






# Communicating With Reps and Customers


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In addition to chat, knowledge entries, and email, iSupport includes several features for providing information to support representatives and customers. You can enable these features as needed:

 **Broadcast messages** can display to all support representatives or to support representatives in selected groups. See [“Sending a Broadcast Message” on page 2](#).


 **Alerts, desktop notifications, and headlines** can display in the **Notification Center** on the Desktop. See [“Creating Alerts and Desktop Notifications” on page 2](#).


 **Header text and images** can display in the top frame of the Desktop. See [“Creating Header Text and Images” on page 4](#).


 **Headlines** can display in a desktop notification or view on the Desktop and mySupport portal. See [“Creating Headlines” on page 4](#).

 **Frequently asked questions** (FAQs) (informational documents in question and answer format) can display on the mySupport portal and in views on the Desktop. See [“Entering FAQs” on page 8](#).


 **News feeds** that contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. See [“Configuring News Feeds” on page 10](#).

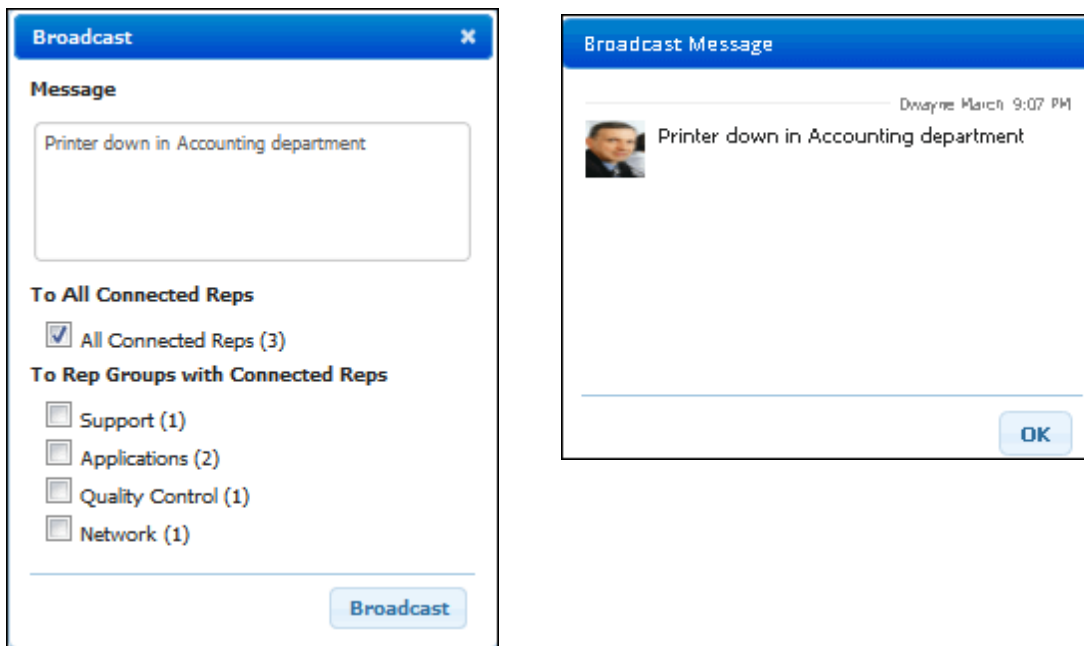
 **Tutorials** with a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content, can be configured for display to support representatives and customers. [“Configuring Tutorials” on page 13](#).

 **mySupport portals** enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more. See [“Configuring mySupport Portal Options” on page 20](#).


 **LinkedIn** and **Facebook** linked account functionality can be enabled for the mySupport portal, and Facebook integration can be configured for the Facebook Monitor Desktop component. **Twitter** notifications can be sent to customers and problems (Service Desk Edition) and headlines can be published to Twitter. See [“Integrating with Social Media” on page 21](#).

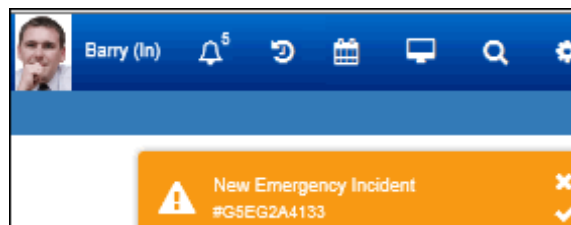
## Sending a Broadcast Message

Broadcast messages appear to all support representatives or to support representatives in selected groups via the  Send Broadcast option on the Desktop Create menu. Support representatives will need to individually close the message window.

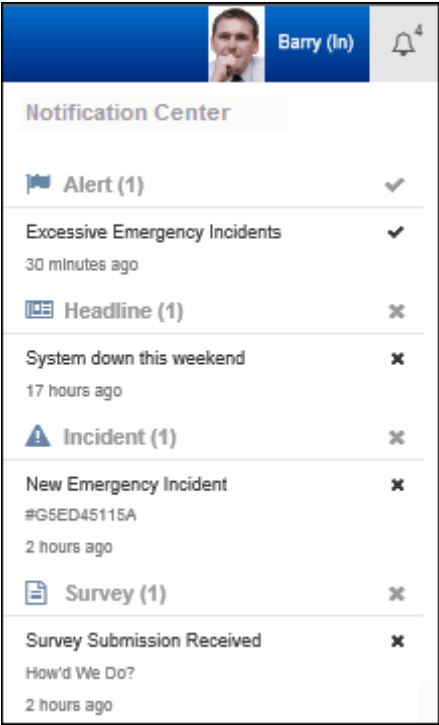


## Creating Alerts and Desktop Notifications

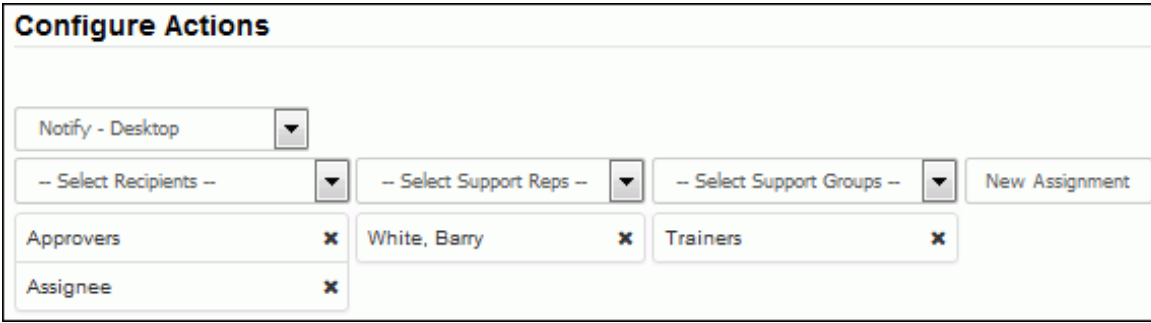
- Use the **Notification Center**  icon to display a list of notifications configured via the Rules, Alert Designer, and Headline screens. Options on the Desktop Notification Center tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry and the maximum number of entries that should appear in the list at one time. An example of a desktop notification popup is shown below:



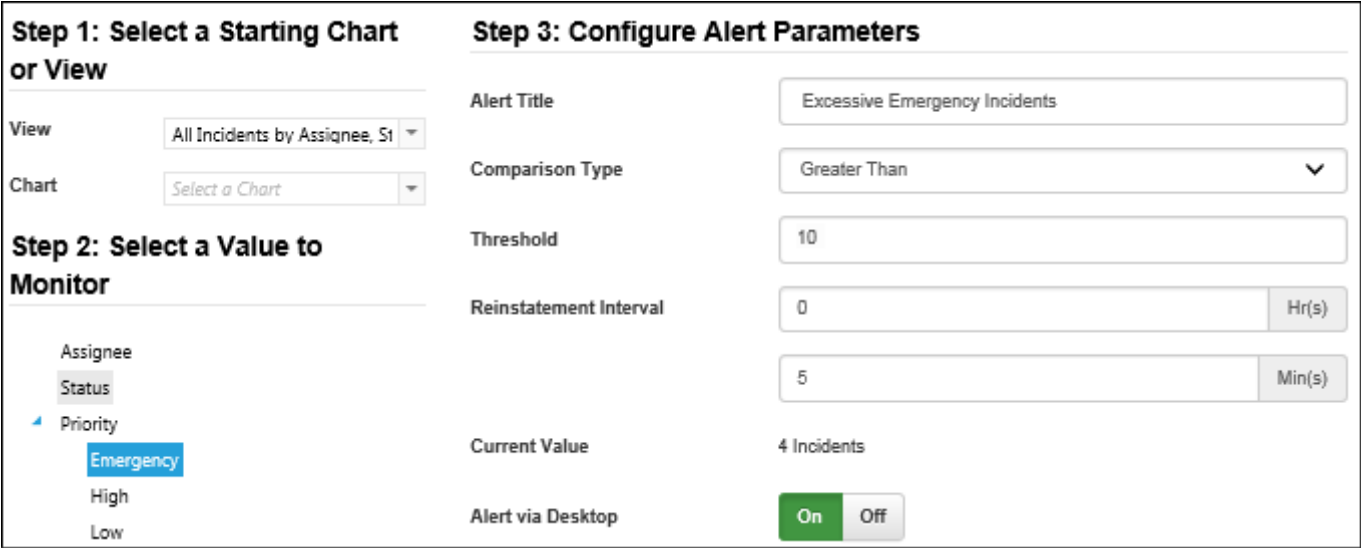
An example of the dropdown is shown below.



Select the Notify - Desktop rule action Desktop Notification in the Rules screen as shown in the example below:

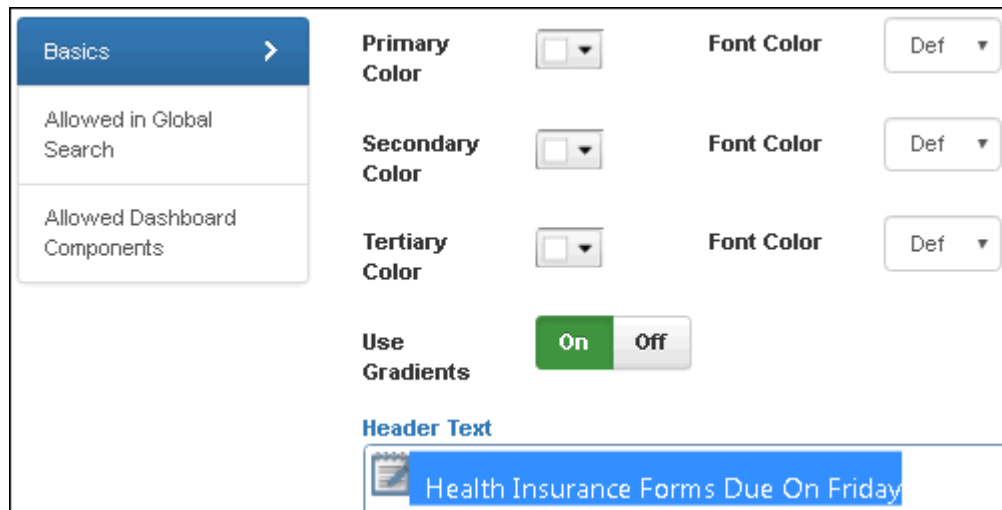


Alerts display when a view field reaches a certain threshold; select Yes in the Alert via Desktop field in the Alert configuration screen to enable it. Note that alerts are evaluated on the schedule of the Alert agent.



## Creating Header Text and Images

Use the Options and Tools | Customize | Dashboard Settings screen to enter text and images to appear at the top of the Desktop page between the Desktop Create icon and the Profile avatar/name. You can format the text and include images via the text editor toolbar.



The screenshot shows the 'Basics' tab in the 'Dashboard Settings' interface. On the left, there are links for 'Allowed in Global Search' and 'Allowed Dashboard Components'. The main area contains settings for 'Primary Color', 'Secondary Color', and 'Tertiary Color', each with a color picker and a 'Font Color' dropdown set to 'Def'. There is also a 'Use Gradients' toggle set to 'On'. At the bottom, the 'Header Text' section shows a text input field containing 'Health Insurance Forms Due On Friday' with a calendar icon on the left.

The text will appear as shown in the example below.

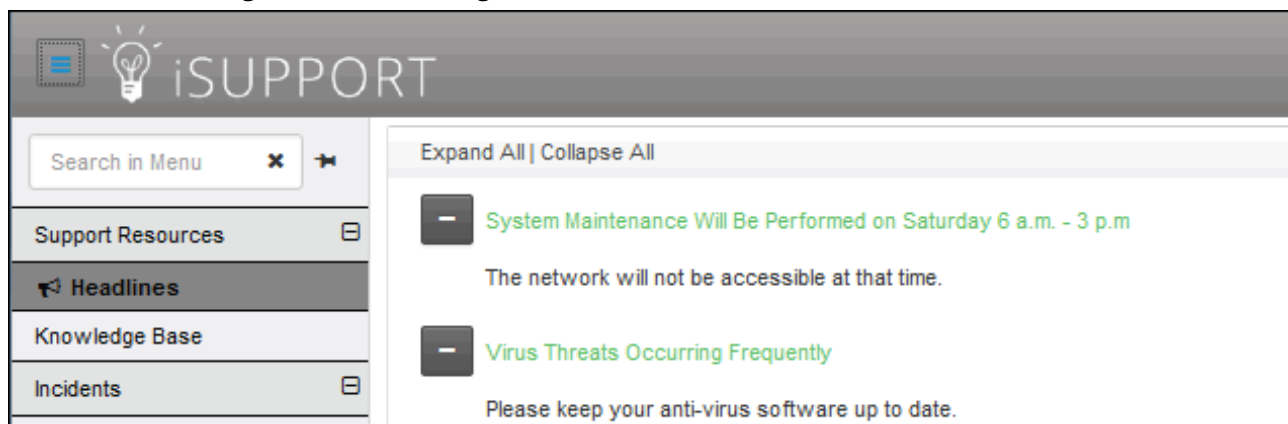


## Creating Headlines

You can create informational headlines for display in a desktop notification or view on the Desktop and mySupport portal.

View				
All Active Headlines				
Actions				
<input type="checkbox"/>	Expire Date	Headline	Details	Audience
<input type="checkbox"/>	1/1/2019	System Maintenance Will Be Performed on S...	The network will not be accessible at that...	Support Representative and Customer
<input type="checkbox"/>	10/25/2019	Company Holiday Party Scheduled for Decm...	The company holiday party will be at the...	Support Representative and Customer

Headlines that are enabled for display to customers can be included on a mySupport portal via a view in a component, feed, or navigator link. The navigator link is shown below.



## Entering Headline Basics

To access the Headline entry screen, select Headlines under Create on the Desktop menu.

The screenshot shows the 'Headline' entry screen. At the top is a blue header bar with the word 'Headline'. Below the header is a toolbar with icons for 'Save', 'Save and Close', 'Print', 'Delete', 'New Headline', 'Publish to Twitter', 'Previous', and 'Next'. The main content area has three tabs: 'Basics' (selected), 'History', and 'Group Access'. Under the 'Basics' tab, there are several fields: 'Created On' (5/13/2016 9:27:30 PM), 'Expires' (5/31/2016), 'Available to Customers' (Yes/No), 'Available to Support Reps' (Yes/No), 'Show In Desktop Notification Center' (Yes/No), 'Notification Center Popup Enabled' (Yes/No), and 'Notification Center Message' (System down this weekend). Below these are sections for 'Message' (System maintenance scheduled for Saturday at 8 a.m.) and 'Details' (All shifts are cancelled on Saturday).

