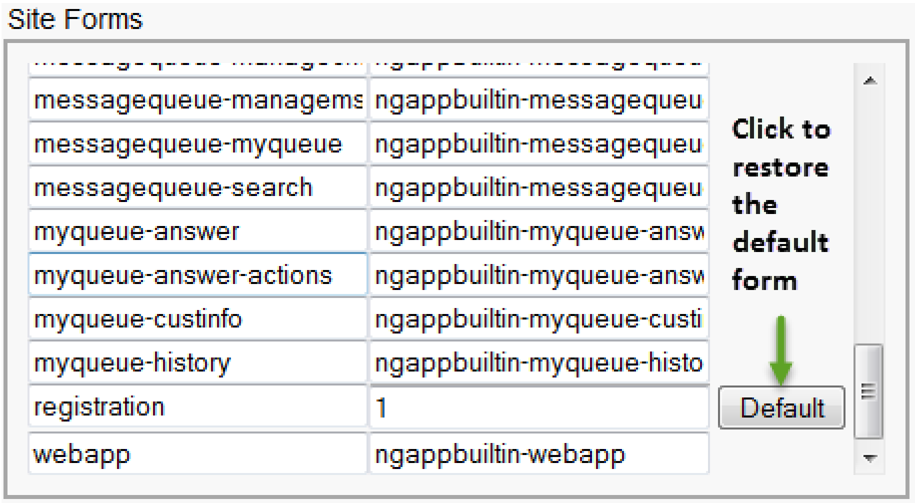


In the example above, the chat placehoder refers to the page displayed at /f/chat. By default this URL loads the iService form named webapp-userchat, which is a form that is built into the iService application. The placeholder above named assigned-msg-hours uses a custom form (#84) that is created in the Admin Tools - Forms page.

The chat form reference above is loaded using /f/chat appended to your iService tenant url. This approach allows you to copy the builtin version of any form, modify it as desired in custom form, and then change the reference within Site Forms to the new Form ID.

Default Values

When you modify the form associated with an iService reserved placeholder (the built-in placeholders), a default button will appear next to the item. Clicking the default button will reset the form name to the original default form.

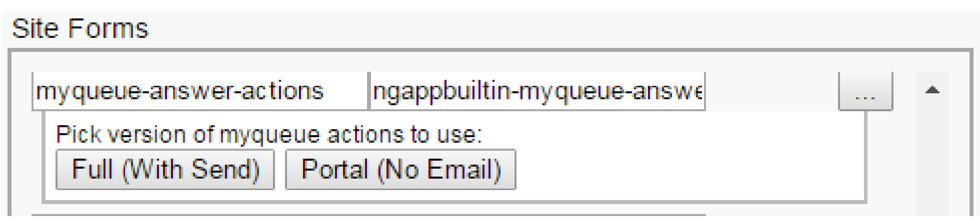


Configuration Options

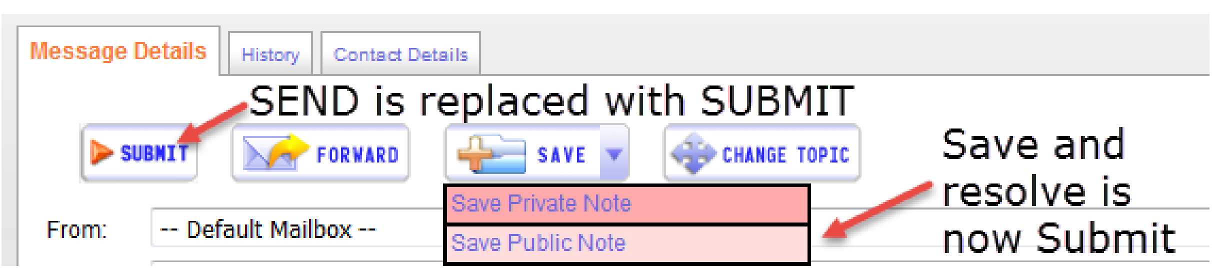
You can change the behavior of a website with the following configuration options.

Standard Email Response vs Secure Message Portal

You can convert a website into a secure messaging portal that does not send email from the MyQueue page by changing the answer actions form as shown below. After making the change, click the Save button to save the changes.



Selecting the Portal (No Email) option will change the actions panel within the My Queue page so there is no SEND button, and the Save and Resolve action is moved to a Submit button as shown below.

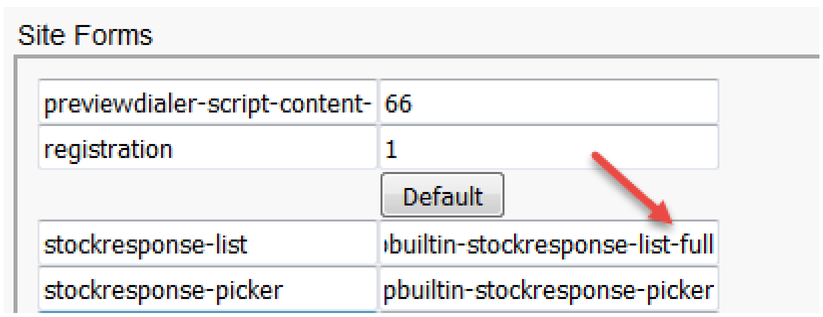


The Submit button will save the response typed by the agent using the Save and Resolve action. This becomes part of the message history for the customer, and the customer can then read the response in an iService message portal securely.

Load only stock response names

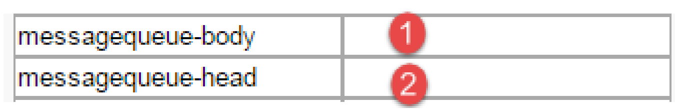
To improve performance for segments with a large number of stock responses (> 250), the value for stockresponse-list can be changed from the default `ngappbuiltin-stockresponse-list-full` to `ngappbuiltin-stockresponse-list-names`.

This will cause the Message Queue - My Queue page to only load the names of the stock responses instead of all the bodies. The bodies will be fetched and pasted into the Draft Message when clicked.



Color code messages by age in Manage Messages page

The manage messages page can color code the dates of messages based upon their age. There are two placeholders used for this configuration as shown below.



1 - Body -- Place the following into a form named messagequeue-body and place the ID of that form into this placeholder.

```
<script>
  var managemessage = iservice.messagequeue.managemessage;
  managemessage.colorCoding.push({ minutes: 240, className: 'color-normal' });
  managemessage.colorCoding.push({ minutes: 360, className: 'color-warning' });
  managemessage.colorCoding.push({ minutes: 480, className: 'color-urgent' });
</script>
```

Update the values for `minutes` as desired. Do not change the color- names.

2 - Head -- Place the following into a form named messagequeue-head and place the ID of that form into this placeholder.

```
<style type="text/css">
  #mq-managemessage-messages tr.color-normal td.column-date { background-color: grey;
  #mq-managemessage-messages tr.color-warning td.column-date { background-color: yello
  #mq-managemessage-messages tr.color-urgent td.column-date { background-color: red; }
</style>
```

Update the values for `background-color` as desired. Do not change the color- names.

Set Business Hours for Assigned-Messages Form

iService includes a built-in form for monitoring the status of assigned messages (/f/assigned-messages). The form uses Monday - Friday 9:00 to 17:00 as the default business hours.

To change the business hours for your website, create a new form named `assigned-messages-body` and include the following code with your required changes (the example sets hours to 8am - 5pm). Then, use the ID from that form as the value for `assigned-messages-body` in the placeholder list.

```
<script>
 iservice.assignedMessages =
 { holidays: [ new Date(0, 0, 1)],
   weeklyHolidays: [0, 6],
   workShifts:
   [ { start: 8,
       end: 17
     } ]
 };
</script>
```

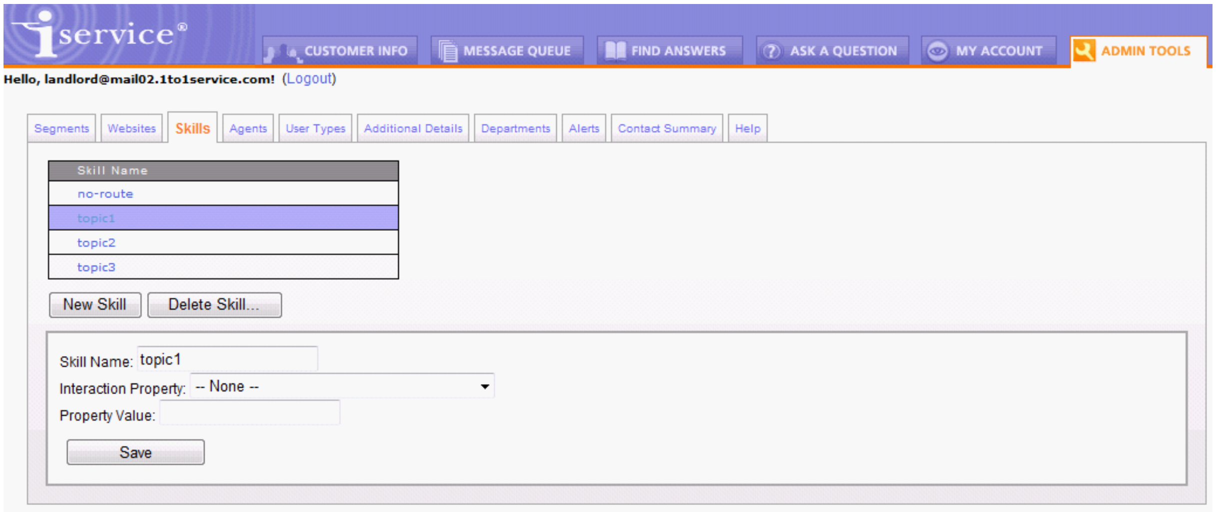
To create multiple shifts, add holidays, etc. consider the example below.

```
<script>
 iservice.assignedMessages =
 {
   // The Date object is constructed by calling the constructor with the following par
   // new Date(year, month, day, hour, minute)
   // year: Is a number like 1990, 2015, etc.
   // month: Is a number from 0 (January) to 11 (December)
   // day: Is a number from 1 to 31
   // hour: Is a number from 0 (12 AM) to 23 (11 PM)
   // minute: Is a number from 0 to 59
   // Week days are represented by numbers running from 0 (Sunday) to 6 (Saturday)

   // holidays is an array of Date objects with each one representing an off day that
   // counted. Notice that we set the year to 0 because holidays are recurring for eve
   // about the year value. We just care about the month and day
   holidays: [new Date(0,0,1),  //Every Jan 1
              new Date(0,5,4),  //Every July 4
              new Date(0,11,25) //Every Dec 25
             ],
```

```
    // weeklyHolidays is an array of numbers with each one representing a weekly off da
    weeklyHolidays: [0, 6], // Sundays and Saturdays are off

    // workShifts is an array of JavaScript objects with each one representing a work s
    // may have one or more shifts as appropriate. The start and end times are represen
    // running from 0 to 24. For example:
    // 0 is 12 AM, 0.5 is 12:30 AM, 20 is 8 PM, 23:33 is 11:20 PM
    workShifts: [{
         start: 8,
         end: 17
     }]
  };
</script>
```

4.3 Skills

Skills are used to ensure incoming questions and tickets are routed to the correct agents. Skills are assigned to topics, and agents are limited to messages where their skills match ALL of the skills assigned to a message's topic. Skills are not required for implementations of iService that do not need skills-based routing. If skills are not used, CSRs will be allowed to receive any inbound message for all segments to which they are granted access. Keep in mind that adding a skill to a topic will **prevent** CSRs from receiving messages from that topic, unless the agent also has the corresponding skill.



4.3.1 Types of Skills

There are two types of skills: *standard skills and interaction property skills*. A standard skill is simply a label, such as Basic Tech, that is assigned to a topic. To handle the questions within that topic will require the agent to also be assigned the standard skill. Interaction property skills are based on a specific value for an interaction property. For instance, an interaction property named Operating System might have three possible values – Windows, Mac, and Linux. If a skill is created that references a value for this property (e.g., Mac), then any message within any topic that has that interaction property value (e.g., Mac) will only be routed to the agents that have this skill assigned. Skills that are based on interaction properties are NOT assigned to topics.

In order to have a message assigned via GetNext or Chat, an agent must have ALL of the skills required by an interaction. This includes skills associated with the topic and also the skills specified by an interaction property.

4.3.2 Creating Skills

To create a new skill in the iService application, click the New Skill button and enter the following information.

Name – The skill name is used throughout iService as a reference to the skill. It is displayed within the Topics, Departments, and Agents administration pages. Choose a name for the skill that is representative of the attributes agents need to answer questions. For example, "Technical Support 1" might be a good name for a skill used to describe entry-level technical support.

Skill Interaction Property - You may apply an interaction property to a skill. This creates a skill that is applied to ALL incoming interactions that contain the matching property value. Skills that are based on a specific interaction property are not assigned to topics, because they apply to all messages regardless of their topic.

An example of an Interaction Property skill is segregating Spanish questions. A filter can be used to identify common Spanish words to determine that an incoming question is written in Spanish. That filter can set a value for an interaction property named "Language" with a value of "Spanish." You might name this skill "Spanish Support", and only assign it to agents that can correspond in Spanish. Any message that arrives into any topic with this designation would then only be routed to agents that speak Spanish.

4.3.3 Overriding Skill Requirements

Skills are used to determine the types of messages routed to agents. However, they can be overridden by a manager from the Msg Queue > Supervisor page by manually reassigning the question to any agent.

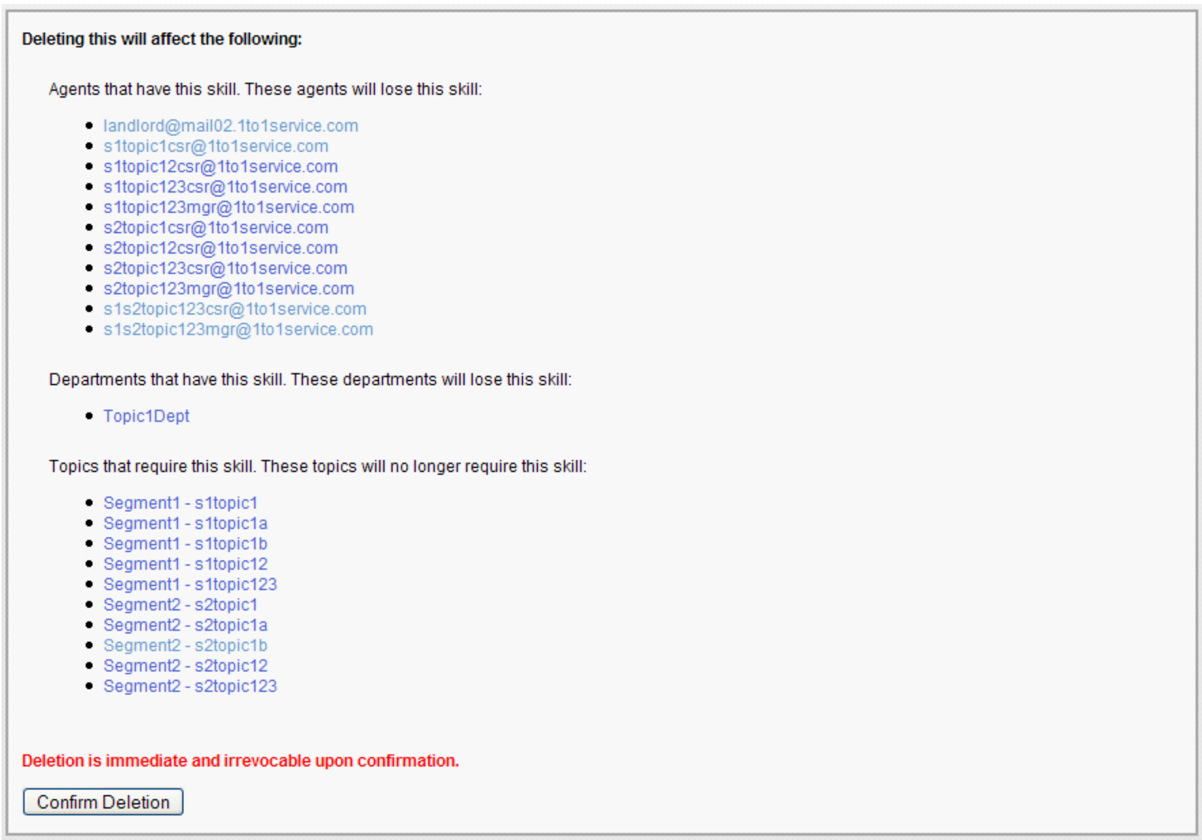
To learn about applying skills to Topics, see the Segment Configuration - Topics section.

To learn about applying skills to Agents, see Tenant Configuration - Agents section.

4.3.4 Deleting Skills

Care should be taken when deleting skills. Any agents, departments, or topics that are using the skill will have the skill removed when deleted. Deleting skills is a two step process: Evaluate the impact of deleting and then confirm deletion.

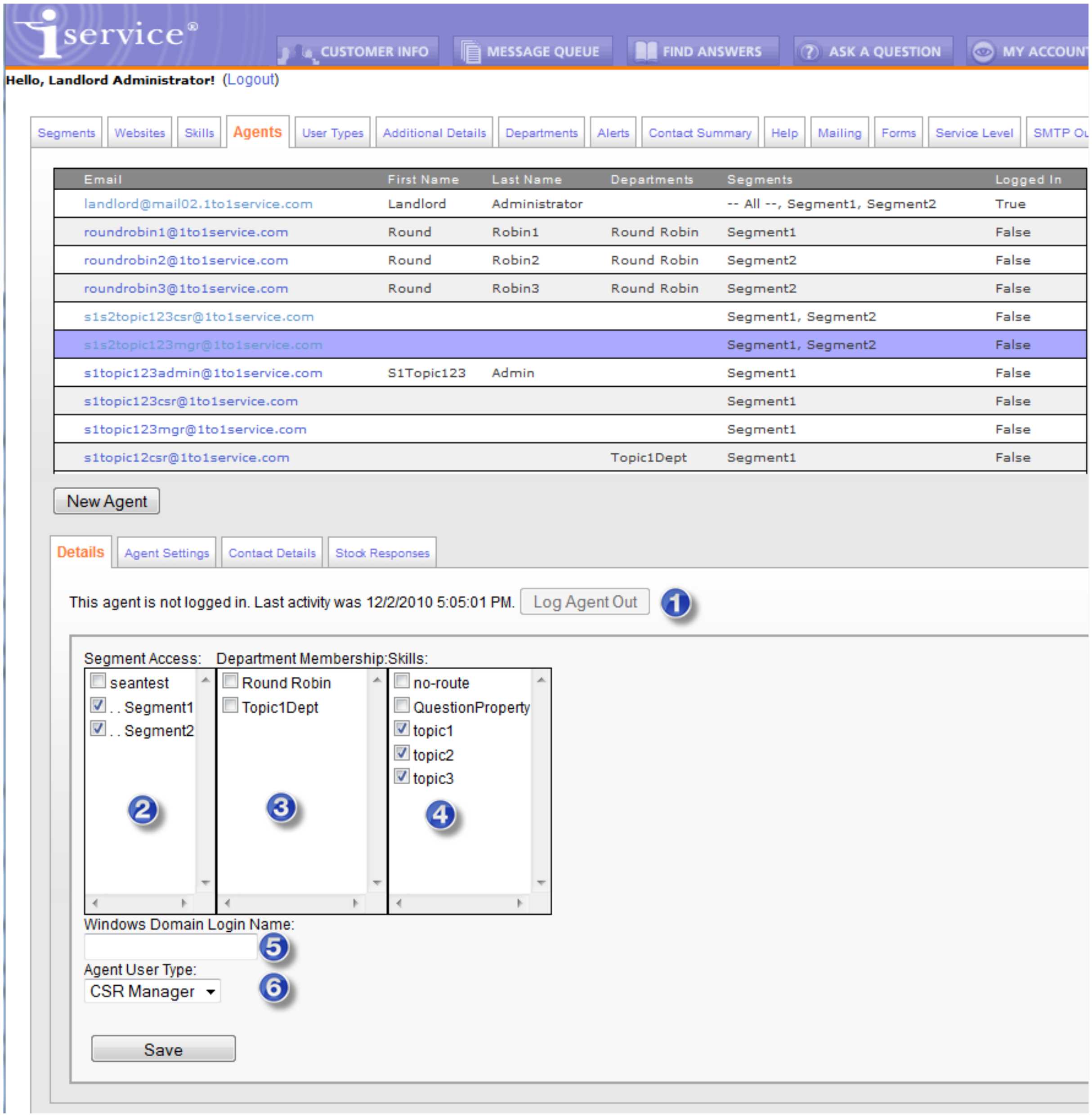
Clicking Delete Skill will generate the following panel.



This panel shows all agents, departments, and topics that are currently using the skill. Clicking on one of the hyperlinks will open a new window where the skill association can be updated.

4.4 Agents

Agents are "internal" users of iService that handle questions from contacts, populate the Find Answers knowledge base, and administer the iService web site. The Agents page can be accessed by Tenant Administrators and CRS Managers. New Agents are added by clicking the New Agent button.



The Agent Details Tab

1 – Agent Status – Agent status is displayed within the agent details panel. This panel shows whether the agent is logged in and the last date/time the agent completed an activity. Agent activity is defined as use of any iService web service (loading any page will use a web service). Agents can be logged out by an administrator via the Log Agent Out button. Any information entered into a web page but not saved will be lost when the agent is logged out by an administrator.

2 – Segment Access – Agents must have access to at least one segment in order to answer messages and view contact information. Segment access is specified by checking the box for each segment to which they are granted access.

3 – Department Membership – When an agent is assigned to a department, they inherit all of the segment access rights and skills of that department.

4 – Skills – Skills are assigned to agents to determine the messages routed to them via the Msg Queue > My Queue page when the request a new message. Agents are limited to messages where their skills match ALL of the skills assigned to a message's topic. Keep in mind that if you only have a small number of Agents, or you want all Agents to answer questions from all topics, you don't have to use skills.

5 – Windows Domain Login Name – iService supports active directory authentication, which will authenticate the user to iService based upon their Windows login. To utilize this feature, the agent's domain and login name must be entered here. The name should be entered in the format domain\login_name. If the agent is currently logged into the domain, their authentication will be passed to iService and they will not have to re-login to iService.

The agent's browser must be configured to support NTLM authentication. See *IIS and Browser Configuration for Active Directory Authentication* for instructions on configuring Active Directory Authentication. The page for auto-agent login is agent.aspx rather than the default.aspx web page. When the agent loads this page while logged into their Windows domain, they will be automatically logged into iService.

6 - Agent User Types
The following user types are available.

Super User – Each installation has a Super User that is able to create administrator accounts. Since users can only create accounts that are at a level below them, this is the only account that can create Administrators.

Administrator - These users have the ability to access all areas of iService including the Admin Tools pages. Administrators are generally the people that maintain your topic tree, add new users, create mailboxes, etc.

Anonymous – This user type allows those with no login account to see what is granted to this account.

Customer – If you have a CSR or Administrator that leaves your company or should no longer have access to iService, you can change their user type to customer. This will retain their information within iService for reporting and message archival purposes, but limit their access to publicly viewable pages.

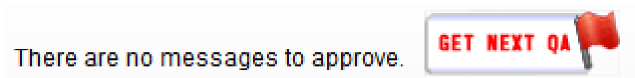
CSR - this user type is designed for customer service representatives that will be answering questions, but not managing other users. They have access to the Message Queue => My Queue page, but can't access the Supervise pages within the

Message Queue. The CSR also has access to Customer Info and Find Answers, including private articles within Find Answers.

QACSR - this user type is designed for customer service representatives that will be answering questions, but not managing other users. As a QA CSR, they do not have the ability to send responses to customers. They can only submit proposed responses that must be reviewed by a QA Manager before the response is sent.

CSR Manager - this user can access the same pages as the CSR, plus the Manage Message and Chats pages within the Message Queue.

