Communicating With Reps and Customers

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.

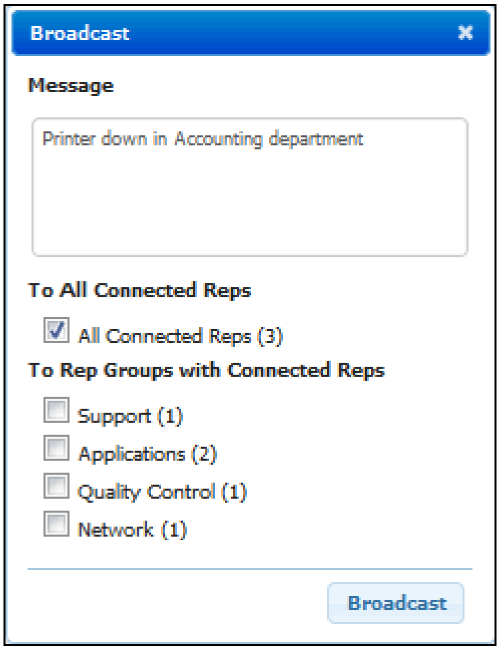
Tutorials with a series of steps, each with an 800x600 image and tags that a user can click to display an additional screen of content, can be configured for display to support representatives and customers. “Configuring Tutorials” on page 13.

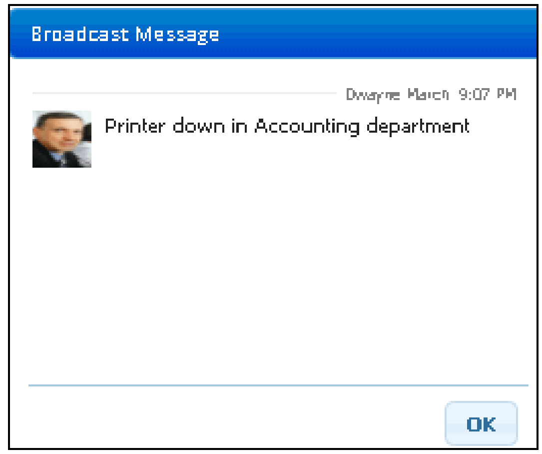
mySupport portals enable customers to submit and view work items, create discussion posts, chat with support representatives, search for knowledge entries, and view PDFs, reports, charts, headlines, FAQs, and more. See “Configuring mySupport Portal Options” on page 20.

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

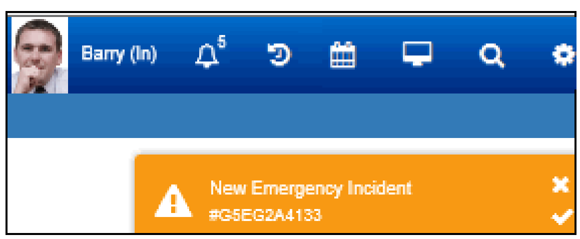
Broadcast messages appear to all support representatives or to support representatives in selected groups via the Send Broadcast option on the Desktop Create menu. Support representatives will need to individually close the message window.



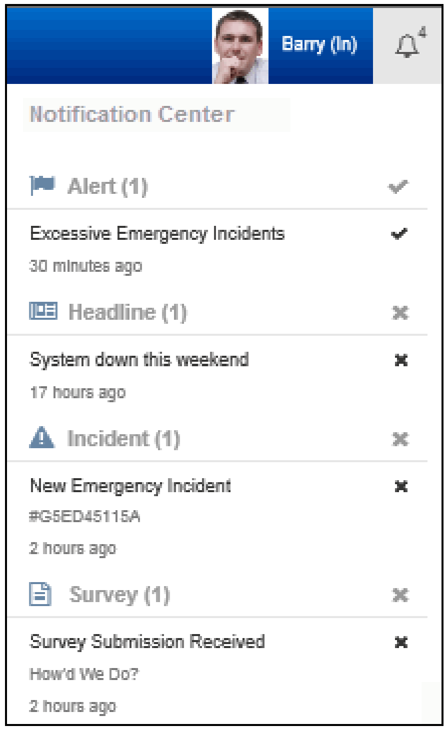


Creating Alerts and Desktop Notifications

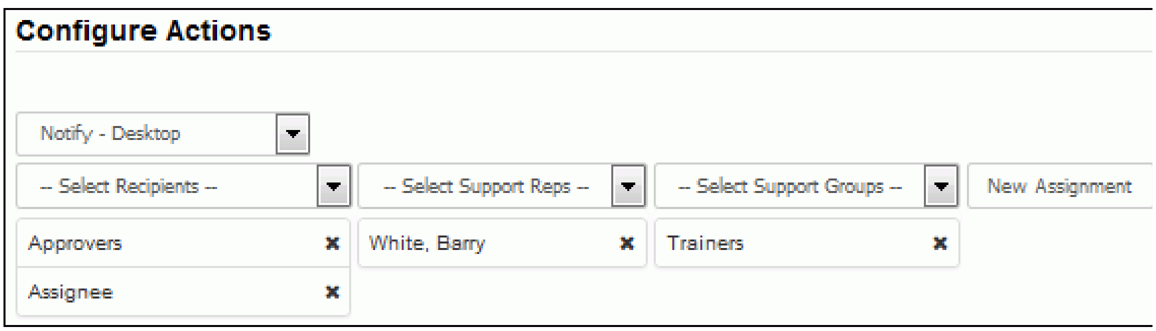
- Use the **Notification Center** icon to display a list of notifications configured via the Rules, Alert Designer, and Headline screens. Options on the Desktop Notification Center tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list 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:



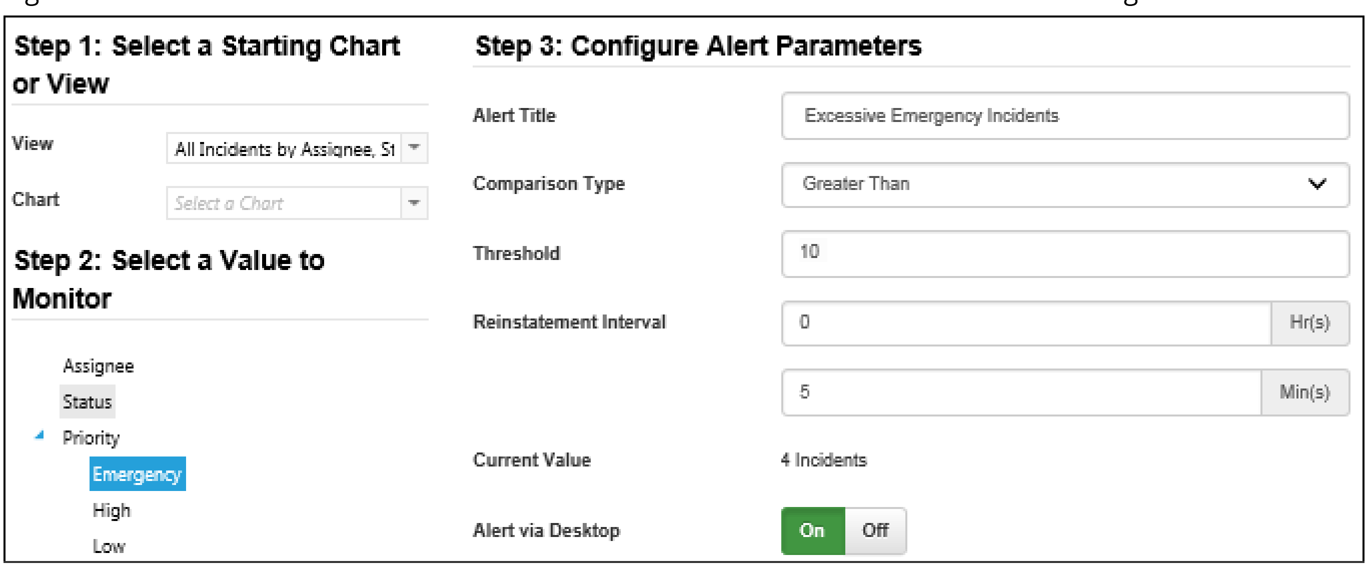
An example of the dropdown is shown below.



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

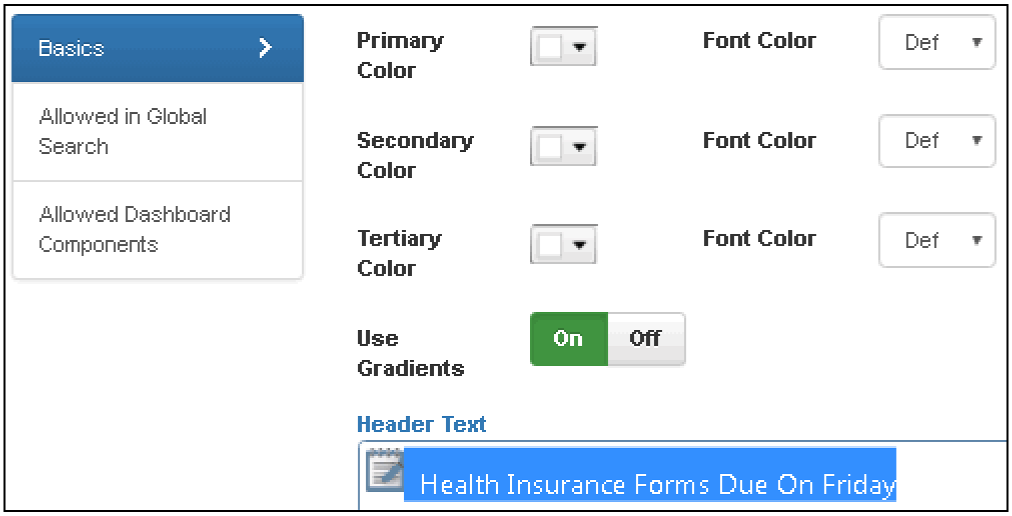


Alerts display when a view field reaches a certain threshold; select Yes in the Alert via Desktop field in the Alert configuration screen to enable it. Note that alerts are evaluated on the schedule of the Alert agent.

