Configuring iSupport Email Functionality

iSupport's email functionality includes:

- **Default outbound settings** for defining the reply-to address, server, and account settings for all notifications generated by iSupport when no applicable rule or email processing applies. See "Configuring Default Outbound Settings" on page 1.
- **Email-submitted incident and change processing functionality** that uses the Email Processing agent to retrieve entries from an email mailbox, create an incident or change for a new or existing customer, and update existing work items. You can configure incident, problem, change, customer, and opportunity rules that can perform additional actions such as sending notifications, changing field values, and more. See "Configuring Email Accounts and Processing" on page 4.
- **Default and custom notifications for iSupport events** that are sent by:
  - For iSupport's Asset, CMDB, Alert, Discussion Digest, and View Subscription functionality, notifications are sent via agents configured in the Options and Tools | Administer | Agents screen.
  - For modules with rule-based functionality (Customer, Incident, Email, Knowledge, Discussion Post, Problem, Change, Opportunity, Purchasing), notifications are sent via rules that will perform actions when specified conditions are met.

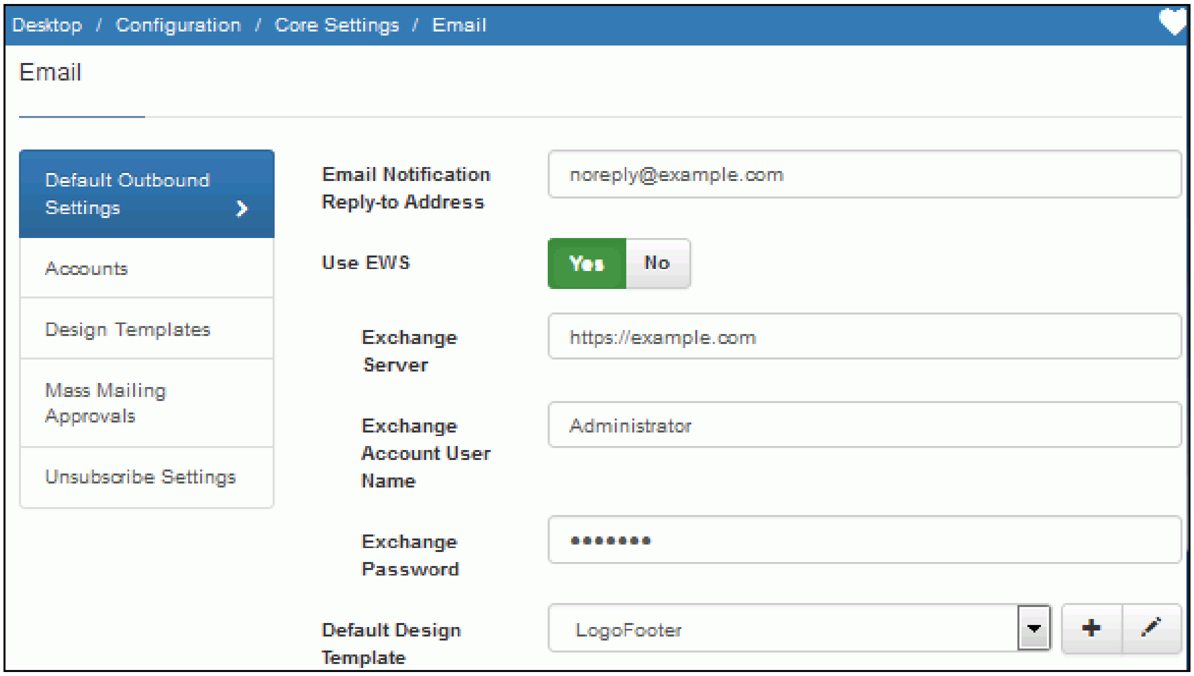
  See "Customizing and Viewing Event Notification Content" on page 22 for more information.
- **Design templates** with elements (text and images) to appear around email body text. See "Configuring Design Templates" on page 24.
- **Correspondence templates** for reps to use in iSupport entry screens and on the Desktop. See "Configuring Correspondence Templates" on page 18.
- **View subscriptions** that send an email with an attached file of exported view data to configured recipients on a schedule. See "Viewing and Creating View Subscriptions" on page 17.
- Require **mass mailing approvals** on correspondence sent from a customer view. See "Configuring Mass Mailing/ Approvals" on page 25.
- Display a **notification queue** and delete any notifications that have not been sent. See "Displaying the Notification Queue" on page 26.

Configuring Default Outbound Settings

Your default outbound email server settings may have been set through the Initial Setup Utility that appears after iSupport is installed and accessed for the first time. Use the Core Settings | Email | Default Outbound Email Settings screen to define the reply-to address, server, and account settings for all notifications generated by iSupport when no applicable rule or email processing applies.

Email Notification Reply-to Address - Enter the address to be included in the Reply To field for notifications generated by iSupport. Format the email address according to the following example: support@iSupport.com

Use EWS - Select Yes to use Microsoft Exchange Web Server (EWS) for outbound email from iSupport.

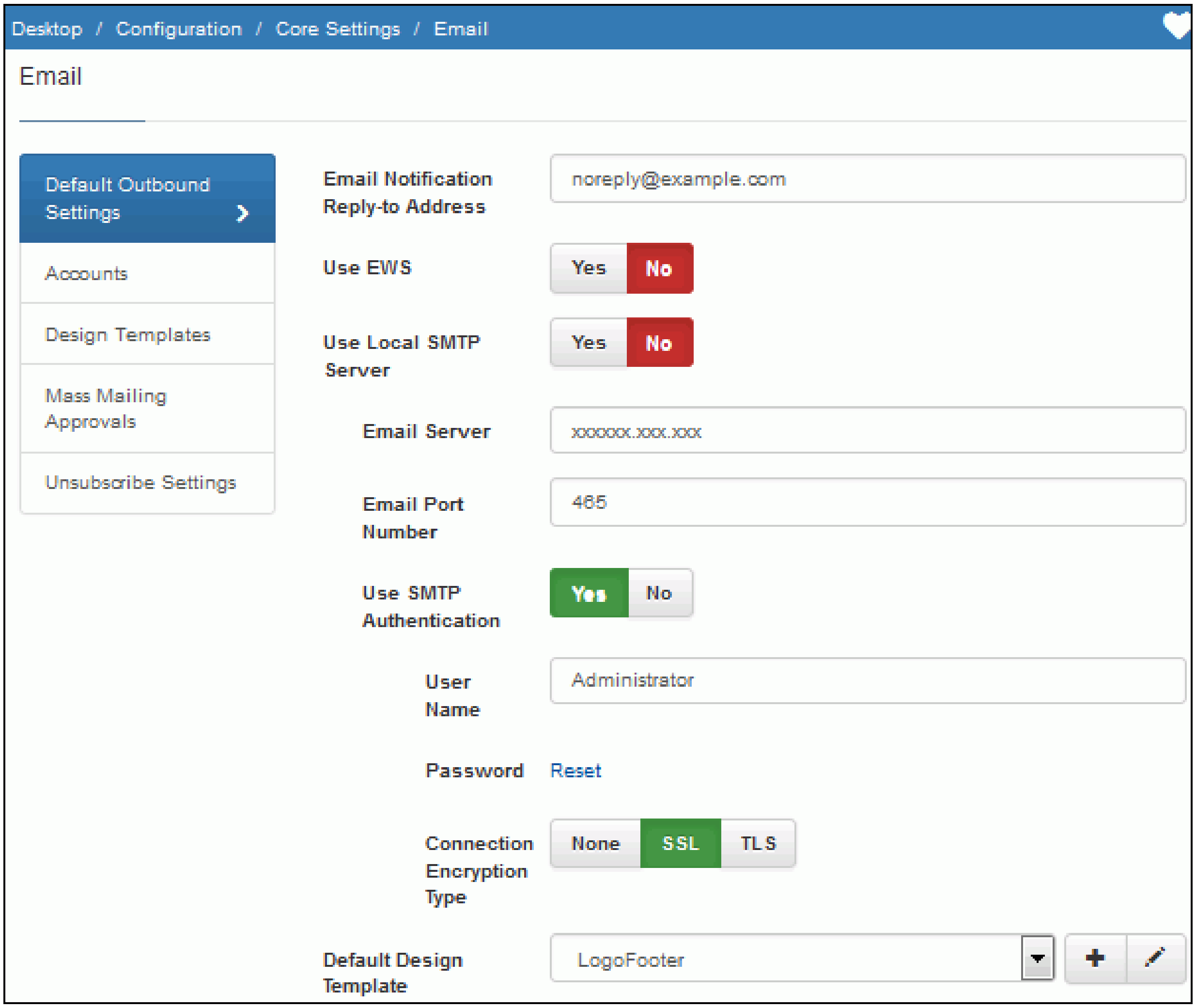


Exchange Server - enter the name or IP of the Microsoft Exchange server to be used for outbound notifications sent by iSupport.

Exchange User Account Name/Password - Enter the user name and password for iSupport to use for connecting to the Exchange server for sending outbound notifications.

Use Local SMTP Server - Do the following:

- Select No if a server that is different from the local server on which iSupport is installed will be used for outbound mail **or** if using Microsoft Exchange and a receive connector cannot be created.



- Select Yes to use the local SMTP server for outbound email notifications sent by iSupport.

  If you are using Microsoft Exchange, you will have to set up a Microsoft Exchange receive connector for the associated port and IP address for the sending server. Receive connectors represent a logical gateway through which all inbound messages are received. Receive connectors are configured on a per-server basis, and they control how the Exchange server receives messages from the Internet, email clients, and other messaging servers. Contact your Microsoft Exchange administrator to add the receive connector.

  Do the following to enable SMTP in the local IIS installation:

  a On the server on which iSupport is installed, select Start | Programs | Administrative Tools | Internet Services Manager.

  b Double-click the SMTP Email feature icon in the features view and add the Reply to address in the E-Mail Address field.

  c Select the Deliver E-mail to SMTP: Server option and enter the SMTP server FQDN or IP in the SMTP Server field. In the Port field, enter the port number used in your network for SMTP. The default port for SMTP is 25.

  d Select the appropriate authentication method for your SMTP server.

  e Click the Apply action in the Actions menu.

Email Server - enter the name or IP of the server to be used for outbound mail sent by iSupport.

Email Port Number - The default outbound mail port number is usually 25, but this number will change depending on your selection in the Outbound Server Connection Encryption Type field. Verify that the number is correct and change it if necessary.

Use SMTP Authentication - If you'll be using a server that is different from the local server on which iSupport is installed for outbound email, select Yes to pass a user name and password to the outbound mail server.

User Name/Password - Enter the login to authenticate against the server for accessing the outbound email account.

Connection Encryption Type - Select the encryption type for the outbound server, if any: Transport Layer Security (TLS) or Secure Socket Layer (SSL). The default in the Outbound Mail Port Number field will change depending on your selection; verify that the number is correct and change it if necessary.

Default Design Template - Design templates include elements (text and images) to appear around the body of the correspondence template and support representative signature (if applicable). Select the design template to apply to outbound email by default (if one associated with a correspondence template or custom notification isn't in effect). Use the Create New ✚ and View/Edit icons to access the Design Template screen. See "Configuring Design Templates" on page 24 for more information.

Configuring Email Accounts and Processing

iSupport's email-submitted incident and change processing functionality uses the Email Processing agent to retrieve entries from an email mailbox, create an incident or change for a new or existing customer, and update existing work items. You can configure incident, problem, change, customer, and opportunity rules that can perform additional actions such as sending notifications, changing field values, and more.