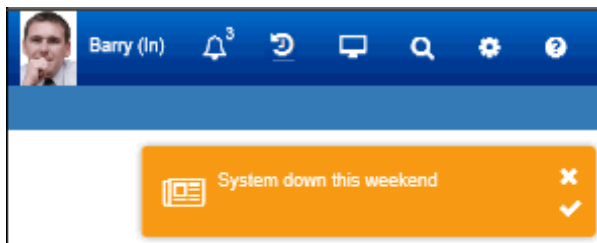
**Expires** - Select the day on which the headline should no longer display. (The headline will not display on this day.)

**Available to Customers** - Select Yes to enable display of the headline on a mySupport portal.

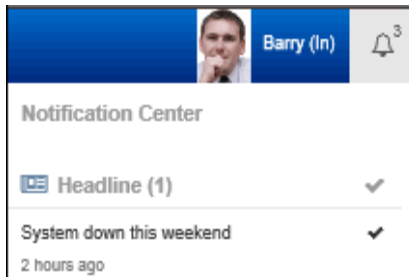
**Available to Support Reps** - Select Yes to enable display the headline in views and in the Notification Center, and in a popup on the Desktop.


**Show in Desktop Notification Center** - Select Yes to enable the headline for display in the Notification Center list and popup.

**Notification Center Popup Enabled** - Select Yes to display the headline in a popup as shown in the example below:



An example of the dropdown is shown below.



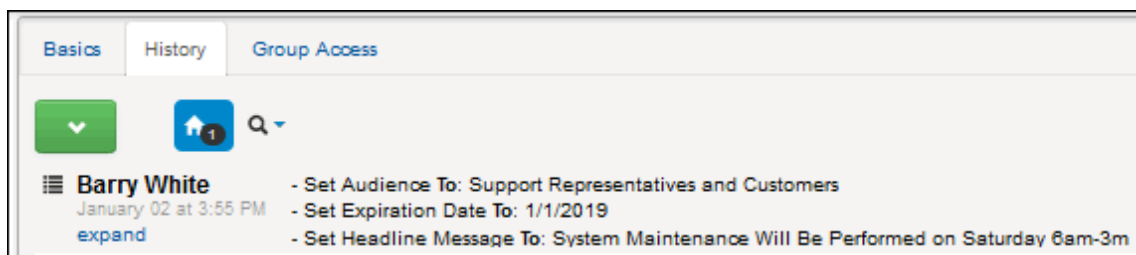
**Desktop Notification Message** - Select Yes to display the headline in the list of notifications accessed via the **Desktop Notifications**  icon.

**Message** - Enter the headline to display on the Desktop and/or mySupport portal. You can use HTML tags to format the text.

**Details** - Enter additional information to display on the Desktop and/or mySupport portal.

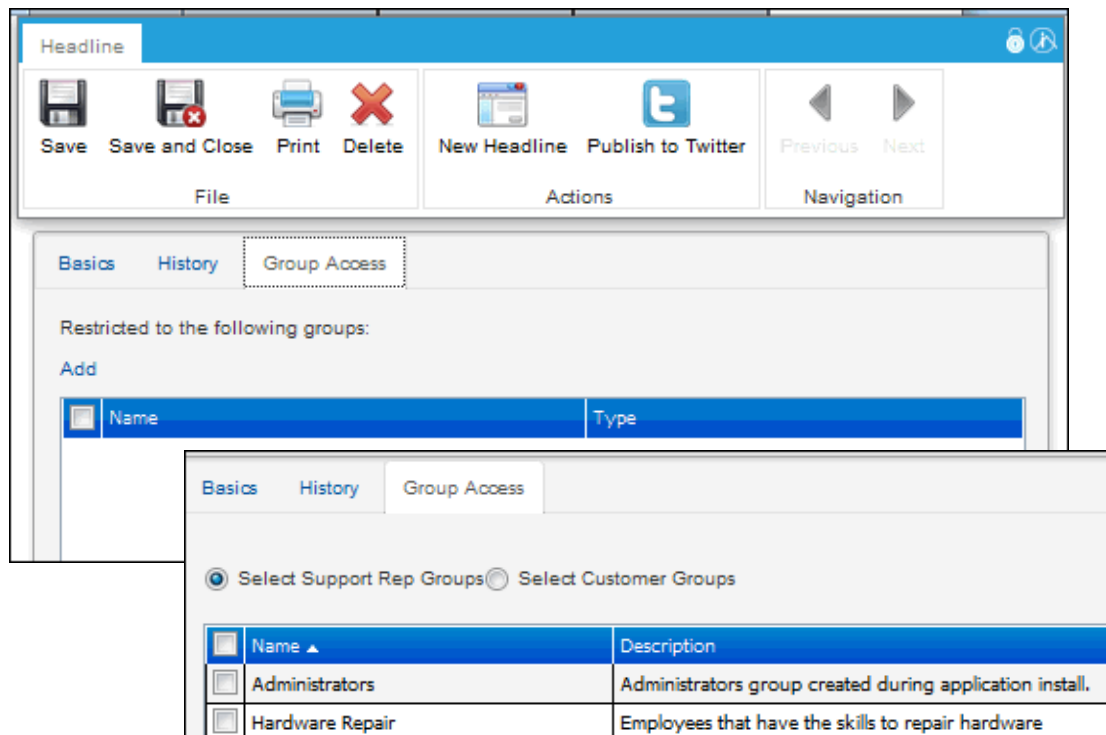
## Viewing History

Use the History tab to view notations on all headline actions.




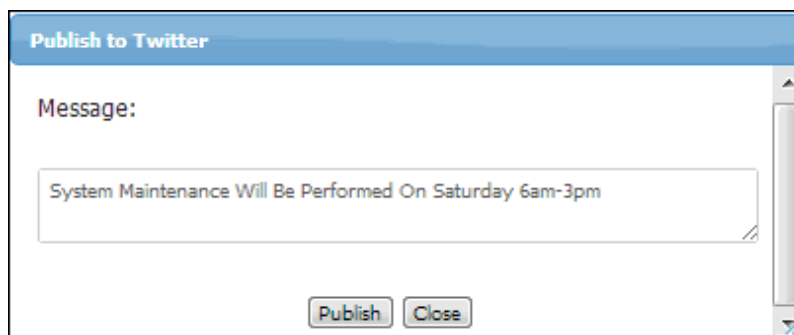
## Restricting Access

Use the Group Access tab to restrict display of a headline to members of support representative and customer groups. Click the Add link to display the following dialog for selecting the groups. **After you add one or more groups and save, the headline will display only to members of the selected groups.**



## Publishing to Twitter

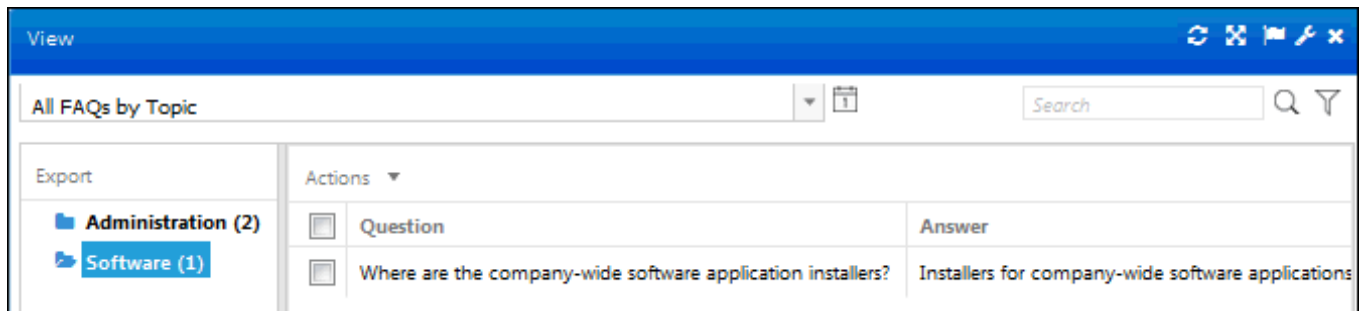
The Twitter®  icon will appear in the Headline screen if you have the Publish to Twitter permission and a Twitter application has configured; when clicked, the Publish to Twitter dialog will appear with the contents of the message and details (for headlines) or the short description (for problems). If multiple Twitter applications have been created, you can select the account to which the headline or problem should be published.