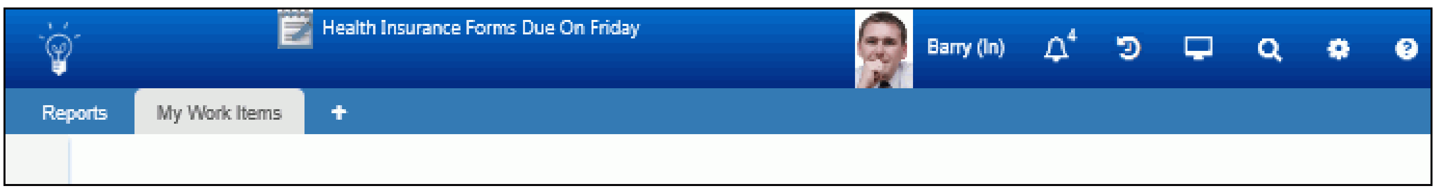


Creating Header Text and Images

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.

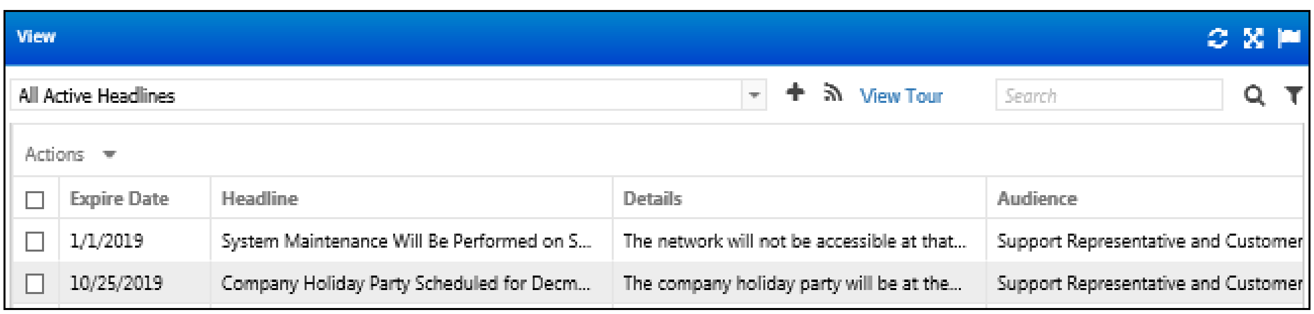


The text will appear as shown in the example below.

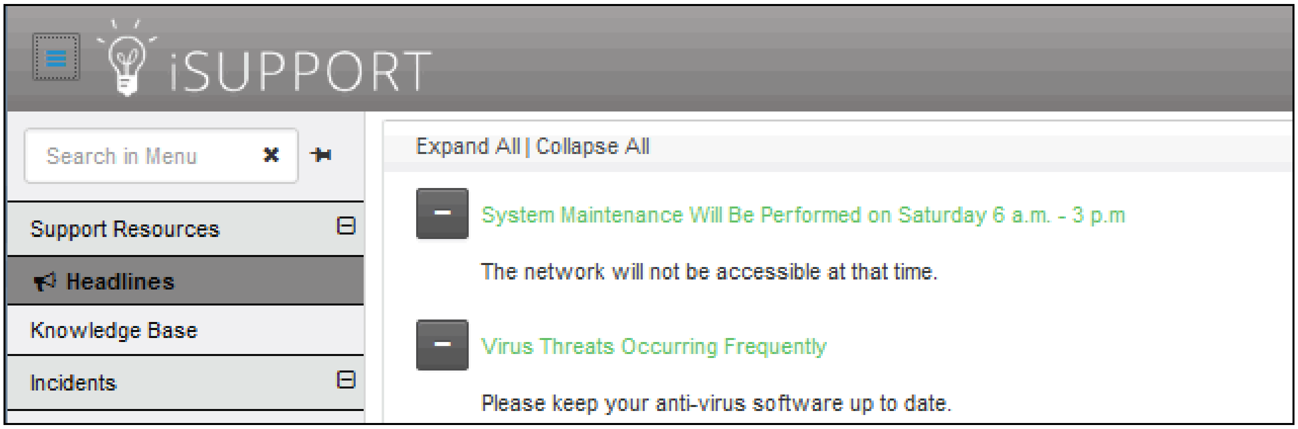


Creating Headlines

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

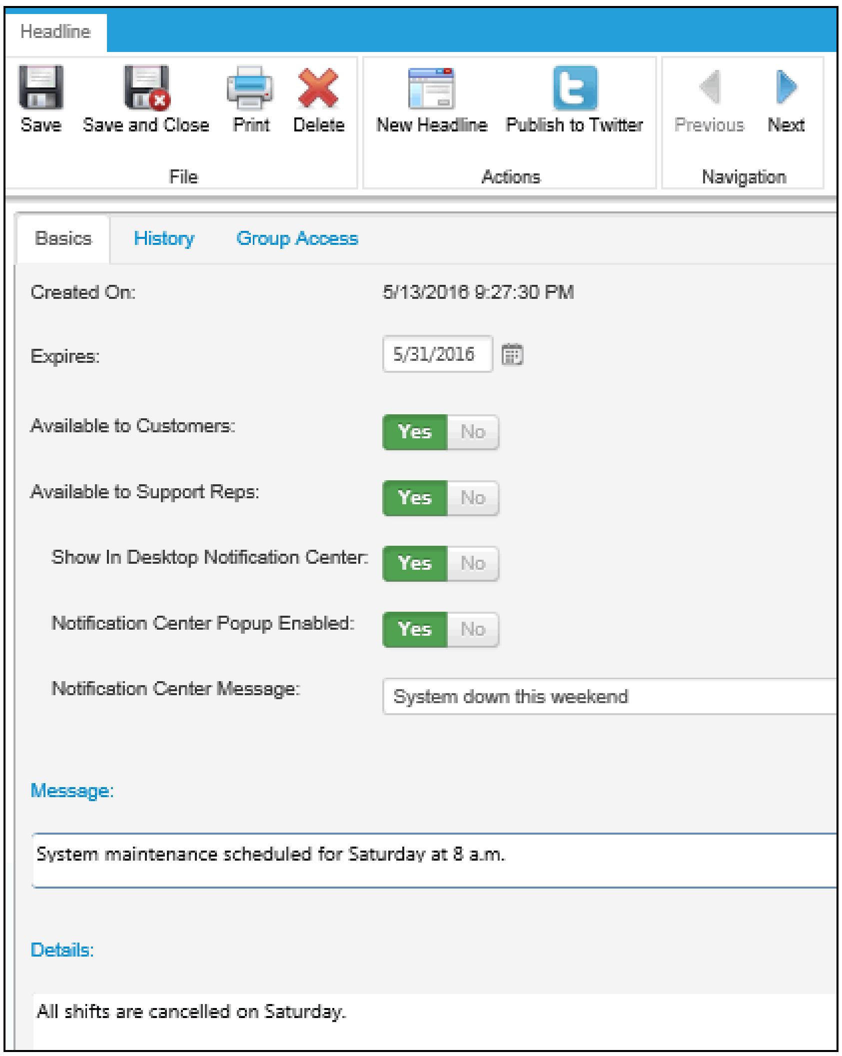


Headlines that are enabled for display to customers can be included on a mySupport portal via a view in a component, feed, or navigator link. The navigator link is shown below.



Entering Headline Basics

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



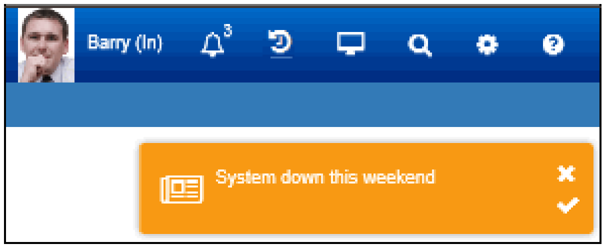
Expires - Select the day on which the headline should no longer display. (The headline will not display on this day.)

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

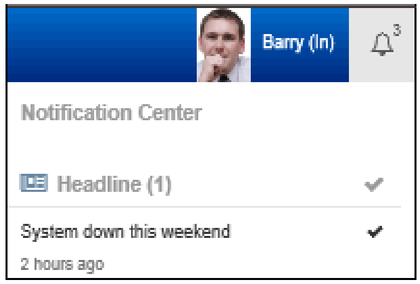
Available to Support Reps - Select Yes to enable display the headline in views and in the Notification Center, and in a popup on the Desktop.

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.



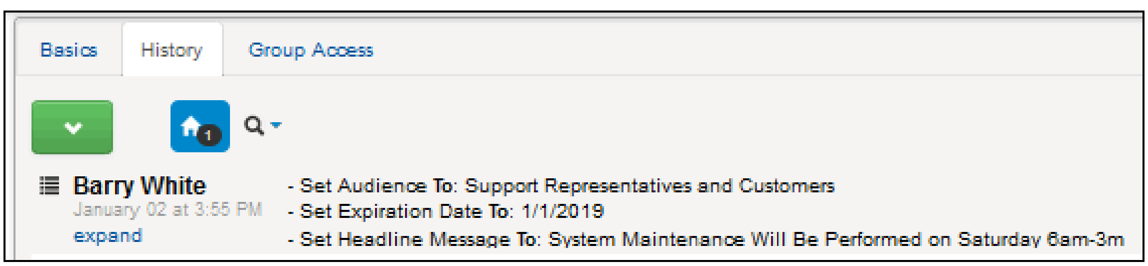
Desktop Notification Message - Select Yes to display the headline in the list of notifications accessed via the **Desktop Notifications** icon.

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.