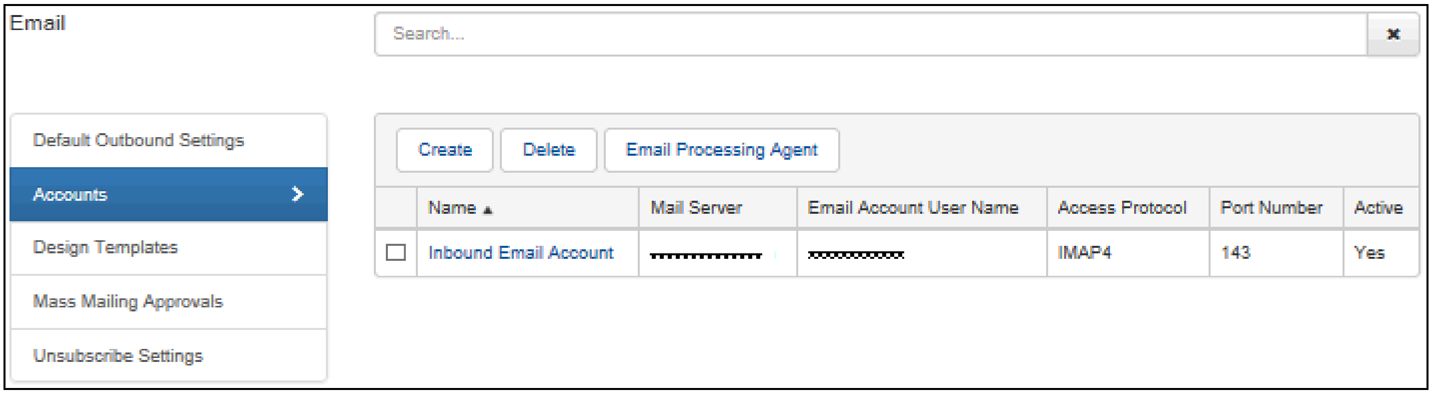
When the Email Processing agent runs, the following occurs if the inbound email address matches the email account user name:

- If the email cannot be parsed, the action specified in the Unparseable Email Action field on the Email Processing tab will be performed.
- **If updates are enabled, the subject and body of the incoming email is searched for an existing message ID, customer reference ID, or 10-character incident, problem, change, or purchase number.** If an existing number exists, matching work items are updated by including a notation in the Audit History field with a correspondence link to view the email and any attachments. Configured rules for the applicable work item type will perform actions if conditions are met. Note that email rules do not apply to work items updated via email processing.
- **If no matching message ID, customer reference ID, or incident, problem, change, or purchase number exists or updates are not enabled, an incident will be created.** Email rules in the rule group associated with the email account will evaluate and apply any actions that correspond to met conditions. Email rule actions can apply an incident or hierarchy template, create a change with a defined template, update the history in a Customer Profile record, and delete or forward the incoming email. If an incident or hierarchy template is not applied in a rule, settings on the Inbound Settings/Email Processing tab in the Email Accounts screen will apply and the subject line and body of the email are placed in the Description field. (However, the subject line text will be included in the Short Description field if it is enabled in the Incident Basics screen. On a Change record, the subject line text will be included in the Reason field.)

  If the sender does not have an email address that exists in a Customer Profile record, a new Customer Profile record will be created for the email address. Any configured incident and change rules will then evaluate and perform actions (such as sending notifications) if conditions are met.

To configure iSupport's email processing:

- Use the **Accounts tab in the Core Settings | Email screen** to set up an incoming email account and define the incoming email server and protocol, primary email account, rule group, and associated defaults to be applied to incidents and/or changes created from email sent to that account. You can also enable updates and define settings for outbound replies. See “Configuring Account Details” on page 6.



- Use the **Options and Tools | Automate | Rules screen** to configure email rules that will execute if updates are not enabled or no matching work item number exists; in order for a rule to evaluate, it must be included in a rule group associated with an active email account**.** Use the **Options and Tools | Automate | Rule Groups screen** to create email rule groups. See “Configuring Email Rules and Rule Groups” on page 12.

  Email rule conditions operate on email fields; you can configure conditions that detect a specified word (such as "Undeliverable") or whether the email is sent from a customer. Email rule actions can create an incident or change with a specified template, delete or forward the incoming email, or only update the history of a Customer Profile record (instead of creating an incident or change) if specified conditions are met.

- If applicable, use the **Incident, Problem, Change, Customer, and Opportunity Rules screens** to configure rules that will perform actions such as sending notifications when a work item is created or updated. You can also configure rules that will set the email account. Note that if conditions are met, rules will perform actions in the order specified in the Rule Group screen.

  You can configure work item rules with the events <*work item type*> Created via Email and <*work item type*> Updated via Email for use with email processing.

- Use the **Core Settings | Email | Default Outbound Email Settings screen** to configure the reply-to address and local SMTP server for notifications generated by iSupport when no applicable rule or email processing applies. See “Configuring Default Outbound Settings” on page 1.

- Click the **Email Processing Agent** button in the Email Accounts list screen to schedule the Email Processing agent, which executes the search of incoming email and updates work items or creates incidents and changes as configured. You’ll select the number of minutes in the interval for the Email Processing agent to search the email mailbox for new messages or select Disabled to disable email processing.

Notes:

- **Important:** In order to avoid an email loop, be sure to consider the impact of automatic response notifications. The email account user name and aliases should not be the same as the email notification reply-to address in the Default Outbound Email Settings screen, and the iSupport Application Account must have Modify permissions.

- For updates, only 10-character strings are considered as valid numbers; therefore, if an incident, problem, change, or purchase request number in an incoming email contains a special character (such as #,/:;!" or ?), the number will be ignored because it counts as 11 characters. This also includes HTML markup such as bold tags. A space must exist before and after the number.

- In an HTML-type incoming email, the incident, problem, change, or purchase request number must be in the Subject line.

- Try to ensure that each customer has a name set up in his/her email application. A name may not be included on an email-submitted incident or change if the customer does not have a profile record and does not have a name set up in his/her email application.

- On an email-processed incident, problem, or change update, if there are names in the CC or TO field (other than the mail-in name) and Others to Notify is enabled, those names may be added to the Others to Notify list for the incident, problem, or change if there is a matching Customer Profile. See “Configuring Inbound Settings” on page 8 for information on this configurable option.

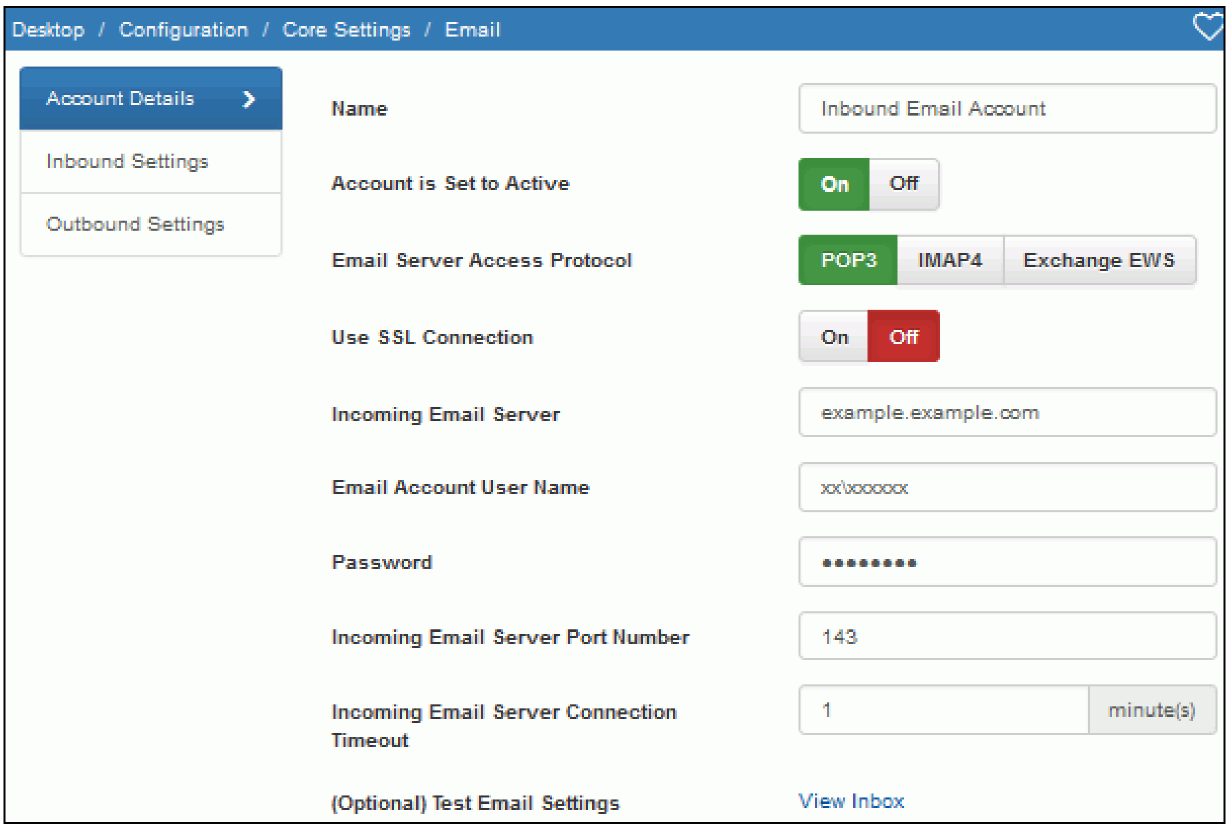
- If an inbound email rule uses an auto-close incident template and a required custom field does not have a default value, the required custom field will not have a value in the closed incident.
- If a template is applied because of a rule and the assignee cannot be determined from the template, the routing method specified on the Inbound Settings | Email Processing tab in the Email Accounts screen will be used. If none is specified, the assignee specified in Default Email Owner field in that screen will be used.
- For information on iSupport's email processing validation functionality, see “iSupport Email Validation” on page 17.

Configuring Inbound Settings

Use the Inbound Settings tab in the Email Accounts screen to set up an incoming email account and define the incoming email server, protocol, rule group, and associated defaults to be applied to incidents and/or changes created from email sent to that account.

Configuring Account Details

Use the Account Details tab to set up an incoming email account and define the incoming email server, protocol, and access information.



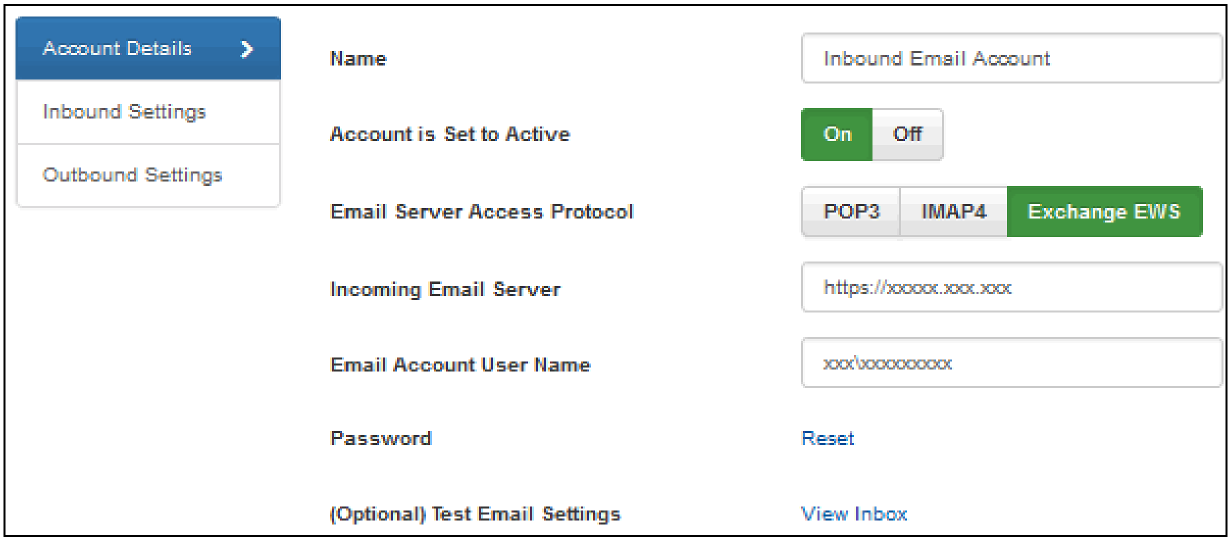
Name - Enter a name for the inbound email account.

Account is Set to Active - Select Yes to enable the account to process incoming email according to the schedule of the Email Processing agent.

Email Server Access Protocol - Select the type of access protocol used by your mail server: POP3 (Post Office Protocol), IMAP4 (Internet Message Access Protocol), or Exchange WebServices (EWS).

Use SSL Connection - This field appears if using POP3 or IMAP4. SSL is an encryption method that overlays the connection between the iSupport server and the mail server. Select Yes if SSL encryption is enabled on the incoming mail server. The default port number in the Incoming Mail Server Port Number field will change because SSL uses a different default port; verify that the assigned port is correct and change if necessary.

Incoming Email Server - Enter the host name of the server from which the email processing agent will retrieve messages. If using Exchange EWS, enter the path to the server (for example, https://example.com).



Email Account User Name/Password - Enter the name and password to be used by the Email Processing agent to log in to the server containing the email.