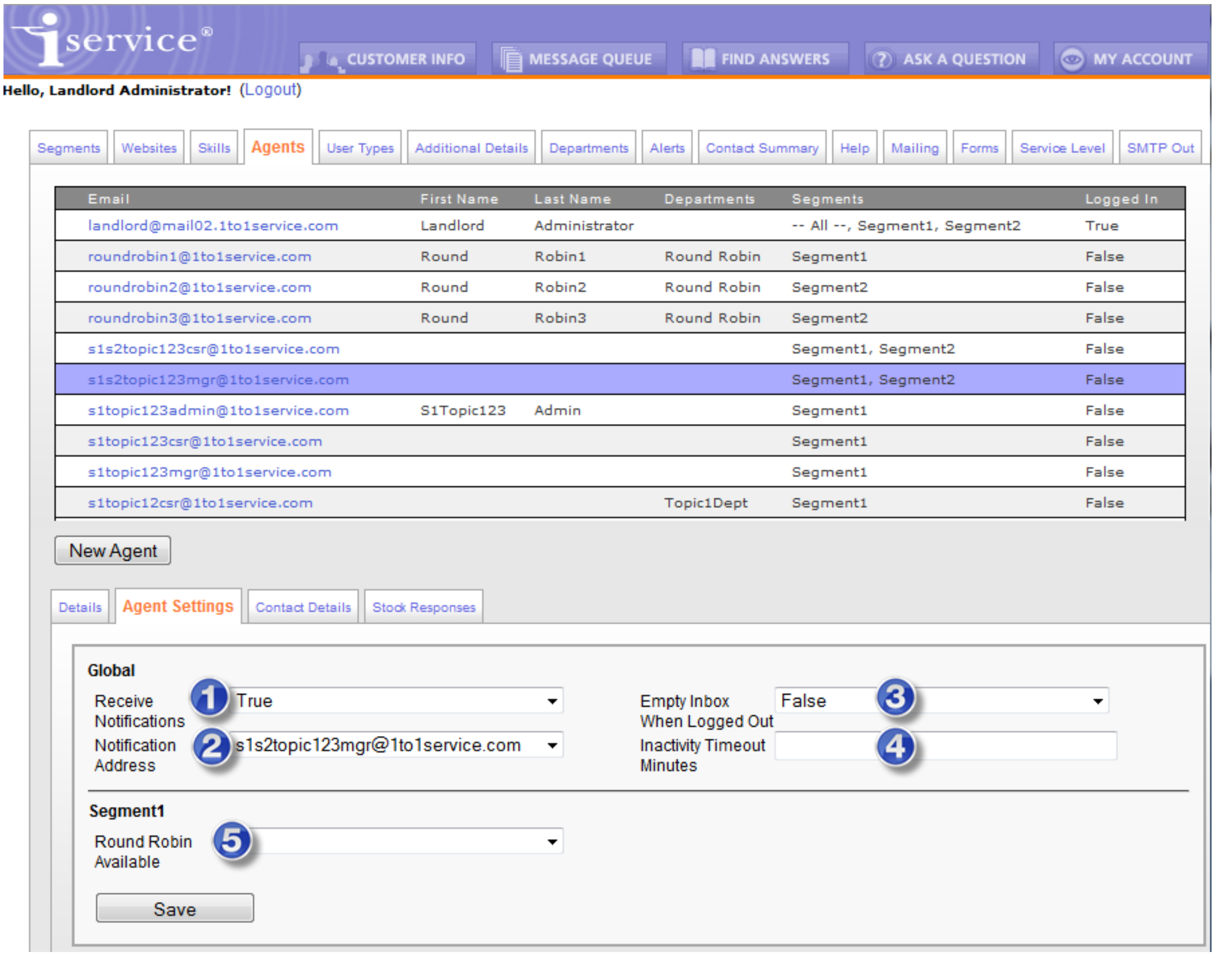
QA Manager - this user can access the same pages as the CSR, plus the Manage Message and Chats pages within the Message Queue. In addition, they receive the proposed responses from the QA CSR's for review and approval via an additional GetQA button that looks like the below image.



Important Note About Changing UserType Rights

The Super User can modify the access rights assigned to the default User Types and create new User Types. However, be careful when modifying access rights to avoid creating a user that has more access than the defaults. In order to access the details of a contact, **agents must have a super-set of the rights** assigned to that contact. For example, if access to tabs are removed from a CSR (e.g., My Account) but remain on the customer user type, CSRs will no longer be able to view contact information.

4.4.1 Agent Settings



The Agent Settings Tab

1 - Receive Notifications – This is an optional field for each Agent. When the Receive Notification option is True, iService will notify this Agent via email when a new message is received by a topic that matches the Agent's skills. Agents are also notified when the topic is changed for messages from a topic which they don't have the required skills to a new topic in which they do have the required skills.

2 - Notification Address – Since all contacts may have more than one email address (including agents), the address to which the notification will be sent must be selected.

3 - Empty Inbox When Logged Out – This option will reassign all interactions from the agent's My Queue back to an unassigned state when the agent logs out. Unsent responses they started will be available to the next agent that has the interaction assigned.

4 - Inactivity Timeout Minutes – When an agent has been inactive for this period they will be automatically logged out of iService. The default timeout within iService is 90 minutes. When this value is left blank the default timeout of 90 minutes will apply.

5 - Custom Segment Contact Property of type Agent – You can create custom contact properties that are only available to agents. Those properties are viewed and set in the Agent Settings tab, rather than within the Customer Info - Contacts tab like other contact properties.

4.4.2 Agent Contact Details Tab

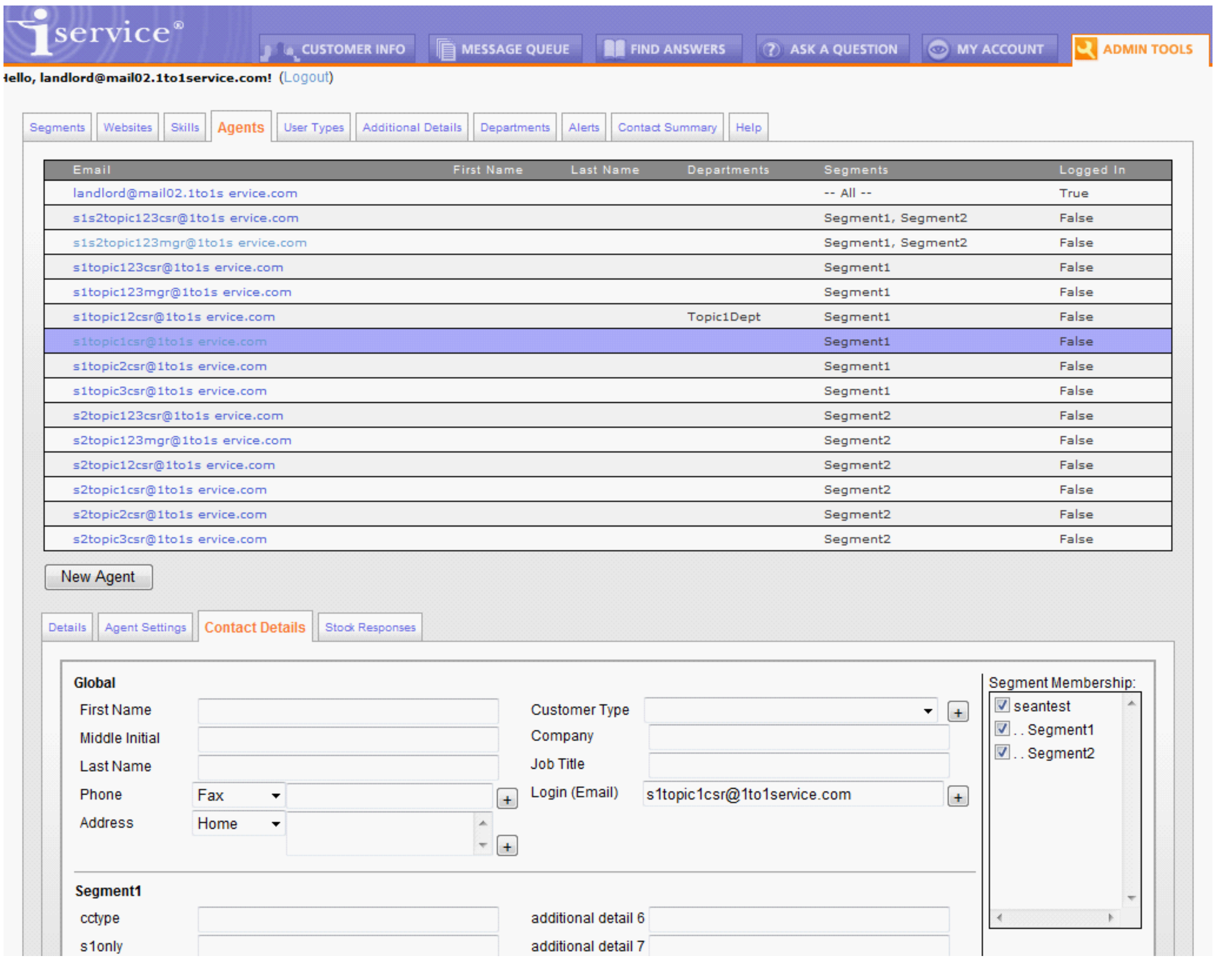
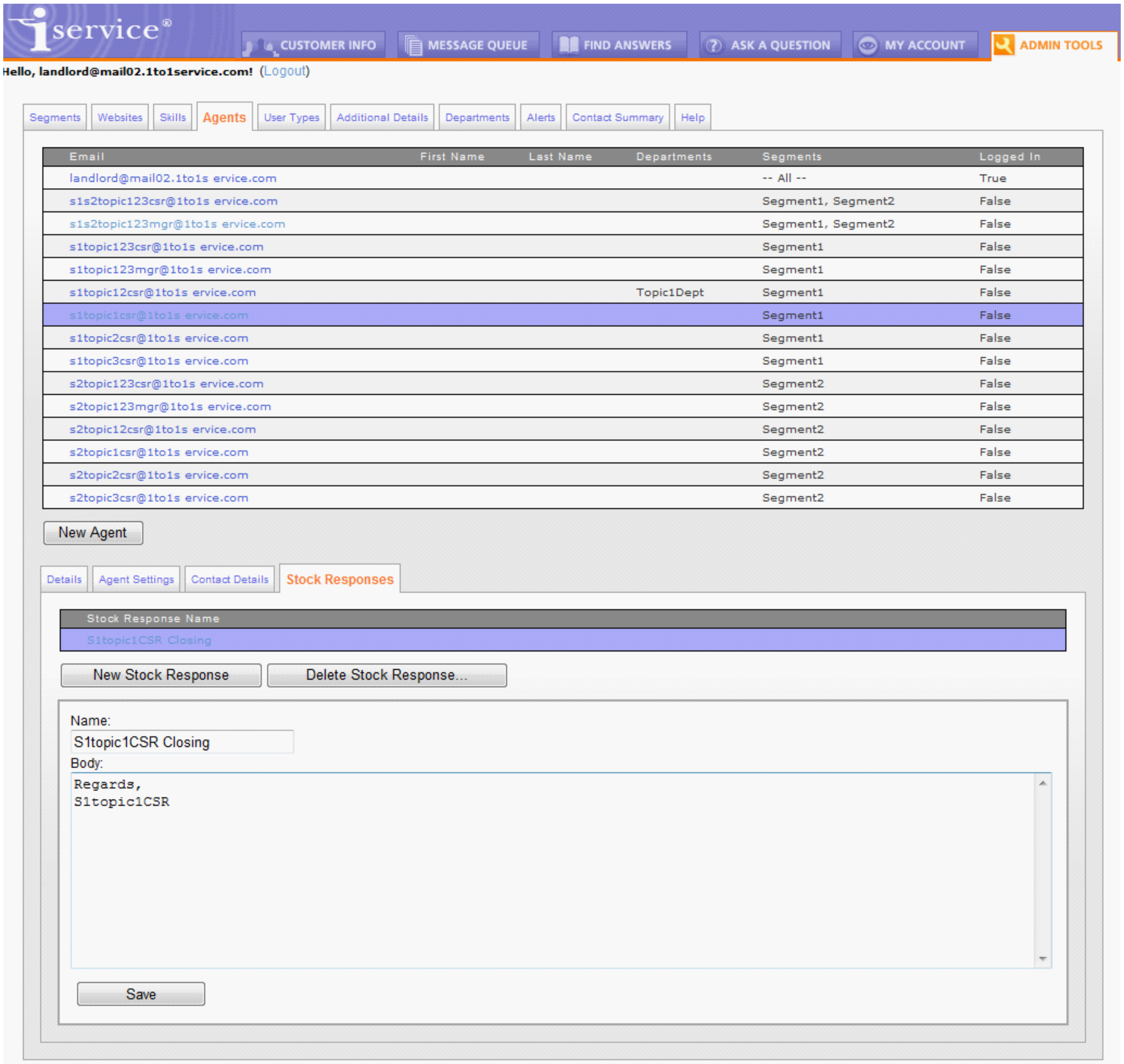


Figure 15- The Agent Contact Details Tab

The agent's detailed properties, such as name and phone number, can be updated from the Agent > Contact Details page as well as the Customer Info>Contact>Details page. This is the same page as Customer Info > Contact > Details.

4.4.3 Agent Stock Responses



Agents can create their own canned phrases from the My Account > Stock Responses page. Administrators can access the personal phrases created by agents from within the Admin Tools > Agents > Stock Responses page.

4.5 User Types Tab

The User Types page can only be viewed by an Administrator or SuperUser, which is typically the person that maintains the Tenant. Administrators can modify the pages accessible by each User Type or create custom users types from this menu.

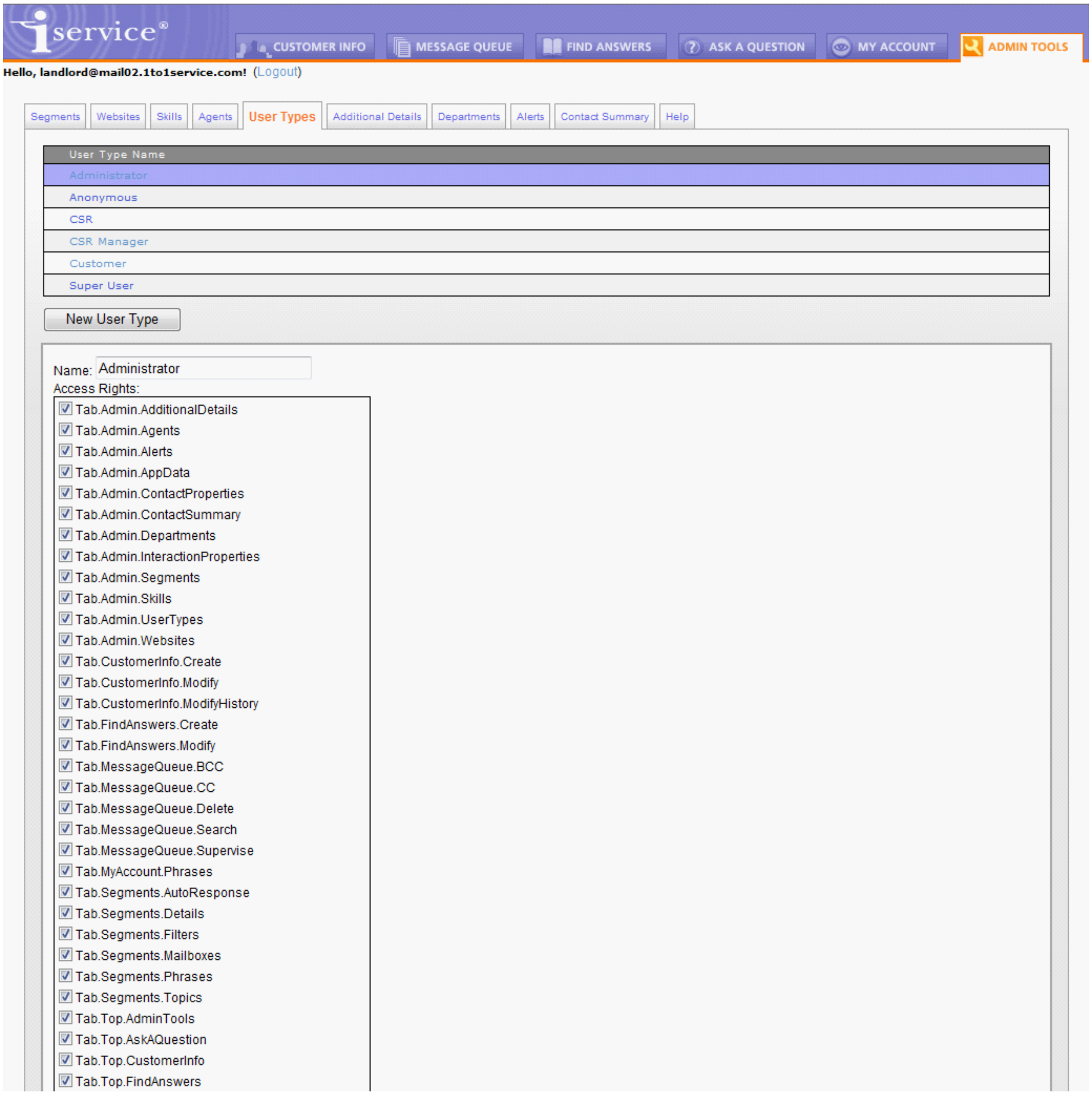


Figure 16- The User Types Tab

For a description of the common user types, see the Admin Tools > Agents section.

Access rights control the pages presented to users, and in some cases grant access to features within a page. Access to message queues and customer data is controlled by the Segment Access settings in Admin Tools - Agents. **Access rights are enforced at the web service level, so they affect custom forms as well as the standard iService web interface.**

Access Right Definitions

Some access rights determine whether the page is presented to a user. In those cases the page name is included within the access right name. In other cases, the access rights control whether a user can see or interact with functionality within certain pages. In those cases the functionality is described in the access right name.

Access Rights List

`Chat.Answer` - This access right is required for Chat Agents. It presents the chat controls that are present in the common header of each page (Go Available, Chats Waiting, etc.).

`Chat.Broadcast` - This access right is required to view broadcast messages displayed in the header of the iService web site. Learn more about broadcast messages in the Management Console User Guide.Chat.Answer

`Tab.Admin.AdditionalDetails` - controls page access

Tab.Admin.Agents - controls page access

Tab.Admin.Alerts - controls page access

Tab.Admin.ContactProperties - controls page access

Tab.Admin.Departments - controls page access

Tab.Admin.Forms - controls page access

Tab.Admin.InteractionProperties - controls page access

Tab.Admin.Mailings - controls page access

Tab.Admin.Monitor - controls page access (page under development)

Tab.Admin.Monitor.All – Monitor all tenants, not just the one currently loaded (Installation Landlord Only) (page under development)

Tab.Admin.OpenID - controls page access

Tab.Admin.Segments - controls page access

Tab.Admin.ServiceLevels - controls page access

Tab.Admin.Skills - controls page access

Tab.Admin.SmtpOut - controls page access

Tab.Admin.UserTypes - controls page access

Tab.Admin.Websites - controls page access

Tab.CustomerInfo.Create – Ability to create new contact (access to the New Contact button within the Customer Info - Contact page used for creating new contacts).

Tab.CustomerInfo.ImportHistory – Special access right required to run the Talisma history import when migrating from that CX system.

Tab.CustomerInfo.Modify – Ability to update properties of a contact (Contact Details page).

Tab.CustomerInfo.ModifyHistory - Provides access to the Edit Properties button within interaction history.

Tab.FindAnswers.Create - Provides access to the Add Article button on the Find Answers page.

Tab.FindAnswers.Modify - Provides access to the Edit Article button when viewing a Find Answers article.

Tab.FindAnswers.Subscribe - Provides access to the Show Subscribers button when viewing a Find Answers article.

Tab.FindAnswers.Subscribe.Notify - Provides access to the Send Notifications to Subscribers button when viewing subscribers of an article.

Tab.Mailings.Campaigns - controls page access

Tab.Mailings.Criteria - controls page access

Tab.Mailings.Lists - controls page access

Tab.Mailings.Mailings - controls page access

Tab.Mailings.Mailings.Send – provide access to the SEND button within mailings

Tab.Mailings.Messages - controls page access

Tab.MessageQueue.Approve - Provides access to the Get Next QA button in the My Queue page. This is required to review and approve answers submitted by QA agents.

Tab.MessageQueue.BCC - Provides access to the bcc line when composing messages and responses.

Tab.MessageQueue.CC - Provides access to the cc line when composing messages and responses.

Tab.MessageQueue.Delete – Provides access to an Interaction Delete option (delete option is under development)

Tab.MessageQueue.From - Allows users to change the From address when composing a response to a customer question.

Tab.MessageQueue.Search - controls page access

Tab.MessageQueue.Send - Provides access to the Send action button when acting on a customer question. Without this access right the Send button is converted to a Submit button, and will generate a draft response for review by a QA manager instead of sending an agent response.

Tab.MessageQueue.Supervise - controls page access (now named Manage Messages)

Tab.MessageQueue.SuperviseChat - controls page access (now named Manage Chats)

Tab.MessageQueue.SuppressRef - Provides access to the Suppress Reference Number option within the Send button drop down.

Tab.MyAccount.Phrases - controls page access (now named My Account – Stock Responses)

Tab.Segments.AutoResponse - controls page access

Tab.Segments.Details - controls page access

Tab.Segments.Filters - controls page access

Tab.Segments.Mailboxes - controls page access

Tab.Segments.Phrases – controls page access (now named Stock Responses)

Tab.Segments.Topics - controls page access

Tab.Top.AdminTools - controls page access

Tab.Top.AskAQuestion - controls page access

Tab.Top.CustomerInfo - controls page access

Tab.Top.FindAnswers - controls page access

Tab.Top.MessageQueue - controls page access

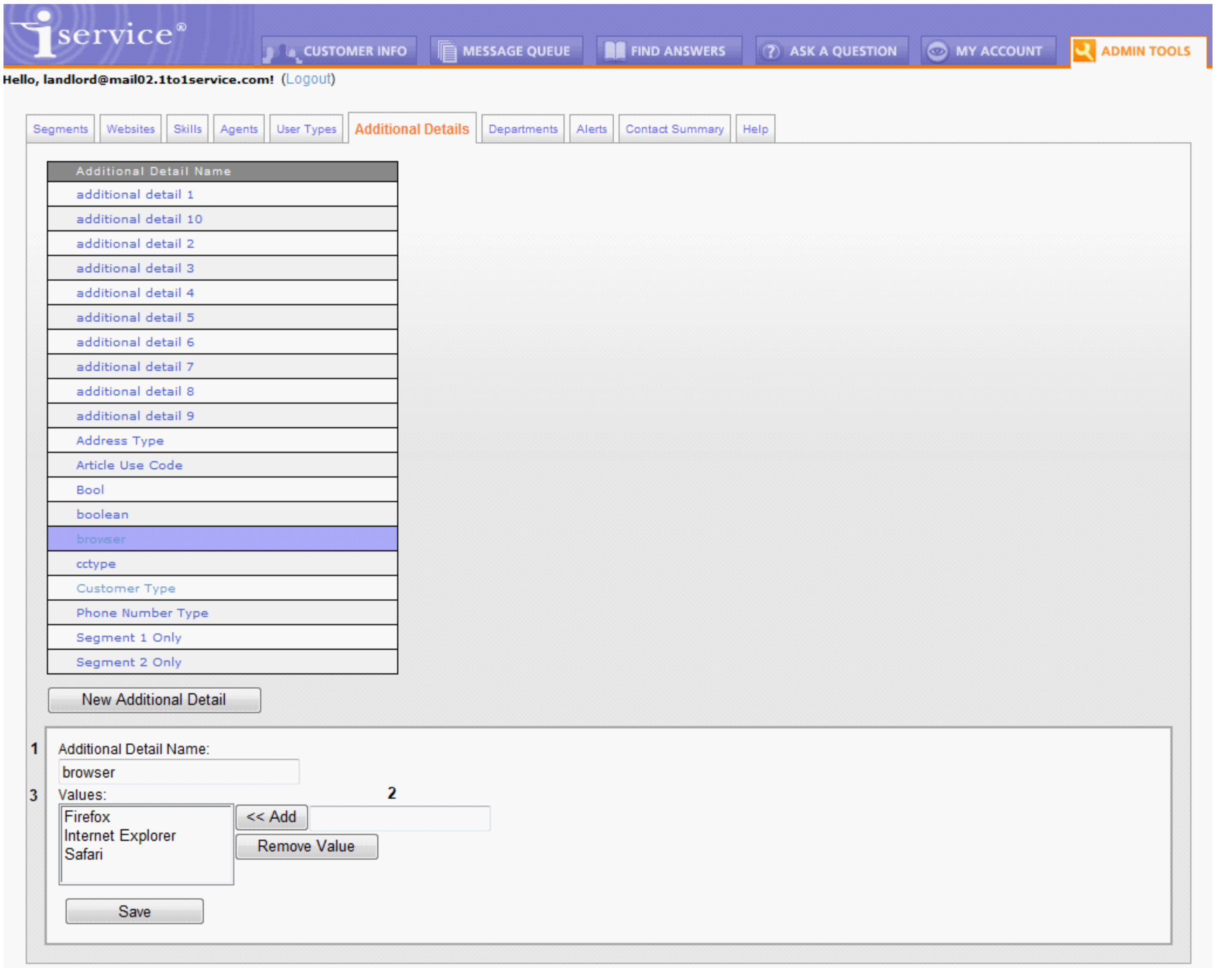
Tab.Top.MyAccount - controls page access

Tab. User Types. CreateAdmin - determines whether the user is allowed to create Administrators. By default, this right is only granted to the SuperUser.