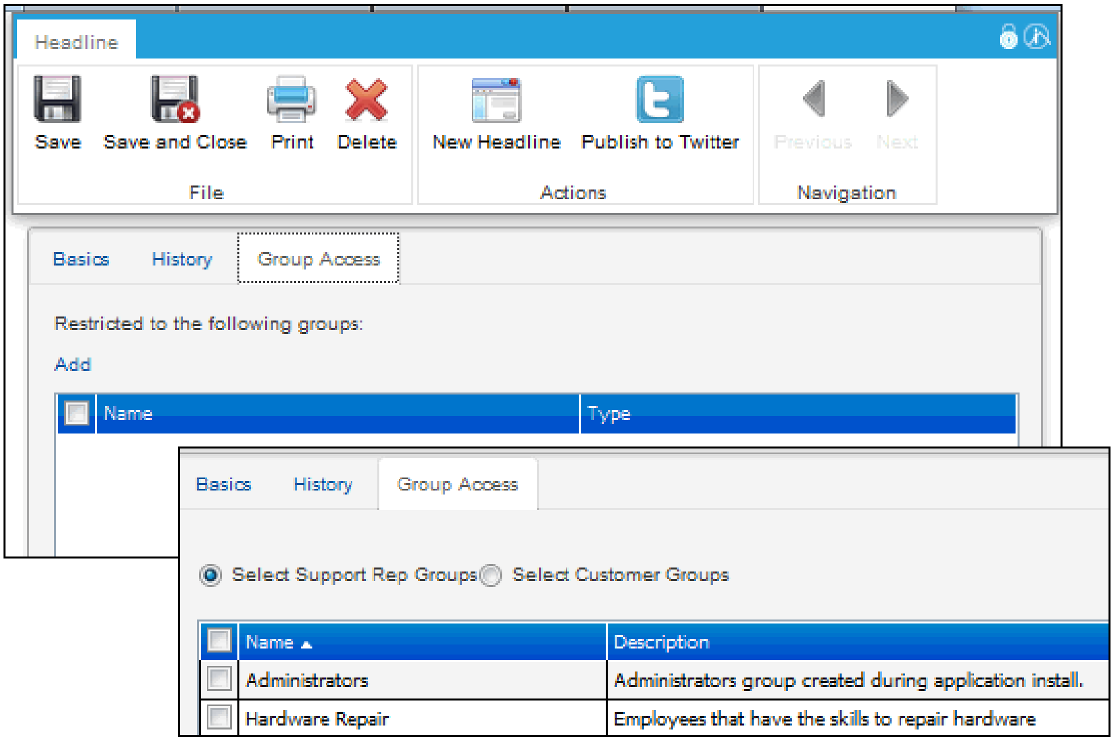
Viewing History

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



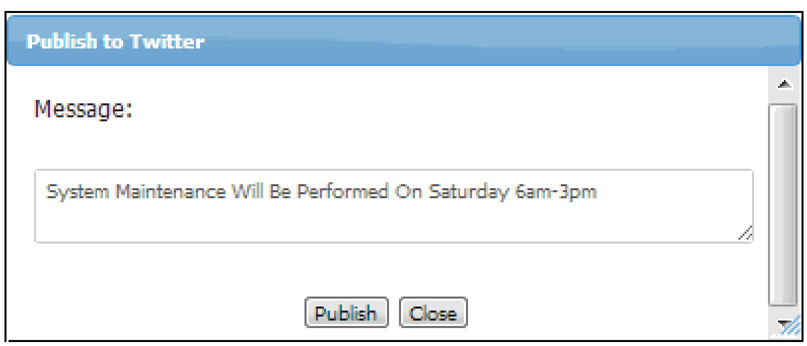
Restricting Access

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

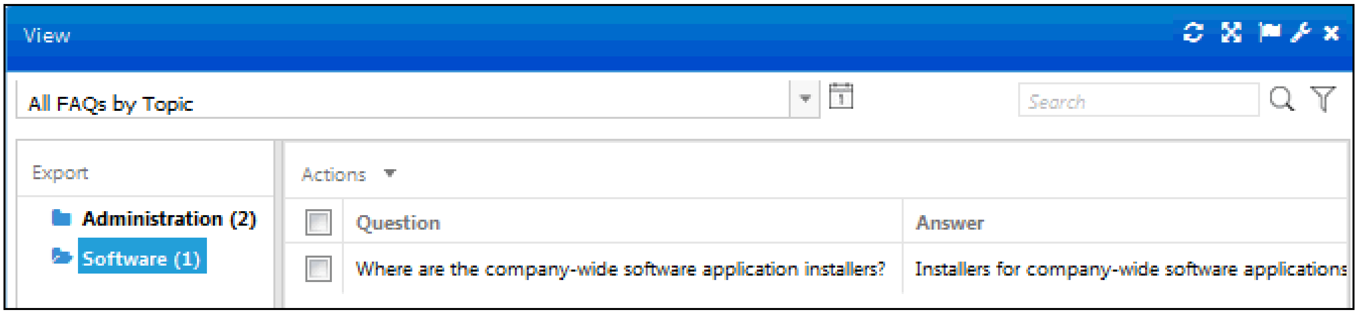
The Twitter® icon will appear in the Headline screen if you have the Publish to Twitter permission and a Twitter application has configured; when clicked, the Publish to Twitter dialog will appear with the contents of the message and details (for headlines) or the short description (for problems). If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



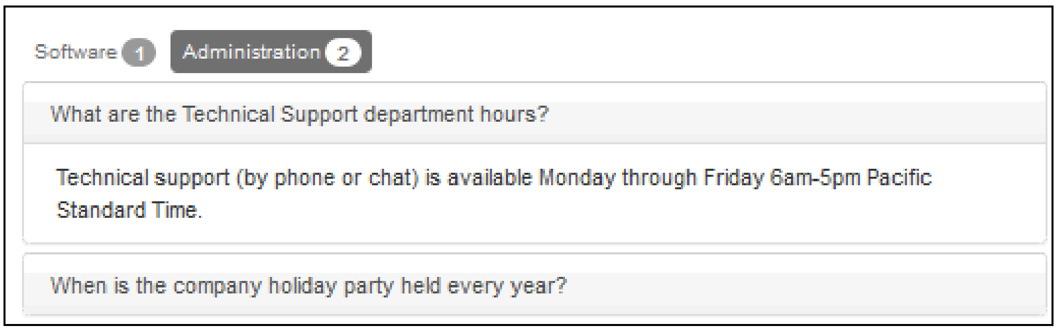
See "Integrating with Social Media" on page 21 for more information.

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.

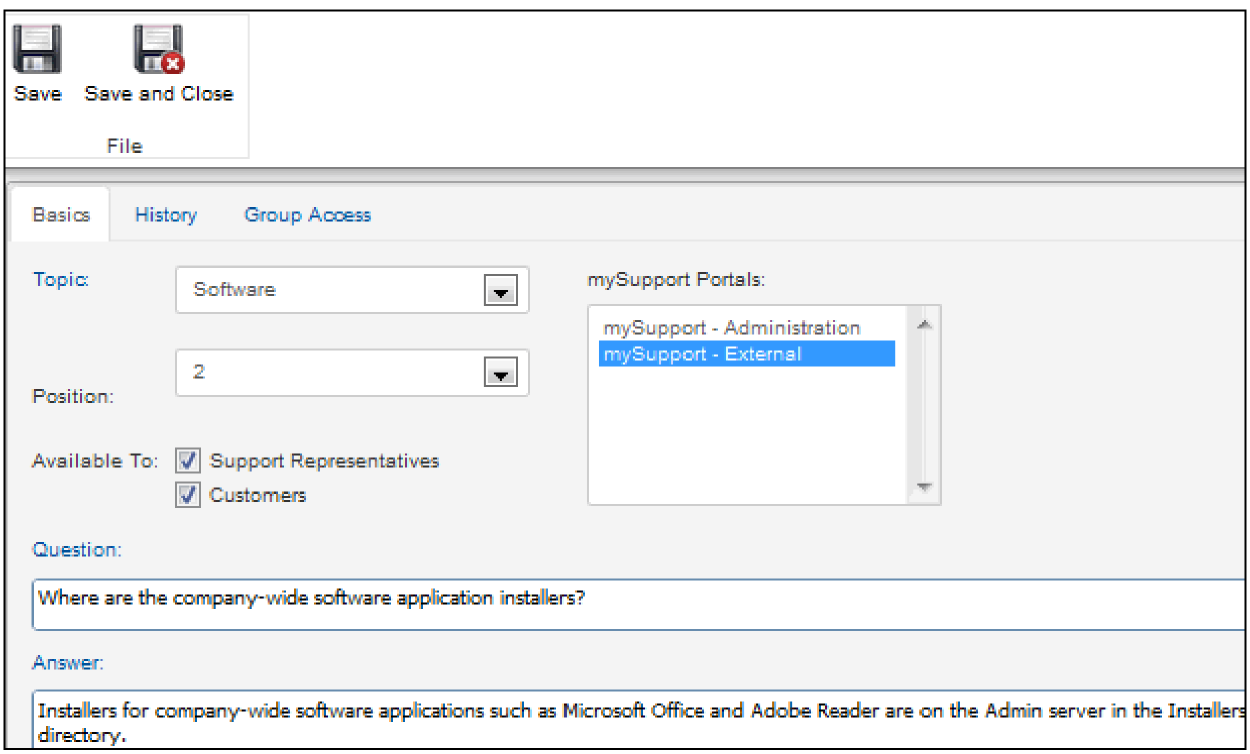


Customers can view frequently asked questions if you add a link on the mySupport portal.



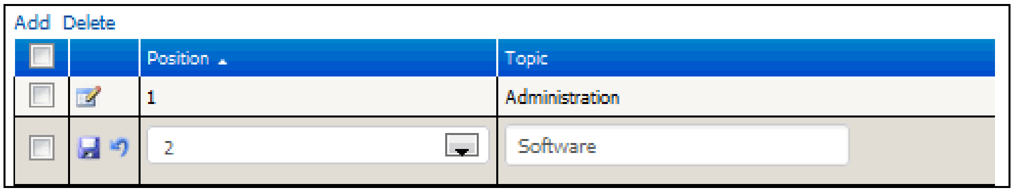
Completing the Basics Tab

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.



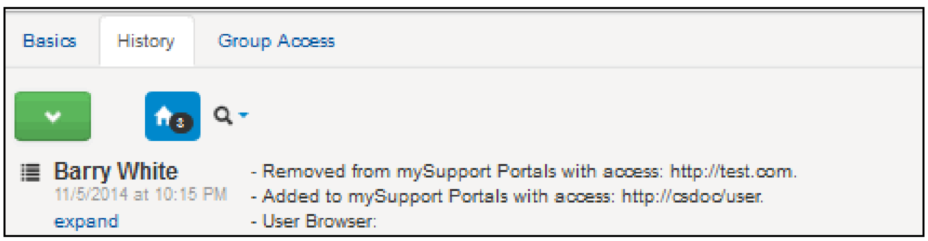
Available To - Select one or both of the following: Support Representatives to allow the frequently asked question to display to support representatives on the Desktop. Select Customers to allow the frequently asked question to display to customers on the mySupport portal.

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.