Note: The inbound email account for processing email must be isolated and not viewed. Any email that has been read or set back to unread will be skipped during the conversion process. If permitted by the email application, mark the inbound email account used for processing email as text only.

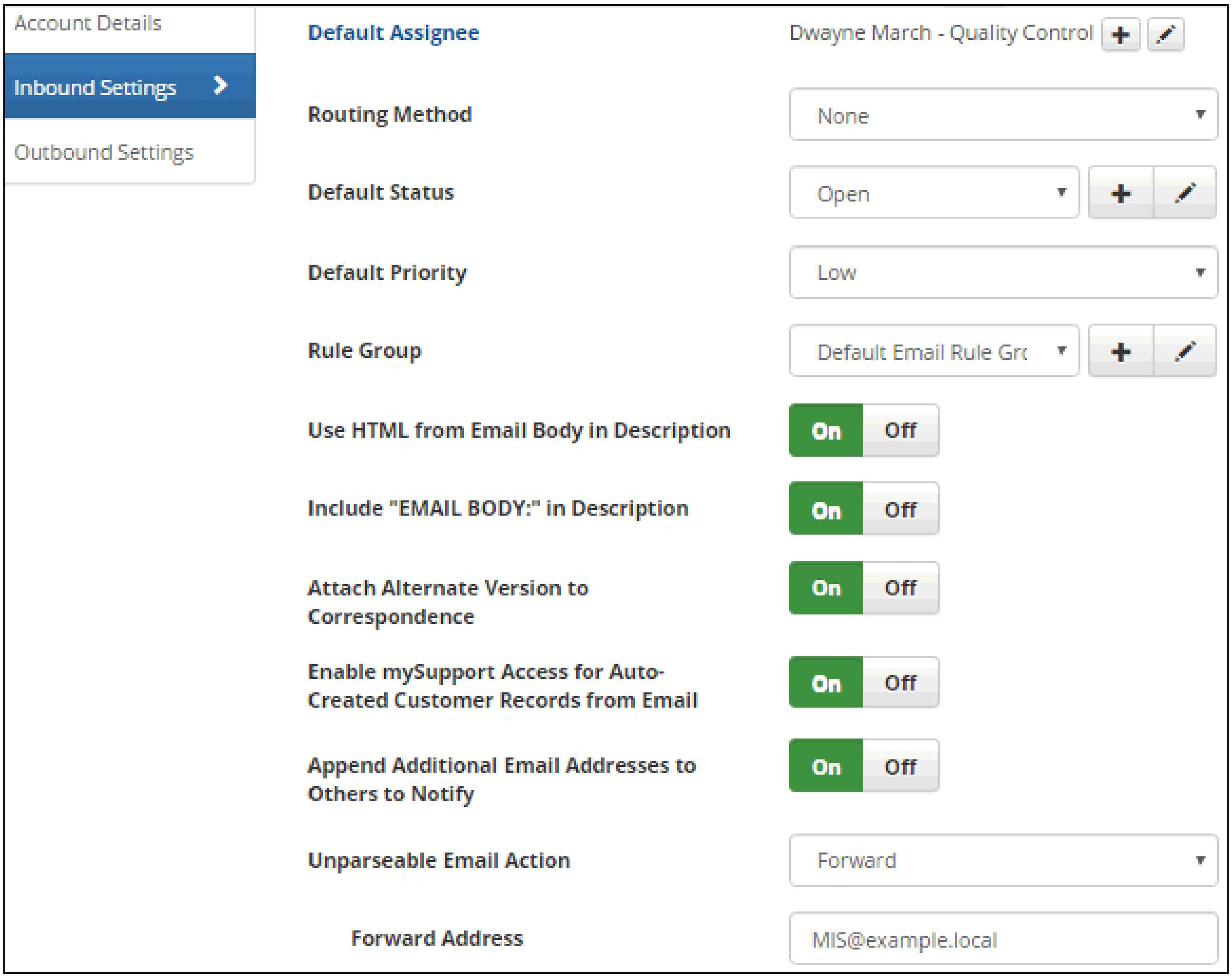
Incoming Email Server Port Number - This field appears if using POP3 or IMAP4. Enter the port number used to access the server containing the email. (For POP3, this number is typically 110. For Secure POP3 (SSL-POP), this number is typically port 995. For IMAP4, this number is typically 143.)

Incoming Email Server Connection Timeout - This field appears if using POP3 or IMAP4. Enter the number of minutes for iSupport to wait for a response from the incoming mail server when connecting, requesting or deleting email, or disconnecting.

(Optional) Test Email Settings/View Inbox - Click the View Inbox link to display email processing errors and any email that has not been processed.

Configuring Inbound Settings

Use the Inbound Settings tab to configure the defaults to be applied to incidents and/or changes created from email sent to the inbound account, and enable updates applied to incidents, changes, problems, and purchase requests.



Default Assignee - Select the support representative to be assigned email-submitted incidents and/or changes. Any assignee specified on an associated template (for a rule) will override this email owner. If a load balanced or round robin routing method is specified as well, incidents and/or changes will be assigned to this support representative if none are available for routing. You can click the Create New + or View/Edit icons to access the Rep Profile screen.

Route Method - Routing options are enabled in the Feature Basics screen. Select one of the following:

- None
- Load Balanced to assign email-submitted incidents and/or changes based on current open statistics, including weights based on priority.
- Round Robin to assign email-submitted incidents and/or changes based on current open statistics, including weights based on priority.
  - By Name to assign to the available support representative with the lightest workload.
  - By Group to assign to the available support representative with the lightest workload within a group.
  - By Location to assign to the available support representative with the lightest workload within a location.

If there is no support representative available for a selected method, the incident and/or change will be assigned to the support representative specified in the Default Email Owner field. Note that any route method specified on an associated template (for a rule) will override this route method.

Rule Group - Select the rule group containing the rules to evaluate when the Email Processing agent runs and processes incoming email. If you select default for a rule group, and none is selected for an email account, the default rule group will be used.

Use HTML from Email Body in Description - Select Yes to enable HTML to be input and rendered by users in the body of an incoming email; attached images will display directly in the Description field. If No is selected in this field, attached images on incoming email will be rendered as attachments on the associated correspondence entry. Check your corporate security practices regarding the ability of users to input and render HTML in web applications.

Include "EMAIL SUBJECT" in Description - Select Yes to include the text "EMAIL SUBJECT" before the email subject text that will be included in the incident description. For example, if "Cannot connect to network" is the subject of the email, the following will be included in the incident description: EMAIL SUBJECT: Cannot connect to network

The subject line text will be included in the Short Description field if it is enabled in the Incident Basics screen. On a Change record, the subject line text will be included in the Reason field.

Include "EMAIL BODY" in Description - Select Yes to include the text "EMAIL BODY" before the email body text that will be included in the incident and change description. For example, if "I have not been able to access the accounting application." is the body of the email, the following will be included in the description: EMAIL BODY: I have not been able to access the accounting application.

Default Status - Select the status to be assigned to email-submitted incidents and/or changes. Any status specified on an associated template (for a rule) will override this status. Only Open type statuses are available in this field. You can click the Create New or View/Edit icons to access the Options and Tools | Customize | Custom Status Labels screen.

Default Priority - This field appears if Impact Urgency Mapping is not enabled. Select the priority to be assigned to email-submitted incidents and/or changes. Note that any priority specified on an associated template (for a rule) will override this priority.

Default Mapping - This field appears if Impact Urgency Mapping is enabled in the Feature Basics screen. Click this link to select the Impact, Urgency, and Priority to assign to the Impact, Urgency, and Priority fields on email-submitted incidents. Note that any mapping specified on an associated template (for a rule) will override this status.

Attach Alternate Version to Correspondence - Select Yes to save any alternate version of the body of an email (created by the email application) as a document and placed on the Attachments tab of the correspondence.

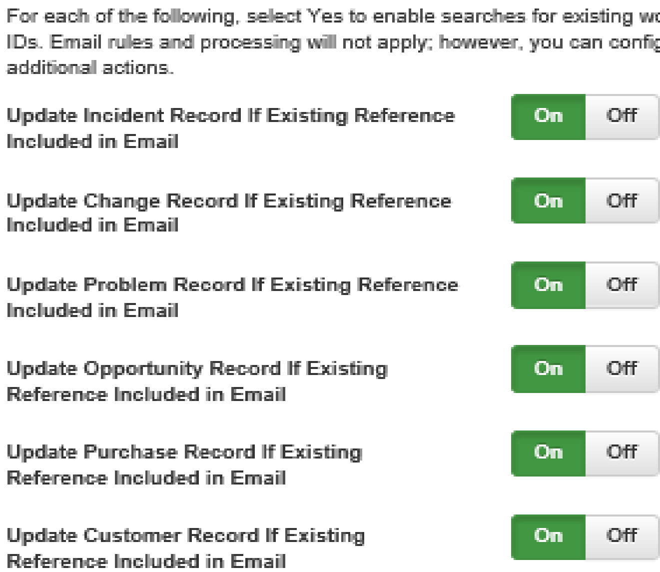
Enable mySupport Access for Auto-Created Customer Records From Email - A Customer Profile record is created when a customer sends an email-submitted incident from an address that does not already exist in Customer Profiles. Select this checkbox to enable the Approved to Access field by default when a Customer Profile record is created in this manner.

Append Additional Email Addresses to Others to Notify - Select Yes to enable the addition of any names in the CC or TO field (other than the mail-in name) of an email-submitted incident or change to the Others to Notify list for the incident if there is a matching Customer Profile. Only the CC field will be evaluated on an update.

Unparseable Email Action - Select the action to occur when an incoming email cannot be parsed: delete the email, forward the email to a specified address, or take no action. Note that if Take No Action is selected, an error will display in the event log every time the agent runs for this email.

Enabling Updates

Update *<Incident/Change/Problem/Opportunity/Purchase>* Record if Existing Reference Included in Email



Select Yes to enable a search for an existing message ID or 10-character work item number for the applicable work item type when the Email Processing agent runs. If a match exists, the matching work item will be updated by including a notation in the Audit History field with a correspondence link to view the email and any attachments. Note that a space must be included before and after the work item number in order for the record to be updated. You can configure further actions to occur via the Rules screen in the applicable configuration module; you can configure work item rules that include conditions with the event <*work item*> Updated via Email for use with email processing or email rules with the event Email Does Not Include iSupport Reference for use with email processing.

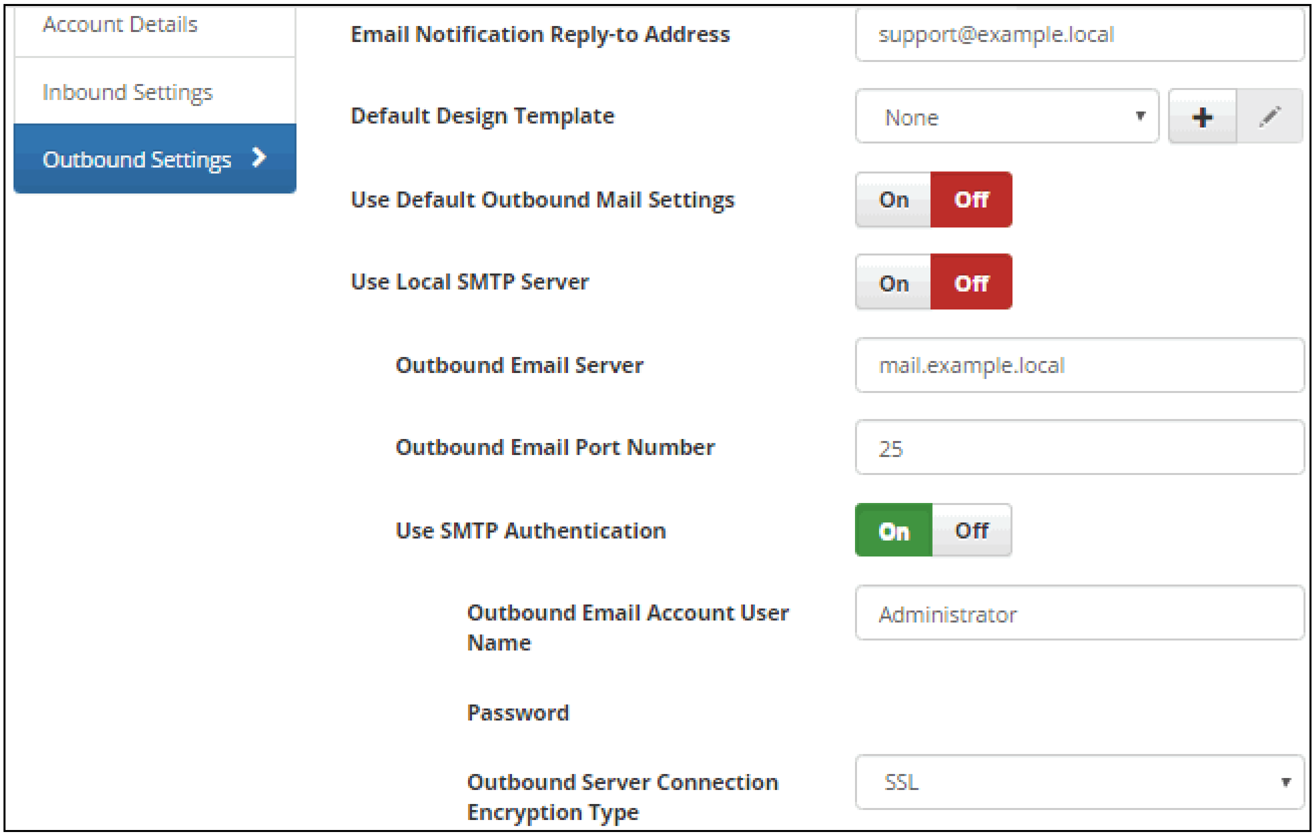
Select No to perform defined email processing on the record. Email rules in the rule group associated with the email account will evaluate and apply any actions that correspond to met conditions; email rule actions can delete or forward the incoming email, as well as create an incident or change with a defined template. If a template is not defined, an incident will be created according to the settings on the Inbound Settings/Email Processing tab and the subject line and body of the email will be placed in the Description field. If the Short Description field is enabled, the subject line will be placed in the Short Description field. If the sender does not have an email address that exists in a Customer Profile record, a new Customer Profile record will be created for the email address. Any configured work item rules will also evaluate and perform actions such as sending notifications if conditions are met.