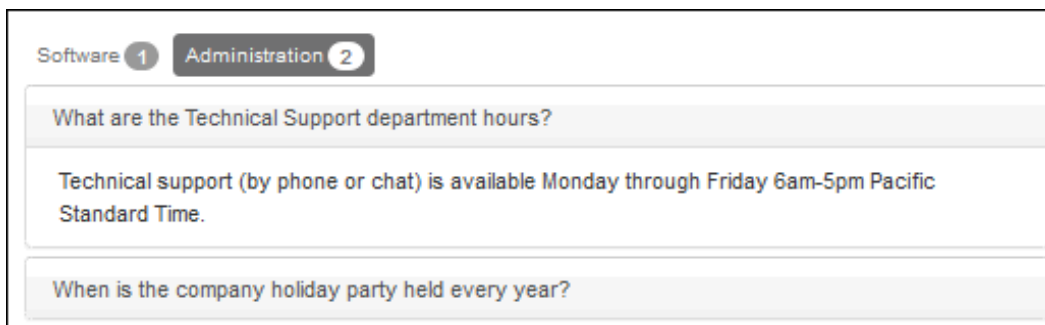
See "Integrating with Social Media" on page 21 for more information.

# Entering FAQs

Frequently asked questions (FAQs) are informational documents in question and answer format on the Desktop and mySupport portal. You can create topics to sort FAQs.

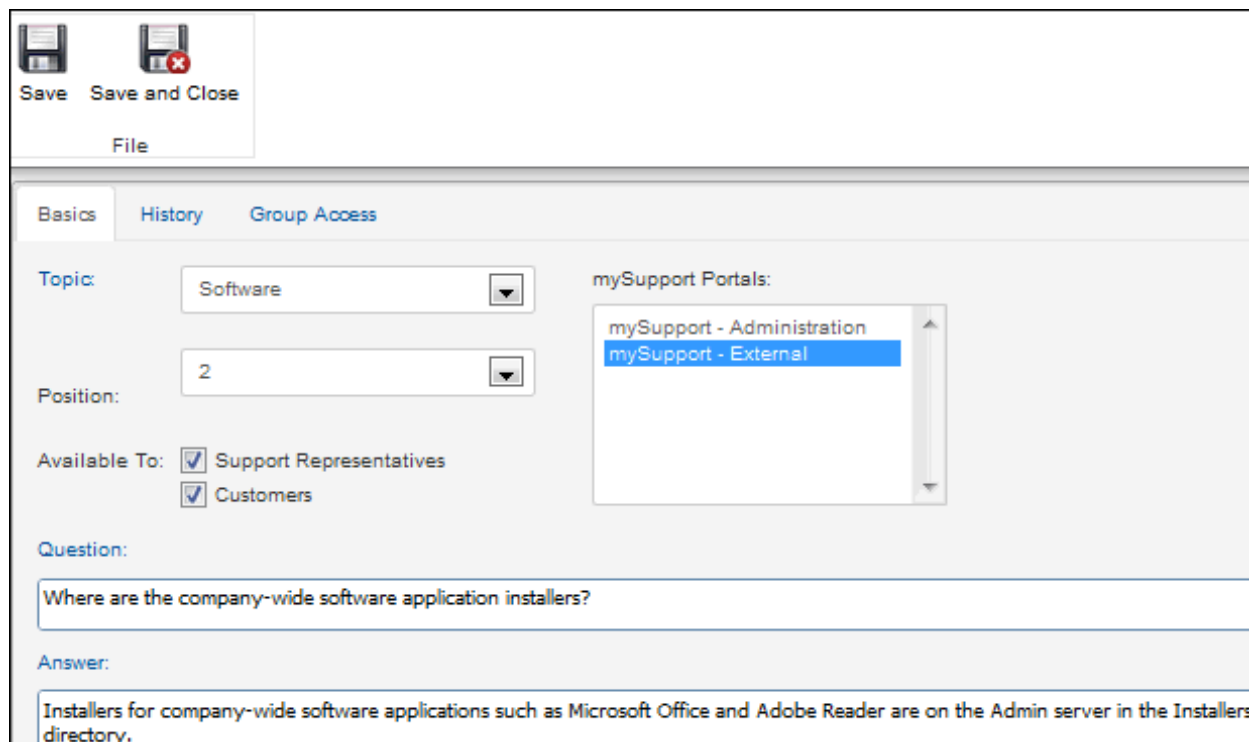


Customers can view frequently asked questions if you add a link on the mySupport portal.



## Completing the Basics Tab

To access the FAQ entry screen, select FAQ under Create on the Desktop menu.



**Topic** - Select the topic under which the FAQ should be displayed. If you select None, the FAQ will appear at the top of the FAQ topics.



To enter a new topic, click the Topic link. In the Manage FAQ Topics dialog, click the Add link. Use the Position field to select the row number for the position of the topic; row one will be listed first, row two will be located under the first row, and so on.

Add Delete			
		Position ▲	Topic
		1	Administration
		2	Software

**Available To** - Select one or both of the following: Support Representatives to allow the frequently asked question to display to support representatives on the Desktop. Select Customers to allow the frequently asked question to display to customers on the mySupport portal.

**mySupport portals** - Select the configured mySupport portals on which the frequently asked question should appear.

**Question/Answer** - Enter the frequently asked question and answer to display to support representatives and/or customers.

## Viewing History

Use the History tab to view notations on all FAQ actions.

Basics	History	Group Access
<b>Barry White</b> 11/5/2014 at 10:15 PM <a href="#">expand</a>		
- Removed from mySupport Portals with access: http://test.com. - Added to mySupport Portals with access: http://csdoc/user. - User Browser:		

## Restricting Access

Use the Group Access tab to restrict display of a FAQ to members of customer groups. Click the Add link to display the following dialog for selecting the groups. **After you add one or more groups and save, the FAQ will display only to members of the selected groups.**

Basics History Group Access

Restricted to the following groups:

Add Remove

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		


Basics History Group Access

Select Customer Groups:

<input type="checkbox"/>	Name ▲	Description
<input checked="" type="checkbox"/>	Administrators	
<input checked="" type="checkbox"/>	Adobe Users	Customers using Adobe products
<input checked="" type="checkbox"/>	Customer Advisory Board	
<input type="checkbox"/>	Executive Mgmt Team	
<input type="checkbox"/>	Platinum Support Members	

Add Cancel

# Configuring News Feeds

The News Feed  component contains feeds that can contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. See the online help for more information on each option.

News Feed

Support Discussion/Incidents

Create New Post

Auto Refresh On

Barry White • 2 minutes ago • Source: Hardware Support

Hey everyone, the printer in Accounting is down - use the Sales printer as a workaround.

Reply

Steve Johnson • 3 minutes ago • Source: Hardware Support

Is anyone else having trouble printing with the Accounting printer?

Reply

Incident D8JA585656 • Updated 4 minutes ago

Slow performance on employee workstation.


Update Customer Work History • View all 3 entries

Barry White • 4 minutes ago

- Set Priority To: Medium - Set Status To: Open - Set Customer To: Steve Johnson - Set Category To: Administration - Existing Employee - Workstation - Other - Set Assignee To: Barry White - Set Group To: Administrators - Set Description To: Slow performance on employee workstation. - Set Service Contract To: None - Set Company To: LBLSoft, Inc.