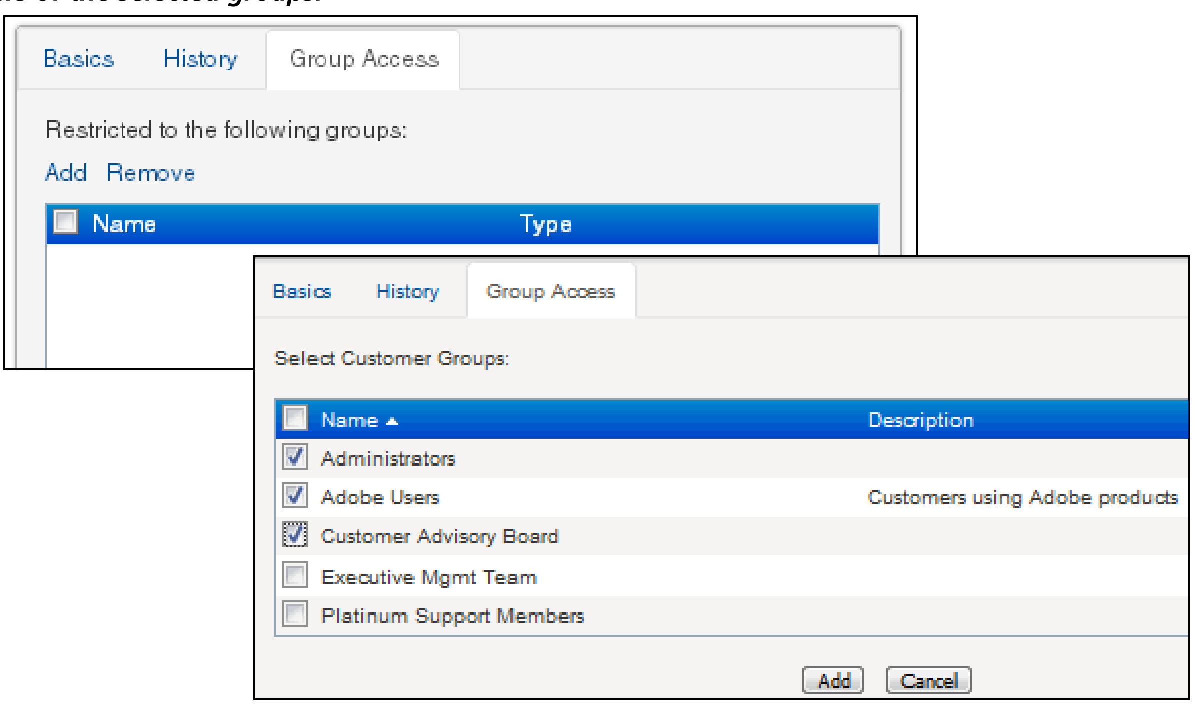
Viewing History

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



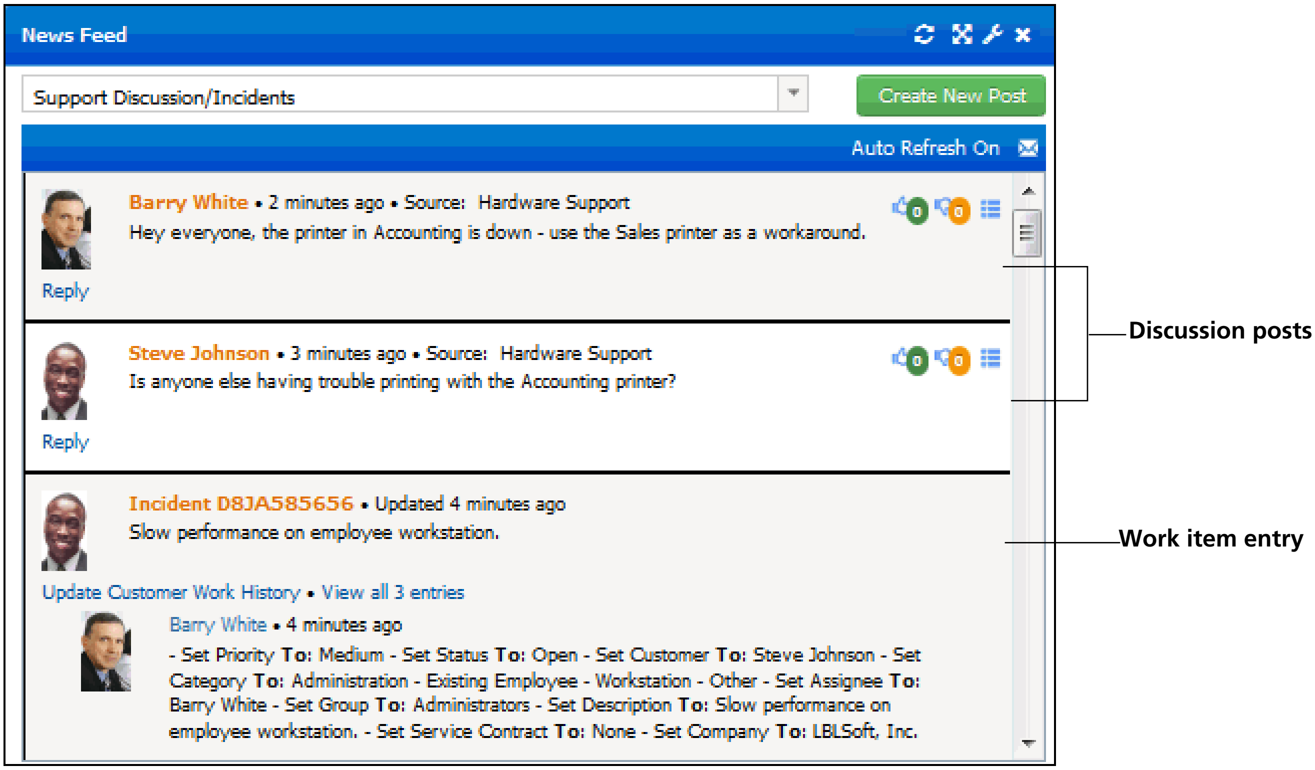
Restricting Access

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.***

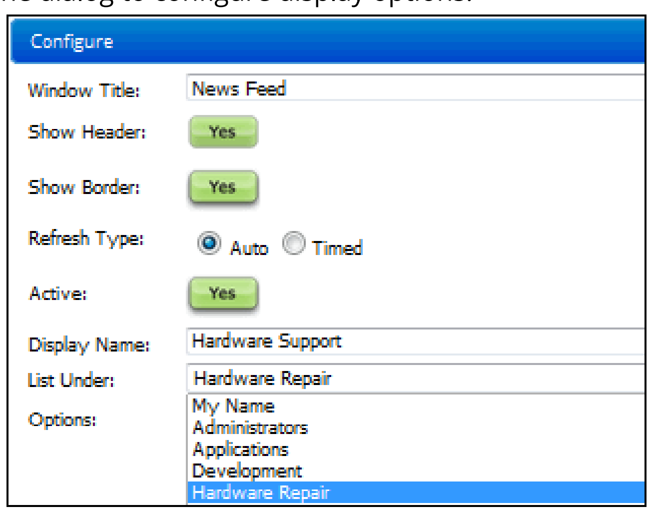


Configuring News Feeds

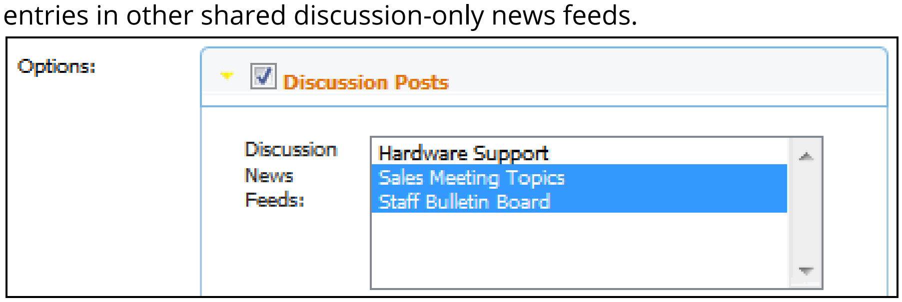
The News Feed component contains feeds that can contain discussion posts (entered via news feeds on the iSupport Desktop and mySupport portal) and/or entries for work item updates. See the online help for more information on each option.



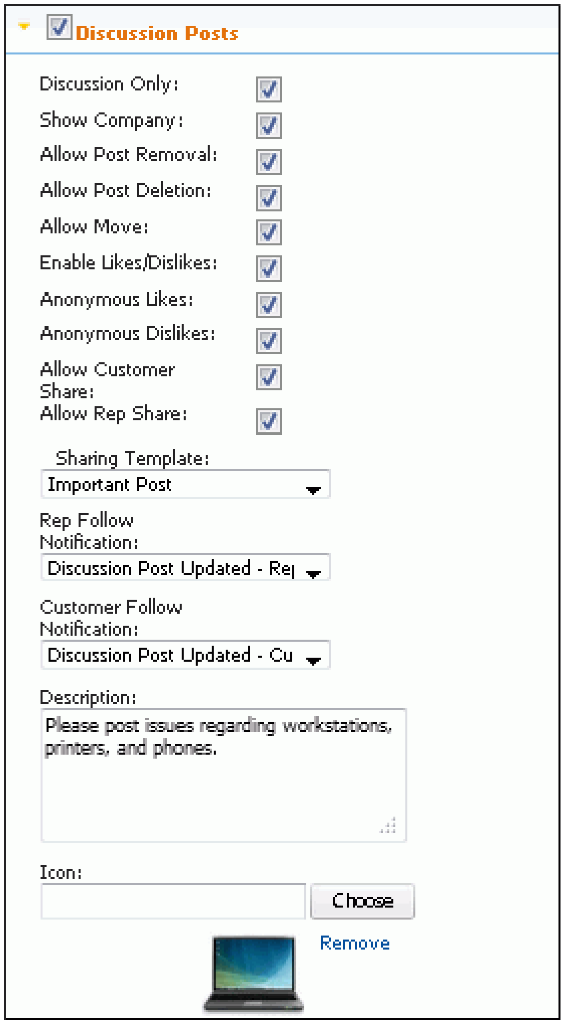
Select Create Feed in the News Feed component dropdown to create a news feed. The Configure dialog appears; use the fields in the top half of the dialog to configure display options.