4.6 Additional Details

Custom fields (properties) can be added to contacts and interactions. For instance, a segment that handles credit card transactions might add a credit card type to their contact records. Segments that provide technical support might add browser type to the support topic so that incoming questions contain this information. These properties are added at the segment level. However, any lists used with the property are created in the Additional Details tab.

This is a tenant level configuration because the detail may be reused within any number of segments. For example, your installation might have three business units that provide support and need to capture browser information with incoming questions. Therefore, you may create one detail named BrowserType and reuse it within each of those segments.



The Additional Details Tab

To create a new Additional Detail, click on New Detail and enter the following information.

1 – Additional Detail Name – this is the name of the detail that will be referenced in the Contact Properties and Interaction Properties tab.

2 – Text Box – To add a detail to the list, enter its value in the text box and click <<Add.

3 - Values –These are the values that will be presented within the property's drop down menu.

Once the additional detail is created, you must associate it with a contact property or interaction property within one or more segments. This is done within the Contact Properties and Interaction Properties tab within segment configuration. If the detail is used within an Interaction Property, then you will need to associate it with a topic (Admin Tools>Segment>Topics). See those sections for further details.

4.7 Departments

Departments are used to organize groups of Agents according to common attributes, such as job function. Skills and Segment access can be assigned to Departments and then inherited by agents that are assigned to the department.

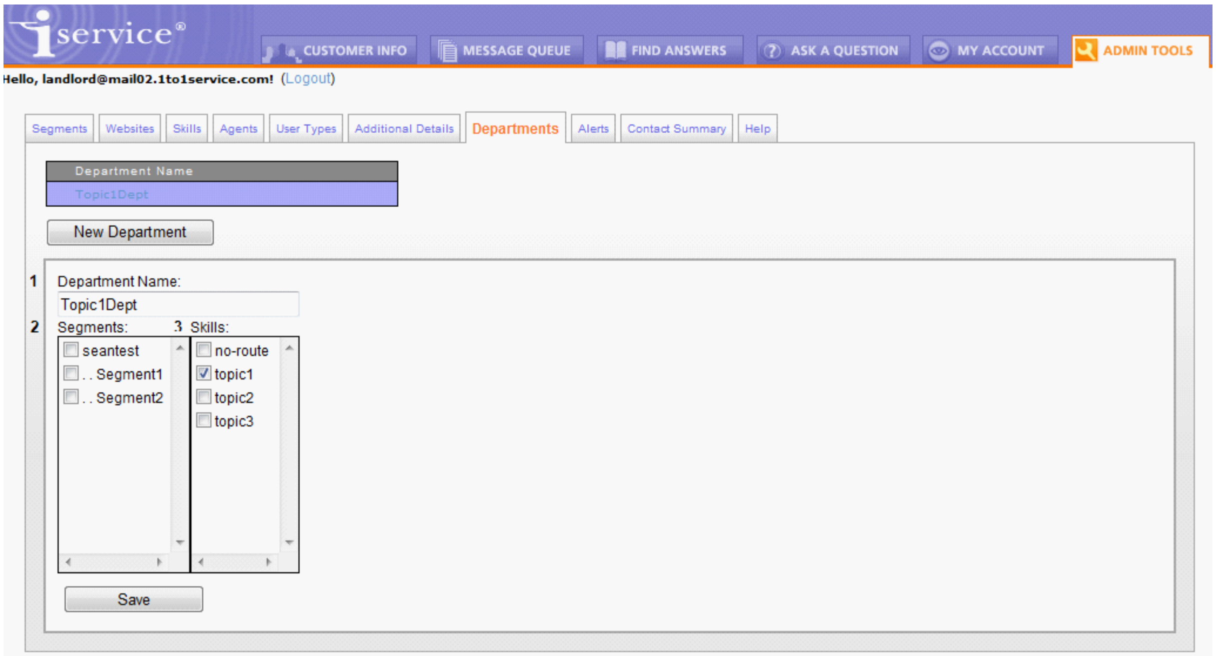


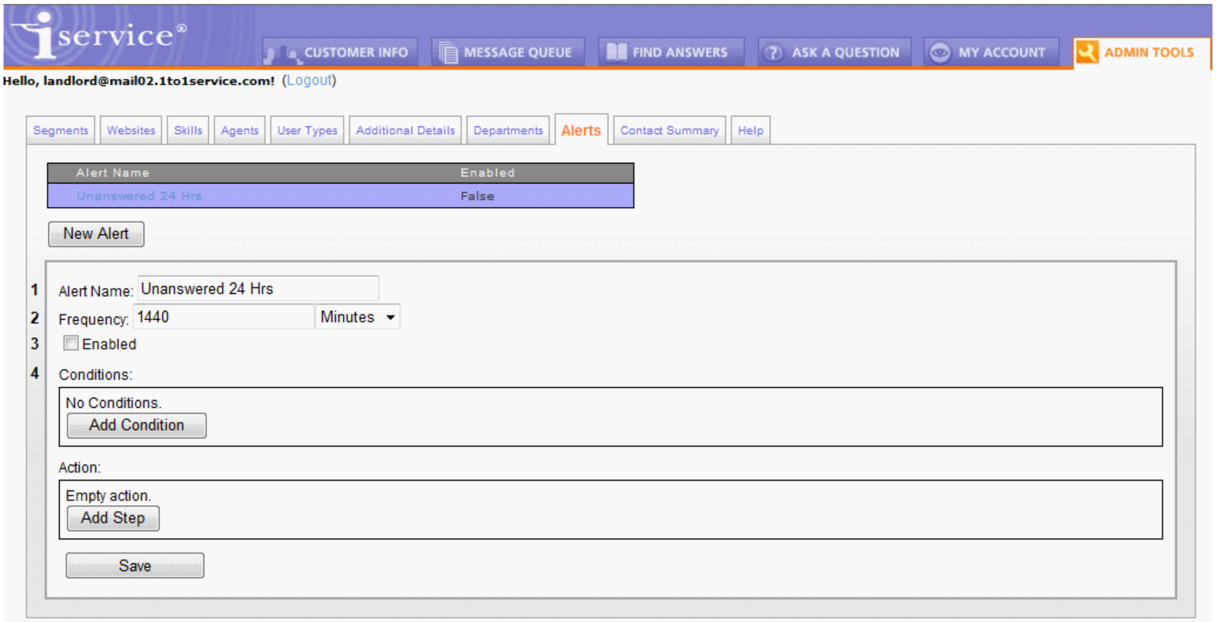
Figure 18- The Departments Tab

1 - Department Name – This is the label that is used when displaying the department in other screens such as the Agent screen.
2 - Segments – Select the segments that should be granted to any agent that is associated with this department.
3 - Skills – Select the skills that should be granted to any agent that is associated with this department.

4.8 Alerts

Alerts may be created to monitor your iService site and take automated actions when conditions are met. They can be used to alert management when service levels have dropped, or can be configured to change the topic of messages that meet the specified conditions.

Creating Alerts – Step 1 (Frequency)

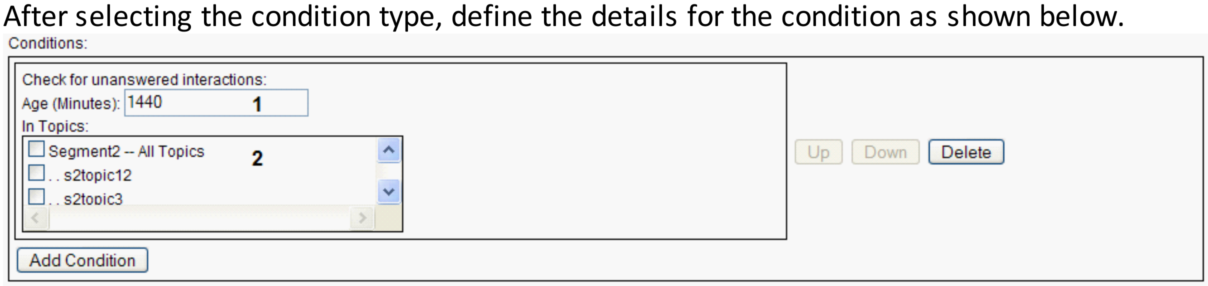


To create an alert, give it a unique name and set the frequency.
1 – Alert Name – This is the name that appears in the Alert list.
2 – Frequency – Specify the frequency with which the alert will process. For example, an alert with a frequency of 1 day will check for the conditions and perform the specified action once per day.
3 – Enabled - To enable the alert, check the Enabled check box.
4 – Conditions – After specifying the frequency, the conditions will be selected in Step 2.

Creating Alerts – Step 2 (Conditions)

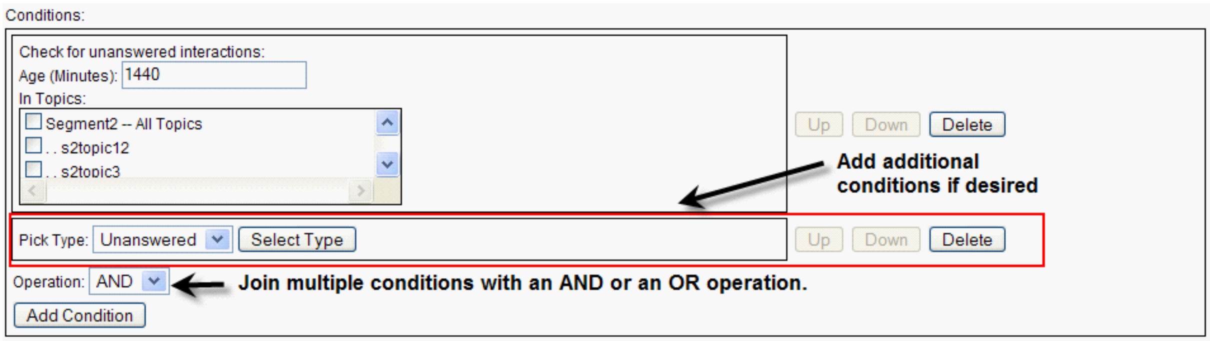
The second step when creating an alert is to specify the conditions in which the actions will apply. Clicking the Add Condition button allows an additional condition to be added via an AND or an OR; however, in release 4.12, the only condition is unanswered interaction, so adding additional conditions through this mechanism is currently not useful.

After selecting the condition type, define the details for the condition as shown below.



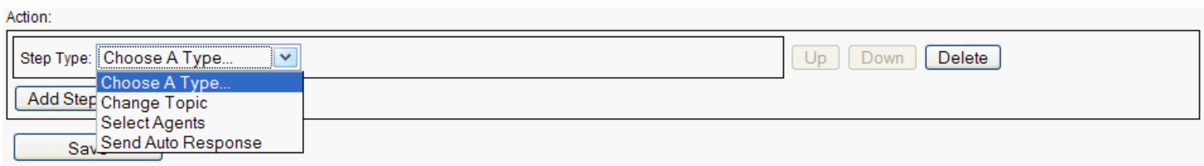
1 – Age – Specify the age of the unanswered interaction that will satisfy the condition.
2 – In Topics – Specify the topics to monitor for unanswered interactions. **If no topics are selected, the Alert will apply to all topics of the tenant.**

If multiple conditions are required, join them with the appropriate operation.



Creating Alerts – Step 3 (Actions)

The third step when creating an alert is to specify the actions that will be taken when the condition is met. There are three different actions that can be taken, and multiple actions may be specified: Change Topic, Select Agents, and Send Auto Response.



Change Topic – This will change the topic for messages that match the condition to the designated topic. Select the segment and desired topic.

Select Agents – Select a list of agents that should receive notification when the condition is met. The auto response is created in the Segment > Auto response page. This action must always be used with the Send Auto Response action.

Send Auto Response – This action generates the auto response sent to the selected agents. To send an Auto Response you must first select the action 'Select Agents' and specify the agents that should receive the notice. Then add the action Send Auto Response and complete the action as shown below.

1 – Segment – Select the agent that contains the desired alert auto response template. Note that only Standard Segments contain mailboxes.

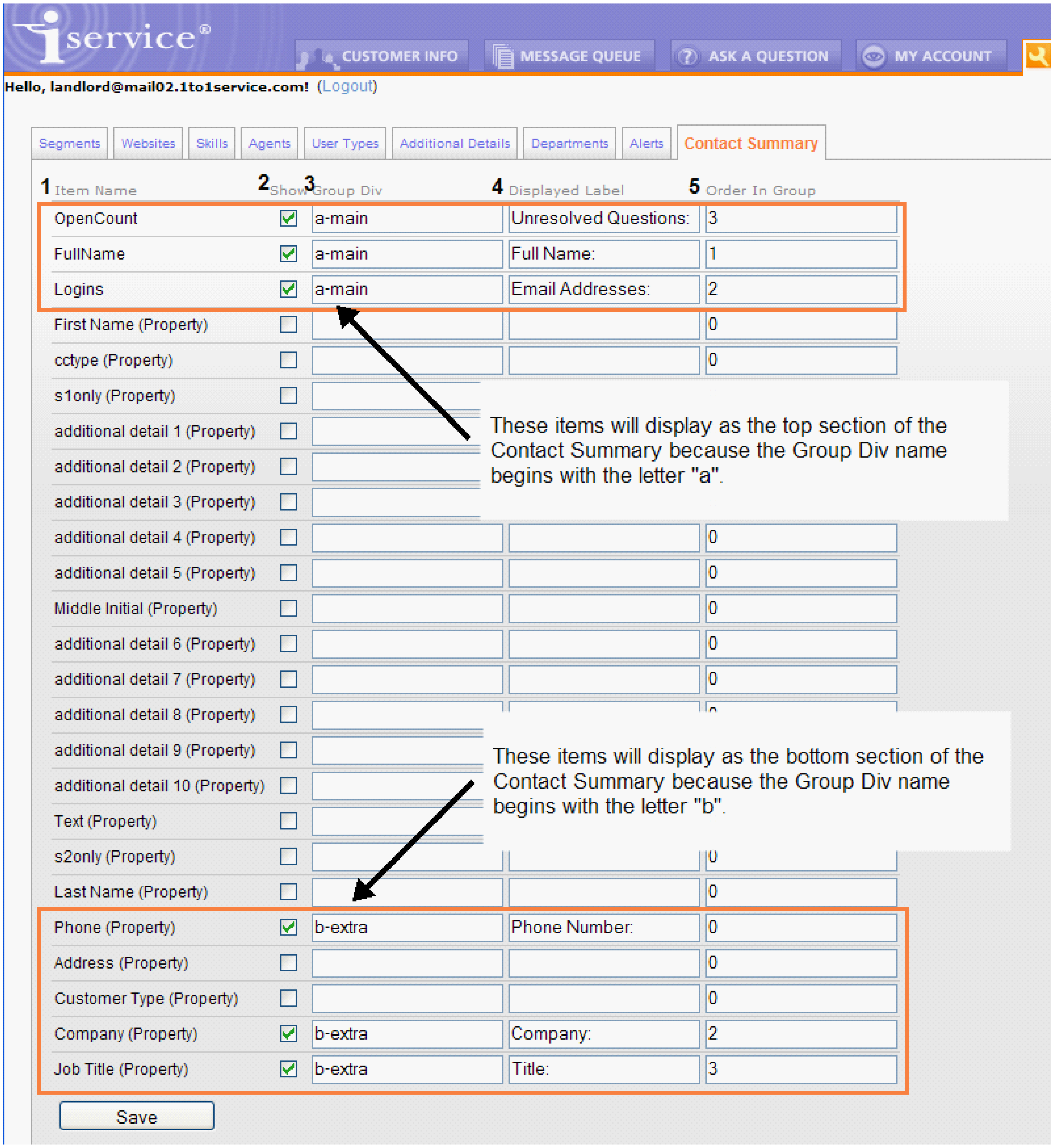
2 – Auto Response – After the segment is selected, a list of auto responses of type Alert will be displayed from that segment.

3 – Mailbox – A list of mailboxes from the selected segment will be displayed. Pick the mailbox that should send the notification.

4 – Use No Reply From Address - To send the response from no-reply@domain.com (where domain is the domain for the selected mailbox), check the Use No Reply From Address box

4.9 Contact Summary

The contact summary is the default view for contacts within the Customer Info > Contacts page. The information displayed on the summary page can be customized by selecting the fields to display, and the styles used for displaying that information.



Click to expand

1 – The “Item Name” corresponds to the contact property name used in the Admin Tools > Segments > Contact Properties page. All contact properties created from all segments are available for inclusion on the contact summary page.

The item labeled “Open Count” is a system generated display of all questions submitted by the contact that have not been answered. In future releases, other system generated values will be available for inclusion within the summary page.

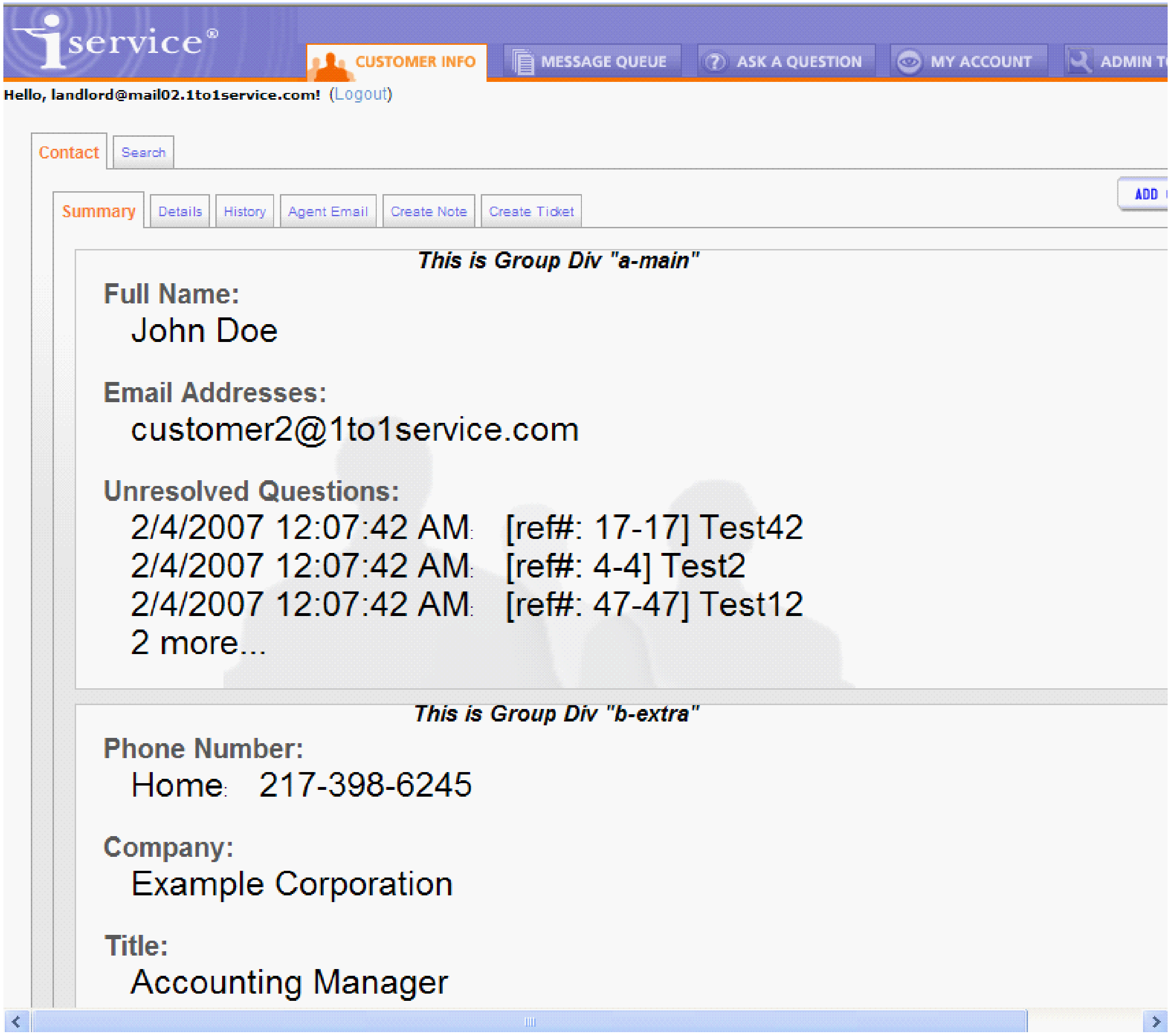
2 – The “Show” column presents a checkbox for each property. Clicking on the check box indicates the property is to be included on the summary page.

3 – The “Group Div” column describes the section of the summary page where the information will appear. The divisions of the page are arranged vertically in alphabetical order. Therefore, the group a-main will appear above the group b-extra.

4– The “Displayed Label” column contains the label that will display on the contact summary page. This label can be different from the item name, if desired.

5 – The “Order in Group” column describes the order of each item inside of its Group Div. The order of each item is relative to other items, and therefore the actual values do not have to be sequential. The lowest numbered item (including negative numbers) will appear first followed by the next highest number.

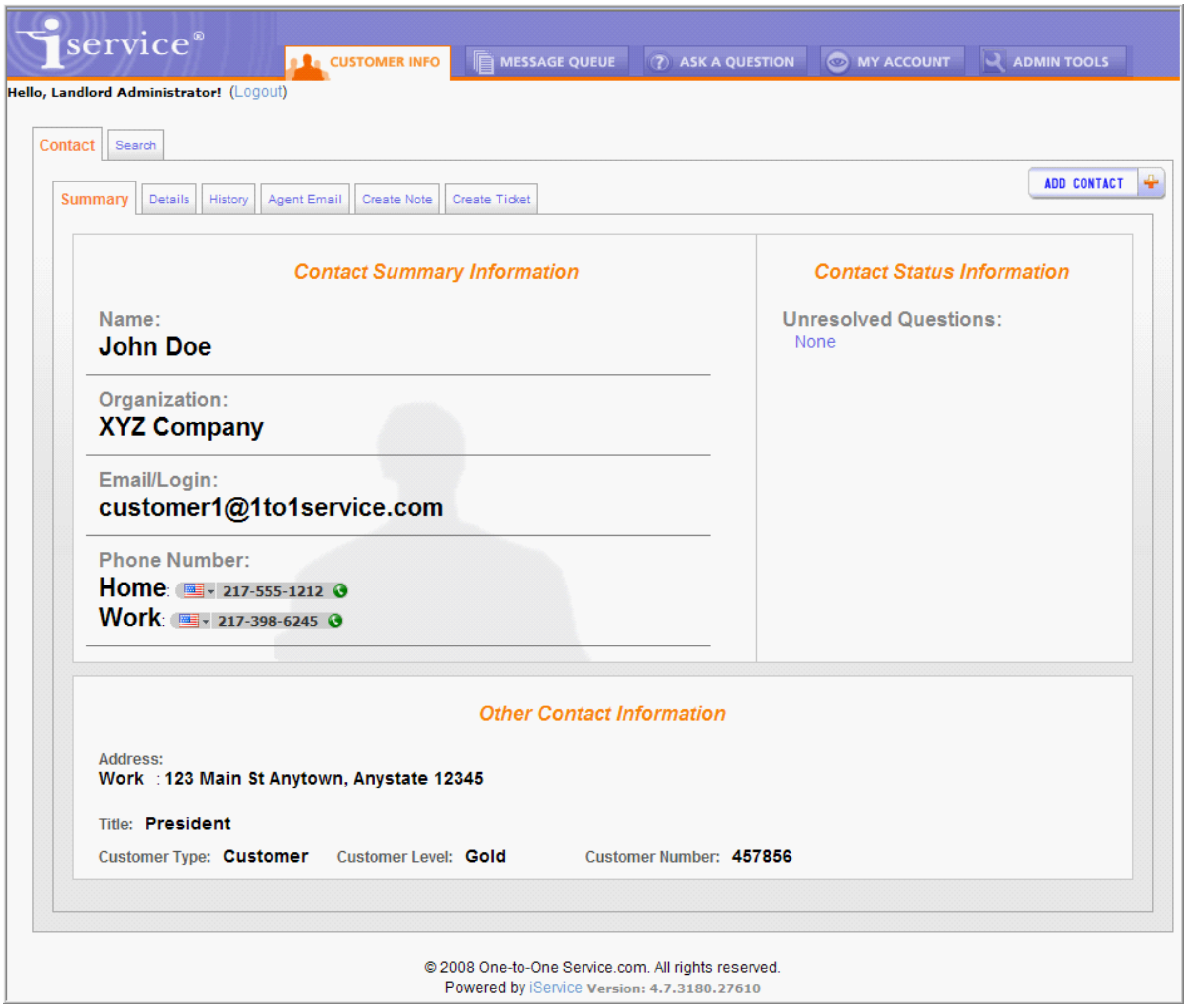
An example of how a Contact Summary page would appear for a site using the configuration above is shown below.



Click to expand

Figure 20 - Example of Contact Summary After Configuration

This summary page can be easily customized to display any information desired. An example of additional changes using a custom cascading style sheet is shown below.