Discussion posts

Work item entry

Select  Create Feed in the News Feed component dropdown to create a news feed. The Configure dialog appears; use the fields in the top half of the dialog to configure display options.

Configure

Window Title: News Feed

Show Header: Yes

Show Border: Yes

Refresh Type: ☒ Auto ☐ Timed

Active: Yes

Display Name: Hardware Support

List Under: Hardware Repair

Options: My Name  
Administrators  
Applications  
Development  
Hardware Repair

Enable the **Discussion Posts** section in the Configure dialog to include discussion posts in a news feed. If you **do not have** Discussion Feed Administrator access in your Support Representative Profile record, use the Discussion News Feeds field to include entries in other shared discussion-only news feeds.

Options:

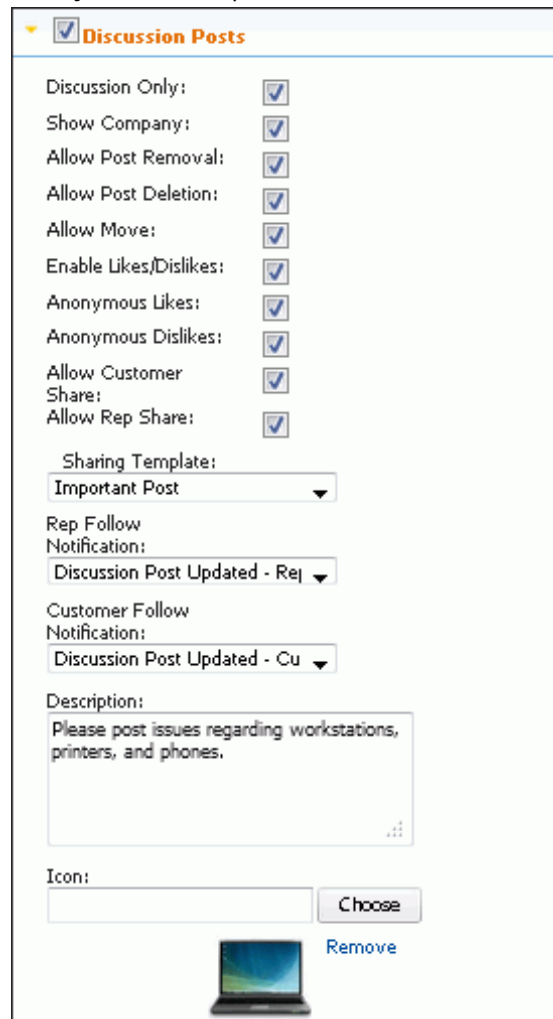
☒ Discussion Posts

Discussion News Feeds:

Hardware Support  
Sales Meeting Topics  
Staff Bulletin Board

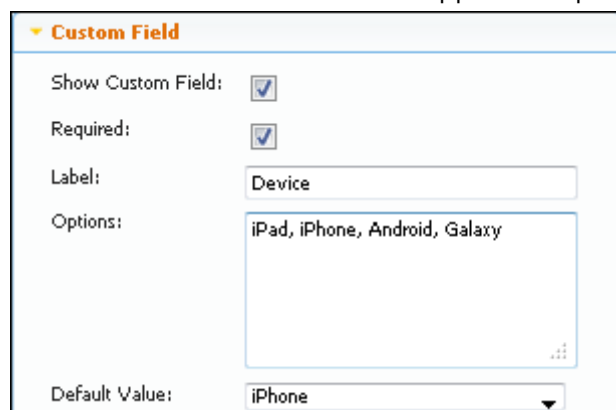
iSupport Software  
Page 10

If you **have** Discussion Feed Administrator access in your Support Representative Profile record, the **Discussion Only** checkbox will appear to include only discussion posts in the feed.



The screenshot shows a configuration panel titled "Discussion Posts" with a dropdown arrow and a checked checkbox. It contains several settings, all with checked checkboxes: "Discussion Only:", "Show Company:", "Allow Post Removal:", "Allow Post Deletion:", "Allow Move:", "Enable Likes/Dislikes:", "Anonymous Likes:", "Anonymous Dislikes:", "Allow Customer Share:", and "Allow Rep Share:". Below these are two dropdown menus for "Sharing Template:" (set to "Important Post") and "Rep Follow Notification:" (set to "Discussion Post Updated - Rej"). Another dropdown menu for "Customer Follow Notification:" is set to "Discussion Post Updated - Cu". A "Description:" text area contains the text "Please post issues regarding workstations, printers, and phones." Below the description is an "Icon:" label, an empty text input field, a "Choose" button, and a "Remove" button. At the bottom is a small laptop icon.

Use the **Custom Field** section to add a custom field to posts in a discussion-only news feed. You can make it required, enter options for selection (separate with a comma), and set a default value. Posts can be sorted by the custom field configured for a feed. Note that custom fields do not appear in replies.



The screenshot shows a configuration panel titled "Custom Field" with a dropdown arrow. It contains settings for "Show Custom Field:" (checked), "Required:" (checked), "Label:" (set to "Device"), "Options:" (a text area containing "iPad, iPhone, Android, Galaxy"), and "Default Value:" (a dropdown menu set to "iPhone").

The **Access** section appears if you have Discussion Feed Administrator access in your Support Representative Profile record. Use the Shared checkbox to enable representatives and customers to view feed entries. (If this box is

unchecked, only you will be able to view the feed entries.) You can restrict availability to selected support representative groups and individual support representatives (in addition to yourself).

▼ Access

Shared: ☒

Restrict:

Add Rep Group

Hardware Repair

Add Rep

Stuart Copeland

Add Customer Group

**Customer Groups**

Administrators

☒ ☒ ☒

Add Customer

**Customer**

Steve Johnson

☒ ☐ ☒

Post Reply

Post Reply

If it is a discussion only news feed, you can also restrict access for customer groups and individual customers.

Options:

☒ Discussion Posts

▼ Access

Shared: ☒

Restrict:

Add Rep Group

Add Rep

Add Customer Group

**Customer Groups**

Executive Mgmt Team

☒ ☒ ☒

Add Customer

**Customer**

Stuart Copeland

☒ ☐ ☒

Post Reply

Post Reply


Use the work item-specific sections in the Configure dialog to restrict display of work items; you can display only work items for a specified incident field value, view, and history type.

The screenshot shows a configuration window titled 'Incident' with a dropdown arrow and a checked checkbox. It contains three sections: 'Filters' with a 'Company' dropdown set to 'LBLSoft, Inc.' and a 'Select Value' button; 'View' with checkboxes for 'All' (checked), 'My Assigned', 'My Authored', 'My Groups', and 'My Locations'; and 'History Types' with two columns of checkboxes, all of which are checked: 'Approval History', 'Audit History', 'Correspondence History', 'Customer Audit History', 'Customer Work History', 'Rep Work History', 'Rep Chat History', 'Rule Group History', and 'SLA History'.