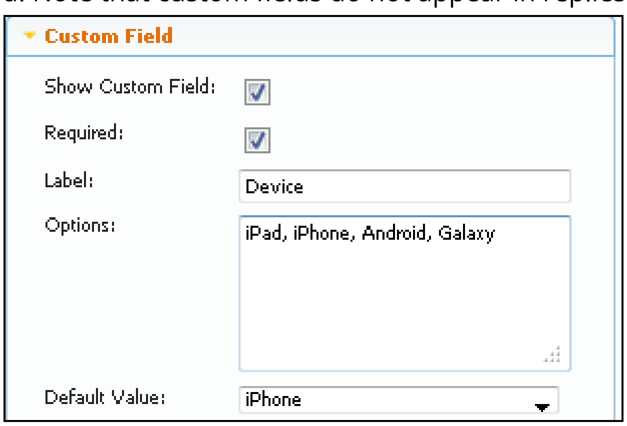
Enable the **Discussion Posts** section in the Configure dialog to include discussion posts in a news feed. If you **do not have** Discussion Feed Administrator access in your Support Representative Profile record, use the Discussion News Feeds field to include entries in other shared discussion-only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



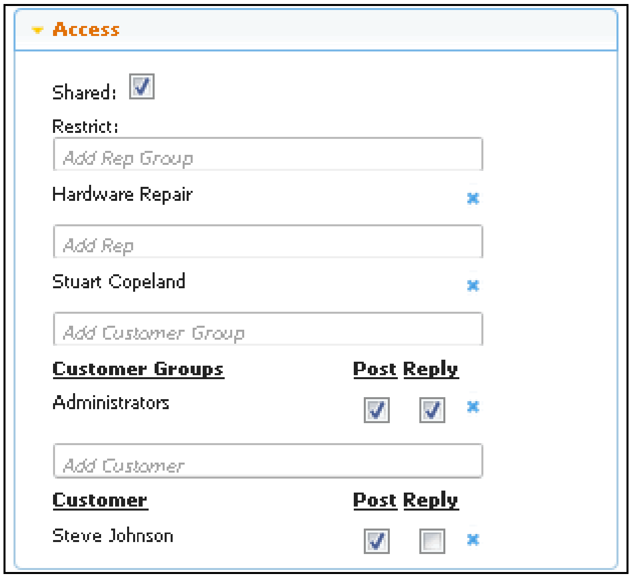
If you **have** Discussion Feed Administrator access in your Support Representative Profile record, the **Discussion Only** checkbox will appear to include only discussion posts in the feed.



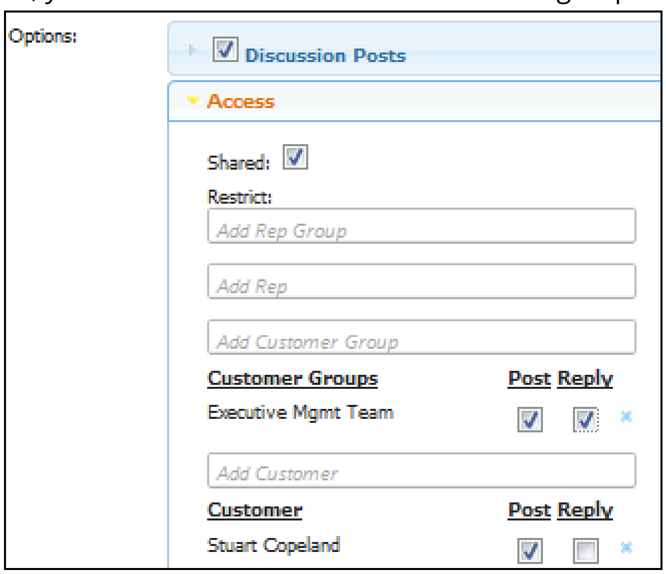
Use the **Custom Field** section to add a custom field to posts in a discussion-only news feed. You can make it required, enter options for selection (separate with a comma), and set a default value. Posts can be sorted by the custom field configured for a feed. Note that custom fields do not appear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



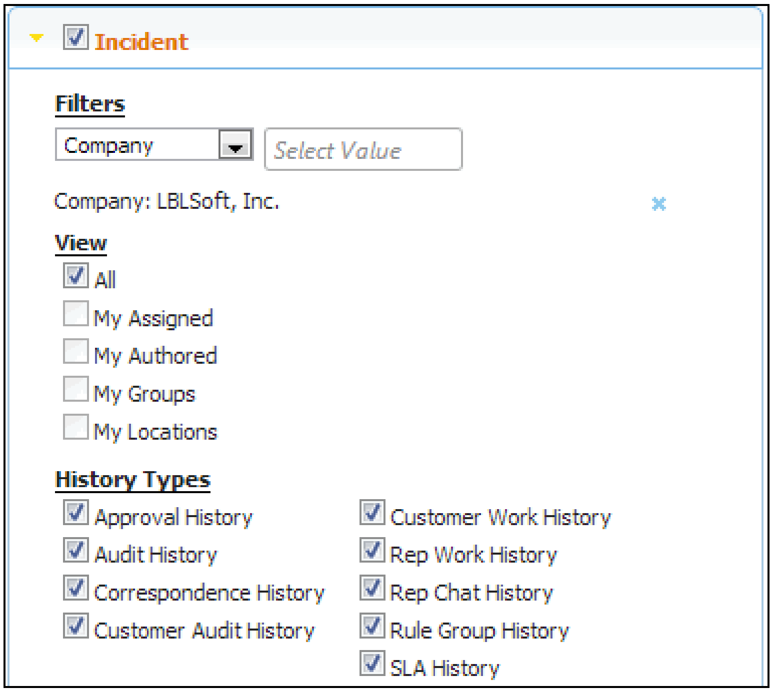
The **Access** section appears if you have Discussion Feed Administrator access in your Support Representative Profile record. Use the Shared checkbox to enable representatives and customers to view feed entries. (If this box is unchecked, only you will be able to view the feed entries.) You can restrict availability to selected support representative groups and individual support representatives (in addition to yourself).



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



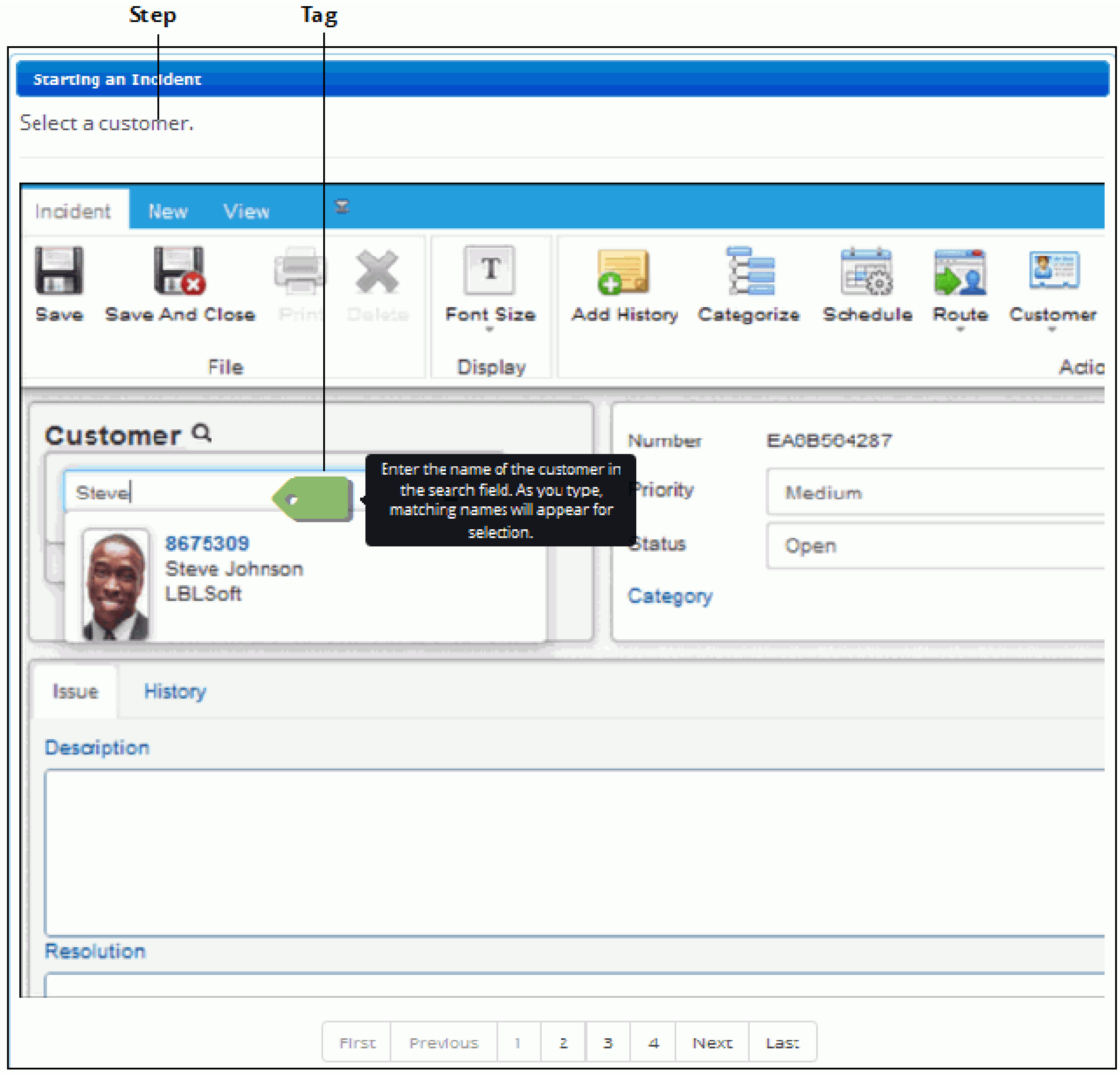
Use the work item-specific sections in the Configure dialog to restrict display of work items; you can display only work items for a specified incident field value, view, and history type.