Click to expand

4.10 Mailing

iService includes a complete outbound e-mail marketing component (iCentives®), which is accessible from the Admin Tools – Mailing tab. Functionality includes list management, customizable messages with trackable URLs, campaign management, and a complete set of reports.

For more information about outbound e-mail management, see the [iCentives Mass Mailing User Guide.]

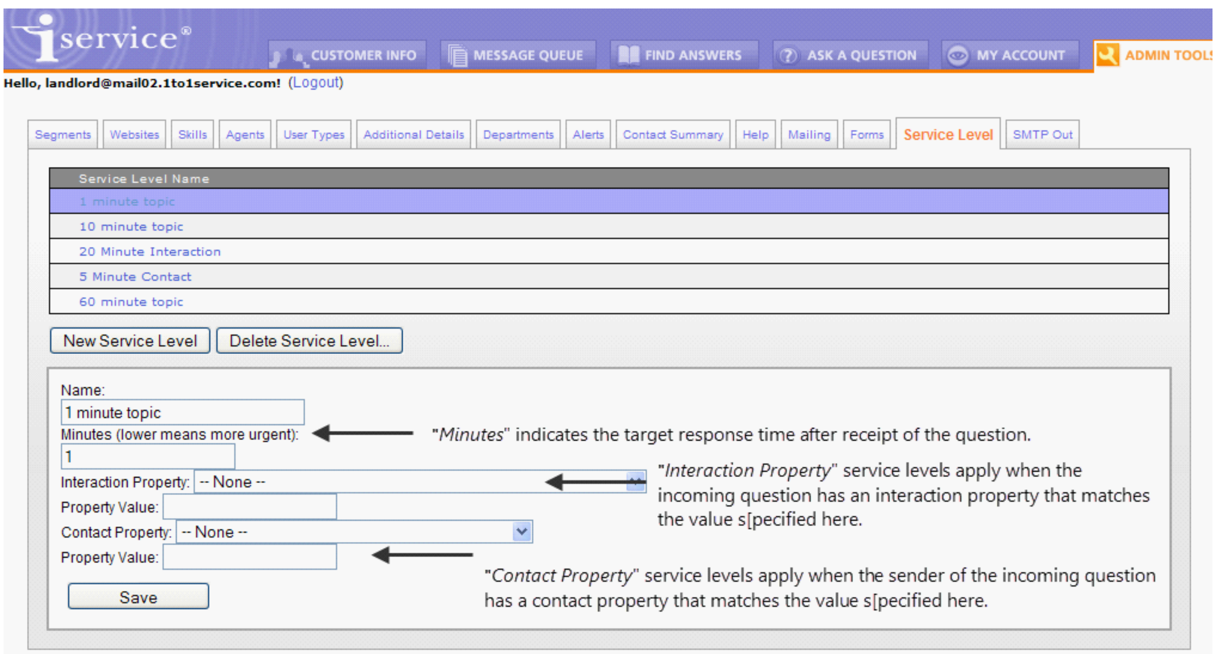
4.11 Forms

The iService Forms interface is used to build web applications that leverage the iService web services. These can be as simple as a form to capture a customer question, or as detailed as an entire customer support portal or workflow application.

To learn more about the forms interface, see the iService Forms User Guide.

4.12 Service Level

iService prioritizes the assignment of messages to agents based upon a calculated target response time. The target response time is based upon the time a message is received, plus any applicable service level that has been defined in the Admin Tools – Service Level page. Service levels are created in the service level tab, and are assigned to each segment from the Segment – Details tab and the Segment – Topics tab.



Service levels can be created based upon interaction or contact property values. Or, they can be created with no properties specified as shown in the example above. Service levels are assigned to incoming questions in one of four ways.

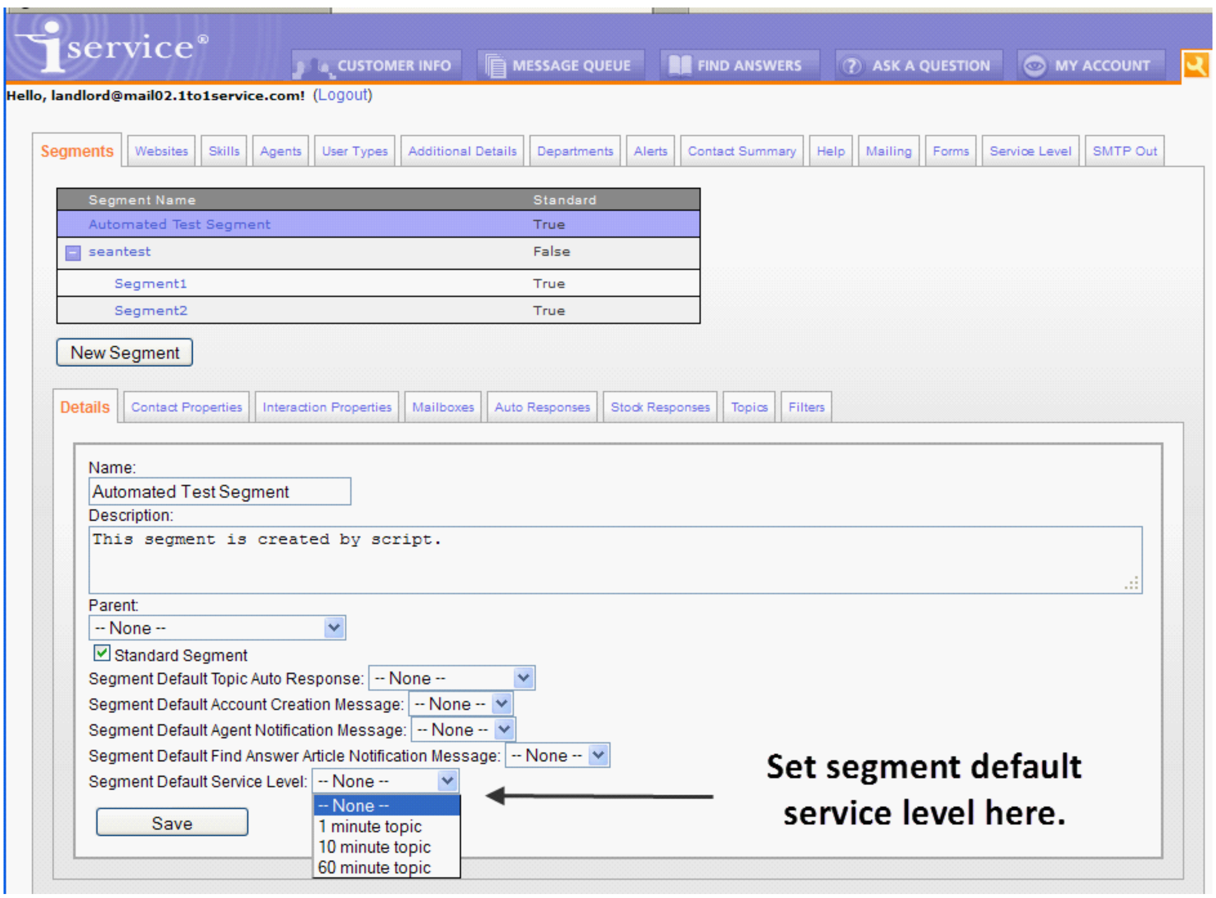
1. Default Segment Service Level – Each segment can have a default service level set on the Admin Tools – Segment – Details page. This type of service level typically does not include any property values.

2. Topic Service Level – Each topic can have its own service level. Topic service levels are typically used for urgent topics they need a response faster than the default segment service level.

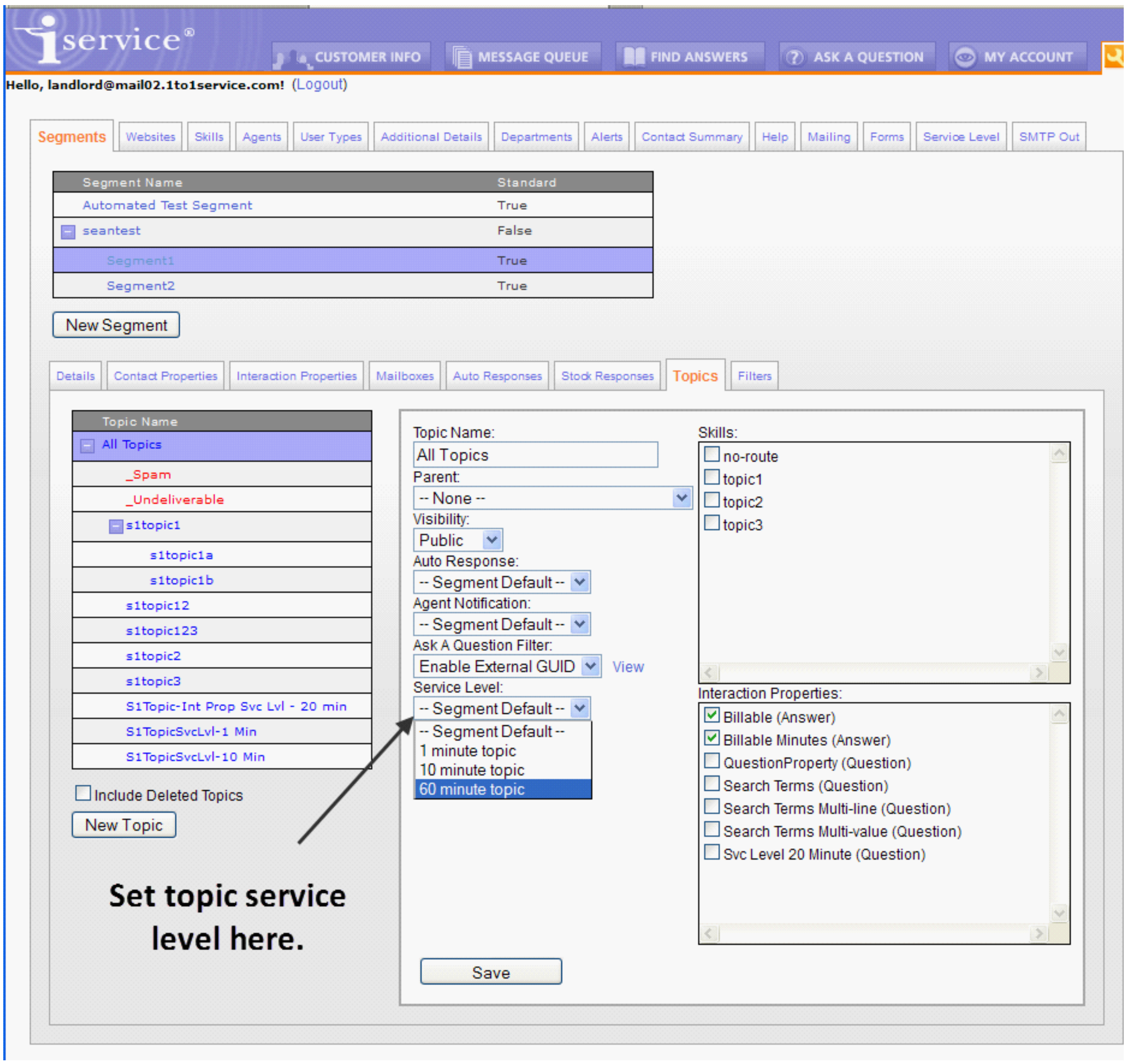
3. Interaction Property Service Level - you might need to assign questions that have certain interaction property values ahead of other questions. For example, if you have an interaction property named priority, questions that have a value of urgent might require more rapid response.

4. Contact Property Service Level - if you use contact properties to identify your most important customers, you can use those values to set a target response time. For example, if you have a contact property named customer level, questions that come from contacts whose value is platinum might get the shorter response target.

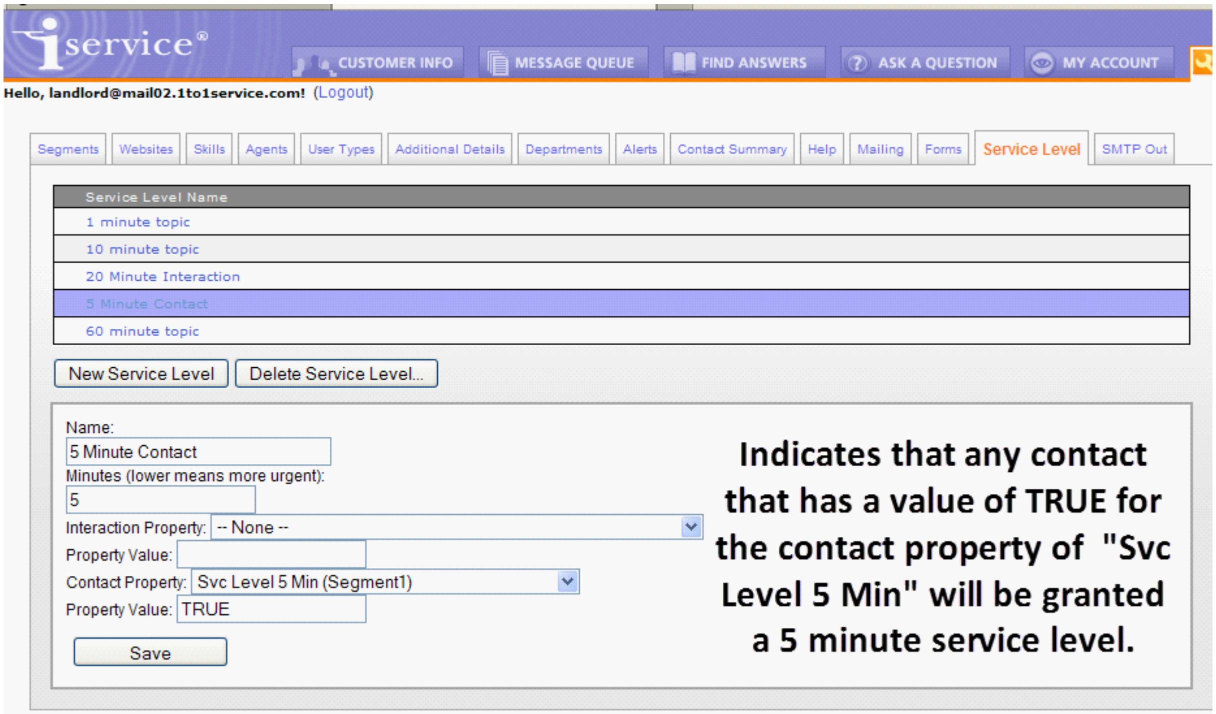
4.12.1 Segment Default



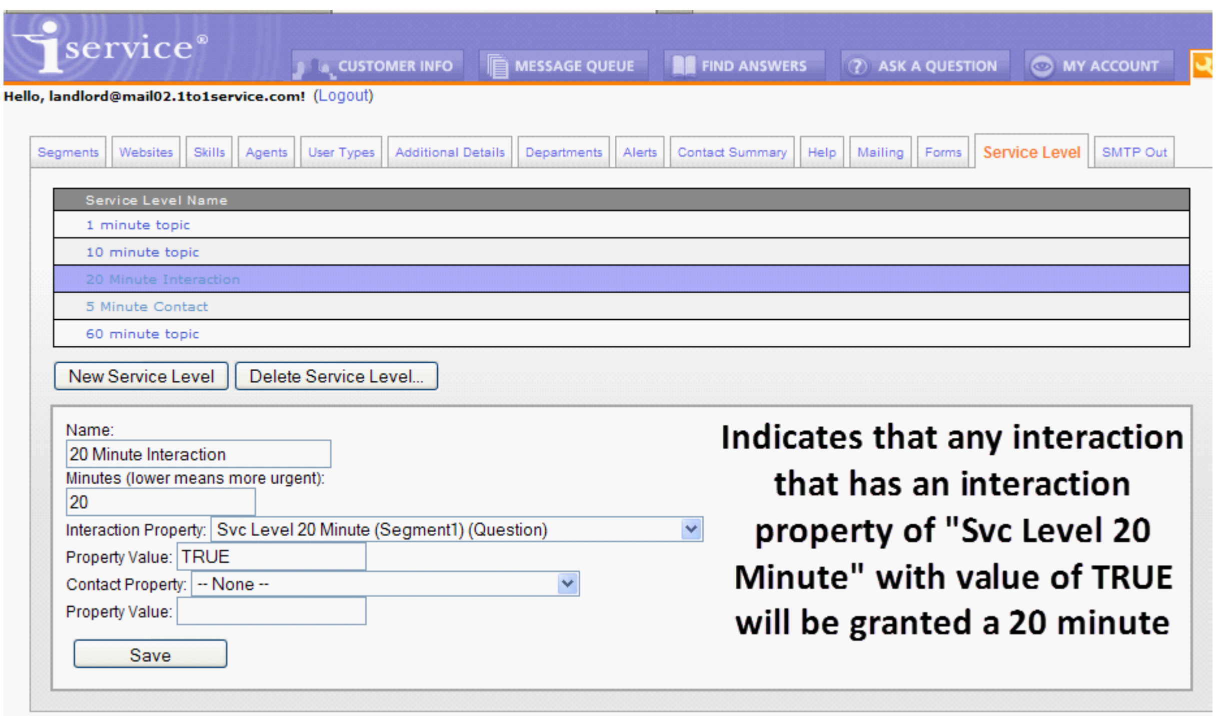
4.12.2 Service Levels in Topics



4.12.3 Service Levels for Contact Property



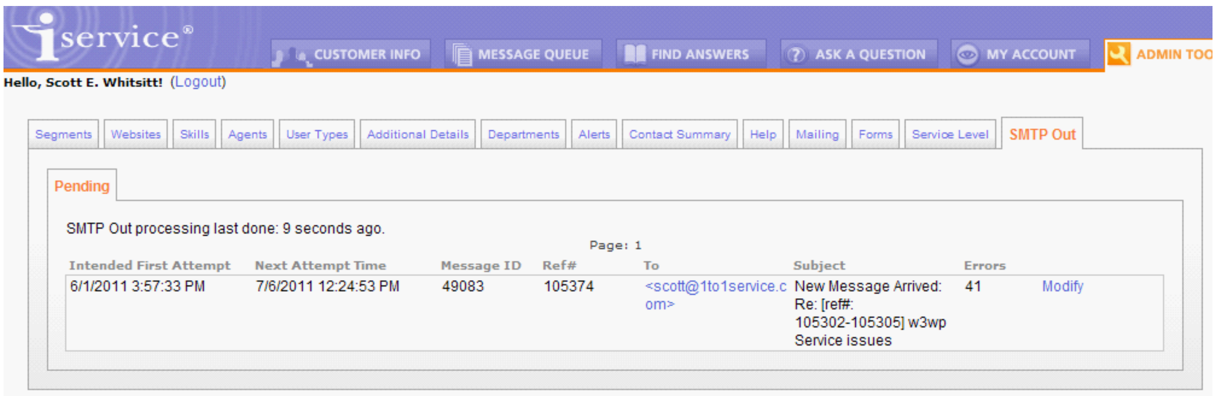
4.12.4 Service Levels for Interaction Property



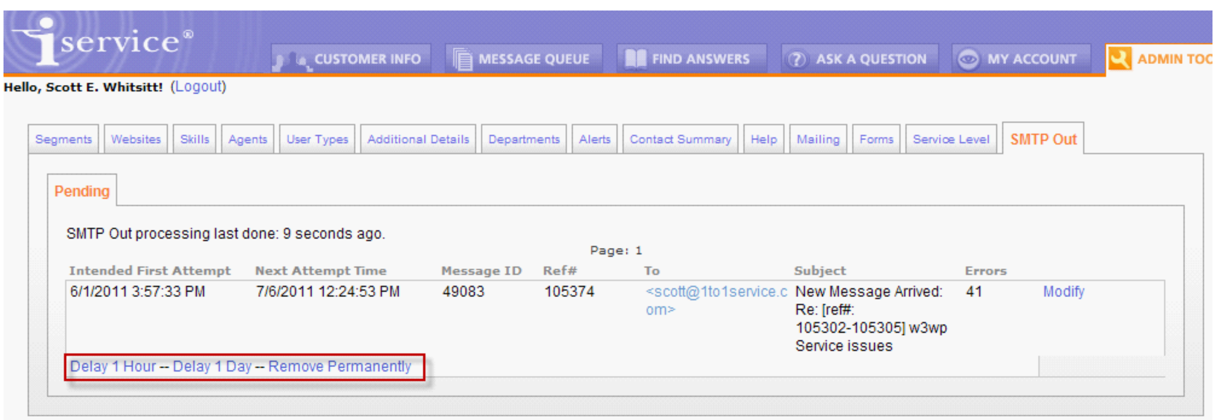
4.13 SMTP Out

When you send messages from iService, either through the user interface or a batch utility, messages are built and stored in a table awaiting delivery to your SMTP server. These messages are typically delivered within a few seconds, but if there is a problem with delivery you can view the message from the Admin Tools – SMTP out tab.

As shown below, messages with errors are displayed on this page with an option to modify the next delivery attempt.



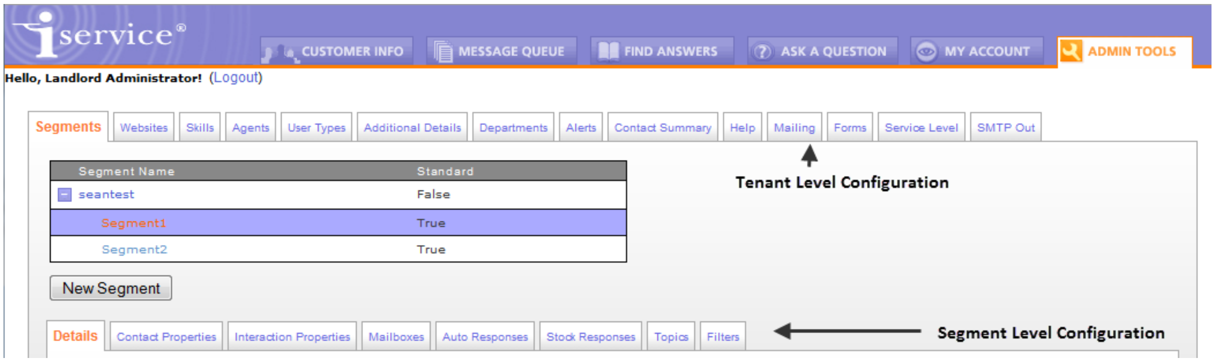
Clicking the modify link will expand the selected message with options for delaying to the next delivery attempt by one hour, one day, or permanently (see below). In some cases the message will never be delivered because of a problem with the email address format. In those cases you should select Remove Permanently to clear it from the SMPT Out queue.



4.14 OpenID

Use the Open ID tab to configure your settings for Google and Microsoft authentication via OpenID Connect. For an overview of OpenID Connect, visit their help site at http://openid.net/connect/faq/.

5 Segment Configuration



Click to expand image

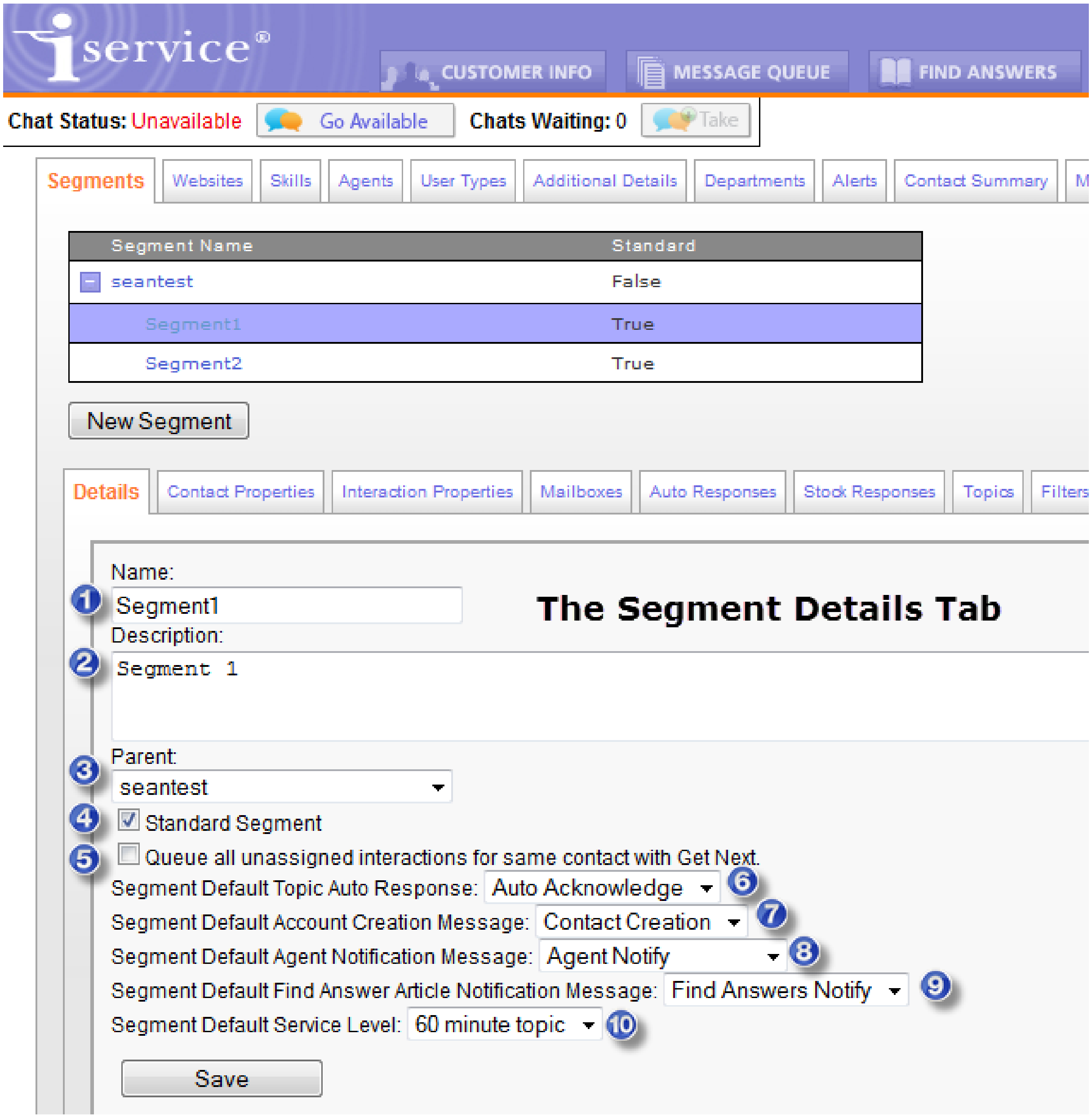
A tenant is comprised of one or more Segments that contain contacts and accepts incoming requests for assistance. Segments are configured by Administrator Users using the iService web interface. Segment information consists of Segment Details, Contact Properties, Interaction Properties, Mailboxes, Auto Responses, Stock Responses, Topics, and Filters.