Update Customer Record If Existing Reference Included in Email - A reference ID is included on correspondence sent from a Customer Profile record; select Yes to perform a search for a matching reference ID or message ID when the Email Processing agent runs. If a match exists, the History field in the Customer Profile record will be updated with a reference to the reply, and no new incident will be created. You can configure email rules with the event Email Does Not Include iSupport Reference and send a notification if applicable.

Select No to create a new incident. Email rules in the rule group associated with the email account will evaluate and apply any actions that correspond to met conditions; email rule actions can delete or forward the incoming email, as well as create an incident or change with a defined template. If a template is not defined, the incident will be created according to the settings on the Inbound Settings/Email Processing tab and the subject line and body of the email are placed in the Description field. If the Short Description field is enabled, the subject line will be placed in the Short Description field. If the sender does not have an email address that exists in a Customer Profile record, a new Customer Profile record will be created for the email address. Any configured work item rules will also evaluate and perform actions such as sending notifications if conditions are met.

Configuring Outbound Settings for an Email Account

Use the Outbound Settings tab to define the reply-to address, server, and account settings for iSupport event notifications for an email account.



Email Notification Reply-to Address - Enter the address to be included in the Reply To field for all notifications generated by iSupport for this inbound account. Format the email address according to the following example: support@example.local

Default Design Template - Design templates include elements (text and images) to appear around the body of the correspondence template and support representative signature (if applicable). Select the design template to apply to outbound email by default (if one associated with a correspondence template or custom notification isn't in effect). Use the Create New and View/Edit icons to access the Design Template screen. See "Configuring Design Templates" on page 24 for more information.

Use Default Outbound Mail Settings - Select Yes to use the settings defined in the Core Settings | Email | Default Outbound Email Settings screen for outbound email from this account.

Use Local SMTP Server/Outbound Email Server/Outbound Email Port Number - Select:

- Yes to use the local SMTP server for outbound email notifications sent by iSupport for this inbound account.
- No to use a server that is different from the local server on which iSupport is installed for outbound mail. Then, in the Outbound Mail Server field, enter the name of the server to be used for outbound mail sent by iSupport for this inbound account.

Regardless of your selection in this field, you'll need to set up your system to relay email. Use the following steps if you are using IIS:

1. On the server on which the mail application is installed, select Start | Programs | Administrative Tools | Internet Services Manager.

2. Right-click on Default SMTP Virtual Server and select Properties. On the Access tab, click the Relay button in the Relay Restrictions section.

3. Use the Relay Restrictions dialog to ensure that the server on which iSupport is installed is allowed to relay email.

Use SMTP Authentication/Outbound Email Account User Name/Password/Outbound Server Connection Encryption Type - The Use SMTP Authentication field appears if No is selected in the Use Local SMTP Server field (you'll be using a server that is different than the local server on which iSupport is installed for outbound email). Select Yes if you need to pass a user name and password to the outbound mail server.

In the Outbound Email Account User Name and Password fields, enter the login to authenticate against the server for accessing the outbound email account.

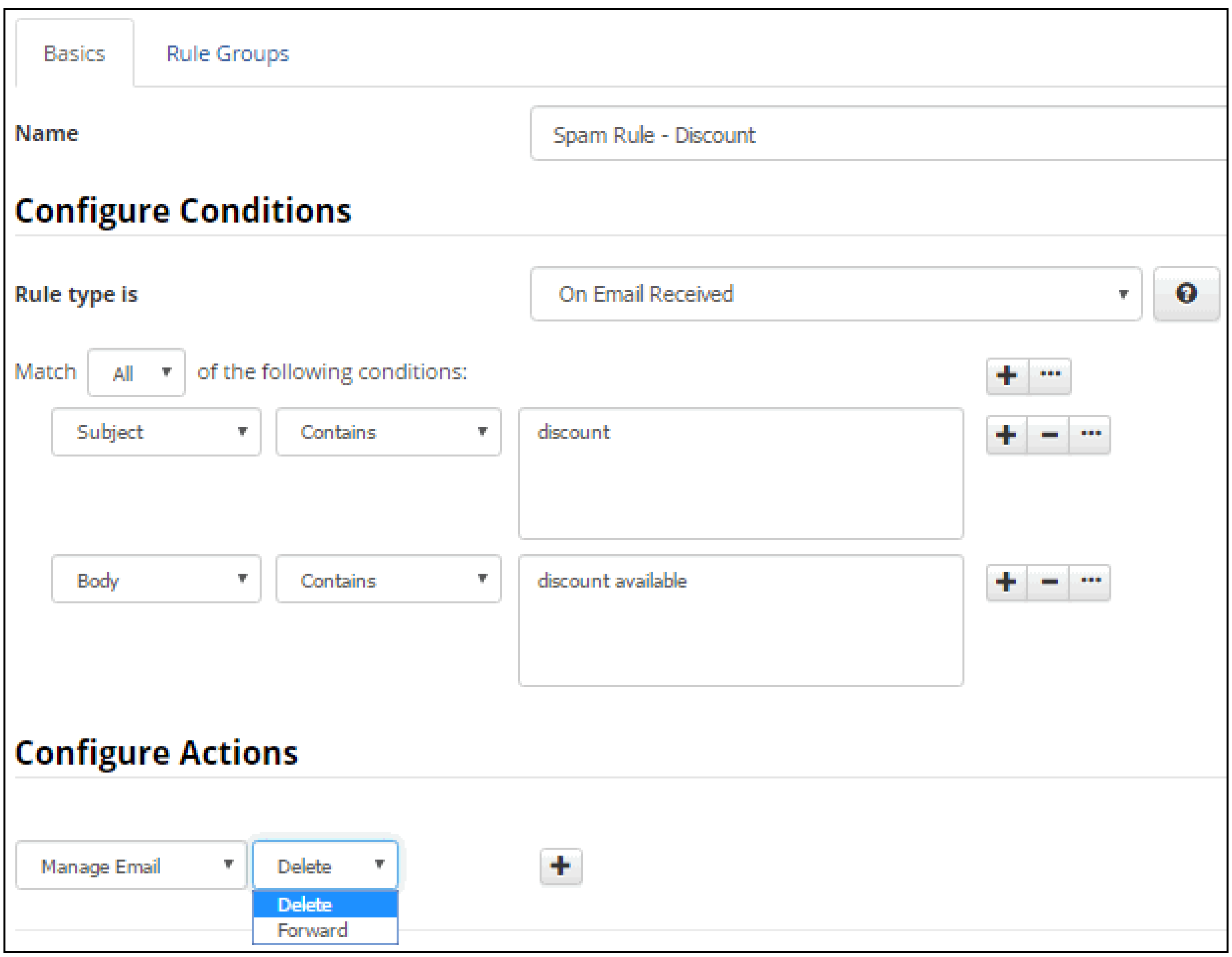
In the Outbound Server Connection Encryption Type field, if the server used for outbound email has an authentication certificate for secure communication, select the type: Transport Layer Security (TLS) or Secure Socket Layer (SSL). The default in the Outbound Mail Port Number field will change depending on your selection; verify that the number is correct and change it if necessary.

Configuring Email Rules and Rule Groups

Use the Email Rules screen to configure custom rules that will be applied to all incoming email (except those that contain an existing incident number in the subject or body of the email), and delete, forward, or create an incident or change with an applied template if the rule conditions are met. You can also post Correspondence data to a web application using email rules.

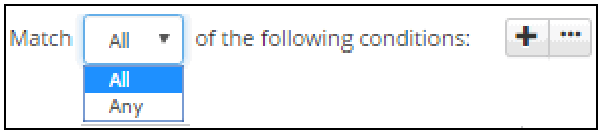
Conditions are applied on the To, CC, From, Subject, and Body fields in incoming email. Each rule can contain multiple conditions; these conditions can be individual in nature (using an AND logic operator) or grouped together (using the OR logic operator).

In order for a rule to evaluate, it must be included in a rule group; rule groups are associated with email accounts. A default email rule group will be included in iSupport on installation or upgrade; upgrades to version will convert previously configured email rules and place them in the default email rule group. Use the Options and Tools | Automate | Rule Groups screen to create new rule groups; see "Creating Rule Groups" on page 16 for more information.

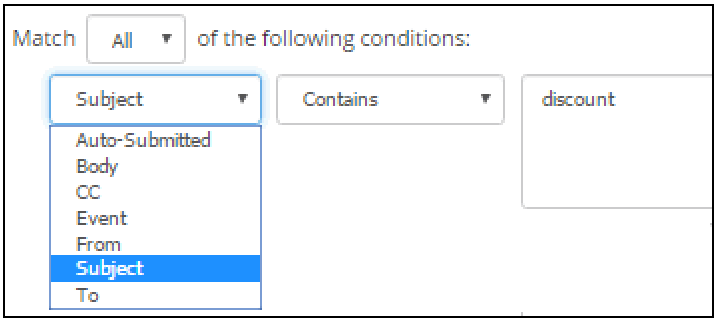


Configuring Rule Conditions

Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.

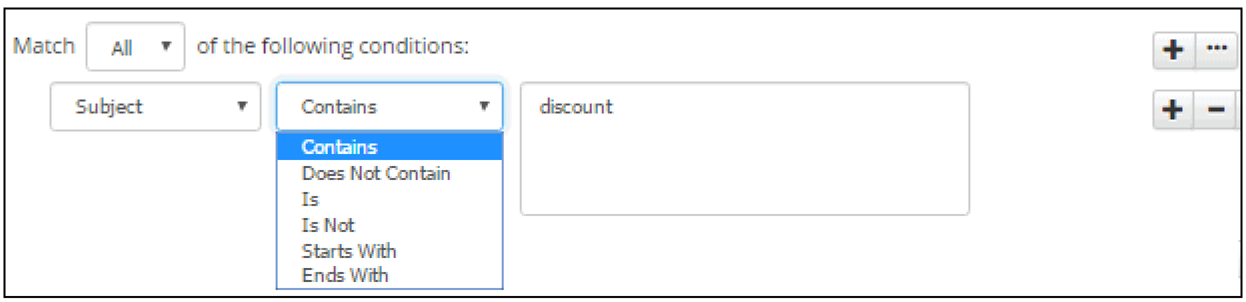


In the first dropdown, select the email field (To, CC, From, Subject, and Body) or event (Email Does Not Contain iSupport Reference) on which the comparison method and value should be applied.



The Email Does Not Contain iSupport Reference event condition refers to iSupport's unique reference to the record, including an existing message ID, 10-character work item number, or customer guid; this reference is used in email updates.

In the next dropdown, select the comparison method.



- **Contains** returns a true result if the value is included in the email field but other characters are included in the field as well; the value can be embedded in a word.
- **Is** returns a true result if the value is the only set of characters included in the email field.