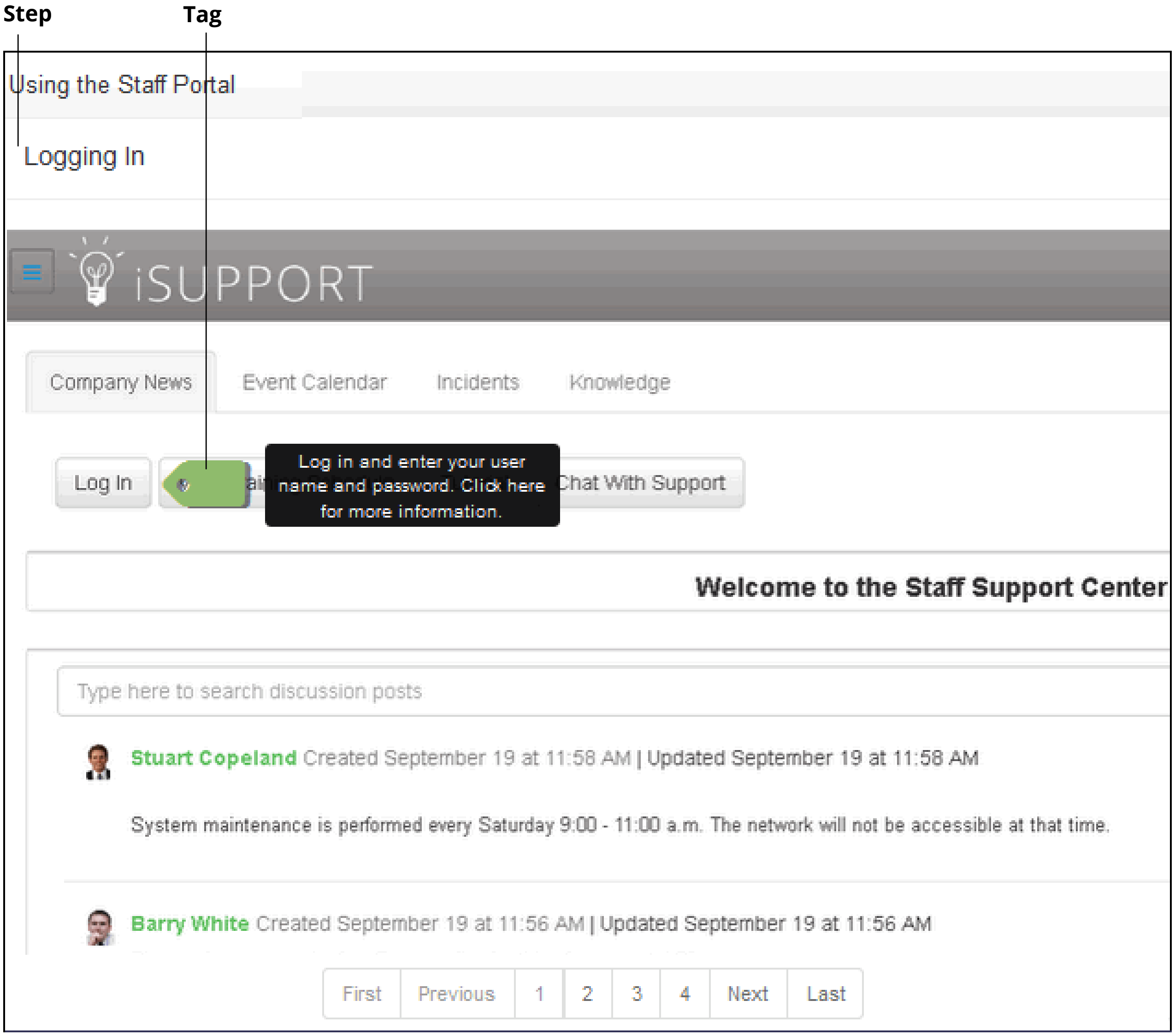
Configuring Tutorials

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:



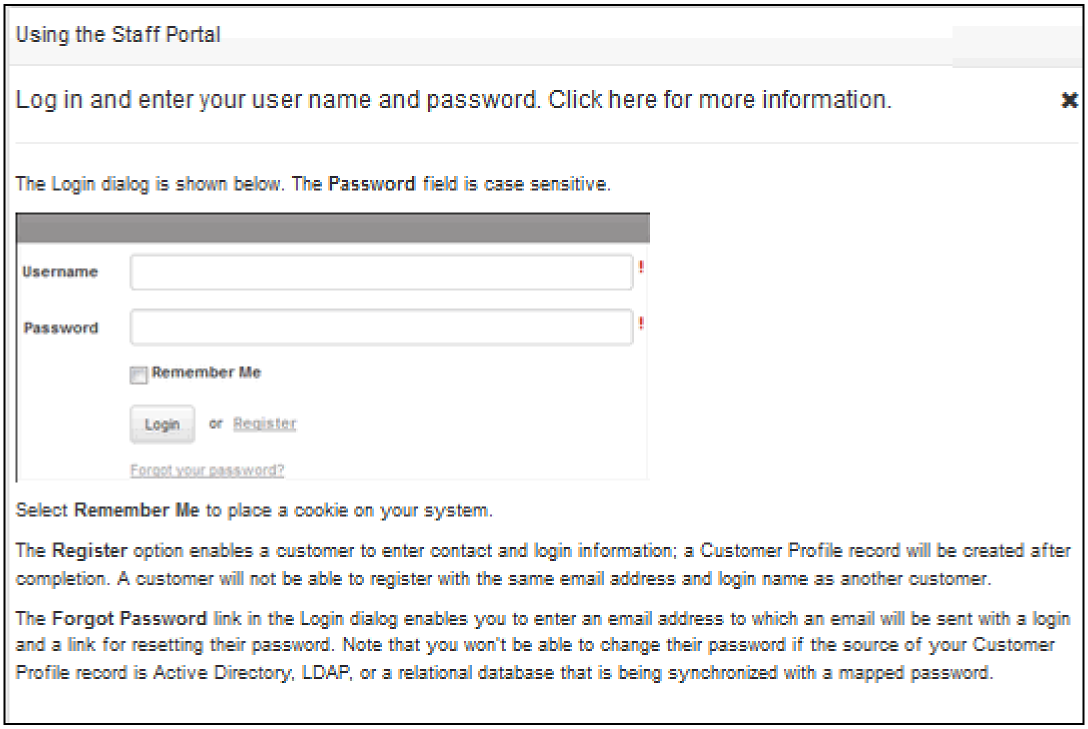
On a mySupport portal:



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.

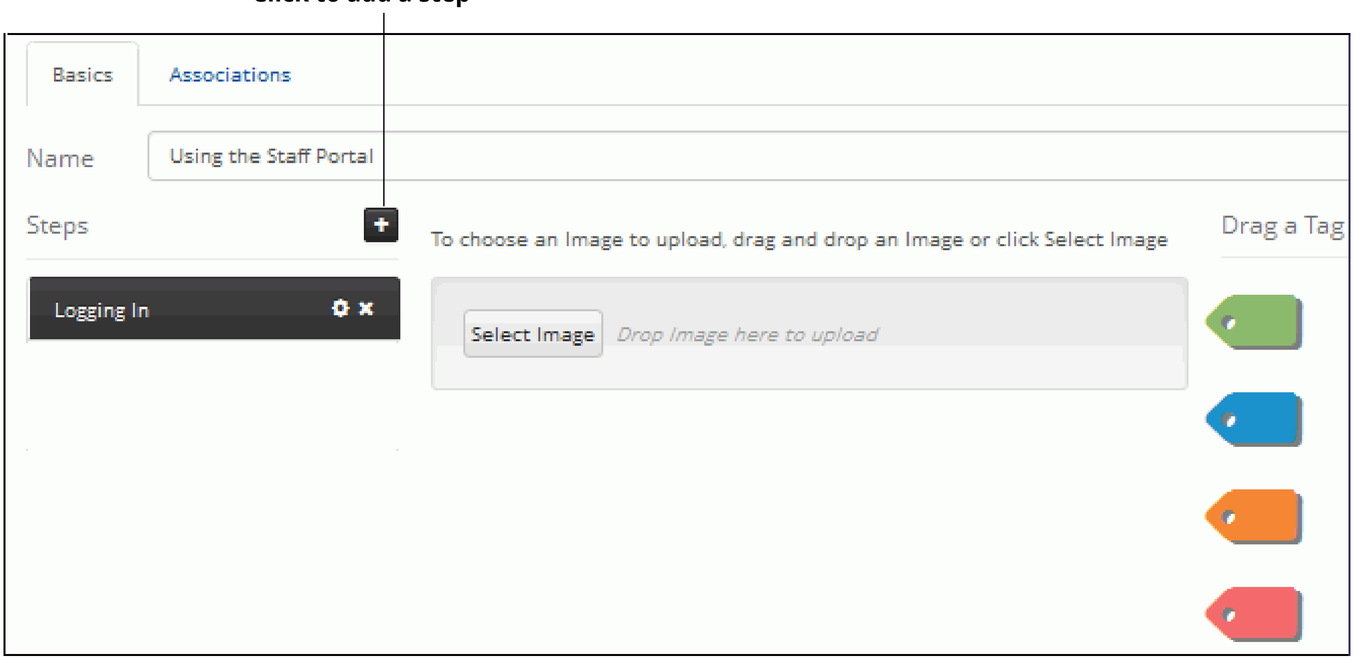
On mySupport, you can associate a tutorial with a dashboard, a mySupport work item submit or display layout, and a navigator link or a button that accesses a feature. For dashboards, the tutorial will appear the first time the authenticated user accesses the dashboard; after that point the Tutorial icon 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.