5.1 Segment Details

Segments are used to separate configuration details (message queues, custom properties, mailboxes, etc.) within iService into logical groupings. They are most commonly used to separate business units that have different sets of customers, topics, and mailboxes. However, since Segment Contact Properties can be made private they can also be used to provide access control over sensitive details for Agents. There are a number of business rules that are specific to Segments, which are described within the Business Rules section.

Standard Segment

Standard segments contain the full set of configuration details, such as mailboxes, topics, filters etc. They are designed to accept incoming questions and publish a knowledge base using the defined topic structure. A segment is designated as standard by checking the Standard Segment box (see 4 below)



Click to expand

1 - Name – This is the name used to reference the Segment. It is the name listed in the Segment List and is a reference name only.

2 - Description – This is a description for the Segment that is not used outside of the Segments page.

3 - Parent Segment – Segments may be hierarchical. To make the new segment of child of an existing segment, select the parent from the drop down menu.

4 - Standard Segment – Standard segments contain mailboxes to accept incoming mail and have their own topic tree for queuing messages. If the Standard Segment box is not checked, the segment will be considered informational only and will be used to define additional contact and organizational details only.

5 - Get All Unassigned Interactions For the Same Contact with Get Next – Sometimes customers will send multiple messages about the same question. This causes issues when using the Get Next assignment process because more than one agent may be assigned message from that customer. If this box is checked, when an agent clicks the Get Next button they will be given all unassigned messages from that customer. The feature does not impact the assignment algorithm. That is, iService will find the next message based on the service levels set and the agents skills. When that message is selected any additional unassigned messages from that customer will also be assigned to the agent.

6 – Segment Default Topic Auto Response – If an auto response is selected, it will be used as the default for all topics in the segment that have "--Segment Default--" selected as their auto response.

7 – Segment Default Contact Creation Message – If a contact creation auto response is selected, it will be used to notify all new contacts created that an account has been created for them.

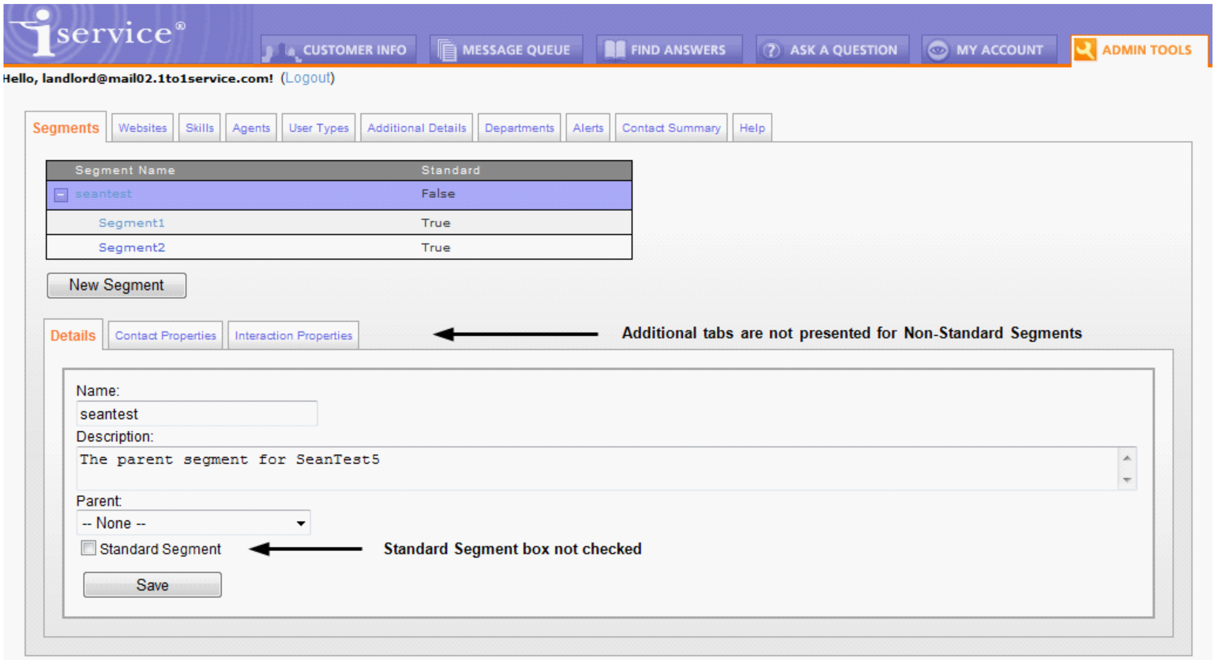
8 – Segment Default Agent Notification Message - The selected auto response template will be used to notify agents when a new message arrives.

9 – Segment Default Find Answers Notification Message - The selected auto response template will be used to notify customers when a Find Answers knowledge base article is updated.

10 – Segment Default Service Level - The selected service level will be applied by default to all messages, unless a lower service level obtained from a contact property, interaction property, or topic is applicable to the message.

Informational Segment (Not a Standard Segment)

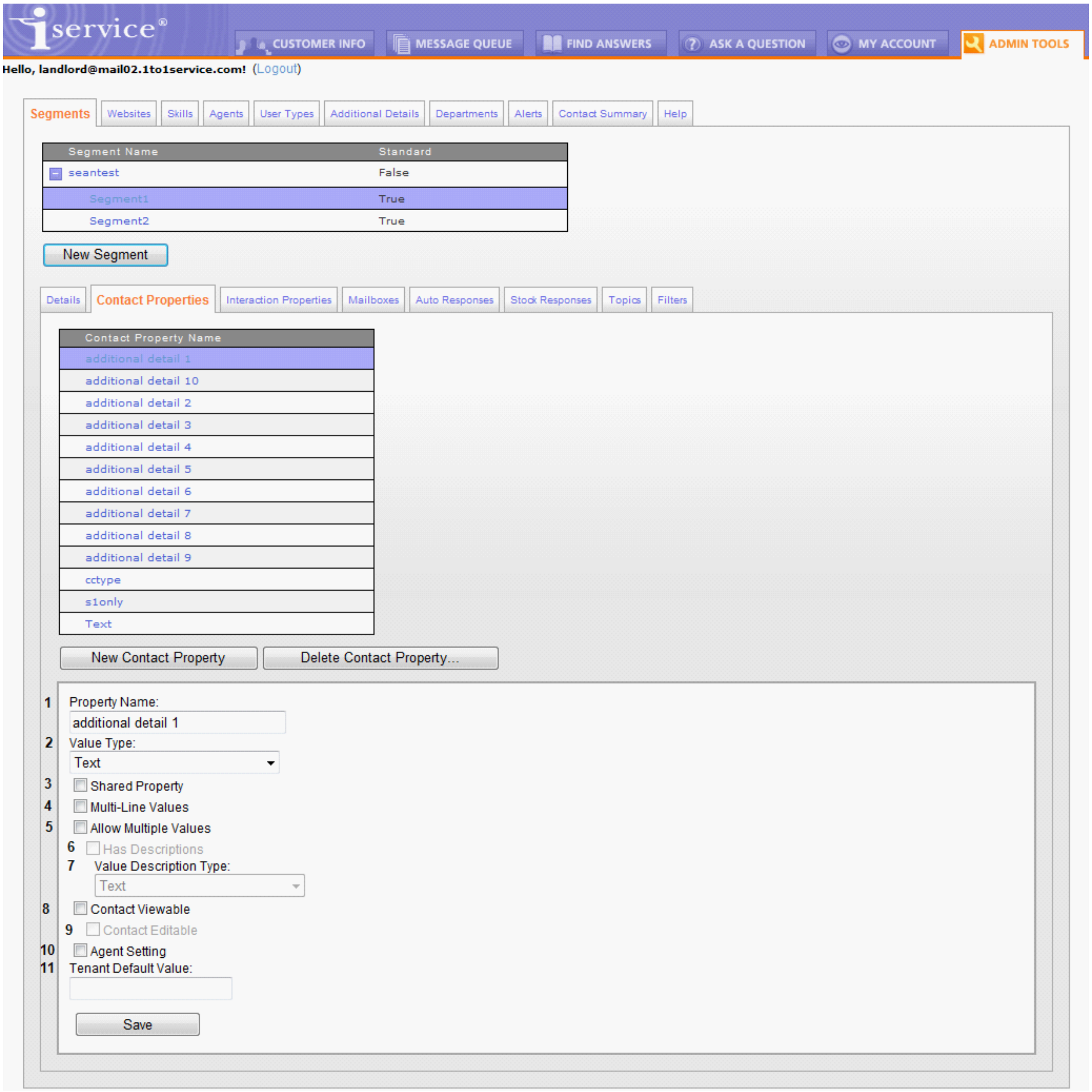
Only standard segments contain mailboxes and topics. If the Standard Segment box is not checked, the segment configuration will appear as shown below without the mailbox or topic related tabs.



Click to expand image

5.2 Contact Properties

Contact properties provide the ability to append custom details to your contacts and organizations. These details will be displayed in the Contacts and Organization pages of iService following the details of the Global segment.



Click to expand image

To create a new contact property, click New Contact Property and enter a name for the new property. Then complete the following information.

1 - Property Name – This name will be the label that is displayed within the Contact or Organization page. The order of the values will determine the order in which they are displayed within the iService interface in the Contact and Organization pages.

2 – Value Type - Select the type of detail that should be associated with this new property. If the property will be a list selection, choose that list from the drop down menu. These lists are created at the Tenant level within the Additional Details tab. See Tenant Configuration for additional information about creating lists. If the property will contain free form text, just select Text.

3 - Shared Property – If you want all users of iService to view these contact properties, regardless of their access to this segment, then select the Share Property checkbox. Otherwise, leave this box unchecked and only agents that have explicit access to this segment will see these values within the contact and organization details.

4 – Multi-Line Values – A multi-line property generates a text box in which multiple lines of text may be entered.

5 – Allow Multiple Values – This attribute will place a [+] next to the property allowing agents to enter multiple values. For instance, a property of type phone number might allow several different numbers to be entered.

6 – Has Descriptions – If the value allows multiple values, it might be desirable to provide a description for each value. For instance, an additional detail for types of phone numbers might be created with values of Home, Office, and Mobile. This additional detail would be selected in item 7 – Value Description Type. The list of Additional Details is enabled in item 7 when the Has Description box is checked.

7 – Value Description Type – This is a list of additional details created in Admin Tools > Additional Details. The list will be used as the description for the Multiple Value property.

8 – Contact Viewable – If the property is contact viewable, it will be displayed to the contact in their My Account page.

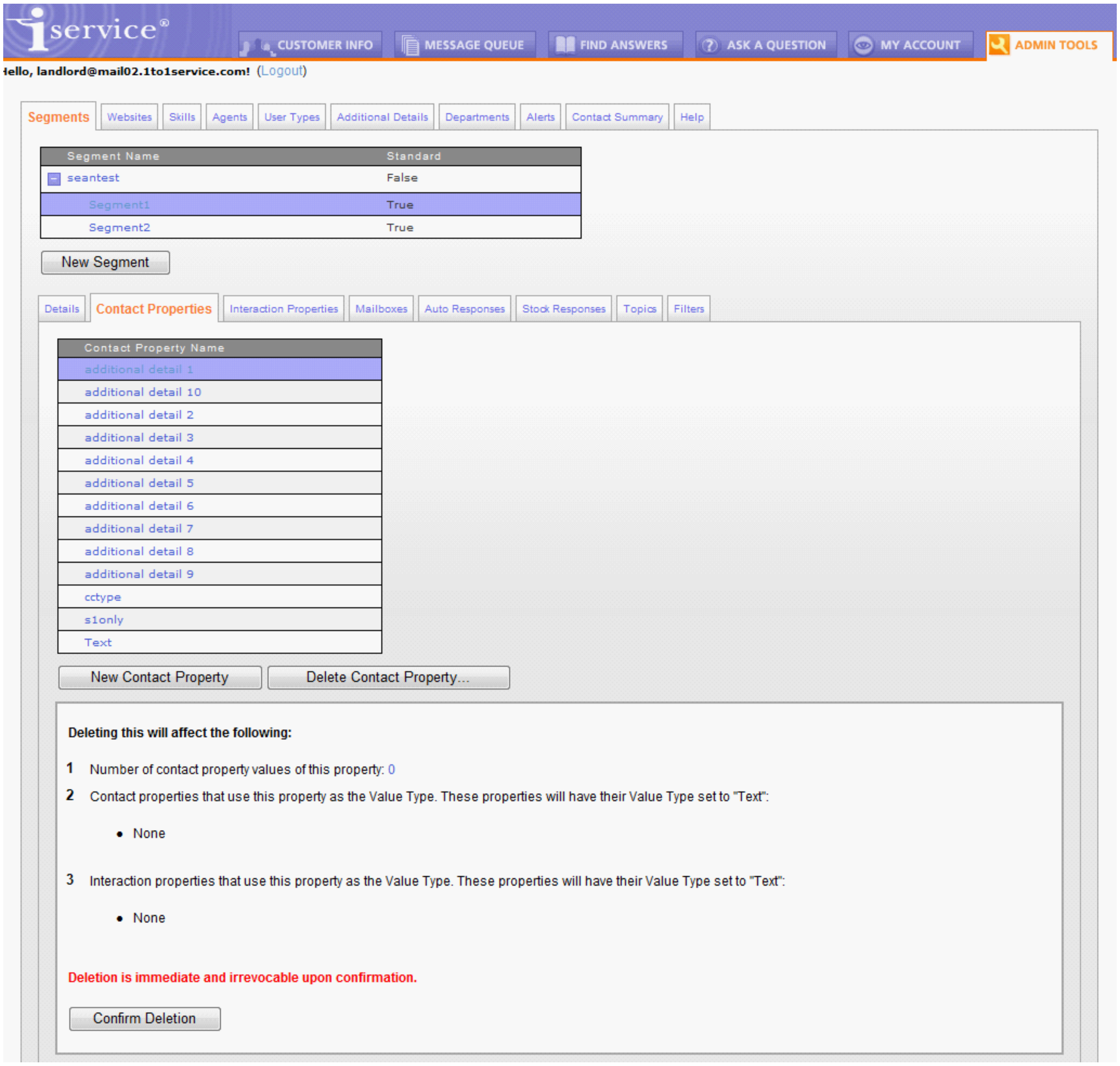
9 – Contact Editable – If the property is contact editable, it can be edited by the contact in their My Account page. This value is only available when the Contact Viewable option is selected.

10 – Agent Settings – If the property is an agent setting, it will display within the Admin Tools > Agents > Agent Settings page. Note – these are essentially contact properties that only appear within the Admin Tools > Agents page. They are values that can be assigned to agents only and are helpful for organizing and describing agents. These values are searchable from the Customer Info > Search page.

11 – Tenant Default Value – *This value is used for agent settings only. It should be left blank in most cases.*

Deleting Contact Properties

Care should be taken when deleting contact properties. Any contacts that have this value assigned will lose their history of the property since it is eliminated from the iService database when deleted. Deleting properties is a two step process: Evaluate the impact of deleting and then confirm deletion.



Click to expand image

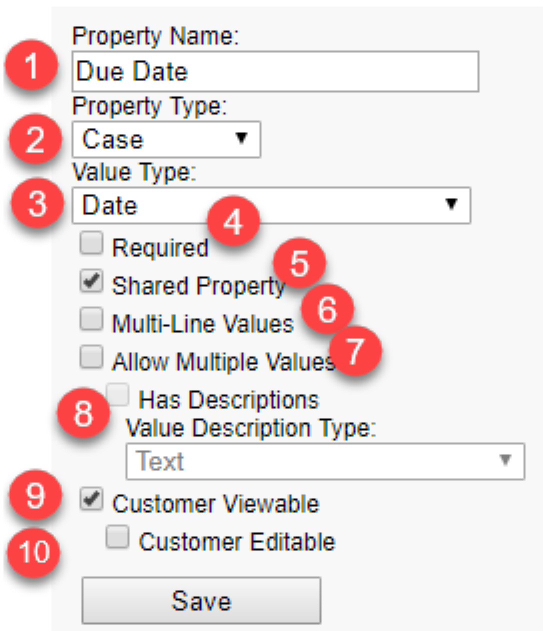
1 – Number of contacts with property – This is the number of contacts in the iservice database that have a value set for this property. Clicking on the number will open a new web page showing all contacts that have a value set.

2 – Contact properties that use this property – It is possible to use the results from one contact property as the value list (drop down menu) for another contact property. Similar to 1 above, this will provide a list of those properties that will be impacted by deletion.

3 – Interaction properties that use this property – It is possible to use the results from one contact property as the value list (drop down menu) for an interaction property. Similar to 1 above, this will provide a list of those properties that will be impacted by deletion.

5.3 Interaction Properties

Interaction properties provide the ability to append custom details to your interactions. For example, you might use them to categorize support requests as defect, user error, or enhancement.



1 - Property Name – This name will be the label displayed within the Topics page and on forms where the property is entered.

2 - Property Type – There are four types of interaction properties: Case, Question, Answer, and Find Answer. The Find Answer property type is only used within Find Answers knowledge base articles. The diagram below shows how Case, Question, and Answer properties are related to a conversation. There will always be only one value saved in the database for case properties, but question and answer properties can have values associated with each individual question or answer.

	Case Property
Customer Email	Question Property
Autoresponse	
Agent Response	Answer Property
Customer Email	Question Property
Autoresponse	
Agent Response	Answer Property

Case Property Example

Perhaps you want to categorize the types of conversations you have with customers using a property with a drop down list of values like Training Needed, Defect, Enhancement Request. This type of property would be related to the entire conversation, and not an individual question or agent answer within the case. In this example the Case Property would be most appropriate because it describes the entire "case", or message thread.

Question Property Example

If you want to document something about each question the user submits, like their level of satisfaction, you would use a question property. Question properties can have a different value for every question within the case (message thread).

After you create the interaction property you have the option to associate it with a set of topics as shown in the Topic section of this user guide. When a user selects that topic in the Ask a Question form of a customer portal, the properties associated will be automatically displayed if they are set as both customer viewable AND customer editable. Unless the property is set as customer editable, it will **not** be shown in the Ask a Question page. However, the property will be shown to an agent in the Create Ticket page because agent's have access to those properties regardless of the customer view and edit settings. NOTE: While the association of the property with a topic determines when the question property will appear in the standard iService GUI, you can create custom forms that include any interaction property regardless of the topic configuration.

When the question is presented to an agent in the Msg Queue page, the value entered on the original question will be displayed in the Message Properties panel. The agent can change this value, which is associated with the incoming question and NOT their answer. Every additional question within the thread (subsequent reply from customer, new ticket added to the thread) will also show this original question property. In our example, the thread is discussing an issue that is related to a specific browser, so it is presented to the agent with every interaction in that thread. Changing the value of the question property will result in all future questions that are part of the thread showing the new value. For example, if the customer selected "unknown" for browser and the agent changed it to IE all future responses from the customer would display "IE" to the agent.

Answer Property Example

Perhaps you want the agent to designate their response as billable and document the minutes spend working on a solution. This would require an Answer Property, and every response from the agent could have a different value. Their first response could be marked as billable and 10 minutes of time. If the customer replied saying thanks, they could resolve that question and mark their resolution as Not Billable and 0 minutes of time. The answer values are separate for each answer created (agent response, private or public note, agent email, etc), and updating their values has no impact on other answer or question properties.

3 – Value Type - Values are stored in the database using one of 4 formats: Date, Number, Integer (whole number), or Text. . If the property will be a list selection, choose that list from the drop down menu. These lists are created at the Tenant level within the Additional Details tab. If the property will contain free form text, just select Text.

4 – Required - When a property is marked as required, a user must enter a value when submitting a form that contains the property. For question properties, the value must be entered when the interaction is created. For answer properties, the value must be entered when the interaction is resolved. See Required Properties for more details.

5 - Shared Property – If you want all users of iService to view these contact properties, regardless of their access to this segment, then select the Share Property checkbox. Otherwise, leave this box unchecked and only agents that have explicit access to this segment will see these values within the contact and organization details.

It is important to note that you can attach interaction properties from one segment to an interaction that is queued in another segment. This can be on purpose (e.g., Feedback values are usually stored in a restricted segment, but the feedback interaction is recorded in the segment used by agents), or it could occur when an interaction of forwarded from one segment to another.

6 – Multi-Line Values – A multi-line property generates a text box in which multiple lines of text may be entered.

7 – Allow Multiple Values – This attribute will place a [+] next to the property allowing agents to enter multiple values. For instance, a property of type phone number might allow several different numbers to be entered.

8a – Has Descriptions – If the value allows multiple values, it might be desirable to provide a description for each value. For instance, an additional detail for types of phone numbers might be created with values of Home, Office, and Mobile. This additional detail would be selected in item 7 – Value Description Type. The list of Additional Details is enabled in item 7 when the Has Description box is checked.

8b – Value Description Type – This is a list of additional details created in Admin Tools > Additional Details. The list will be used as the description for the Multiple Value property.

9 – Customer Viewable – If the property is customer viewable, it will be displayed to the contact in their My Account page when viewing history.

10 – Customer Editable – If the property is customer editable, it can be edited by the contact in their My Account page when viewing history. In order to automatically display a property to a customer on an Ask a Question form, both the Customer Viewable and Customer Editable fields must be selected.

5.3.1 Required Properties

Interaction properties can be marked a "Required" to ensure that information is consistently captured. Marking a property as required has a different impact depending on the type of property: Question or Answer.

Question Property Rules

When a required property is set on a question, the following rules are enforced.

1. Customer emails are exempt from the required rule since it is can't be enforced consistently without filters.
2. Ask a Question and Ticket form submissions return a standard error (see below example) when the property is not included. For manually prepared forms, be sure to include all required forms for the user to populate.

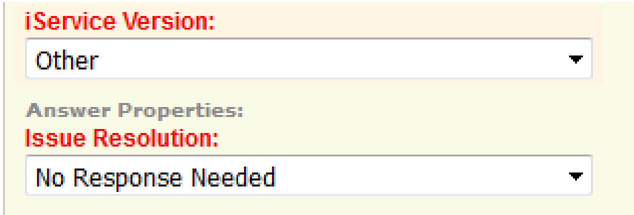
3. Properties that are not customer editable are exempt from the required check when a customer submits an Ask a Question form.
4. Questions created without a required question property (e.g., customer emails or forms submitted where the property was not customer viewable) can't be updated by an agent until a value is set. The agent will be required to set the property before they can Save as Draft or Forward the interaction to another agent.

Answer Property Rules

When a required property is set on an answer, it must have a value entered before the interaction is resolved.

Displaying required interaction properties

Required interaction properties are displayed in a bold, red color to alert the agent that a value must be entered.