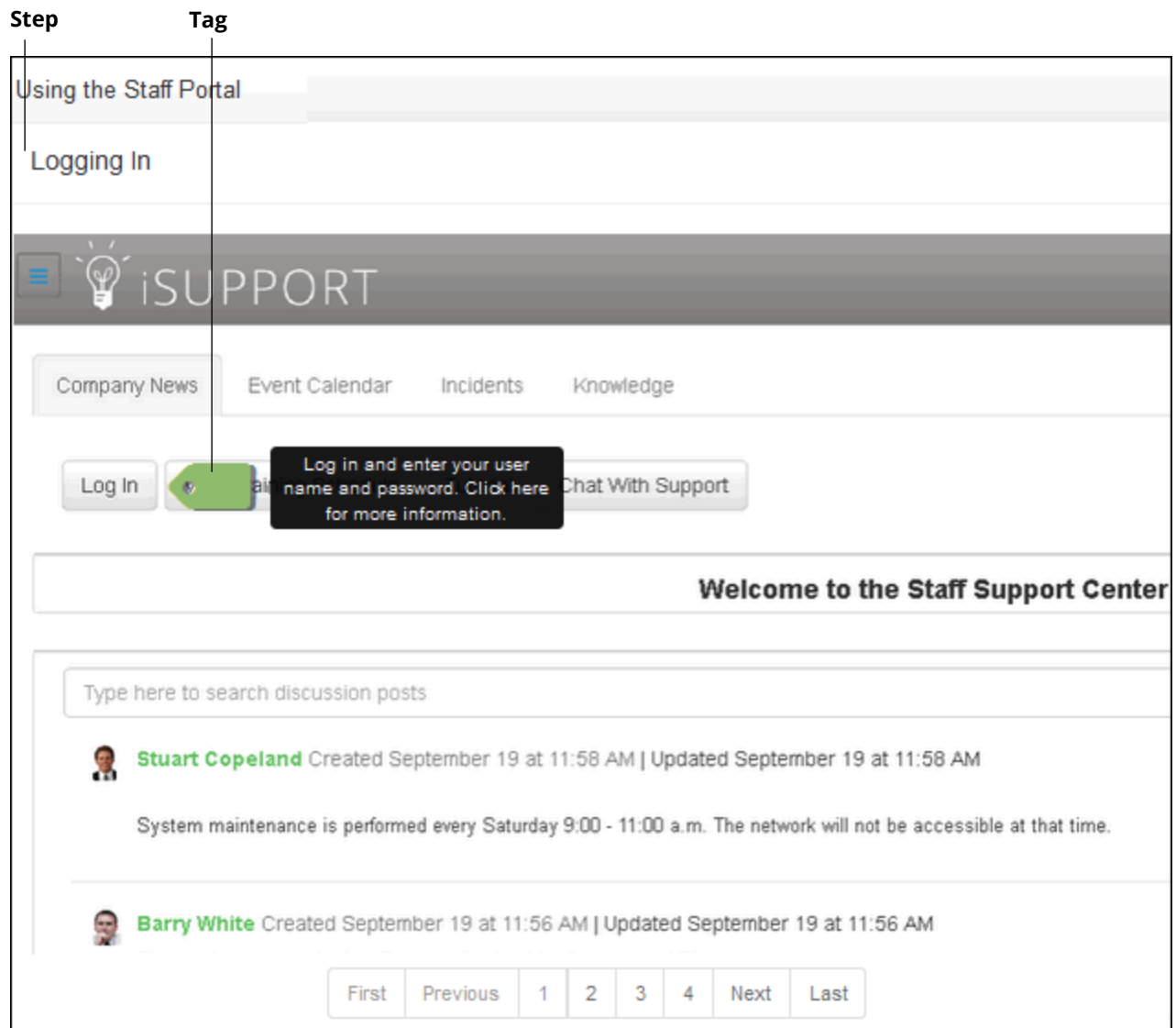
## Configuring Tutorials


Go to Options and Tools | Customize | Tutorials to configure tutorials for providing information to support representatives and customers. A tutorial consists of a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content.


On the Rep client:

Step	Tag
<b>Starting an Incident</b>	
Select a customer.	
<div>Incident   <b>New</b>   View</div> <div><div>Save   Save And Close   Print   Delete</div><div>Font Size   Add History   Categorize   Schedule   Route   Customer</div><div>File   Display   Action</div></div>	
<div><div><b>Customer</b> 🔍</div><div><div>Steve</div><div><div>8675309 Steve Johnson LBLSoft</div></div></div><div><div>Number: EA0B504287</div><div>Priority: Medium</div><div>Status: Open</div><div>Category:</div></div></div>	
<div>Issue   <b>History</b></div> <div><b>Description</b></div> <div><b>Resolution</b></div>	
<div>First   Previous   1   2   3   4   Next   Last</div>	

On a mySupport portal:



You can associate a tutorial with entry screen layouts, configuration screens, Rep Desktop dashboards, and mySupport dashboards. The tutorial will appear the first time a support representative accesses the screen associated with the layout or page. After that point, for screens with a large icon ribbon, a Tutorial  icon will appear on the View ribbon if one is associated with the layout or page.

On mySupport, you can associate a tutorial with a dashboard, a mySupport work item submit or display layout, and a navigator link or a button that accesses a feature. For dashboards, the tutorial will appear the first time the authenticated user accesses the dashboard; after that point the Tutorial  icon will appear in the upper right corner. You can also directly link a tutorial to a button or navigator link; this will display the tutorial every time the button or link is clicked.

You can display images, videos, links, and formatted text in the screen that appears when a user clicks a tag.

Using the Staff Portal

Log in and enter your user name and password. Click here for more information. ✕

The Login dialog is shown below. The Password field is case sensitive.

Username

Password

☐ Remember Me

or [Register](#)

[Forgot your password?](#)

Select **Remember Me** to place a cookie on your system.

The **Register** option enables a customer to enter contact and login information; a Customer Profile record will be created after completion. A customer will not be able to register with the same email address and login name as another customer.

The **Forgot Password** link in the Login dialog enables you to enter an email address to which an email will be sent with a login and a link for resetting their password. Note that you won't be able to change their password if the source of your Customer Profile record is Active Directory, LDAP, or a relational database that is being synchronized with a mapped password.

To configure a tutorial, go to Tutorials and click Create. Enter a name the tutorial; this name will appear as the heading. Then click the Add Step icon and enter the name of a step. You can use the Edit Step icon to change step text.

Click to add a step

Basics Associations

Name Using the Staff Portal

Steps

Logging In

*Drop Image here to upload*

To choose an Image to upload, drag and drop an Image or click Select Image

Drag a Tag



An image is required for each step; click Select Image or drag one into the gray area. To add a clickable tag, drag one from the list on the right onto the area in which you want to provide more information.

Basics Associations

Name Using the Staff Portal

Steps

Logging In

iSUPPORT

Company News Event Calendar Incidents Know Your iSUPPORT

Log In Training Schedule Tutorial Chat

Type here to search discussion posts

Stuart Copeland Created September 19 at 11:58

System maintenance is performed every Saturday 9:00

The Edit Step Tag screen appears; in the Description field, enter the text to appear next to the tag. Use the Color and Rotation fields to change the appearance of the tag if applicable, and then use the Content field to include the text, images, links, or YouTube videos to appear when the tag link text is clicked by the user.

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Add additional steps as necessary.

The screenshot displays the iSupport software interface. At the top, there are two tabs: 'Basics' and 'Associations', with 'Associations' being the active tab. Below the tabs, there is a 'Name' field containing the text 'Using the Staff Portal'. To the left of the main content area is a 'Steps' sidebar. This sidebar has a '+' icon at the top and a list of steps: 'Logging In' (highlighted in dark grey), 'Using the Navigator', 'Submitting Incidents', and 'Viewing Incidents'. Each step has a settings gear icon and a close 'x' icon. The main content area features a header with the iSUPPORT logo and a 'Drag a Tag' prompt. Below the header is a navigation bar with links for 'Company News', 'Event Calendar', 'Incidents', and 'Know'. A 'Log In' button is visible, with a tooltip that reads: 'Log in and enter your user name and password. Click here for more information.' Below the navigation bar is a search bar with the placeholder text 'Type here to search discussion posts'. At the bottom, there is a user profile for 'Stuart Copeland' with a profile picture, and a notice stating 'System maintenance is performed every Saturday 9:00'.

## Associating Tutorials With Dashboards, Layouts, and Configuration Screens

Use the Associations tab in the Tutorials screen to link a tutorial to entry screen layouts, configuration screens, Rep Desktop dashboards, and mySupport dashboards.