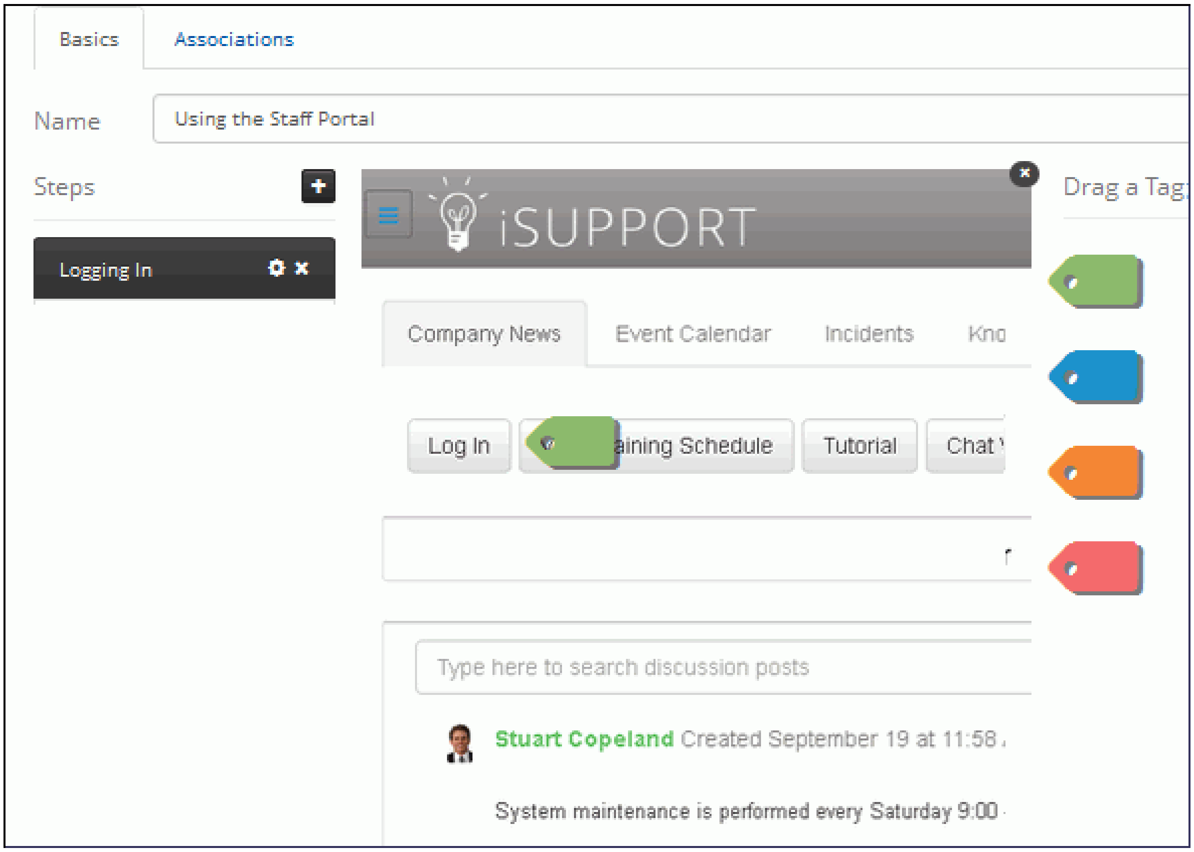


To configure a tutorial, go to Tutorials and click Create. Enter a name the tutorial; this name will appear as the heading. Then click the Add Step icon and enter the name of a step. You can use the Edit Step icon to change step text.

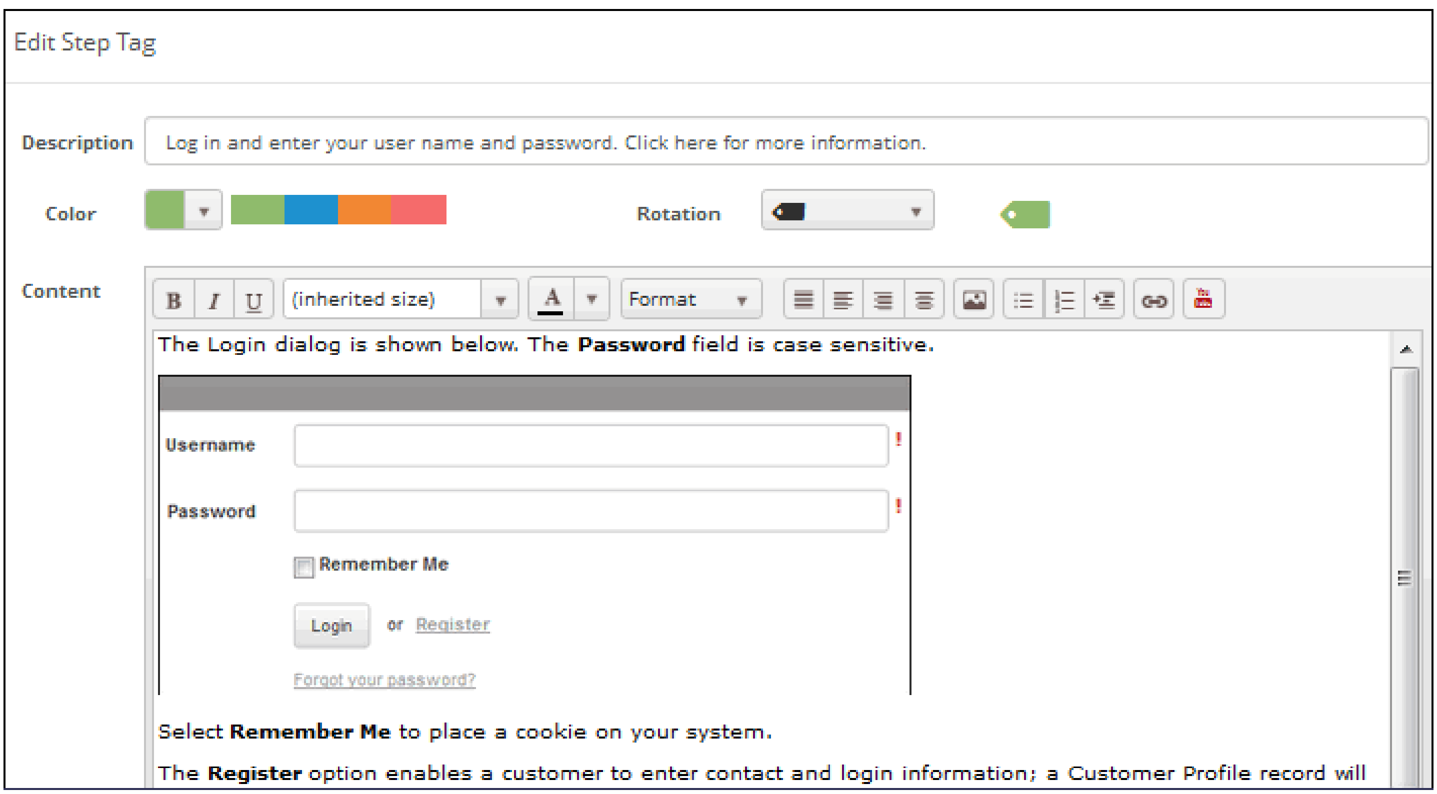
Click to add a step



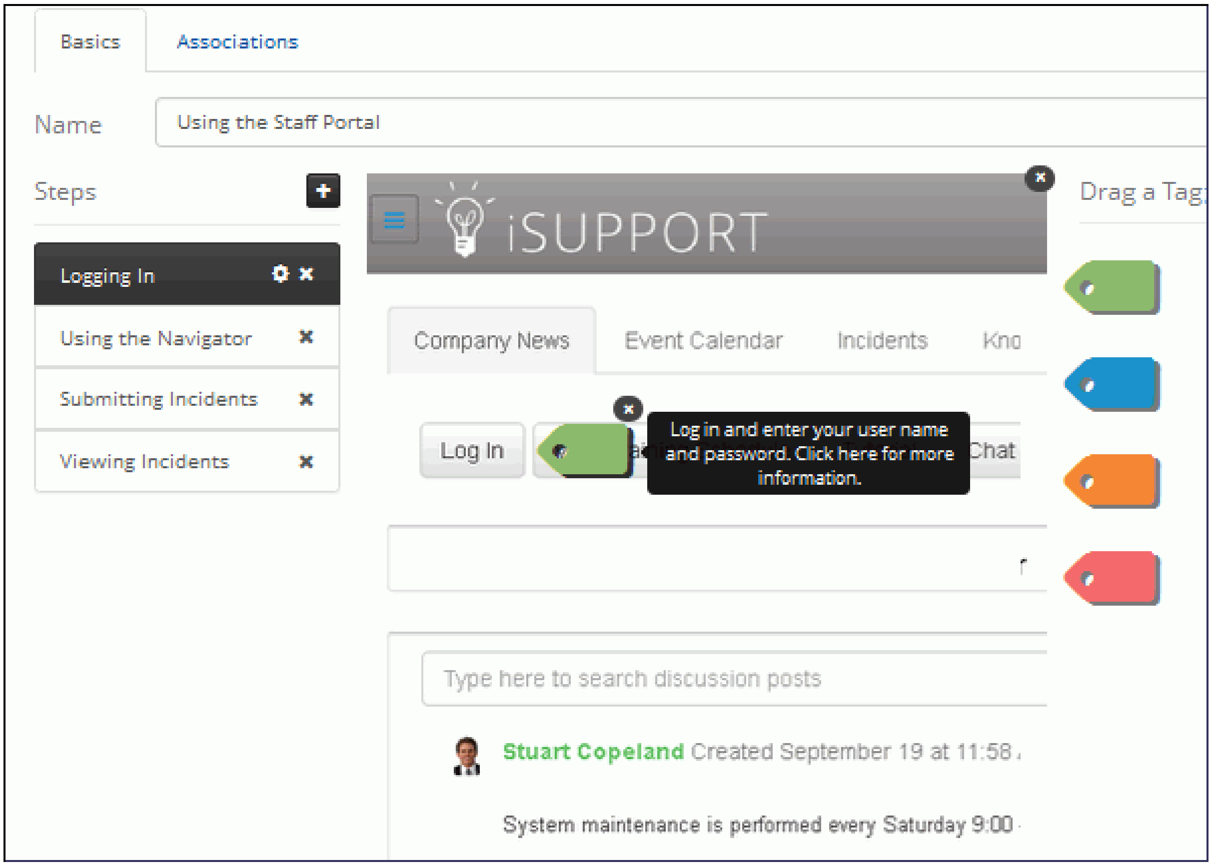
An image is required for each step; click Select Image or drag one into the gray area. To add a clickable tag, drag one from the list on the right onto the area in which you want to provide more information.



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.