5.3.2 Interaction Property Types

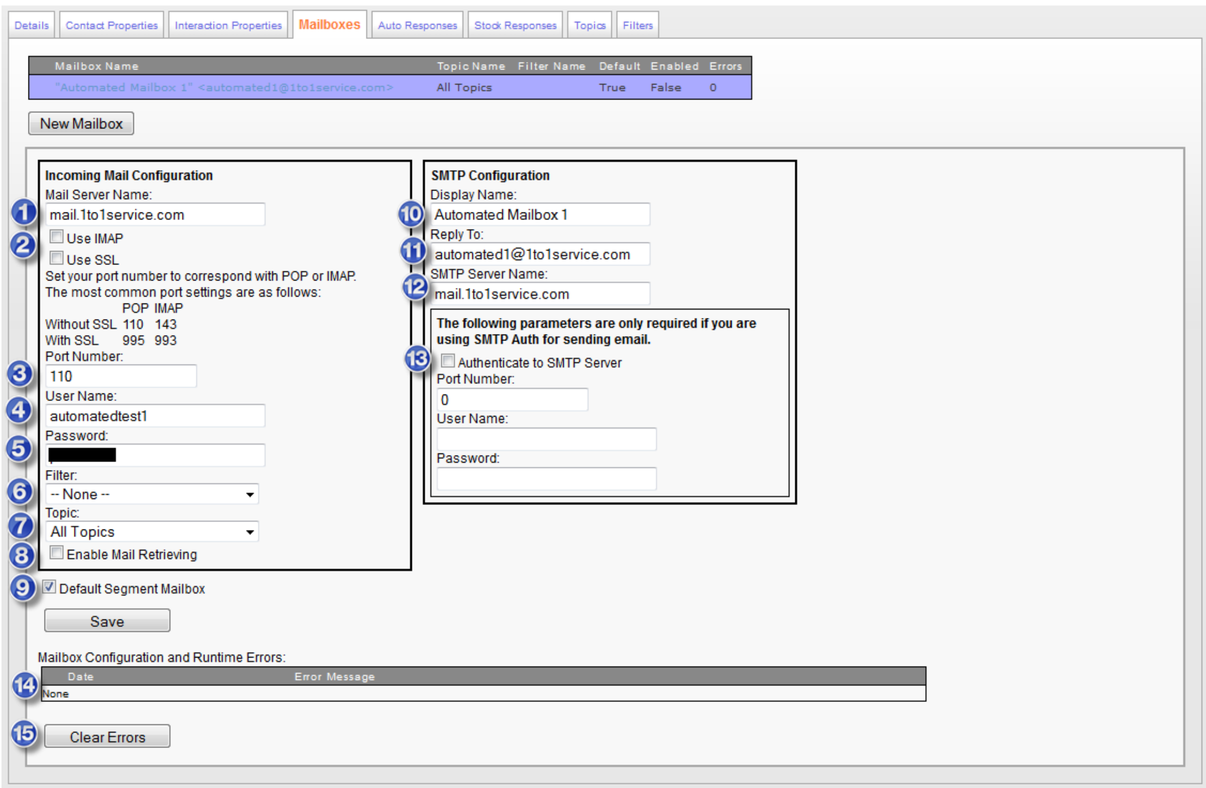
Interaction properties are classified as related to cases, questions, answers, or find answers articles (knowledge base). Interactions that are categorized as questions vs answers are shown below. Questions will appear as interactions in the Message Queue pages until they are resolved. Other interactions do not appear in the Message Queue.

Interaction Type	Classification for Interaction Properties
Ask A Question	Question
Customer Email	Question
Ticket	Question

Interaction Type	Classification for Interaction Properties
Agent Email	Answer
Agent Response	Answer
Note	Answer
Private Note	Answer
Resolve Note	Answer
Secure Email	Answer
Secure Response	Answer

5.4 Mailboxes

Mailboxes retrieve messages from generic email accounts (e.g., info@yourcompany.com) and convert those messages into questions within the Message Queue. To create a new mailbox within iService, select New Mailbox and complete each of the fields as described below. Incoming and Outgoing mail servers associated with an iService mailbox can be separate and are configured with separate parameters.



Click to expand

Incoming Mail Configuration

1 – Mail Server Name – Mail Server name is the name of the mail server on which the mailbox is hosted. For example, mail.yourcompany.com.

2 – Protocol for Incoming Email – By default, iService will use POP3 without SSL to retrieve email from the specified mailbox. To use IMAP or SSL, check the appropriate box.

3 – Port Number – Designate the port through which mail will be popped. For non SSL POP mailboxes, this is usually port 110.

4 - User Name - User Name is the login name for the mailbox. In the example above, the User Name might be info. If the User Name is entered incorrectly, iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect. Please note that the user name is typically not the same as the reply address.

5 - Password - Password is the POP3 password necessary to login and retrieve email from the mailbox. If the Password is entered incorrectly, an error will be generated and iService will not be able to login to the mailbox. An error will be recorded in the Mail Processor log if this value is incorrect.

6 - Filters - Filters read incoming messages and set their topics based upon keyword or phrase matches. Filters are created in the Segment Configuration - Filters tab and selected from this drop down menu.

7 - Topic - Default Topic is the topic to which email from this account will be assigned, unless a filter assigned to this mailbox identifies a different topic.

8 - Enable Mail Retrieving - The Enable Mail Retrieving check box is used to enable or disable checking of the mailbox, without deleting the account setup. When selected, iService will retrieve email from the mailbox every 60 seconds. When not selected, email will not be retrieved from this mailbox. This only affects incoming email as Outgoing SMTP will function for the specified mailbox as long as the mail popper service is running.

9 - Default Segment Mailbox – Each standard segment must have a default mailbox that is used for processes such as password reminders, agent emails, etc. Check this box to designate the mailbox as the default.

SMTP Configuration

10 - Display Name – The display name is typically what will display in the From line. For example, a name such as Customer Service might be used.

11 - Reply To – This address is the full email address you want to use as the reply to address when sending replies or agent emails from this mailbox. For example, info@yourcompany.com.

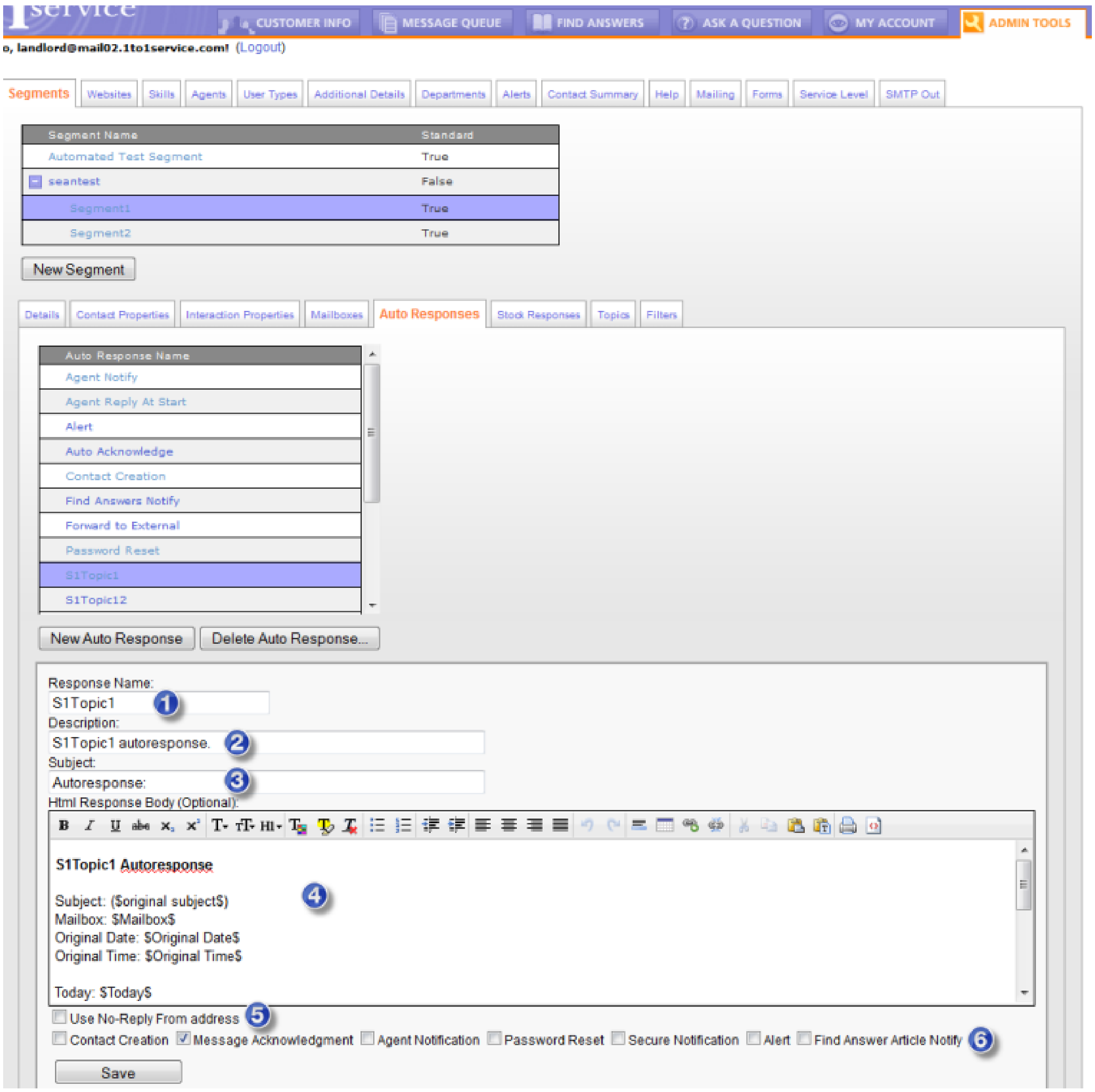
12 – SMTP Server Name – A separate server may be used for sending mail than receiving. List the name or address for the SMTP server used to send mail for this mailbox.

13 – SMTP Authentication – To use SMTP Authentication for your SMTP server, check the "Athenticate to SMTP Server" box and specify the information for your server.

14 - Errors - If iService encounters errors retrieving or sending email from the mailbox, details of those errors will be listed in the Mailbox Configuration and Runtime Errors table. These error messages are generally what is reported by the mail server. For performance purposes, only 1000 error messages are displayed.

15 - Clear Errors - To clear the errors from the errors listing, click the "clear errors" button.

5.5 Auto Responses



Click to expand

Auto response (notification) messages are templates used to send notices to contacts and agents. There are seven types of notification messages: Contact Creation, Message Acknowledgment, Agent Notification, Password Reset, Secure Notification, Alerts, and Find Answers Article Notify. The fields common to all auto responses are as follows.

1 – Response Name – This is the reference name displayed throughout iService. It is only viewed by iService Agents.

2 – Description – The description is used to describe the purpose of the response, and is only displayed in the Auto Response page.

3 – Subject – The subject used used as the subject for email sent to the recipient of the auto response. For some message, such as message acknowledgment, a reference number will be appended to the subject automatically.

Response body – This is the body of the auto response message sent to the recipient. It may contain variables that will be automatically populated when iService composes the message. The variables available are dependent on the auto response type, and are listed below in the *Using Variables in Auto Responses* section. Auto responses are sent in multi-part format, and the plain text version is automatically derived from the rich text version entered in the rich text editor.

5 – Use No-Reply from address – When checked, the auto response will be sent using a reply address of no-reply@domain.com. The domain used will be the domain for the mailbox that would normally be used.

6 – Auto Response Type – There are seven types of Auto Response messages. The purpose and use of each is described below.

> Contact Creation – This notification is sent as a response the first time an email is received from a new iService user. This informs the sender that an account was created automatically for them and provides their password. This password is required for the sender to update their original question or ask new questions via the Ask a Question interface. The auto response is also useful to promote usage of the iService knowledge base. Although multiple auto responses of this type may be created, only one will be used by the Segment. The default Contact Creation auto response is set in the Admin Tools > Segment > Details page. If you don't want your customers to view the iService interface, set the default contact creation auto response to –none- within the Admin Tools > Segments > Details page.
>
> Message Acknowledgment – Message Acknowledgments are automatically sent to the contact each time an inquiry is received by a topic that has the auto response assigned. The acknowledgment informs the contact that their message has been received, and can contain information specific to the topic that might answer the contacts question. These acknowledgments are associated with topics in the Admin Tools > Segments > Topics page.
>
> Agent Notifications - Agent notifications are sent to agents only when a) the agent has notifications enable, and b) the agent has all of the skills and segments required to answer the question that was received. Although multiple auto responses of this type may be created, only one will be used by the Segment. The default Agent Notification auto response is set in the Admin Tools > Segment > Details page.

There are two types of agent notifications: system generated agent notifications, and agent generated notifications. System generated responses can be sent to agents to inform them of new messages arriving within iService. These notifications are set within the Admin Tools>Segment>Topics page on a topic by topic basis. A special Forward to External notification can also be sent by agents from within the Message Queue page. These types of agent notifications MUST contain the $Forward URL$ variable to appear in the Message Queue forward list.

Password Reset – When a contact forgets their password they can request a reminder from the iService web site. The reminder will be sent using the Password Reset auto response. Although multiple auto responses of this type may be created, only one will be used by the Segment. The default Password Reset auto response is set in the Admin Tools > Websites tab.

Secure Notification – When agents respond to contact questions with sensitive information, that information should not be sent using clear text email. Instead, a secure notification should be sent informing the contact that an answer is available within the iService system. The contact should return to the iService website and login to read the message from an encrypted page. These auto response templates can be accessed from the Message Queue page's SEND button when agents compose their response.

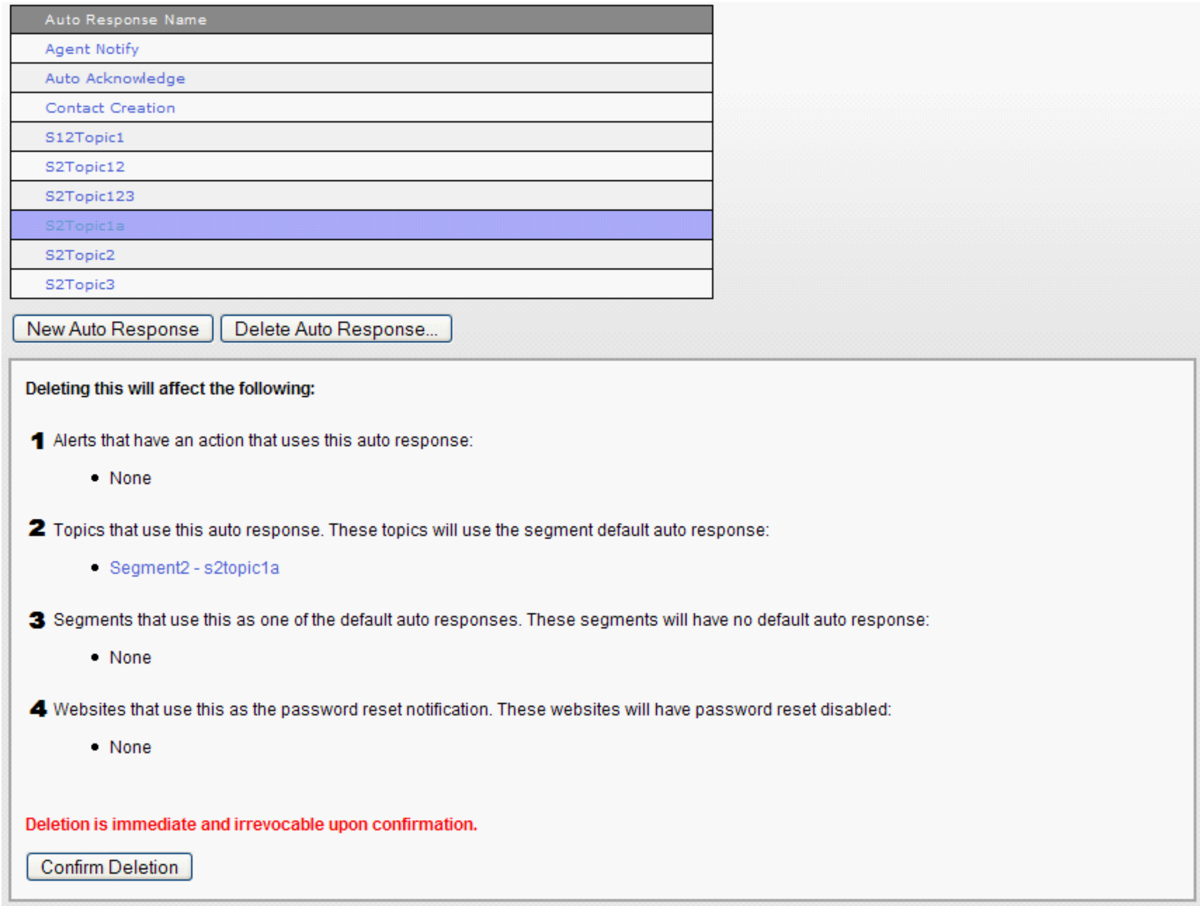
Alert – iService provides an Alerts system to monitor system status and can generate notices to agents. The Alert auto responses are selected from the Admin Tools > Alerts page when creating alerts that send auto responses.

Find Answers – Users can subscribe to articles within the Find Answers knowledgebase so they can be notified when the article is updated. This template is sent to those users to notify them of these changes. The template is selected from the Segment-Details tab and is used for all article updates within that segment.

5.5.1 Deleting Auto Responses

Care should be taken when deleting auto responses. Any topics that are using the auto response will have their auto response set to –Segment Default-- when deleted. Deleting auto responses is a two step process: Evaluate the impact of deleting and then confirm deletion.

Clicking Delete Auto Response will generate the following panel.



1 – If the auto response is used by an alert, links to those alerts will be listed here.

2 – If the auto response is used by a topic, links to those topics will be listed here.

3 – If the auto response is used as one of the Segment defaults (topic, contact creation, or agent notification), those default settings will be listed here.

4 – If any websites use the auto response for their password reset notification, they will be listed here.

5.5.2 Using variables in auto responses

You can embed variables within your auto responses to perform a variety of functions. The substitutions of these variables is handed by the iService Forms component. For details on variables that are available, see the iService Forms Developer Guide.

The following variables may be used within your auto response message. Variables within Message Acknowledgements are obtained from the message to which the auto response is sent. Variables must be enclosed within brackets (e.g., <Name>) or the dollar symbol

($Name$). When constructing HTML responses, the $ symbol is more convenient because variables within brackets will not display within most HTML editors.

Variable Name	Description	Contact Creation	Message Acknowledge	Agent Notify	Password Reset	Secure Notify	Alert
$value -customer click here for details	You can display the contact property values (name, address, etc.) associated with the person that is getting the auto response using the $value -customer parameter	X	X	X	X	X	
$value -question click here for details	Display details about the original question, such as the subject or body of the message, using $value -question.	X	X	X	X	X	X
$value -today **$value -now**	Display the date with -today, or the date and time with -now	X	X	X	X	X	X
$value -forwardexternal click here for details	The $value -forwardexternal parameter is used to populate a Forward to External Agent auto response with details about the forwarding agent, their comments, the link for			X			

	accessing the message, etc..						
$value - notifyresponse(id) click here for details	This is used within an Agent Notification to allow agents to reply directly to the notification, rather than logging into iService. This is used to identify the notification interaction and enables the mail processor to connect the agent reply to the original interaction, since the notification interaction ID is not part of the subject line. This can be used within a Forward to External Agent or Agent Notification on receipt of new messages. *NOTE – do not set the No-Reply option for auto responses that are used for accepting email responses from agents. Otherwise, the message will not be delivered to iService.*			X			
$value - notifyresponse(body) click here for details	This is where the quoted question appears and where the agent enters their answer. It includes special start and end markers which must			X			

	not be corrupted by the agent in his reply. This can be used within a Forward to External Agent or Agent Notification on receipt of new messages. This variable must be used with the NotifyResponse(ID) variable to match the response to the original question. ***NOTE** – do not set the No-Reply option for auto responses that are used for accepting email responses from agents. Otherwise, the message will not be delivered to iService.*						
$value - notifyresponse(bodyatstart) click here for details	This is used within an Agent Notification to allow agents to reply directly to the notification, rather than logging into iService. This is similar to the - NotifyResponse(Body) variable above, except it does not include Begin and End markers. It is designed to iService will accept all text entered before this variable and include it in the outgoing						

	response. Therefore, it should normally be the first item in the auto response. This can be used within a Forward to External Agent or Agent Notification on receipt of new messages. This variable must be used with the NotifyResponse(ID) variable to match the response to the original question. *NOTE – do not set the No-Reply option for auto responses that are used for accepting email responses from agents. Otherwise, the message will not be delivered to iService.*						
$value - customer(Password)	Displays the user's password necessary to log into the iService interface.	X					
$value - passwordreset(url) click here for details	The URL at which the recipient must change their password. It has the full URL to the reset confirmation page and is generated by the web front end web site (not the web service back end) and actually has <Reset GUID> embedded into it. Note – there is a				X		

<table>
<tr><td></td><td>space between the word Reset and URL.</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>$value - passwordreset(ip address)

click here for details</td><td>The IP address of the user to whom the password reset was sent. Reset IP is optional but can be useful for the user to investigate if someone else is trying to hijack their account. Note – there is a space between the word Reset and IP.</td><td></td><td></td><td></td><td>X</td><td></td><td></td></tr>
<tr><td>$value - alert(name)

click here to learn more</td><td>This will return the name of the Alert.</td><td></td><td></td><td></td><td></td><td></td><td>X</td></tr>
<tr><td>$value - alert(count)

click here to learn more</td><td>This will return the total number of items included in the alert.</td><td></td><td></td><td></td><td></td><td></td><td>X</td></tr>
<tr><td>$value - alertitem(id|agent|name|email|subject|time|date)

click here to learn more</td><td>This is similar to a /Body tag within HTML. All AlertItem tags must be embedded within these tags. You must replace (*) with the actual tags listed below.</td><td></td><td></td><td></td><td></td><td></td><td>X</td></tr>
</table>

5.5.2.1 Agent Notify Example - Reply at Start of Msg

This is an example of a notification template in which the agent can reply using email to answer the customer's question. They simply type a response at the beginning of the notification message and send it back to iService. When received, iService will strip all of the message prior to the $notifyresponsebodyatstart$ variable and use it as the agent reply to the customer's question.

Auto Response Body Example:

```
$notifyresponsebodyatstart$

$NotifyResponseID$

Some text could be enter here to provide an explanation to the agent.
```

Example of Notification Sent to Agent:

```
On 4/19/2013 3:49:37 PM, customer@domain.com wrote:
> This is a question for illustrative purposes.
>

==== End Answer ==== f0135a3c-33ac-40dd-b0a3-4ca0dd45dd41

[Notify#: 25394]

Please click reply in our mail client and send a response. DO NOT TYPE AFTER THE END M
```

Example of the agent's response:

```
Hi Customer,

This is your answer.

Regards,

The Agent

On 4/19/2013 3:49:37 PM, customer@domain.com wrote:
> This is a question for illustrative purposes.
>

==== End Answer ==== f0135a3c-33ac-40dd-b0a3-4ca0dd45dd41

[Notify#: 25394]

Please click reply in our mail client and send a response. DO NOT TYPE AFTER THE END M
```

Example of the message received by the customer:

```
Hi Customer,

This is your answer.

Regards,

The Agent

On 4/19/2013 3:49:37 PM, customer@domain.com wrote:
> This is a question for illustrative purposes.
>
```

5.5.3 HTML and iService Variables in Auto Responses

It's common to use HTML when composing auto responses, and the Rich Text Editor makes it easy to compose nice looking messages. But, sometimes you need to insert iService variables within the HTML in non-standard locations. For instance, consider the situation where you want to make an alert auto response with a table for the details of unanswered messages.

The -alertitem parameter must be used within a $repeat command to generate the repeating list of values. A simple example of this command is as follows.

```
$repeat -alertitems$
     Date of Message: $value -alertitem(date)$
     Subject of Message: $value -alertitem(subject)$
     From: $value -alertitem(name)$
$endrepeat$
```

NOTE: When using this command within an HTML table, the $repeat command must be marked as a comment. Since it is embedded within an HTML table out side of the TD, your browser will remove the tag if it is not commented because placing it between a table parameter and row parameter is an invalid location for HTML code.