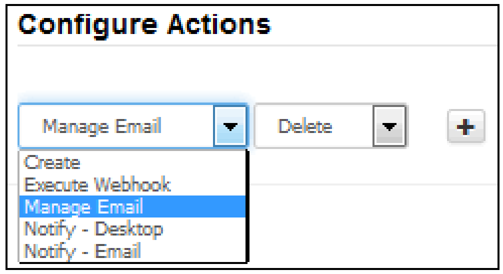
Finally, enter the value to be used with the comparison method.

Note: A literal (but not case-sensitive) search will be performed; quotation marks, asterisks, and special characters (such as the plus sign or tilde sign used in Google searches) will be treated as plain text.

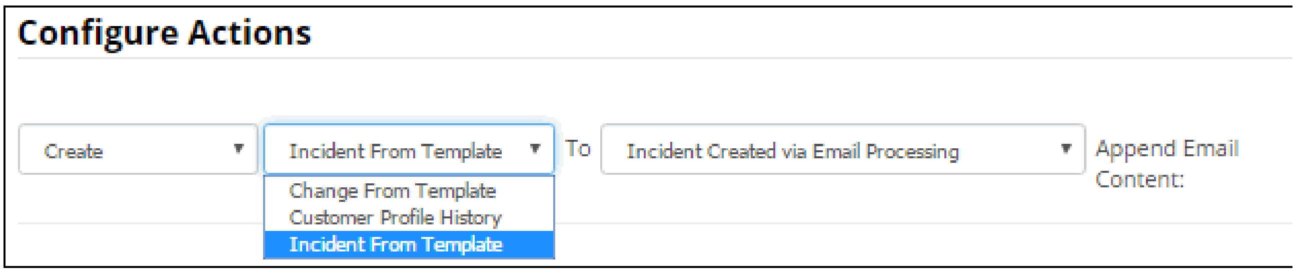
Use the Add Condition + and Remove Condition − icons to display and remove a set of condition fields (a portion of the email to evaluate, a comparison methods, and entry field) to evaluate. You can use the Add Condition Group ··· icon to put a set of conditions to be evaluated together in a group.

Configuring Rule Actions

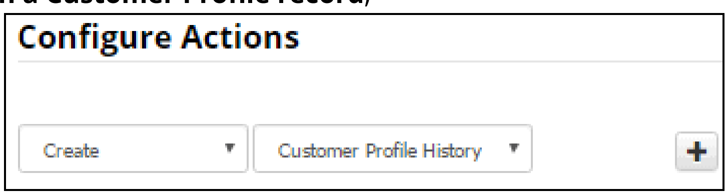
Use the Actions section to select the actions to perform when the conditions are met.



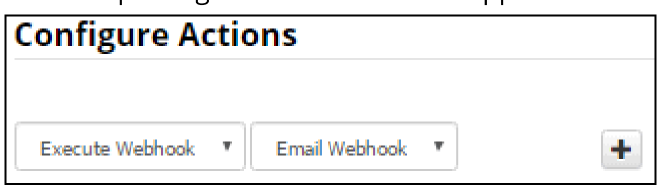
- **Create an incident or change using a template.** Use the Append Email Content button to enable the subject and body of the email to be added after the template's Description field content in the Description field of the incident or change created by the rule. If the Short Description field is enabled, the subject line content will be placed in the Short Description field instead of the Description field.



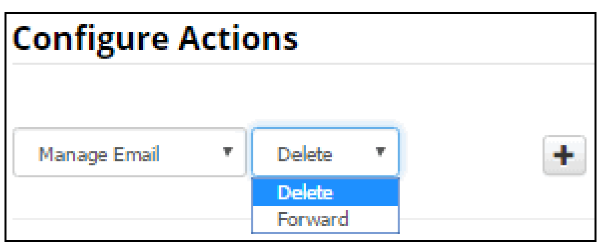
- **Create a history entry in a Customer Profile record**,



- **Execute a configured webhook** for posting email data to a web application.

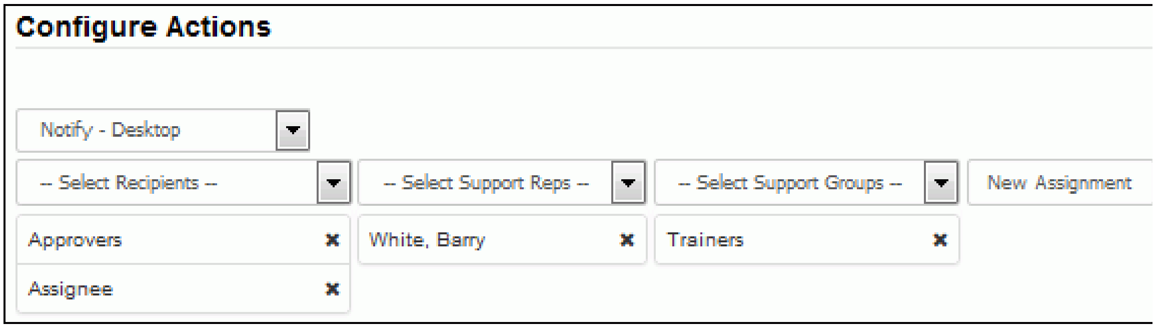


- **Delete or forward the email.**



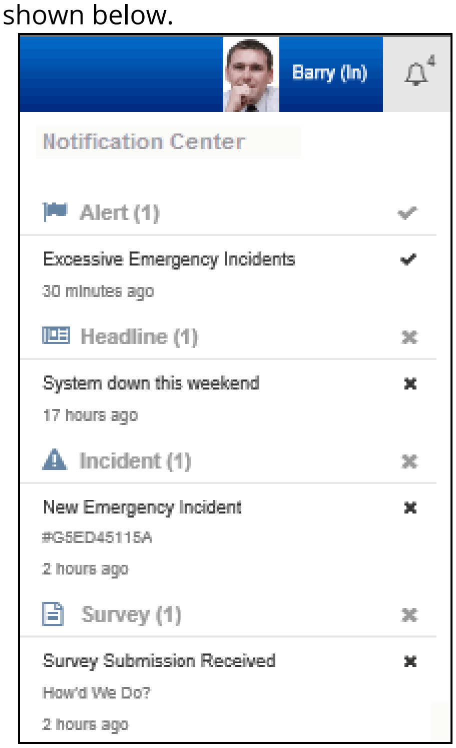
- **Send a notification** via desktop notification or email.

- **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/login) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:

An example of the dropdown is shown below.

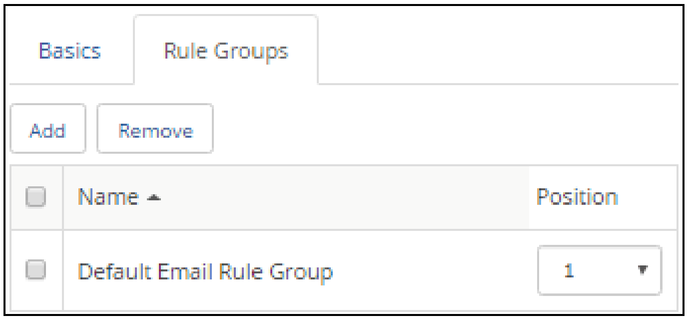


- **Email:** If sending a notification via email, select Notify - Email, the recipient, and the notification to be sent.

You can select the default or a custom notification. If possible the notification options will include one of iSupport's default notifications that match the condition or recipient.

Associating Rules With Rule Groups

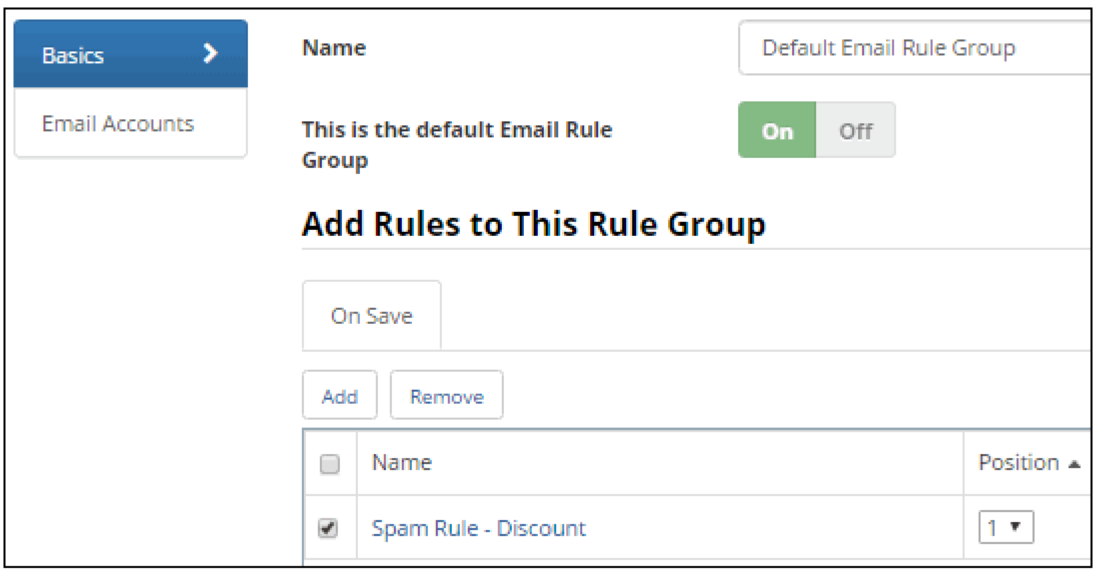
After creating a rule, you'll need to include it in a rule group. You can add a rule to a rule group via the Rule Group tab in the Rules screen or via the Options and Tools | Automate | Rule Group screen. On the Rule Groups tab in the Rules screen, click the Add link. Rule groups configured via the Rule Group screen appear; select the applicable groups and click OK. The rule group displays along with its position:



All rules in the rule group associated with an email account are evaluated when the Email Processing agent runs; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

Creating Rule Groups

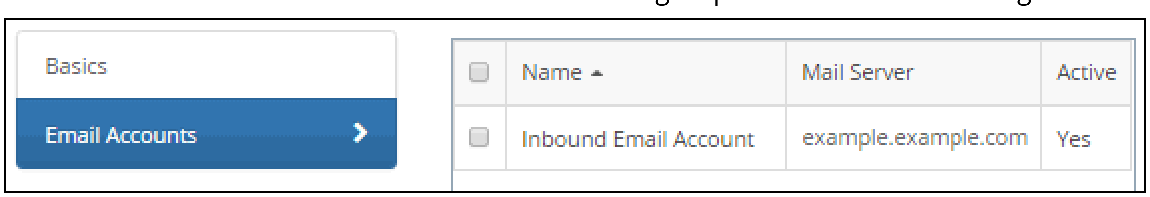
Use the Email Rule Groups screen to create a rule group, add rules to rule groups, and associate rule groups with email accounts.



Name - Enter a name for the rule group.

This is the Default Email Rule Group - Select this checkbox to designate the rule group to apply if no rule group is associated with an email account.

Click the Add link on the Email Accounts tab to associate the rule group with one or more configured email accounts.



iSupport Email Validation

In order to prevent email loops caused by automated Out of Office and email bouncing replies, iSupport performs a check on the inbound email source address during the Email Processing routine.

First Level Check

iSupport tracks a cycle of ten Email Processing agent runs to see if there has been a communication from the same email address. It checks for a quiet period, which occurs when no email messages with excessive sender email addresses are detected for one complete cycle of the Email Processing Agent. If there is no quiet period during ten Email Processing agent runs and messages keep coming from the detected email address, the excessive sender's email address is flagged as potentially causing an automated loop.

The following error appears in the log: "Email address (name) (email address) has potentially caused a loop."

During this first level excessive sender email address condition, both the Email Processing agent and notification rules will suspend sending any automated iSupport messages to the detected excessive sender's email address. All other configured recipients of iSupport notifications will continue to receive the automated messages.

Second Level Check

iSupport continues to track another cycle of ten Email Processing agent runs to see if there has been a communication from the same email address. If a condition occurs where there is no quiet period during the previous 20 consecutive runs and messages keep coming from the detected excessive sender's email address, even after the first level's suspension of automated notifications, the following error will appear in the log: "The (notification type) notification will not be sent for incident number (#). Reason: The From address (name) (email address) is a known automated email sender or has been flagged for causing an email loop or the **subject** (**subject**) indicates that the email is an out of office reply."