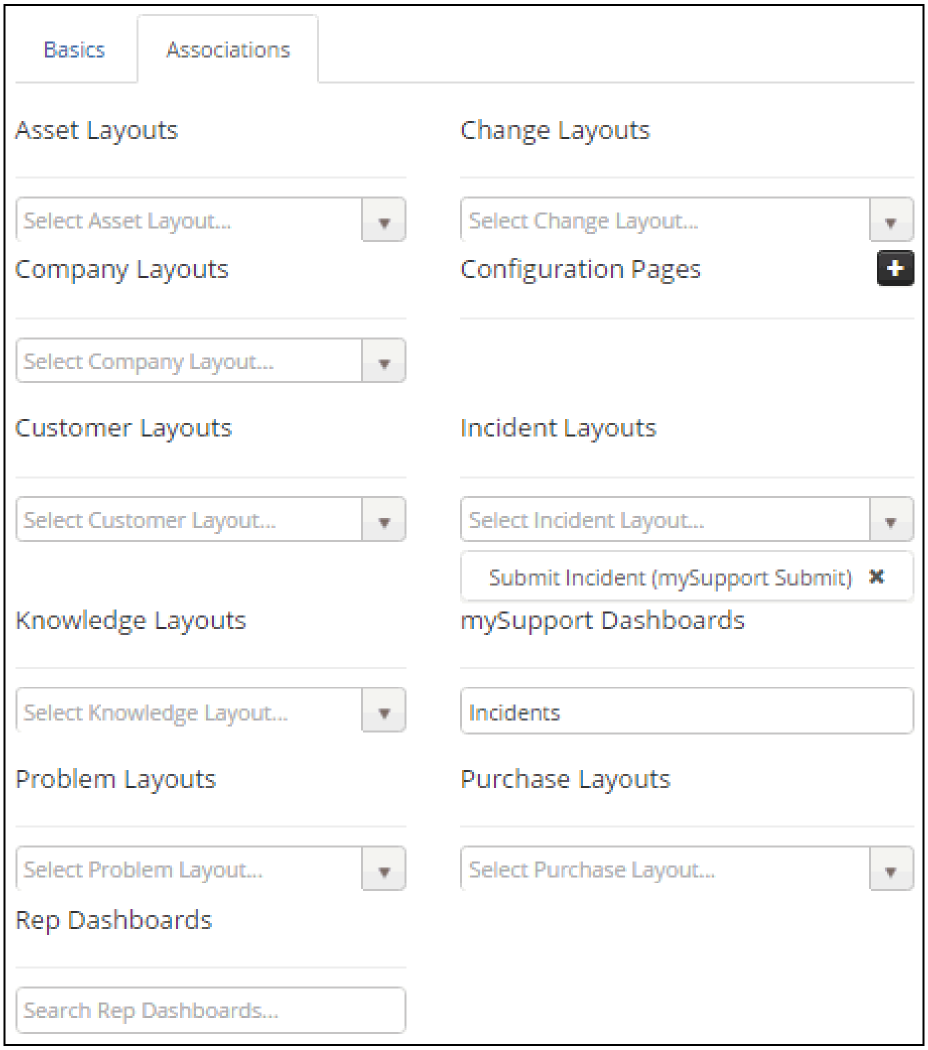


Add additional steps as necessary.



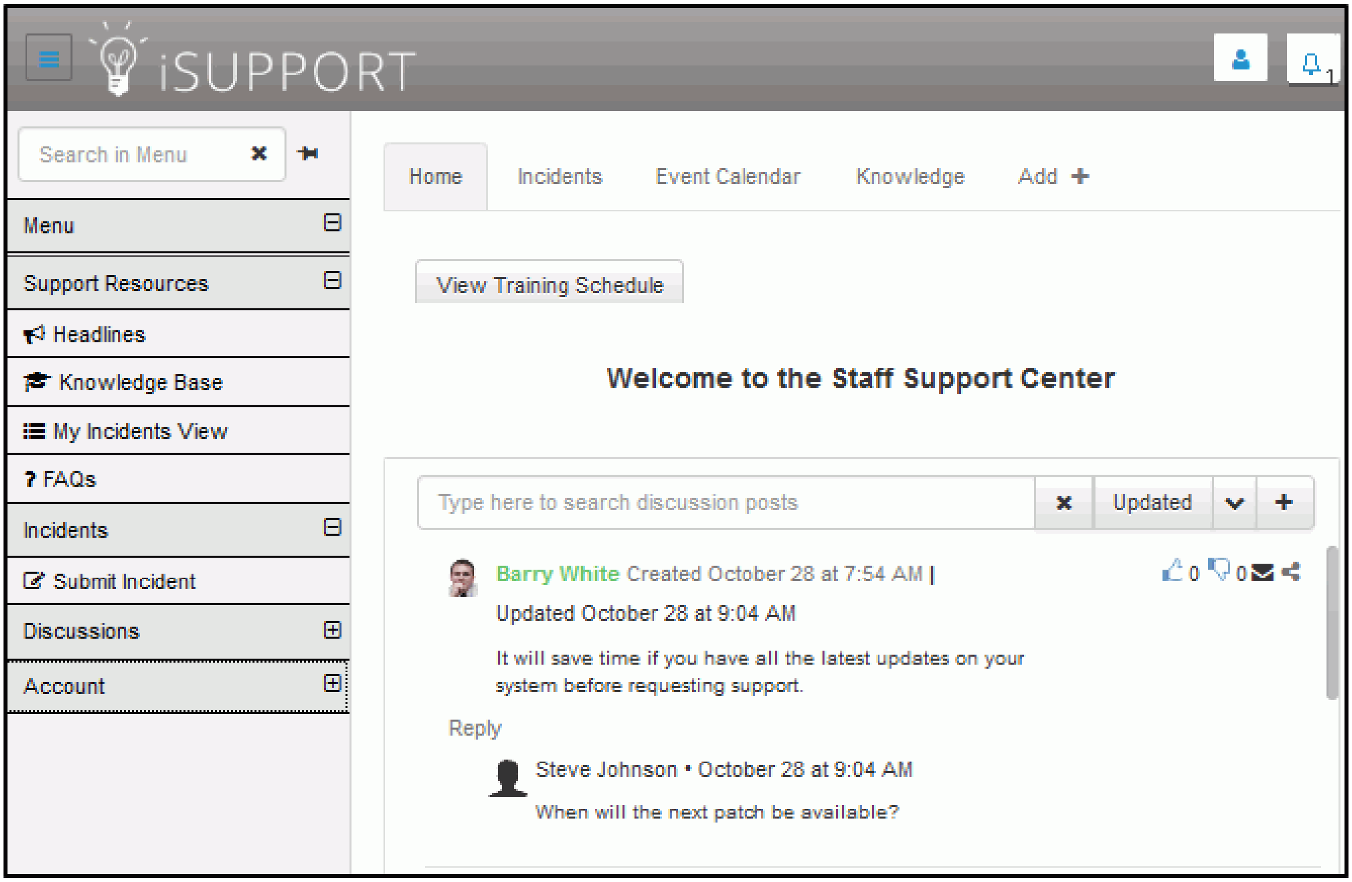
Associating Tutorials With Dashboards, Layouts, and Configuration Screens

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



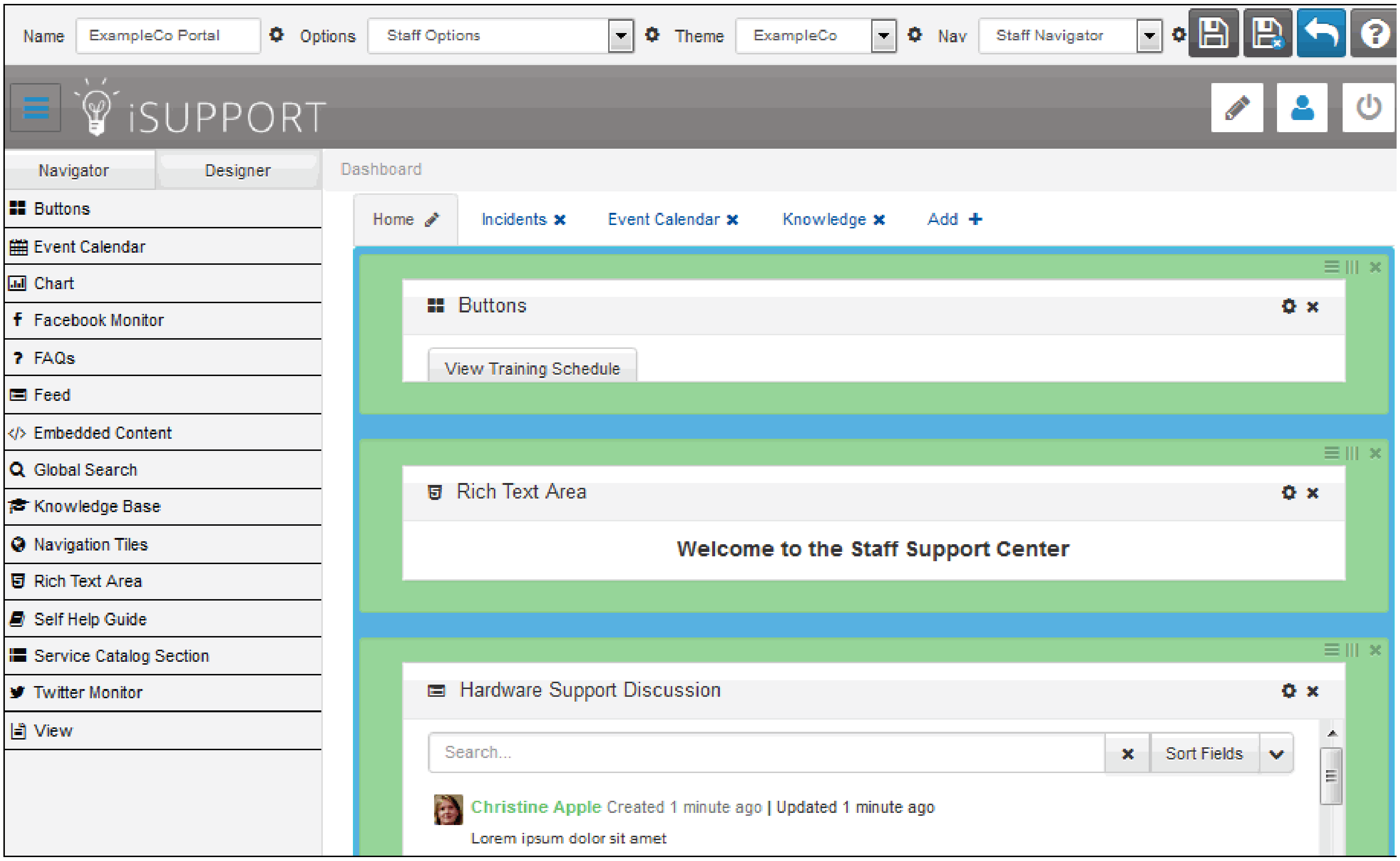
Configuring mySupport Portal Options

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.

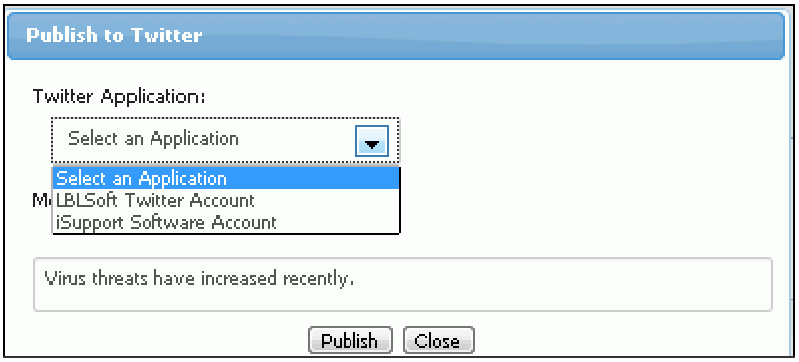


Integrating with Social Media

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.



- 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).