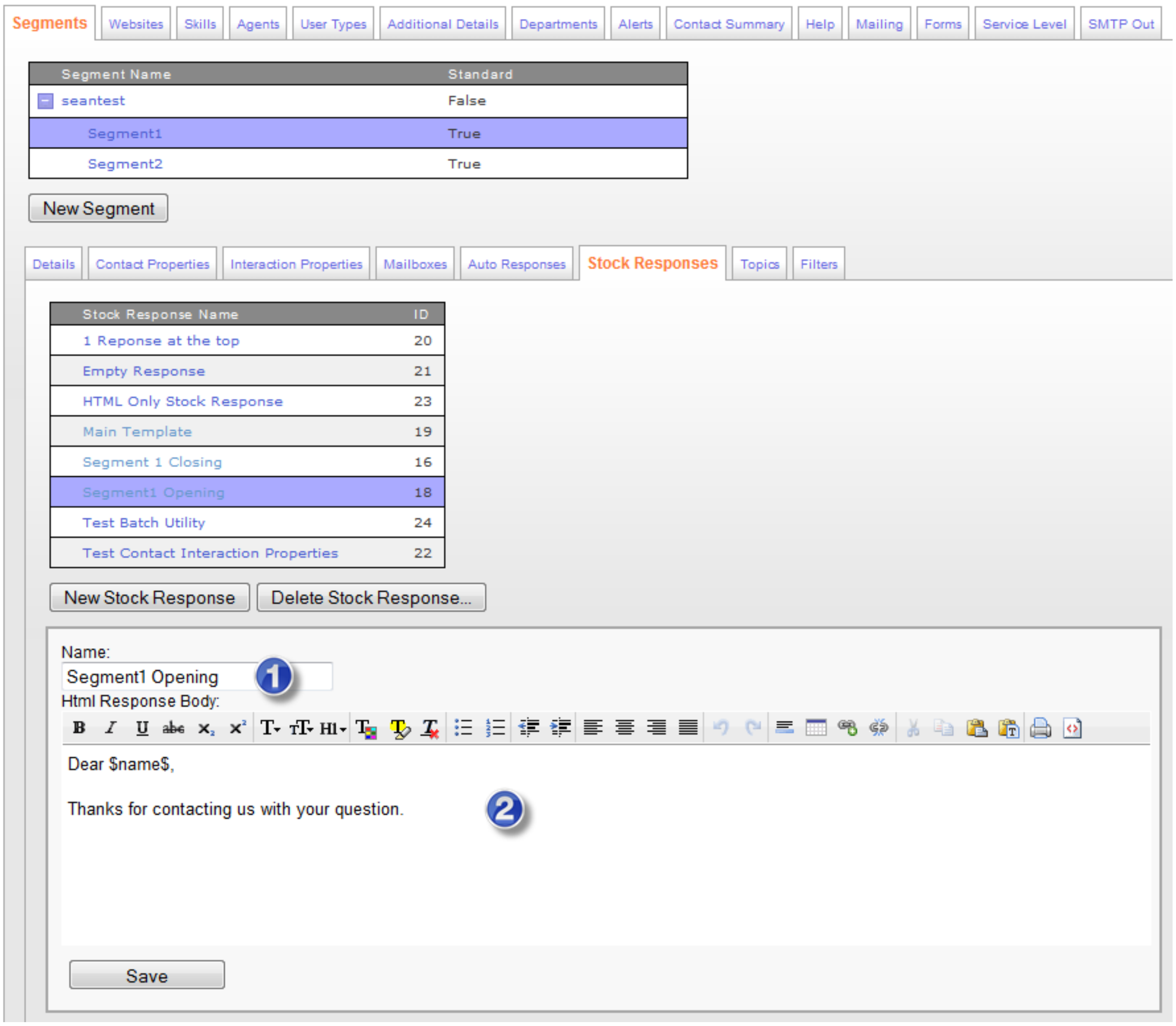
```
<table border="0" cellpadding="3" cellspacing="1" align="left" width="100%">
<thead>
   <tr>
     <th>Date of Original Msg</th>
     <th>Interaction ID</th>
     <th>Contact Name</th>
     <th>Contact Email</th>
     <th>Subject</th>
     <th>Assigned Agent:</th>
   </tr>
 </thead>
```

```
<tbody>
   <!-- $repeat -alertitems$ -->
      <tr>
     <td>$value -alertitem(date)$ $value -alertitem(time)$</td>
<!--Edit the line below for your iService URL-->
     <td><a href="https://1to1service.iservicecrm.com/MessageQueue.aspx?mode=search&ar
     <td>$value -alertitem(name)$<br></td>
     <td>$value -alertitem(email)$</td>
     <td>$value -alertitem(subject)$</td>
     <td>$value -alertitem(agent)$</td>
  </tr>
  <!-- $endrepeat$  -->
 </tbody>
</table>
```

5.6 Stock Responses

Stock responses provide a convenient and efficient way for agents to build answers to commonly asked questions. There are two types of Stock Responses: Segment Level and Agent Level. Responses created at the Segment Level are available to all agents of that segment when viewing a question within that segment. Agent level responses are only shown for the agent that created them, and are created in the My Account>Stock Responses page. The agent responses can be viewed and edited by managers in the agent admin page.

Segment level responses are created from within the Admin Tools>Segment>Stock Responses tab as shown below.



Click to expand

1 - The name selected for the stock response is displayed to agents in the Stock Response picker.

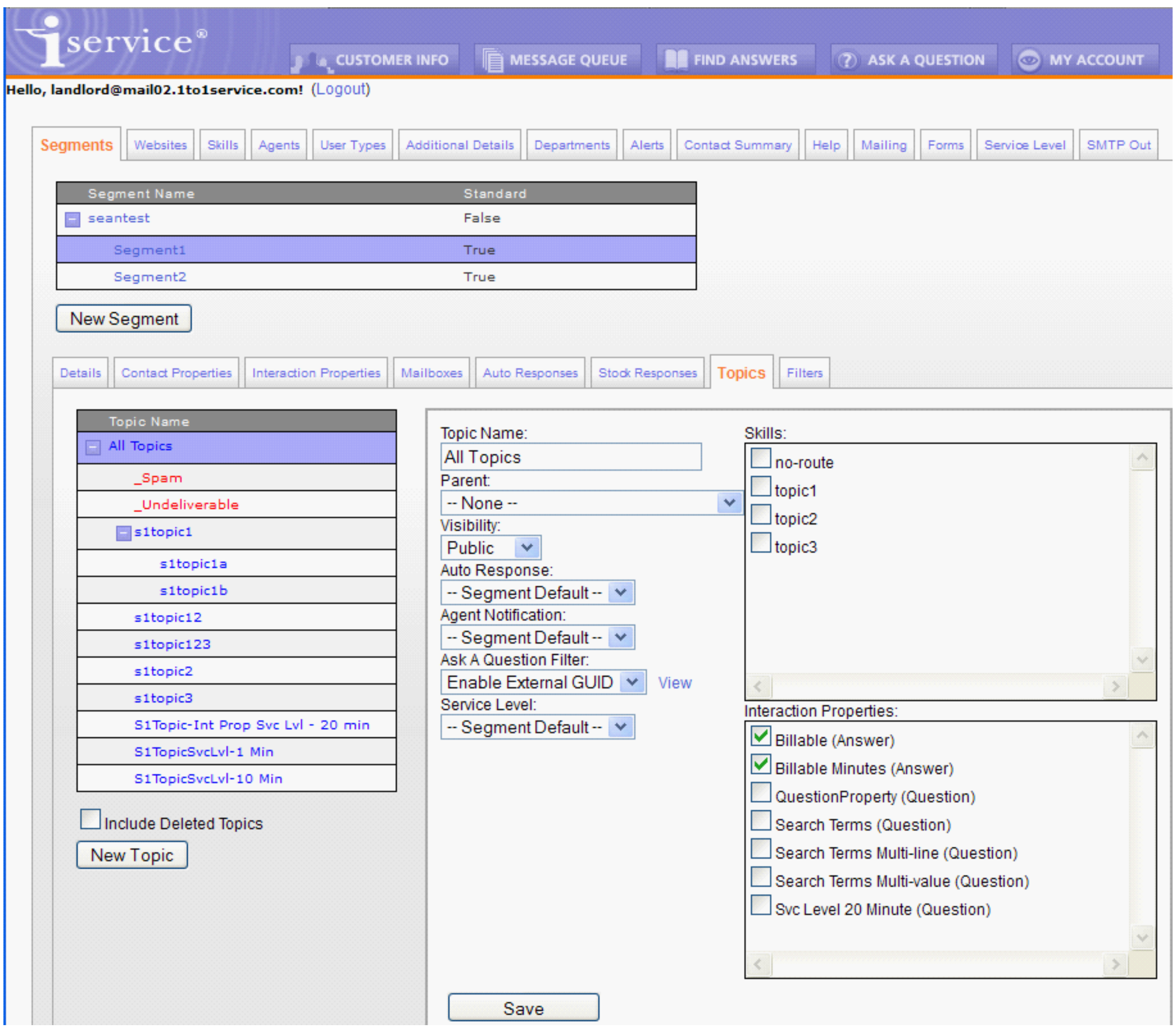
2 - The HTML body will be automatically converted to plain text for the plain text version of the response. You can include other stock responses and variables inside of a stock response, if desired.

Important Note Regarding Pasting Content Into a Stock Response

When pasting content into the Stock Response, keep in mind that you are pasting into a rich text editor. **Never paste content directly from a word processing program** (e.g., Microsoft Word), because those programs use embedded proprietary codes to manage their display. These codes are NOT HTML compatible, and although you may not see them in the rich text version of the editor, you will see them in the source of the response. **These codes will cause iService to malfunction when pasted into an agent response with unpredictable display to the end user.**

5.7 Topics

Topics are a critical part of iService. They are used to organize answers within the iService knowledge base and to create message queues for routing questions to customer support representatives. Topics are organized into a hierarchical topic tree as "branches" or topic categories that can be publicly visible or private. Clicking on the + or – image in front of a title expands or collapses the topics visible in the Topic Tree.



Topic Details Panel

The details for the topic selected from the topic tree are displayed in the Topic Details box to the right. You can select any topic for editing by selecting it from this tree. After changing any details for the topic, you must click the Save button or changes will not be saved.

Visibility - Select whether you want the topic to be visible as public (anonymous and customer user types may view this topic), private (not viewable by anonymous or customer users), or deleted (not viewable by any users).

Auto Response - If you would like an automatic response sent for each message that is received by the topic, select the appropriate auto response from the drop down menu. If you do not want auto responses to be sent for certain topics, then you should select --None--. If –Segment Default-- is selected, then the Default Topic Auto Response set in the Admin Tools>Segments>Details page will be used.

Agent Notification - Select the auto response that should be sent to agents when a new message arrives. The options are Segment Default, a specific auto response, or -none-.

Ask A Question Filter - If you would like to filter messages that are received through the Ask a Question tab, select the appropriate filter from the drop down menu. These filters will be applied to questions that are submitted from the Ask a Question interface only. To filter questions submitted via email, add the filter to the Mailbox.

Service Level - You can assign a service level to any topic, and if it is lower than the segment default it will be adopted by all interactions queued within the topic.

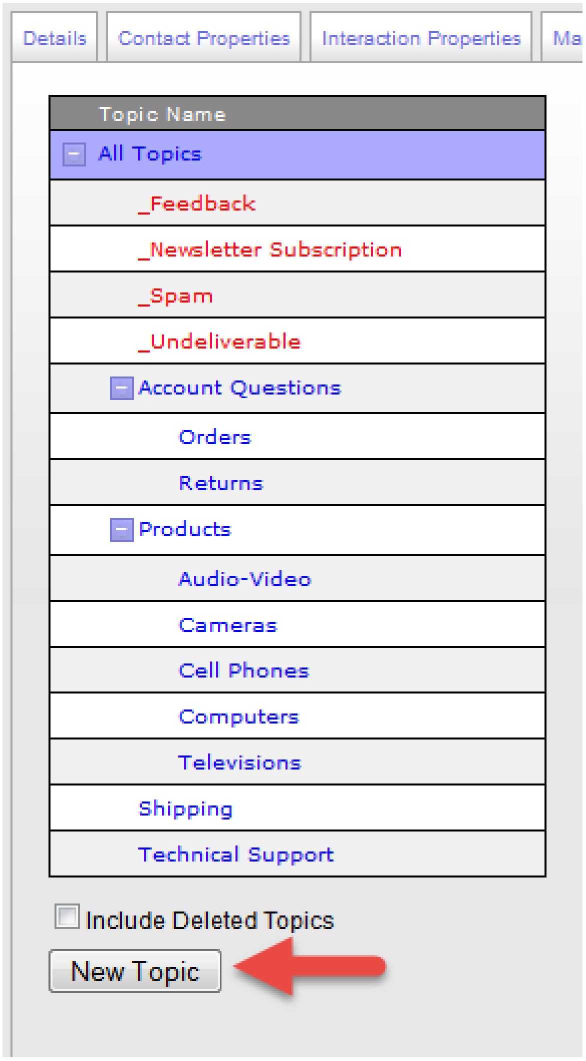
Skills - Select any skills that are required to answer questions sent to the topic.

Interaction Properties – Interaction properties can be presented to customers when they fill out the Ask a Question page. To require this information, select it from the Additional Details box. In addition, agents can be presented with additional properties to complete when they answer a question.

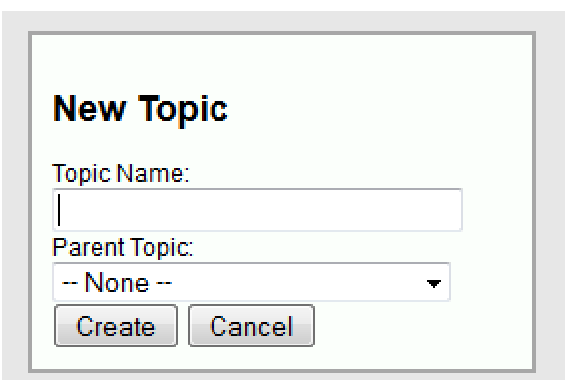
Include Deleted Topics - When topics are marked for deletion, they no longer appear within the topic tree to users (internal or external). If you would like to view the topics that have been marked for deletion and change their status to public or private, click this check box and they will be displayed in a grey color. You can then select the deleted topic and “undelete” it by changing its visibility.

5.7.1 Creating a New Topic

To create new topics click on the Topics tab to show the Topics tree, and click New Topic.



Enter the name of the new topic and complete the following information. The topic name is also displayed in the Find Answers page to internal and external customers. Select the topic that will be the parent for the new topic, and click New Topic and click Create.



After your topic is selected, update its settings as desired.

5.7.2 Default Topics

When a standard segment is created, it is automatically populated with three topics that should not be deleted.

Topic Name
All Topics
_Spam
_Undeliverable

All Topics - "All Topics" is the initial root parent of the topic tree for the segment. It is named all topics because when viewed from the Find Answers page with "Include All Sub-topics" selected, the articles from all topics within the segment are displayed. But it can be renamed as desired to reflect how you intend to configure iService (e.g., Other Questions).

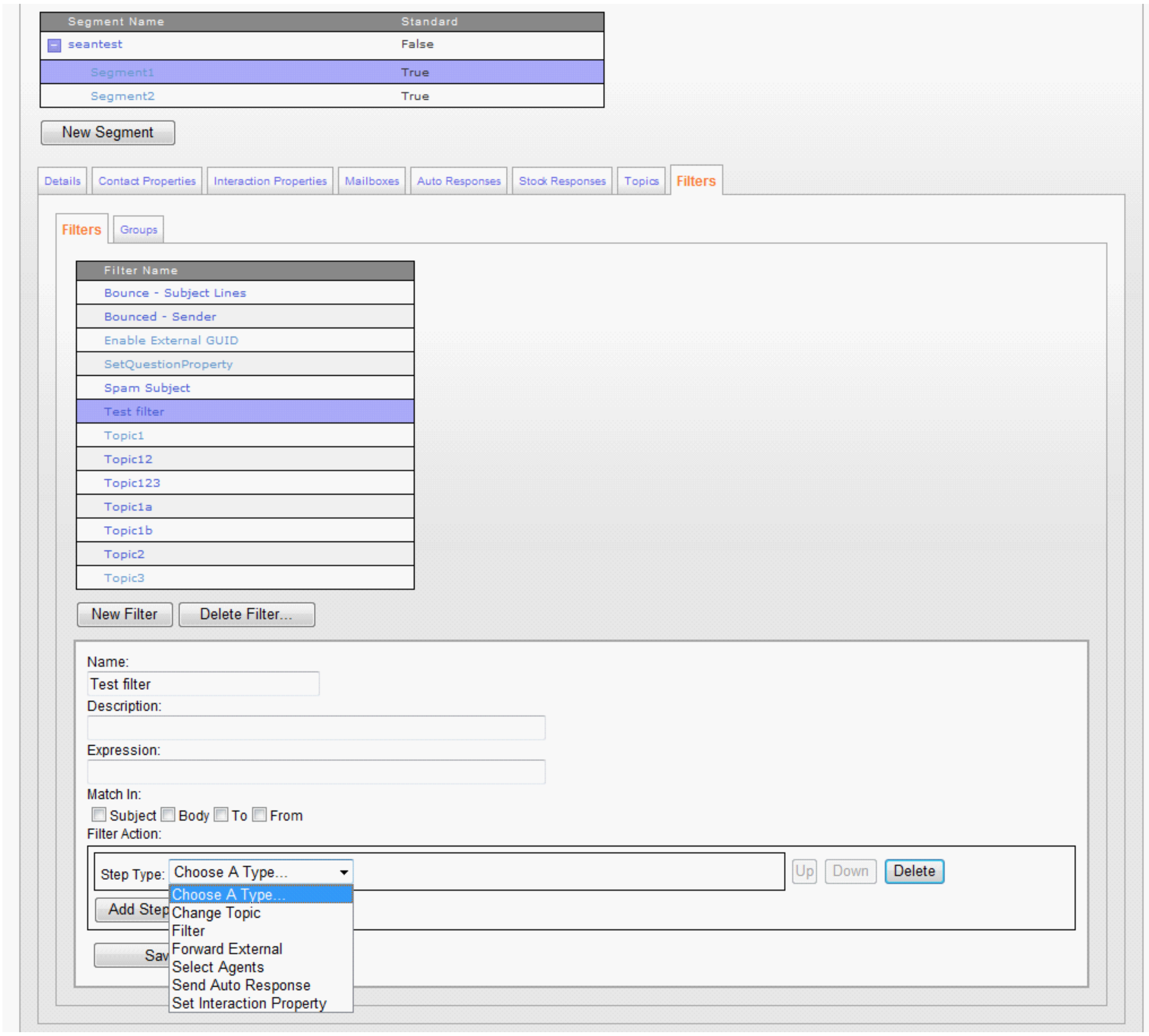
_SPAM - The spam topic is used to separate spam messages and improve the accuracy of reports. The Message Queue - SPAM button will automatically change the topic of the message to _SPAM, and therefore this topic should not be removed. In addition to the SPAM button, you can create filters to identify messages that are spam and move them to this topic.

_Undeliverable - This topic is used to route bounced messages that do not require a response. It is typically used with a set of bounce filters that will identify undeliverable notices and move them into this topic.

5.8 Filters

Filters are used to evaluate incoming interactions and take automated actions based upon regular expression matches. An example of a common action is to redirect incoming messages to a specific topic based on content in a message. Filters can be applied to mailboxes (see Segment Configuration > Mailboxes) individually, or combined in groups. When applied to a mailbox, filters parse the contents of incoming mail.

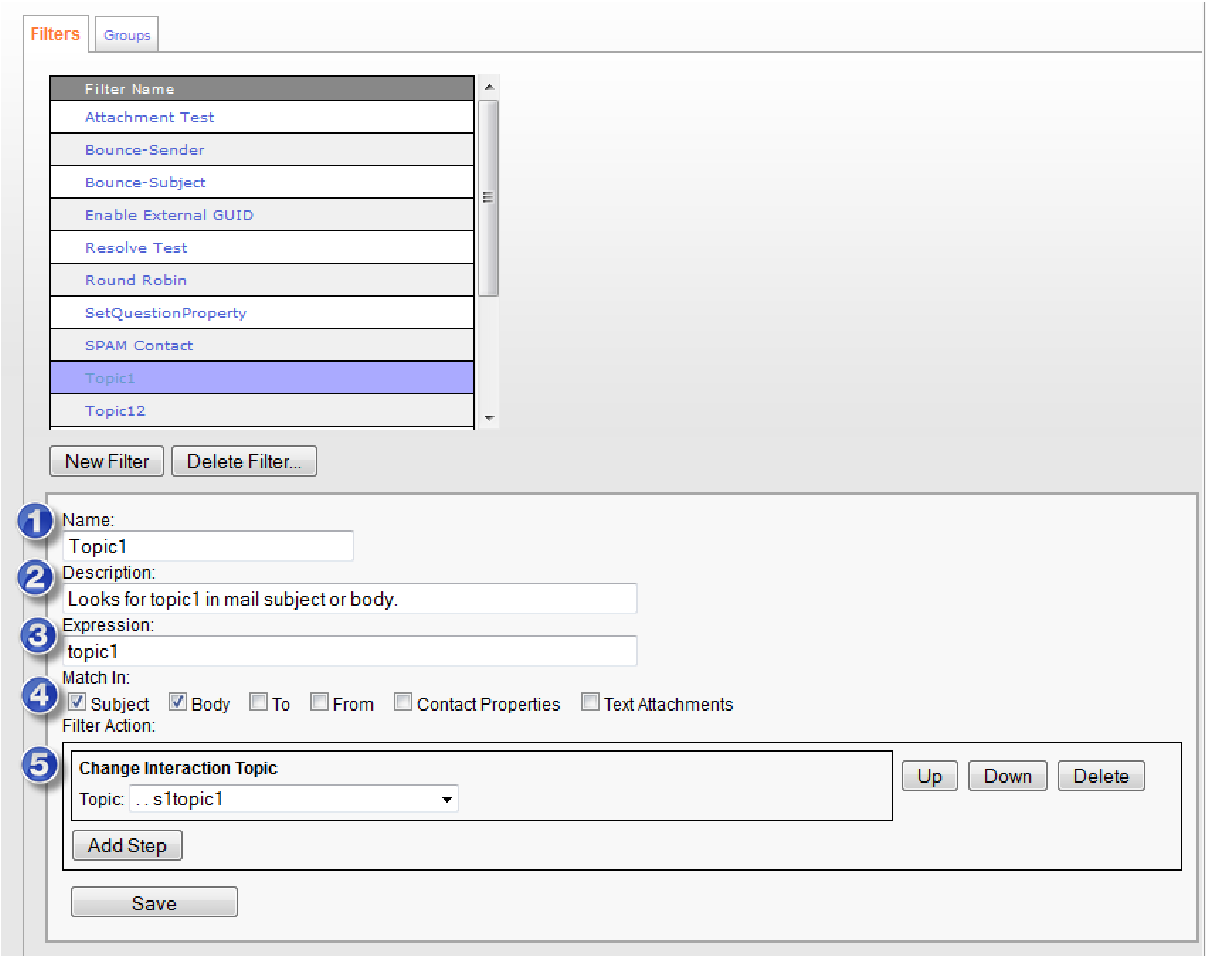
When applied directly to topics (see Segment Configuration - Topics), filters parse the contents of Tickets and Ask a Question interactions (e.g., iService Forms and the Ask a Question page) that are submitted directly to iService rather than via email.



Click to expand image

5.8.1 Creating a new filter

Individual filters are built using two components: Filter Expression and Filter Action (actions may contain multiple action steps). Filters look for matching expressions within the subject, body, to, from, or contact properties of the sender of an incoming question. When that condition is met, the associated filter action is executed.



Click to expand

1) Name - This is the name of the filter. It is used to identify the filter when assigning it to a mailbox or topic. Select a short name that will be easily viewed from a drop down menu. For example, we might use a name such as "SPAM" for a filter that looks for incoming questions that contain common terms within unsolicited bulk email messages..

2) Description - Description is used only within the Filter Administration page to describe the objectives for the filter. Enter a description that will be helpful to others in understanding what the filter does or how it is intended to be used.

3) Expression - The Expression box is where you enter your keywords or phrases. iService will look for matches to these terms when the filter is executed against incoming questions. Regular expression formula's are supported such as including the pipe character (|) to represent an "or" condition. If special characters are included in the search terms they must be preceded with a "\". Example: If e-card was a term to be searched for it would be entered as "e\-card" in the Terms section because "-" is a special character.

iService allows up to 1,024 characters in the Expression field, and supports matches in the Subject, Body, To, and From portions of incoming questions. For a deeper insight to the queries possible, please refer to the following Microsoft link: http://msdn.microsoft.com/en-us/library/az24scfc.aspx

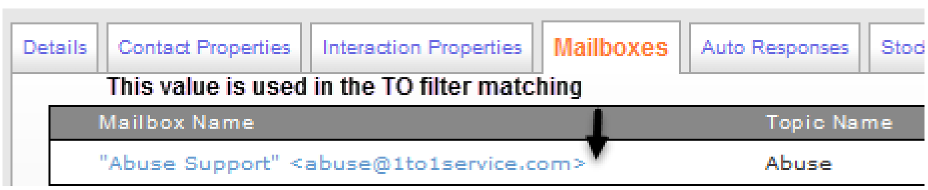
4) Match In - iService can match text in the following areas:

a. Subject - This is the Subject of the question entered within Ask a Question, or the subject line of incoming email.

b. Body - This is the body of the question entered within Ask a Question, or the body of incoming email.

c. From - This is the From Address line within an incoming email.

d. To - This is the Mailbox Name for the mailbox in iService that received the message. It contains both the Display Name and the Reply-To address.



e. Contact Properties - This options evaluates the expression against all the contact property values on the contact. To limit the match to a specific contact property, use the following as your regular expression.