During the second level excessive sender condition both the Email Processing agent and notification rules will suspend sending any automated iSupport messages to the detected excessive sender's email address and all other configured recipients of the notifications associated with incidents affected by the excessive sender's email address. Email addresses for other unaffected incidents will continue to receive the configured automated notifications.

The system will automatically reset a first level condition, if a quiet period of one Email Processing agent occurs. In the case of a second level condition, two consecutive Email Processing agent routines must pass with no detected messages from the excessive sender's email address to automatically reset. Once the reset condition is met, all notifications will resume as configured.

A second level condition will be in effect immediately if the source of the email is from a known automated response source:

- Mailer Daemon
- Postmaster
- System Administrator

It will also be in effect if the **subject** line of the email contains a string of text containing:

- "Out of office Autoreply:" (This is the default text for an MS Exchange out of office notification.)
- "Undeliverable: "

These values are stored in the web.config file in the folder in which iSupport is installed. Administrators can add other automated sourced email addresses and standardized automated response **subject** lines unique to their environment.

Viewing and Creating View Subscriptions

The View Subscription feature enables you to send an email with an attached file of exported view data to configured recipients on a schedule; Support representatives can also configure view subscriptions via the Subscription icon in the View component on the Desktop. The email will be sent via the View Subscription agent, which runs on a five minute interval. Use the Email | View Subscriptions feature to create, modify, and delete view subscriptions.

View Subscriptions

Search...

Create Delete

	Name ▲	View	Author	Subject	Format
☐	Weekly Incidents by Assignee for CEO	All Incidents by Assignee, Status, and Priority	Barry White	Weekly Incidents by Assignee Report	Excel
☐	Weekly Priority Open Incidents Report	This Week's Priority Open Incidents	Barry White	This Week's Priority Open Incidents	PDF

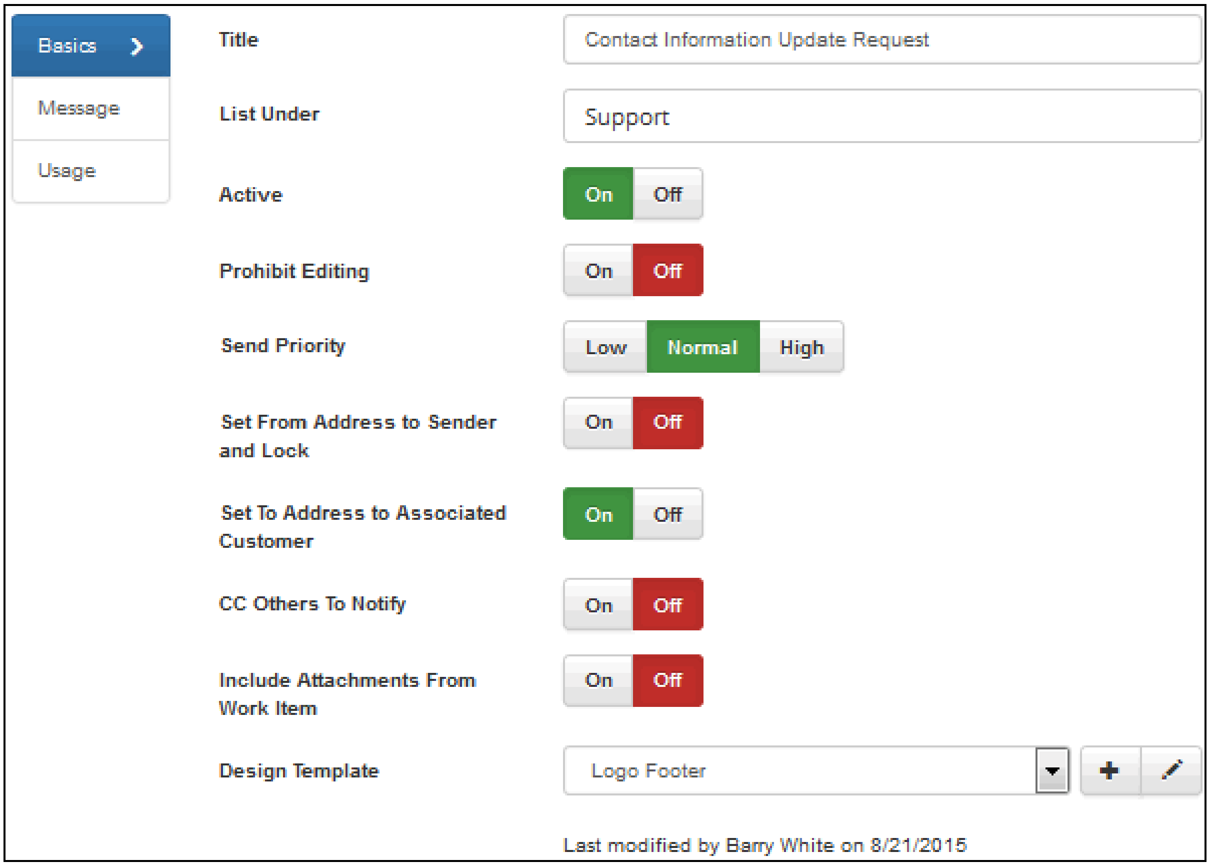
Configuring Correspondence Templates

Use the Correspondence tab on the Options and Tools | Templates screen to set up correspondence templates for use in iSupport entry screens and on the Desktop. You can include all aspects of an email, including attachments. When creating a correspondence document in iSupport, you can select a predefined template or create a new document. After the email is sent and the record is saved, notations are included in the History field. You can view sent correspondence via Correspondence views on the Desktop, and you can display and open correspondence via the View menu in iSupport entry screens. When using a multiselect view to send a correspondence, if there is a value specified in the To field on a template, a Preview dialog will appear with a Send to Template Recipients menu option. Select this option to send the correspondence to the email addresses in the To field on the template.

If permissions for personal correspondence templates are enabled in the Support Representative Profile screen, use the Personal Correspondence Template tab in Preferences to create a correspondence template that will appear only to you in the list of correspondence templates available in iSupport.

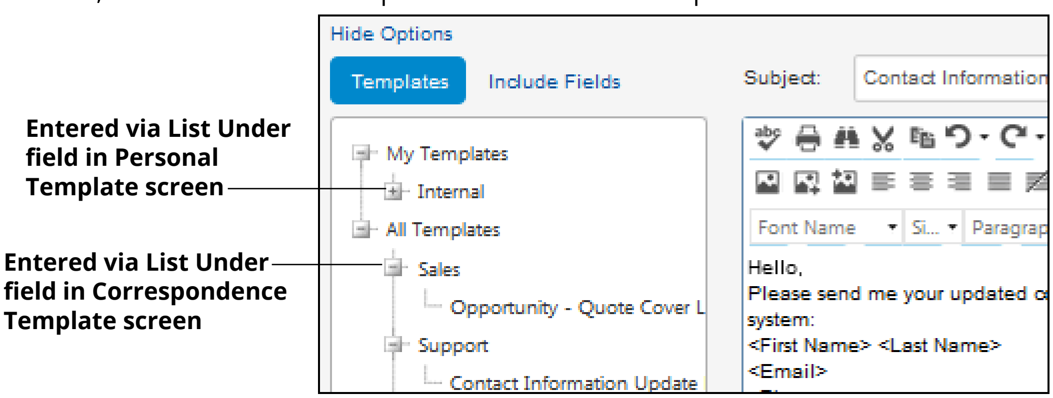
Setting Basic Options

Set miscellaneous options on the Basics tab.



Title - Enter a name for the correspondence template. If the Active checkbox is selected in this screen, this template title will display for selection in the correspondence template selection dialog.

List Under - Enter the name under which the template should appear in the list for selection in the Correspondence screen as shown below; this list includes both personal and shared templates.



Active - Select On to include the template in the correspondence template selection dialog in the Use With (Incident/ Customer Profile/Problem/Change/Purchase Request) screens.

Prohibit Editing - Select On to, when the template is selected, prevent all fields on the email from being edited.

Send Priority - Select the priority delivery level for the email created from the template.

Set From Address to Sender and Lock - Select On to populate the From field with the address of the support representative sending correspondence via the template and prevent any changes to the From field.

Set To Address to Associated Customer - Select this checkbox to append the customer from the incident to the list in the To field.

CC Others to Notify - This field appears if the Others to Notify option is enabled in the Feature Basics screen. It will not appear if only Service Contracts or Discussion Posts are enabled in the Use With field. Select this checkbox to include the CC: Others to Notify field when a correspondence is created from the template.

If originating from a customer profile or for customers selected on the Desktop, this will copy the correspondence to those on the customer's Others to Notify list as well as the Others to Notify list of the company assigned to the customer.

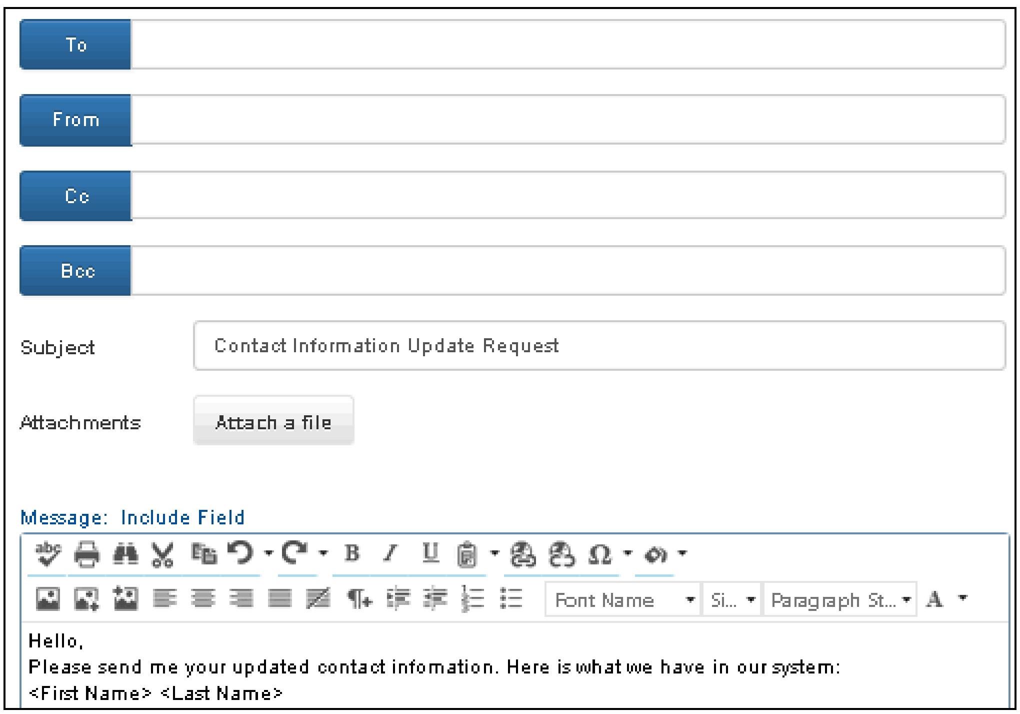
If originating from an incident, problem, purchase request, and/or change selected on the Desktop, this will copy the correspondence to those on the Others to Notify lists for the incident, the selected customer profile, the customer's company, and selected categorization.

Include Attachments From Work Item - Select On to associate any attachments from the referenced work item with the correspondence document when it is sent.

Design Template - If desired, select the design template with the elements (text and images) to appear around the body of the correspondence template and support representative signature (if applicable). You can click the Create New and View/Edit icons to access the Design Template screen; see "Configuring Design Templates" on page 24 for more information.

Configuring Message Options

Use the Message tab to enter the To, From, CC, BCC, and content of the message to populate the email created from the template.



To - Select or enter the address to which correspondence using this template should be sent. Note: When using a multiselect view from the Desktop to send a correspondence, if there is a value specified in the To field on a template, a Preview dialog will appear with the Send to Template Recipients menu option.

From - Select or enter the address to be included in the Reply To field when an email is created from the template.

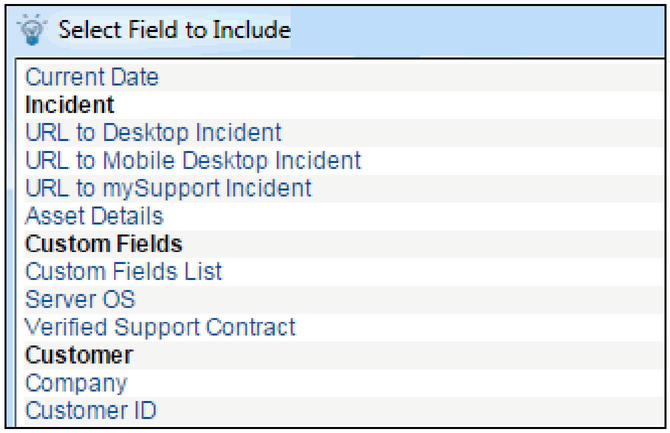
CC - Select or enter the address to be included in the CC field when an email is created from the template.