Basics

Associations

Asset Layouts

Select Asset Layout... ▼

Company Layouts

Select Company Layout... ▼

Customer Layouts

Select Customer Layout... ▼

Knowledge Layouts

Select Knowledge Layout... ▼

Problem Layouts

Select Problem Layout... ▼

Rep Dashboards

Search Rep Dashboards...

Change Layouts

Select Change Layout... ▼

Configuration Pages

+

Incident Layouts

Select Incident Layout... ▼

Submit Incident (mySupport Submit) ✕

mySupport Dashboards

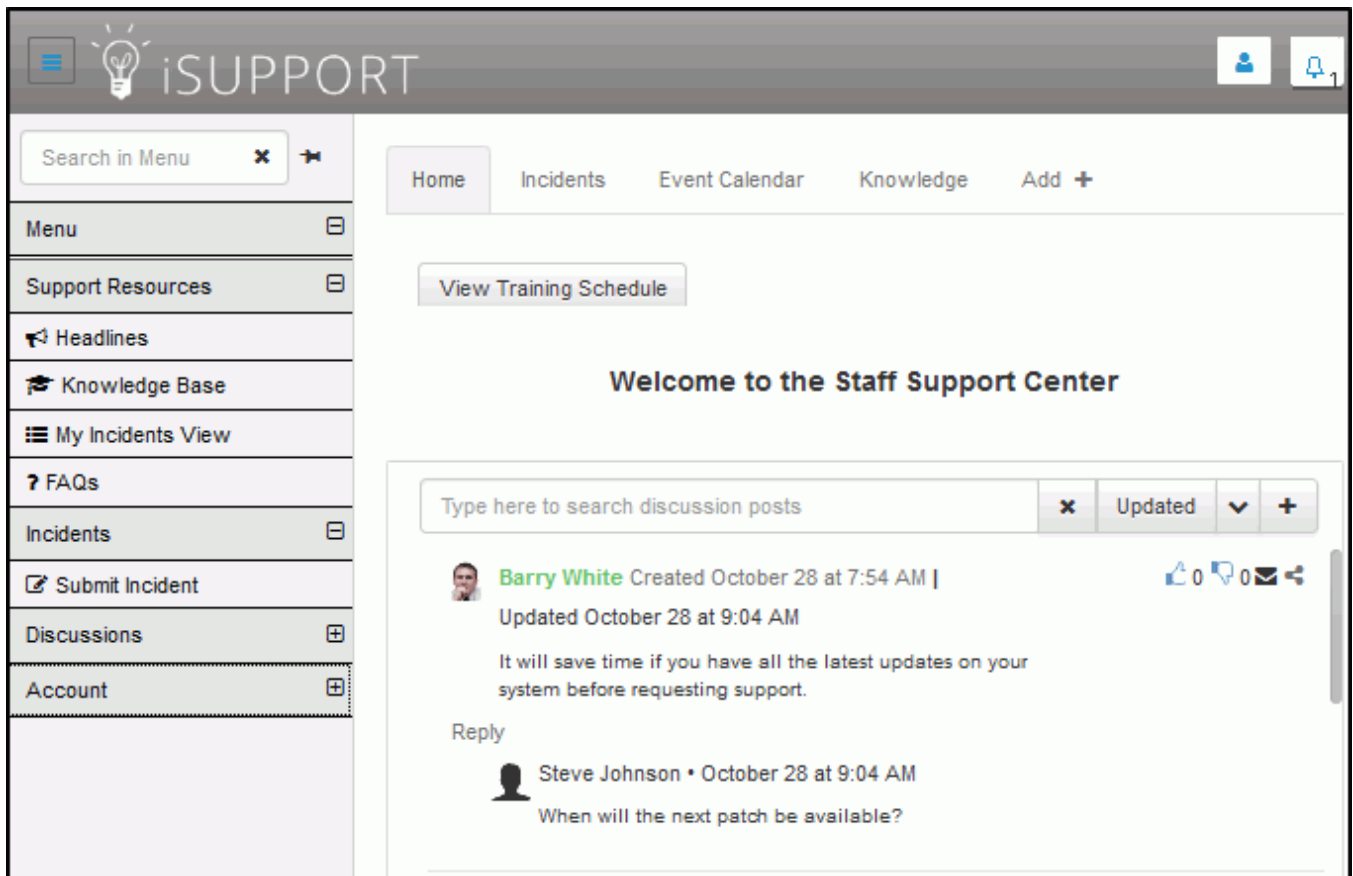
Incidents

Purchase Layouts


Select Purchase Layout... ▼

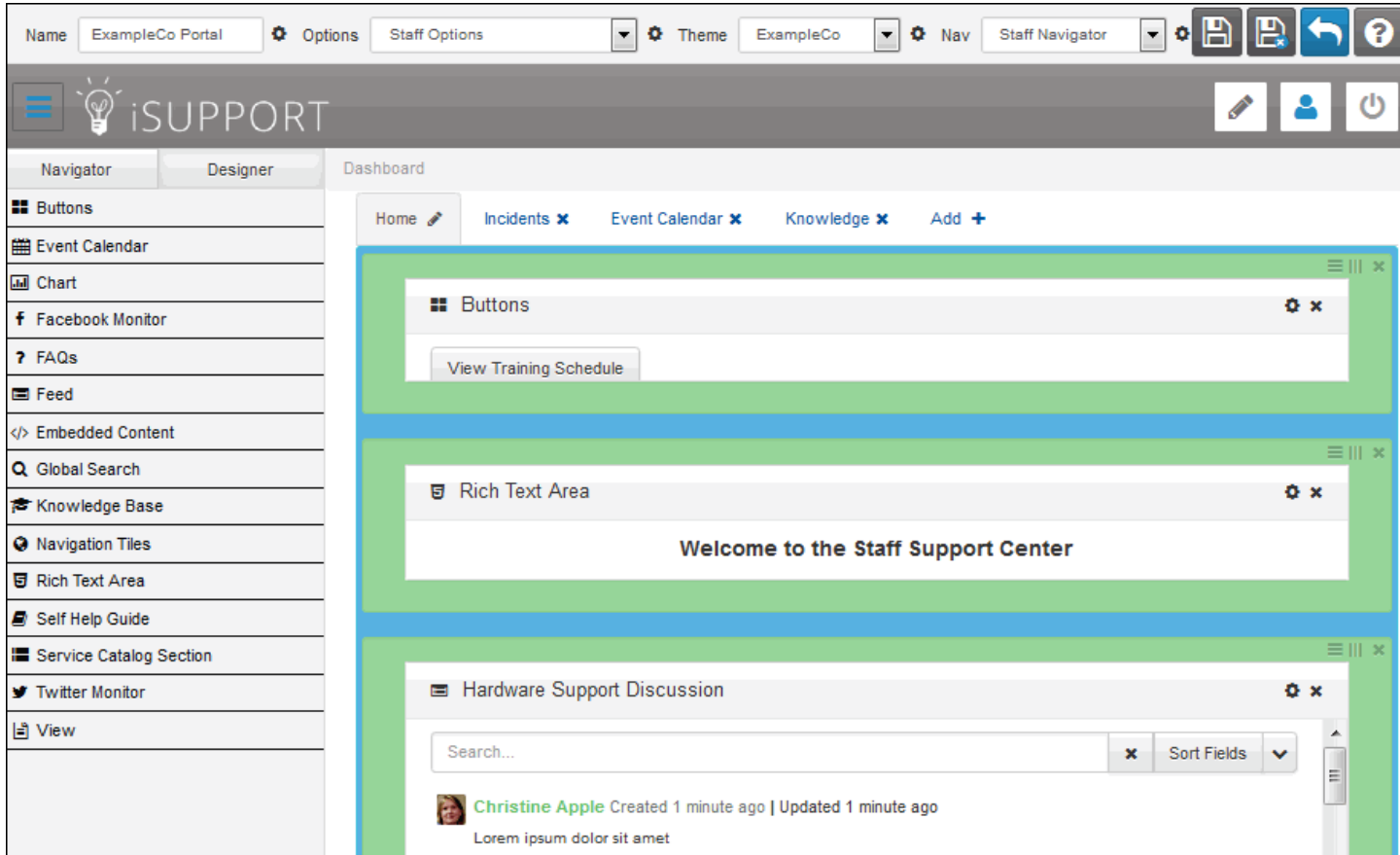
# Configuring mySupport Portal Options

mySupport portals enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more.