`propertyname: value` - The propertyname is a contact property, like customer type. The value is the value you want to match, like customer.

f. Text Attachments - This option evaluates the expression against all of the attachments to the email message. This works best with text files rather than binary files like MS Excel.

5) Filter Action Steps

There are nine filter action steps that can be performed on Customer Emails, Tickets, and Ask a Question interactions when an expression match occurs.

Change Interaction Parent – This action is used to move the incoming interaction to an existing message thread, rather than create a new thread. Replies to existing threads are automatically added to into the thread based upon the Ref # in the subject of the message. But, if the incoming message does not have that matching reference number, you can still move it to another thread if you can match on an interaction property value.

For this action to work properly, the previous interaction must have an interaction property with a value that is the same as the new interaction. For instance, let's say you have an interaction property named CaseNumber that captures a case number on a new user account request. Then, if another interaction is created later and the property CaseNumber contains that same value as the previous interaction, the new interaction can be added to that existing thread.

Change Topic - When the filter expression finds a match, it will assign the incoming question to a specified topic.

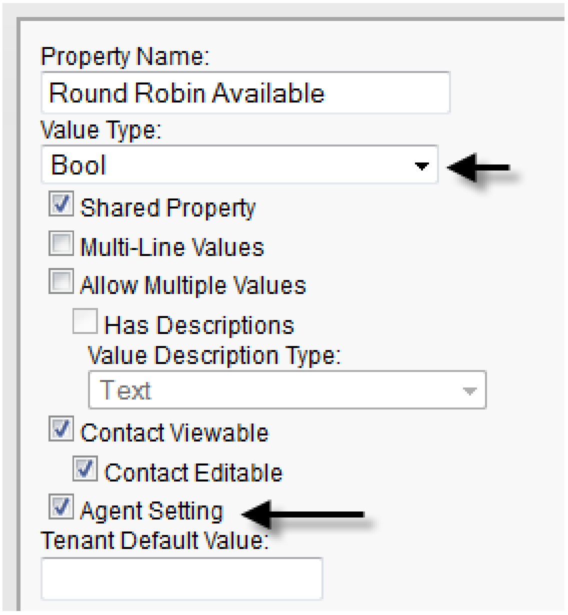
Filter - When another filter is selected as an action step, this filter will be run when the expression matches. This allows you to continue processing the message, but check for new matching criteria. For example, filter1 might 1) look for password support requests, 2) change the topic when a password request is found, and 3) run filter2. Then, filter2 might 1) check the senders contact properties to see if they are VIP, and 2) notify support managers when it is an important person.

Forward External – If you want to use the external answer page link within your agent notifications, you must enable a GUID for those messages. This GUID allows anonymous access to answer the question when that value is specified in auto response.

Resolve Interaction – This action step will mark the interaction as resolved if the filter criteria are met.

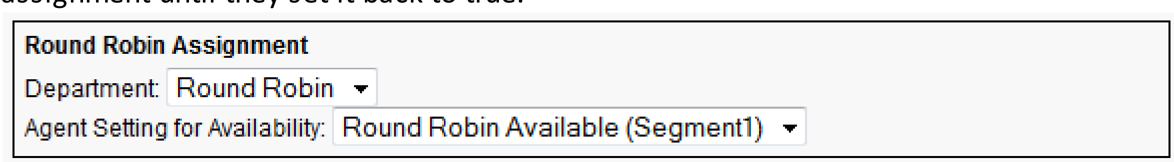
Round Robin Assignment – iService can automatically assign incoming messages to agents using a round Robin method. To configure round Robin assignment you must first create a department that will be used to determine the agents eligible for assignment. Agents that are assigned to this department will be included within the rotation of message assignment.

You must then create an agent setting that will be used to determine when an agent is not available for assignment. This contact property must be configured as a Boolean property with the Agent Setting box checked as shown below.



A Contact Property Used for Round Robin Availability

The round Robin filter action will use this property to determine if the agent is available for assignment. When the agent sets this value to false, they will be excluded from message assignment until they set it back to true.



A Round Robin Filter Action

Select Agents / Send Auto Response – The Select Agents and Send Auto Response options must be used together. The first action, Select Agents, will pick the agents that should be notified of the incoming interaction. The second action, Send Auto Response, will specify the auto response template to send those selected agents. NOTE- this filter will not assign the message, but simply notify those agents selected that it has arrived.

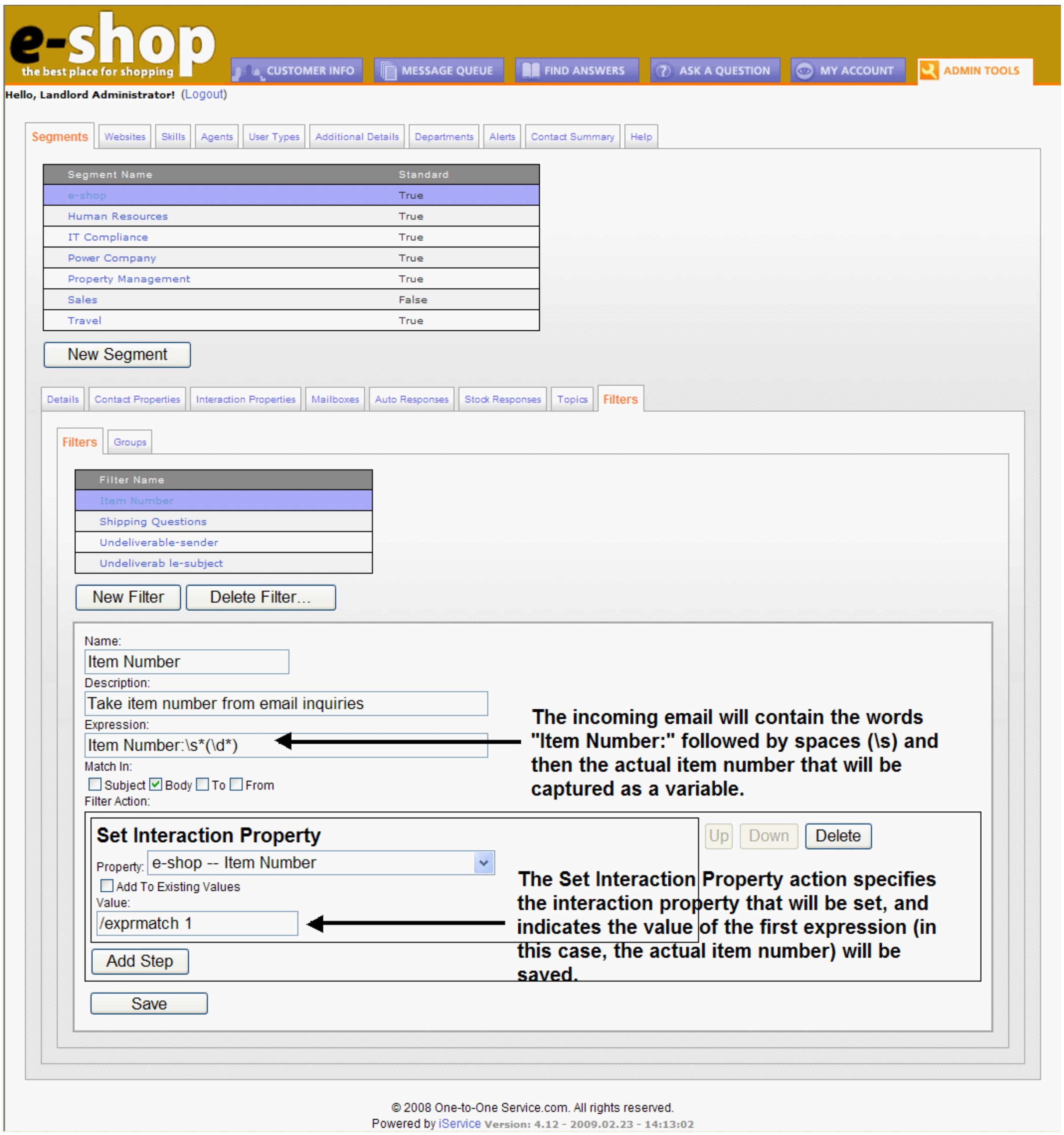
Set Interaction Property – This action will set a specified value for interactions when the expression match occurs. There are two primary ways to set this value: use a constant value, or set the value with a variable from the incoming message.

1. Using a constant value – An incoming message may contain various subject lines from your websites email form, such as System Outage Report, Problem Notice, etc. When this match occurs, an interaction property named “Request Type” could set a fixed value such as “Problem”. This provides the ability to use this filter for routing, reporting and display to agents.

2. Using a variable – Incoming messages from forms might contain information such as account number that you would like to capture from the message. Using a special

regular expression format, you can specify the portion of the message to be saved as the interaction property value. An example of this setup is shown below.

If the interaction already has a value set, the filter can either replace that value or add a second value for the property (if the property supports multiple values). To add a second value, you must check the "Add To Existing Values" checkbox. NOTE: The Add to Existing Values checkbox will only appear when you select an interaction property that is configured to support multiple values.



Click to expand image

5.8.2 Filter Groups

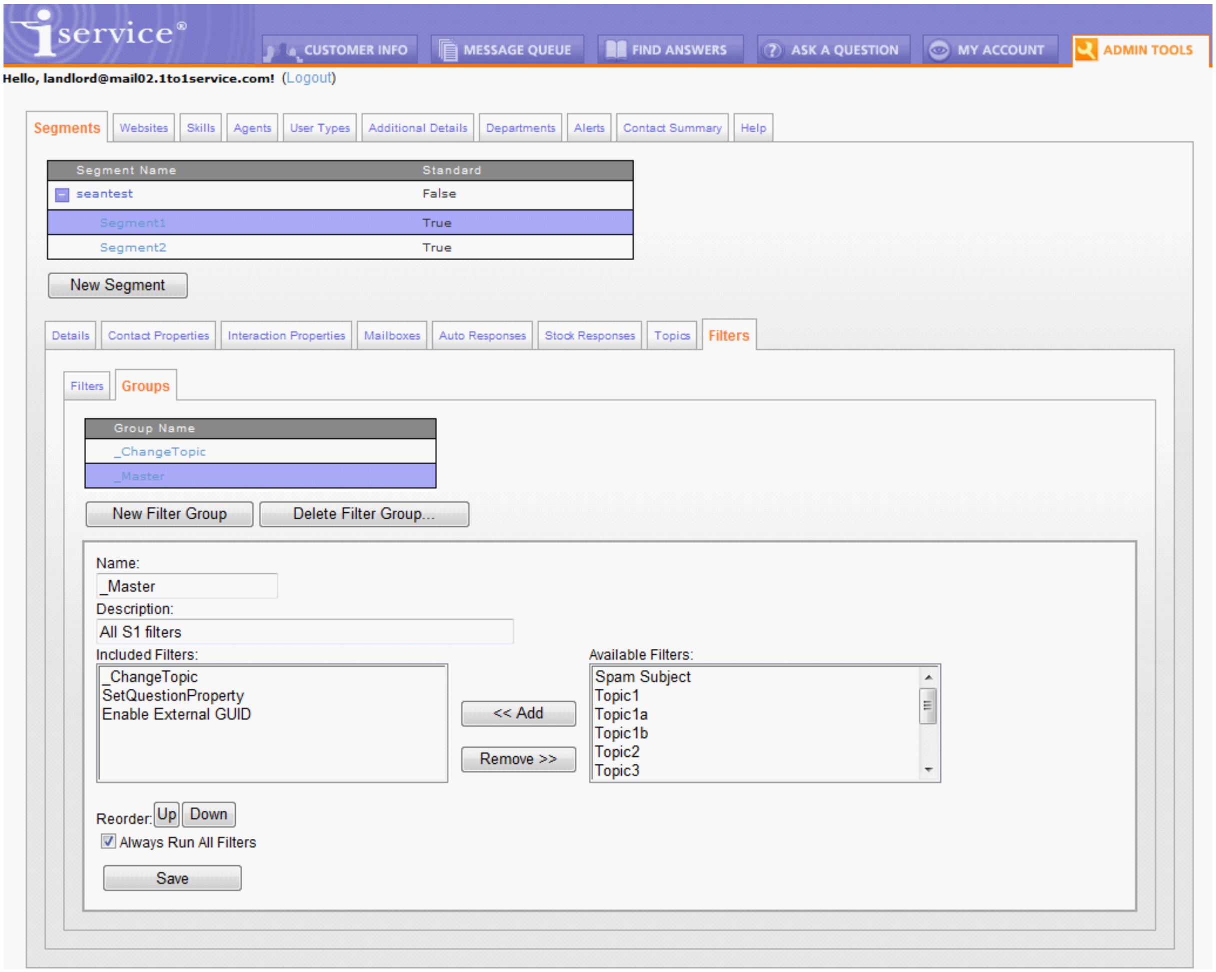
Since mailboxes and topics can only have one filter assigned, groups can be used to combine multiple filters. To create a filter group, click New Filter Group and enter a name for the filter group. Then select the filters to be included within the group from the Available Filters box and click Add.

The order of the filters will determine the order for matching. For example, if a term within the first filter in the list is identified and the Always Run All Filters box is not checked, the filter action will run and the group will bypass the remaining filters. Generally, the following filter groups are used.

_Master - This can be assigned to mailboxes and include all desired filters and filter groups.

_TopicChanges - It is suggested to put all filters that change a messages topic into a single filter group, and set the group to NOT Always Run All Filters.

_SetProperties - Since you might want to set multiple properties it's suggested that filters which set properties be combined into a group with the Always Run All Filters box checked.



Click to expand image

5.8.3 Common Filter Examples

Although filters are completely customized for each tenant, there are several filters that are commonly used for scenarios such as bounced messages. Some of these are shown below.

Undeliverable Messages

Undeliverable messages can be identified by their subject line and in most cases the sender. Typically, the following two filters are created to match bounced messages and are placed at the top of the topic change filter group.

Check Subject Line

Expression: Subject Matches - `Undelivered Mail Returned to Sender|failure notice|Returned mail|Undeliverable Mail|Delivery Status Notification|Mail could not be delivered|Mail delivery failed|Delayed Mail`

Action: `Change topic to _Undeliverable`

Check From Address

Expression: From Matches - `postmaster|mailer-daemon`

Action: `Change topic to _Undeliverable`

Out of Office Messages

Out of Office messages can be identified by their subject line

Check Subject Line

Expression: Subject Matches - `Automatic reply|Out of Office|Automatische Antwort|Niet aanwezig|Automatisch antwoord|Abwesenheit|Ya no escribir a este correo|Abwesend|Abwesenheitsnotiz|out of the office|kann ihre Mail nicht empfangen!`

Action: `Change topic to _Undeliverable or _Out of Office`

6 Common Configurations

Some features, such as agent notifications, require configuration in multiple iService screens. The details of those screens are described within the Tenant and Segment configurations chapters. This chapter describes some of the most common ways to use iService and includes specific examples with reference to all the places within iService that you will need to configure.

6.1 Standard Agent Notifications

Agent notifications are email messages sent to agents to inform them of various events. These include new incoming messages, messages that have been assigned to them, and messages that are forwarded to them using the Forward to External actions. In all cases, an auto response template must be configured for this feature to work. These notifications do NOT rely on filters to trigger the notification. To learn about setting up an agent notification triggered by a filter, see the Send Autoresponse Filter chapter.

Agent Notification of New Messages

IService can be configured to send an e-mail notice to agents whenever a new message arrives that they have the skills to answer. These notices will be sent for any topic that has notifications enabled.

To set up this feature, you need to configure the following aspects of iService.

1. Set Up The Auto Response Template

The message sent to the agent will use the auto response template selected for the topic into which a new message arrives. This template will typically send the agent details about the person that sent a message and details about the message itself. Only auto response templates that are marked as agent notification can be selected.

To learn more about creating auto responses, read the Auto Response chapter.

2. Select the Template to Send

Each topic within iService has an agent notification template setting. The default setting is to use the Segment Default template, but it can be changed to a specific template or -none-. If you don't want any agents to receive notifications for a particular topic, set its template to -none.

Learn more about setting the segment default for an agent auto response.
Learn more about specifying a template for a specific topic, read the Topics chapter.

3. Turn on Agent Notifications for The Agent

Agents will only receive notifications if they have notifications enabled on their account, and they have all the skills and access rights to get the new message that arrived. If they would get the message assigned by clicking Get Next in their My Queue page then the notification would be triggered. The agent setting is configured on the Admin Tools - Agent Settings tab. The skills settings are based on the skills required for the incoming message (set by topic or interaction property), and the skills assigned to the agent in the Admin Tools - Agents Details tab.

To learn more about configuring skills-based routing, read the Skills topic.

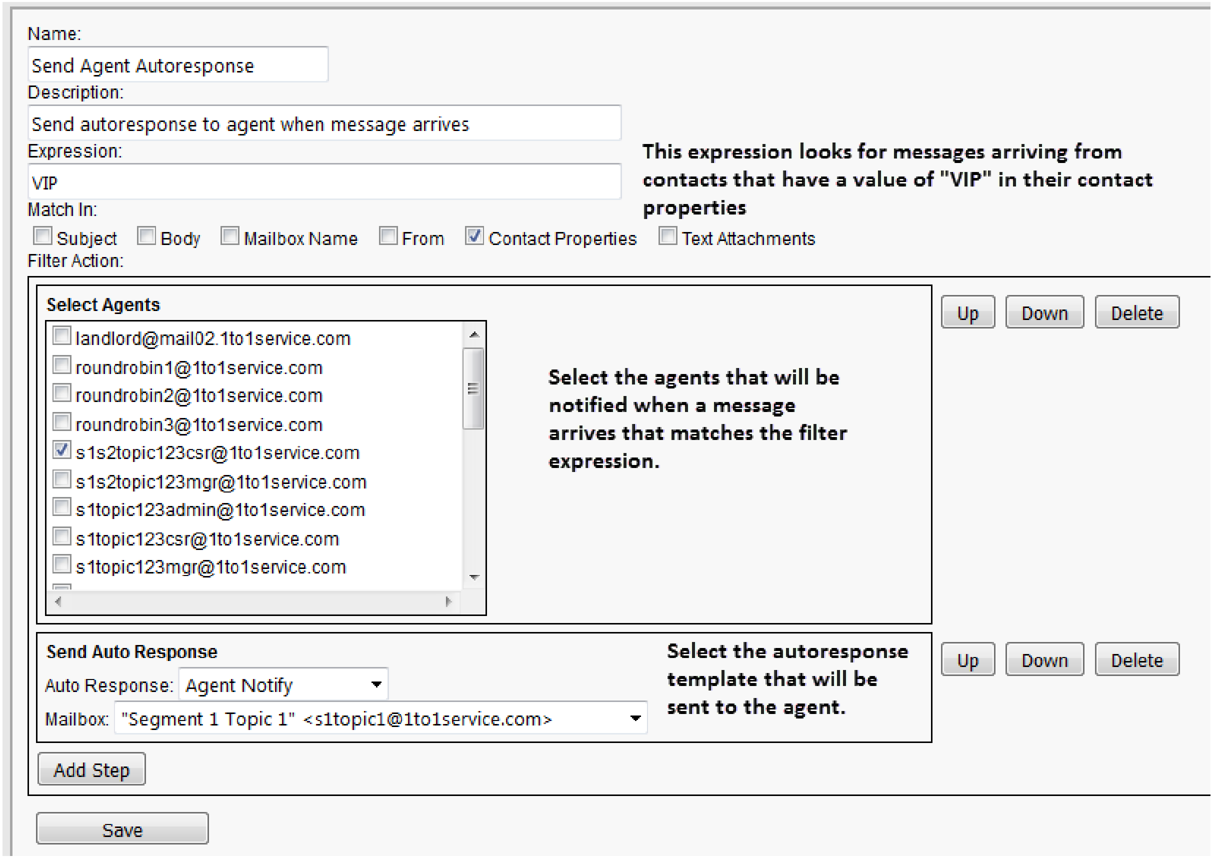
When these three areas are properly configured, agents will receive the designated auto response template each time a new message arrives that they have the skills and access rights to answer.

6.2 Send Autoresponse Filter

The Send Autoresponse filter is designed to send an agent notification based on a matching expression within a filter. This differs from other autoresponses that are sent based upon the topic configuration.

The setup requires three steps.

1 - Create the autoresponse that will be sent to the agent.
2 - Create the filter using an expression to match and two actions: Select Agents and Send Autoresponse.



Click to expand image

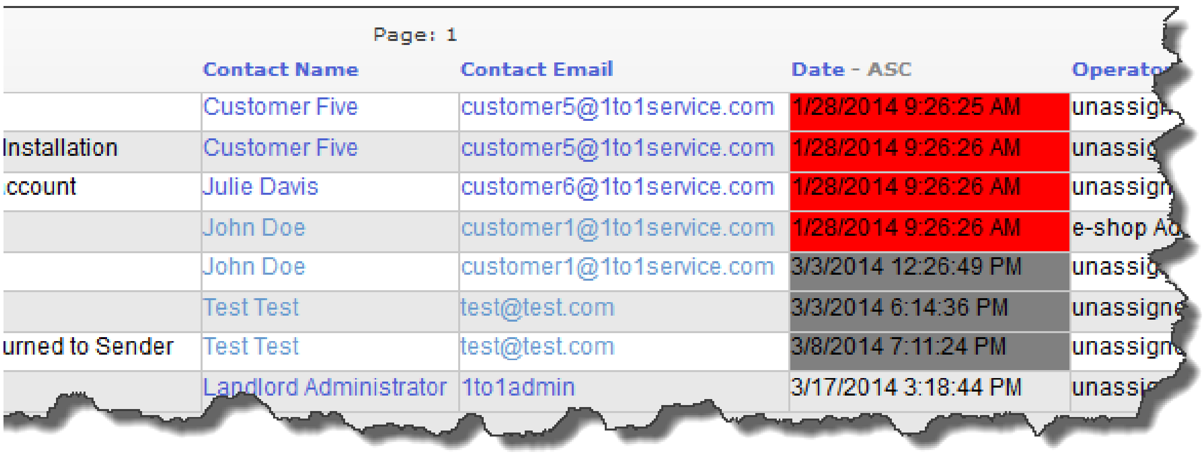
3 - Apply the filter to a mailbox (usually via groups) or a topic for Ask a Question submissions.

7 iService Add Ons

iService add-ons are ways to enhance your iService configuration using predesigned forms, JavaScript, and other customizations. Add-ons can be downloaded from the one-to-one service.com website at www.1to1service.com/Resources/iServiceAddOns.aspx.

This chapter provides additional details regarding configuring these add-ons.

7.1 Highlight Messages Based on Age


Page: 1

	Contact Name	Contact Email	Date - ASC	Operato
	Customer Five	customer5@1to1service.com	1/28/2014 9:26:25 AM	unassig
Installation	Customer Five	customer5@1to1service.com	1/28/2014 9:26:26 AM	unassig
ccount	Julie Davis	customer6@1to1service.com	1/28/2014 9:26:26 AM	unassign
	John Doe	customer1@1to1service.com	1/28/2014 9:26:26 AM	e-shop Ad
	John Doe	customer1@1to1service.com	3/3/2014 12:26:49 PM	unassig
	Test Test	test@test.com	3/3/2014 6:14:36 PM	unassigne
urned to Sender	Test Test	test@test.com	3/8/2014 7:11:24 PM	unassign
	Landlord Administrator	1to1admin	3/17/2014 3:18:44 PM	unassi

The layout of messages within the Manage Msgs tab is controlled by CSS (cascading style sheet). You can update the style to highlight messages based on their age to give you a quick indication of how long messages have been waiting. This is accomplished by updating the CSS within the websites page.

You can either use an existing CSS template hosted by One-to-One Service.com, or you can create your own custom template using any combination of times and colors for the aging categories. The available files and their settings are listed below (all files are accessible at https://1to1.iServiceCRM.com/1to1service/css/). For example, the URL for the CSS for the first item below would be https://1to1.iServiceCRM.com/1to1service/css/aging1.css.

File Name	Category 1	Category 2	Category 3
aging1.css	> 5 Minutes | Grey	> 10 Minutes | Yellow	> 15 Minutes | Red
aging2.css	>15 Minutes | Grey	> 30 Minutes | Yellow	> 60 Minutes | Red
aging3.css	> 60 Minutes | Grey	> 120 Minutes | Yellow	> 480 Minutes | Red
aging4.css	> 480 Minutes | Grey	> 720 Minutes | Yellow	> 1440 Minutes | Red

Index

- $ -

- _ -

- < -

- A -

- B -

- C -

- D -

- E -

- F -

- H -

- I -

- M -

- N -

- O -

- P -

- R -

- S -

- T -

- U -

- V -

- W -

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