BCC - Select or enter the address to be included in the BCC field when an email is created from the template.

Subject - Enter the text to be included in the Subject field when an email is created from the template.

Attachments - Attach any files to be attached when an email is created from the template.

Use the **Include Field** link to add field values from the current record to the Body field. When the correspondence template is selected, the selected field data will be inserted into the email. The following dialog will appear for selecting values; the fields that appear will correspond with the modules selected in the Use With field. The field will be included in brackets in the message body.



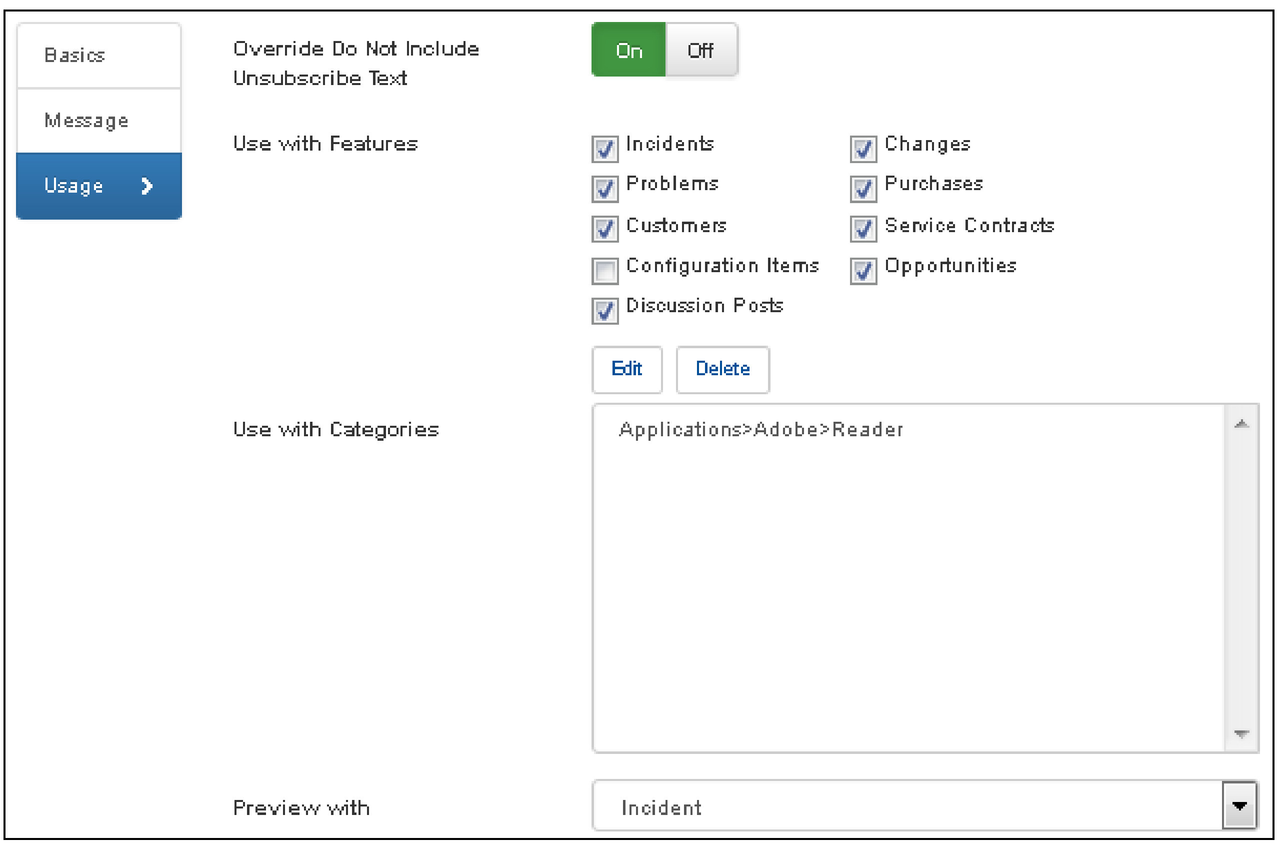
Use the <*Rep URL to Read Online*> and <*mySupport URL to Read Online*> include tags to include a URL for viewing a correspondence online (in case a message with linked images cannot be properly rendered with a mail client). You can customize the display text for the generated link by adding the following after the field, before the end bracket:

:label:*text to replace the link*

Example: <Rep URL to Read Online:label:Click here to read online>

Setting Usage Options

Use the Usage tab to set unsubscribe, availability, and preview options.



Override Do Not Include Unsubscribe Text - This field appears if Unsubscribe Settings are configured which will append unsubscribe links and text to outbound email correspondence, enabling customers to unsubscribe and prevent email from being sent by support representatives via the Desktop, Customer Profile, and Opportunity screens. After a customer has unsubscribed, the status in the Unsubscribe Status field in the Customer Profile screen will change to Unsubscribed; other options for the Unsubscribe Status field include Do Not Include Unsubscribe Text to enable correspondence to be sent without the configured links, and Include Unsubscribe Text to enable correspondence to be sent with the unsubscribe links. Select On in this field to override the Do No Include Unsubscribe Text option if it is enabled in the Unsubscribe Status field in a recipient's Customer Profile record, and enable an email to be sent.

Use With Features - Select the screens in which the template should be available: Incidents, Problems, Changes, Purchases, Customers, Service Contracts, Discussion Posts, and/or Configuration Items.

Use With Categories - Select Edit to associate the template with a categorization; the template will only appear in the list of available correspondence templates when the categorization is selected for a record, or when a correspondence is sent from a view on the Desktop.

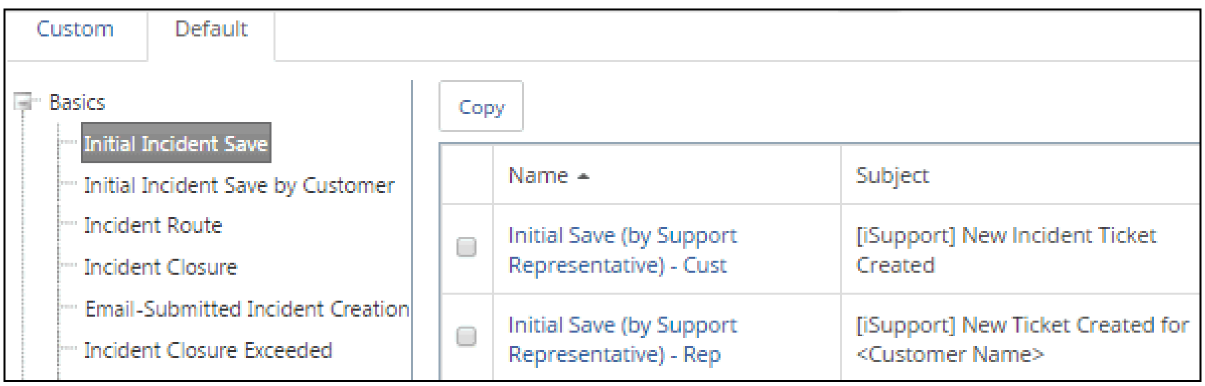
Preview With - Use the Preview With field to view the template using values from a selected record. When using a multiselect view to send a correspondence, if there is a value specified in the To field on a template, previewing correspondence will include the value in an Also Send To field. **Note:** If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

Customizing and Viewing Event Notification Content

Go to Options and Tools| Customize | Custom Notifications to view and customize the content of notifications for iSupport events. All default notifications include "[iSupport]" preceding the subject text, but you can remove that text by creating a custom notification. Event notifications are initiated in two ways:

- For iSupport's Asset, CMDB, Alert, Discussion Digest, and View Subscription functionality, notifications are sent via agents configured in the Options and Tools | Administer | Agents screen.
- For modules with rule-based functionality (Customer, Incident, Problem, Change, Opportunity, Email, Discussion Post, Purchasing, and Knowledge), notifications are sent via rules that will perform actions when specified conditions are met. (The Time-based rule agent monitors time frames for time-based rules, however.)

In the Custom Notification screen, you can display and copy iSupport's default notifications via the Default subtab, and create new custom notifications via the Custom subtab.



About Recipients

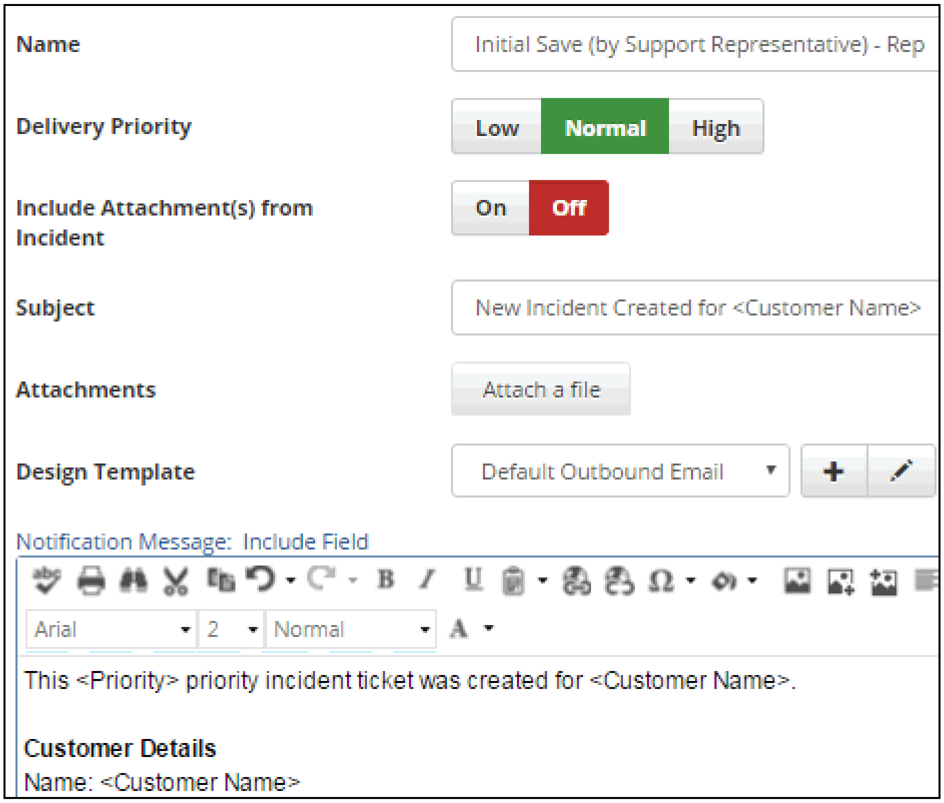
Recipients for default notifications can include both support representatives and customers, and the default notification text is different for each. Support representative notifications (designated as "Rep") typically contain customer details, the priority, the assignee, the URL to Desktop incident, and the URL to Mobile incident. Customer default notifications (designated as "Cust") typically contain a link to the record on a mySupport portal; this link will go to the URL specified in the mySupport Portal Configuration screen.

Duplicates will be checked in order to prevent a recipient from receiving the same notification more than once. However, duplicate notifications to the same recipient may still occur. For example, if the incident creation notification is configured to be sent to the Customer and CC: Others to Notify as well as the Assignee and CC: Others to Notify, and the customer is on the Others to Notify list, the customer could receive a customer-targeted incident creation notification as well as a support representative-targeted incident creation notification, and the link on the support representative-targeted incident creation notification may not be accessible to the customer. Use the Others to Notify views on the Desktop to review potential notification recipients.

Recipient email addresses are validated; if a blank address exists, no attempt will be made to send it. Automatic notifications sent via agent will note errors in the Event Log. If an agent is run manually, errors will also display in a dialog after the agent runs. The SMTP server will be checked for responsiveness; if it is unresponsive, an error will be included in the log and processing will stop for that time. The notification failure threshold is 36 hours and all attempts will be stopped after that point. If a component of a notification is missing and cannot be resolved, an error will be included in the log and the notification will be deleted after 36 hours.

Creating a Custom Notification

Use the Custom Notifications screen to select the delivery priority, enter subject and body text, and attach files for a custom notification. You can include data from the associated record via the Include Field link.



Name - Enter a name for the custom notification.