Everything on a mySupport portal is configurable, including all label and header text, which can be translated. You can configure the feature links, fields that appear for viewing and submitting records, etc. An unlimited number of interfaces can be configured to target different customer groups.

Use the Core Settings | mySupport | **Portals** screen to create, copy, and configure the dashboards, navigator, theme, and option set for a portal. Use the Configure  icons at the top of the screen to create, copy, and configure the dashboards, navigator, theme, and option set for a portal.

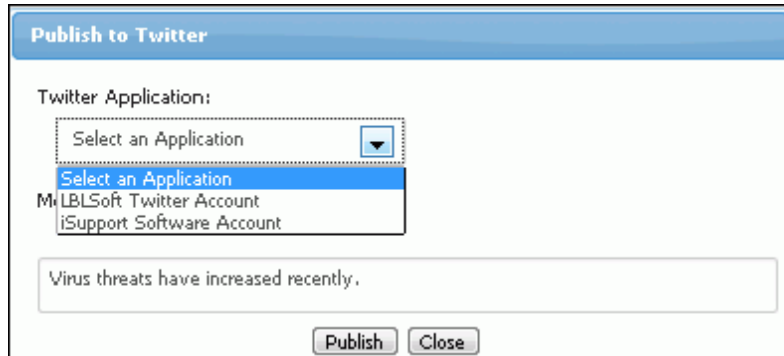


## Integrating with Social Media

You can configure settings that work in conjunction with Twitter® notifications as well as the LinkedIn® and Facebook® linked account functionality on the mySupport portal. Follow the steps on the Options and Tools | Integrate | Social Media Integration screen and information in the online help.

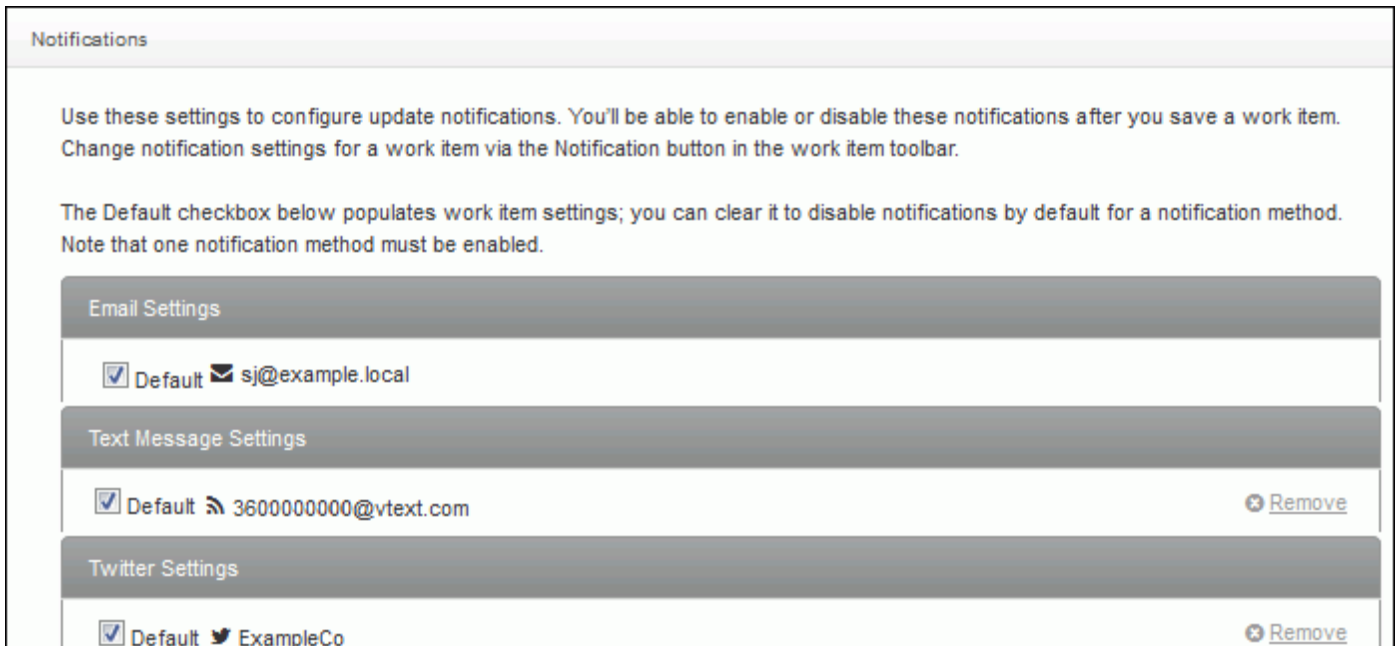
- Customers can link to and authenticate to the mySupport portal via a **Facebook account**; use the Facebook Applications tab to configure an application for this functionality.
- Customers can link to and authenticate to the mySupport portal via a **LinkedIn account**; use the LinkedIn Applications tab to configure an application for this functionality.
- Configure a Twitter application to do the following.
  - The Twitter  and Twitter Monitor  components display a Twitter feed for a specified Twitter username on the Desktop.
  - The Twitter Monitor  component searches Twitter and displays tweets that include a specified search term, or for a specified Twitter account, for the last 90 days. You can use the Reply link to reply to tweets directly from iSupport, or use the Create Incident link to create an incident and send a reply to the Twitter user (via a Twitter direct message) with their incident number included. The tweet will be included in the Description field in the incident, and if the Twitter username exists for a customer in Customer Profiles, the matching Customer Profile record will be used. If the Twitter username does not exist for a customer, a new Customer Profile record will be created in the format of <Twitter username>@twitter.com.
  - Support representatives can publish headlines and problems via Twitter. The Twitter  icon will appear in the Headline and Problem screens if the support representative has the Publish to Twitter permission; when clicked, the Publish to Twitter dialog will appear with the contents of the message and details (for headlines)

or the short description (for problems). If multiple Twitter applications have been created, the user can select the account to which the headline or problem should be published.



A dialog box titled "Publish to Twitter". It contains a section labeled "Twitter Application:" with a dropdown menu showing "Select an Application". The dropdown is open, showing two options: "MiLBSoft Twitter Account" and "iSupport Software Account". Below the dropdown is a text input field containing the text "Virus threats have increased recently.". At the bottom are two buttons: "Publish" and "Close".

- Customers can use the Notifications section in Accounting Settings on the mySupport portal to enable a notification to be sent via email, SMS, and/or Twitter direct message whenever a rule results in any notification to the customer regarding work items (incidents, problems, changes, purchase requests).



A screenshot of the "Notifications" settings page. The page has a header "Notifications" and a sub-header "Email Settings". Below the header is a paragraph: "Use these settings to configure update notifications. You'll be able to enable or disable these notifications after you save a work item. Change notification settings for a work item via the Notification button in the work item toolbar." Below this is another paragraph: "The Default checkbox below populates work item settings; you can clear it to disable notifications by default for a notification method. Note that one notification method must be enabled." The settings are organized into three sections: "Email Settings", "Text Message Settings", and "Twitter Settings". Each section has a "Default" checkbox and a "Remove" button. The "Email Settings" section shows "sj@example.local". The "Text Message Settings" section shows "3600000000@vtext.com". The "Twitter Settings" section shows "ExampleCo".