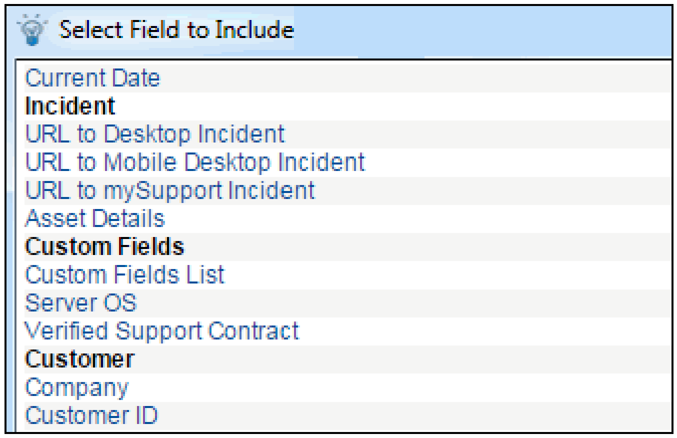
Delivery Priority - Select the priority level to assign to the email: High, Normal, or Low.

Design Template - If desired, select the design template with the elements (text and images) to appear around the body of the correspondence template and support representative signature (if applicable). You can click the Create New + or View/Edit icons to access the Design Template screen; see "Configuring Design Templates" on page 24 for more information.

Subject/Notification Message - In the Subject field, enter the subject line for the email notification.

On the Body tab, enter the body of the email notification. You can click the Notification Message link to display a larger window for entry.

In both fields, you can use the Include Field link to add values from the record. Place the cursor where the data is to be inserted and click the Include Field link. The following dialog appears; select the field to insert. When the event occurs, the selected field data will be inserted into the email.



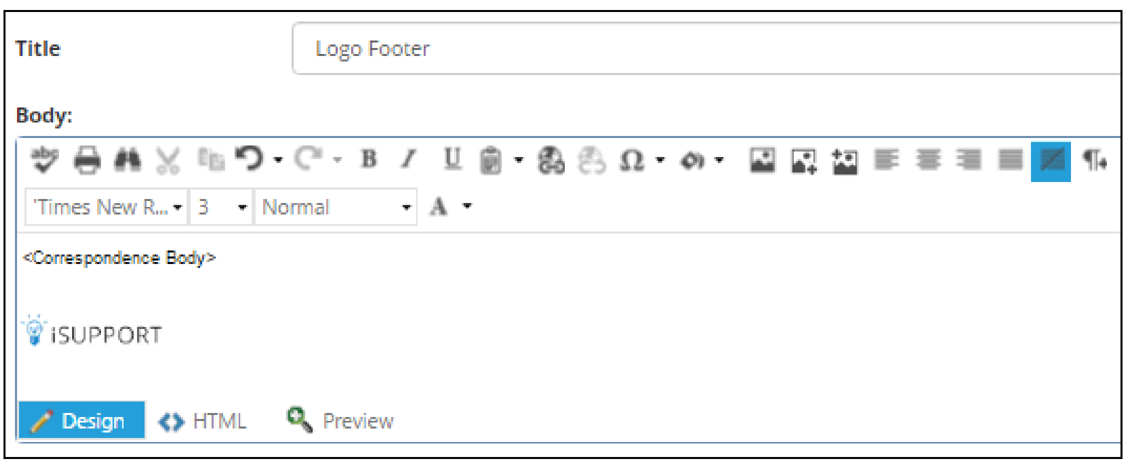
Include Attachment(s) from <record type> - For all modules except Asset, CMDB, Discussion Posts, Security, and Alerts, select this checkbox to associate any attachments from the referenced work item type to the notification when it is sent.

Attachments - Use the Attachments tab to attach a file to be sent with the notification.

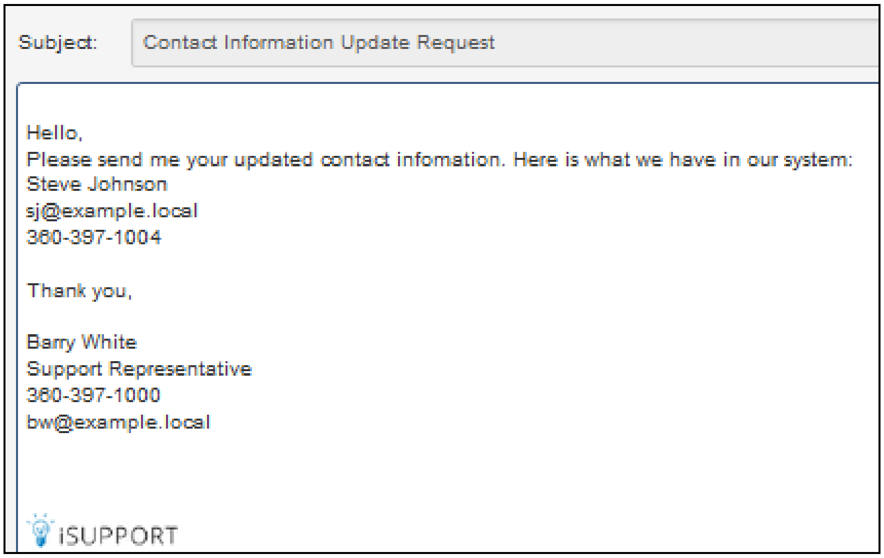
Note: If data does not exist for a required field, nothing will be inserted when the email is generated. The field area will be blank.

Configuring Design Templates

Use design templates to add common design elements such as header and footer text or images to outbound email generated from iSupport. Use the Design Templates tab in the Core Settings | Email screen to enter a title and text and images; the <Correspondence Body> tag indicates where the email data will be inserted when the design template is applied.



If a support representative sending a correspondence with the design template has a signature block, design elements that are after the <Correspondence Body> tag will appear after it.

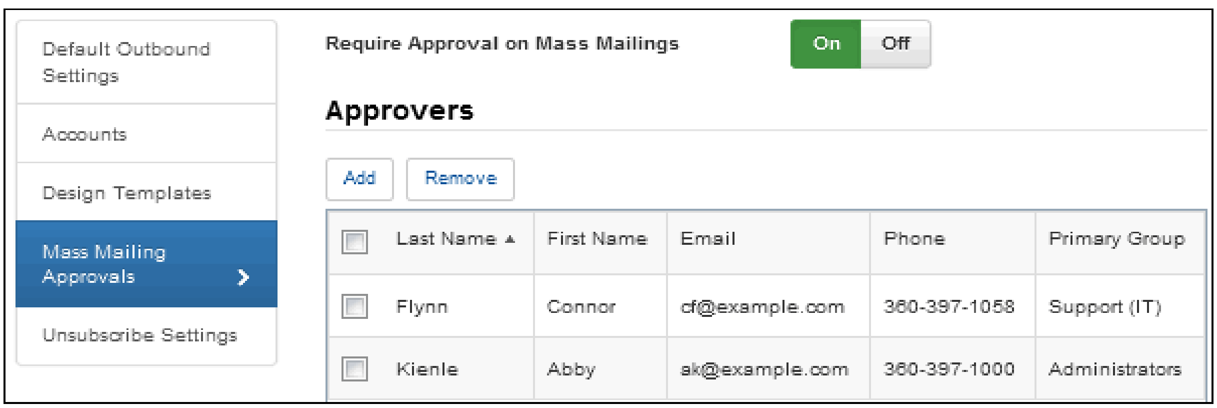


Configuring Mass Mailing/Approvals

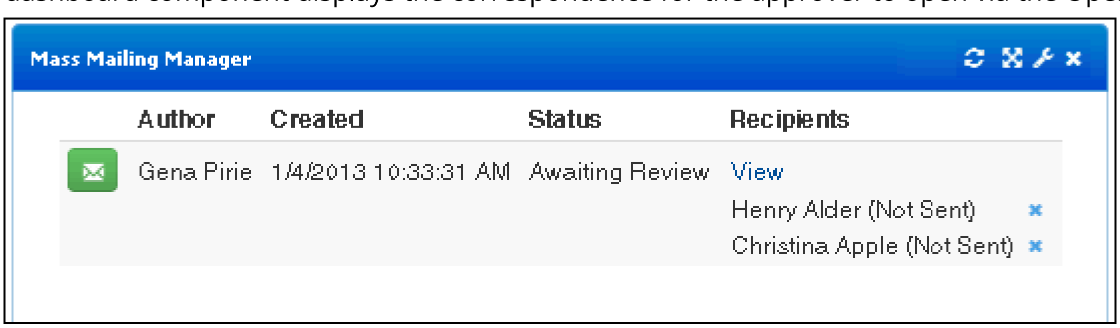
iSupport's Mass Mailing Approvals feature requires approvals on any correspondence sent from a customer view. The Mass Mailing component includes correspondence that is awaiting approval or has been rejected by an approver.

To configure this feature:

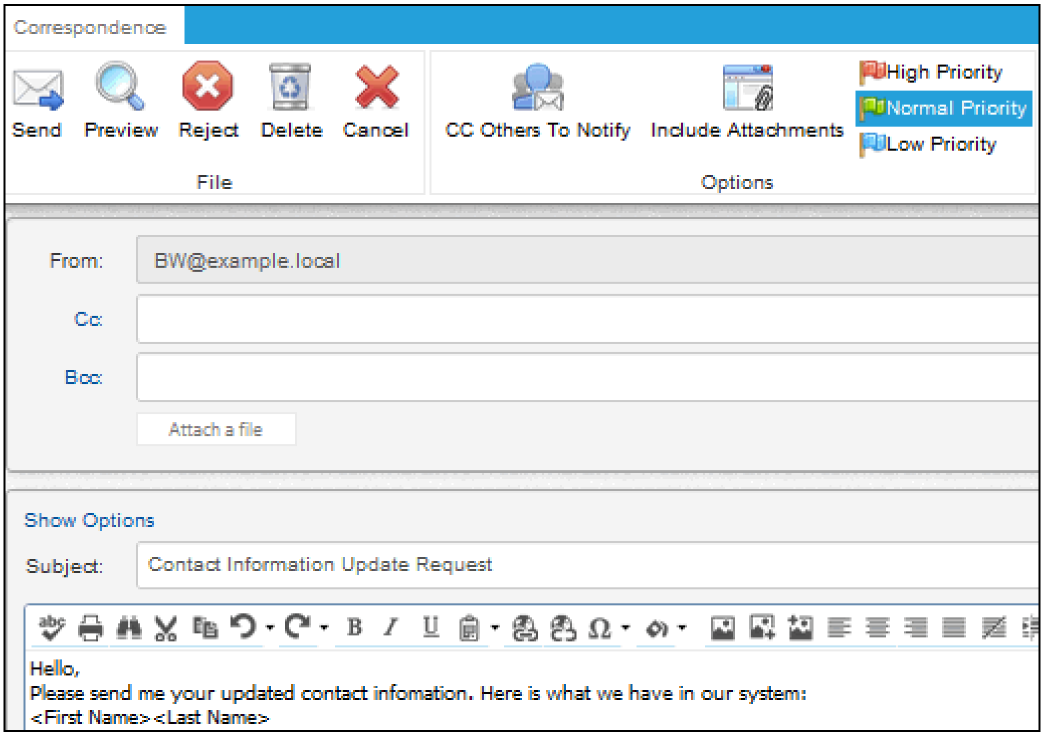
- Enable required approvals and designate approvers via the Mass Mailings screen.



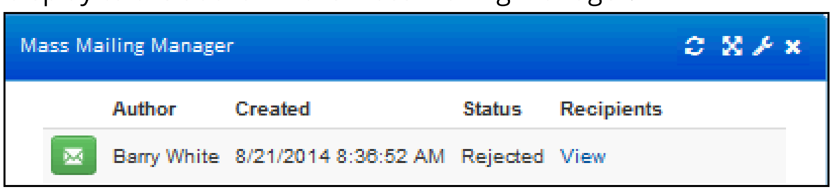
- Use the Dashboard Settings screen to make the component available for the author and approver to add to a dashboard.
- When the author creates a correspondence from a customer view and clicks the Send button, the Mass Mailing Manager dashboard component displays the correspondence for the approver to open via the Open icon.



Approvers can use the Reject button in the Correspondence screen to prevent the correspondence from being sent, or the Send button to send the correspondence.



The correspondence will display to the author in the Mass Mailing Manager.



Displaying the Notification Queue

Use the Notification Queue option under Options and Tools | Administer to display all notifications that have not been sent. You can use the checkboxes to restrict the notifications to appear in the screen, and delete any notifications that you do not wish to be sent.