Configuring iSupport Opportunity Functionality

Overview

Basic Configuration

- Enable and set **basic Opportunity options** in Core Settings | Feature Basics, including configuring Intuit® QuickBooks® integration and entering information to include on quotes generated via the Opportunity screen. Intuit® QuickBooks® integration and enter information to include on quotes generated via the Opportunity screen. See “Setting Opportunity Basics Configuration Options” on page 4 for more information.
- Configure **roles/permissions** for support reps and rep groups using Opportunity functionality via the Support Representatives or Groups screens. See the online help for more information.

Customization

- Use the following options under Options and Tools | Customize | Opportunity:
- Configure **opportunity types** to group opportunities in a descriptive manner for tracking and reporting. Types are assigned to opportunities in the Opportunity screen. See “Creating Opportunity Types” on page 8 for more information.
- Use the **Product Groups** screen to configure line item groups for classifying and filtering line items. Use the **Product** screen to configure line items that will be available for selection when creating quotes and invoices in the Opportunity screen. See “Creating Product Groups and Products” on page 9 for more information.
- Use the Opportunity Stages screen to configure **stages** for describing the different parts of the sales process for tracking and reporting. Stages are assigned to opportunities in the Opportunity screen. See “Creating Stages” on page 8 for more information.

Integration

- Use the Options and Tools | Automate | Webhooks screen to configure **webhooks** for posting iSupport’s Opportunity data to a web application when configured rule conditions and time frames are met. See “Configuring Webhooks” on page 11.

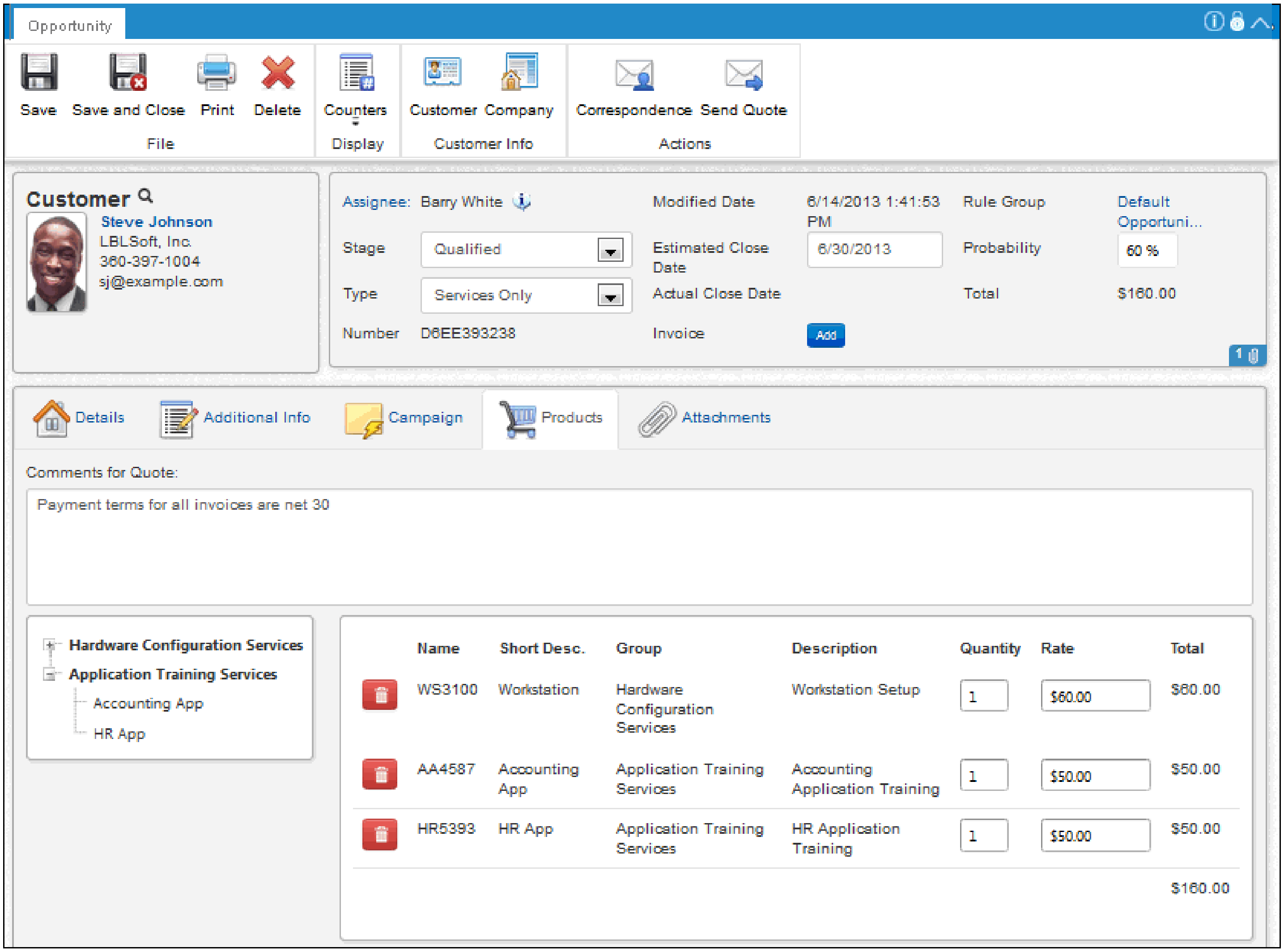
Automation

Use the following options under Options and Tools | Automate:

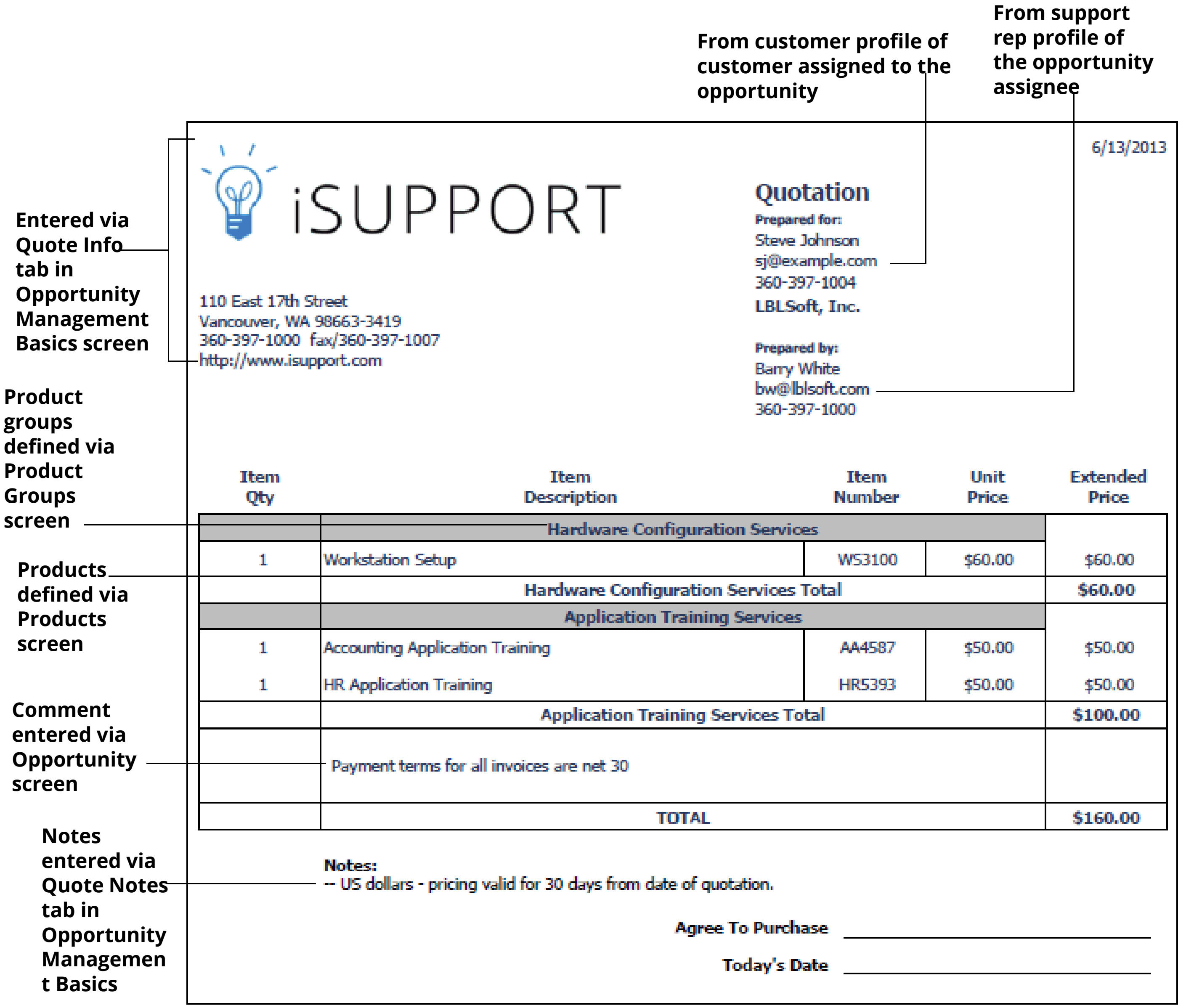
- Configure **correspondence templates** for use with quotes. See the online help for more information.
- Configure condition-based **rules** to send notifications, change field values, initiate web hooks, and more. See “Configuring Rules and Rule Groups for Opportunities” on page 12 for more information.

The Opportunity Screen

Create a product list for an opportunity by dragging and dropping preconfigured product groups and products, and then changing the rate and quantity of each item if necessary. Quotes will include the items on the Products tab; to generate a quote, you'll use the Send Quote action.



Quotes are sent in PDF format as an attachment to an email that you configure using the Correspondence Template screen. You'll configure the logo, address, products, product groups, and more. An example of a quote is shown below.



6/13/2013

Quotation

Prepared for:
Steve Johnson
sj@example.com
360-397-1004
LBLSoft, Inc.

Prepared by:
Barry White
bw@lblsoft.com
360-397-1000

110 East 17th Street
Vancouver, WA 98663-3419
360-397-1000 fax/360-397-1007
http://www.isupport.com

Item Qty	Item Description	Item Number	Unit Price	Extended Price
	Hardware Configuration Services			
1	Workstation Setup	WS3100	$60.00	$60.00
	Hardware Configuration Services Total			**$60.00**
	Application Training Services			
1	Accounting Application Training	AA4587	$50.00	$50.00
1	HR Application Training	HR5393	$50.00	$50.00
	Application Training Services Total			**$100.00**
	Payment terms for all invoices are net 30			
	TOTAL			**$160.00**

Notes:
-- US dollars - pricing valid for 30 days from date of quotation.

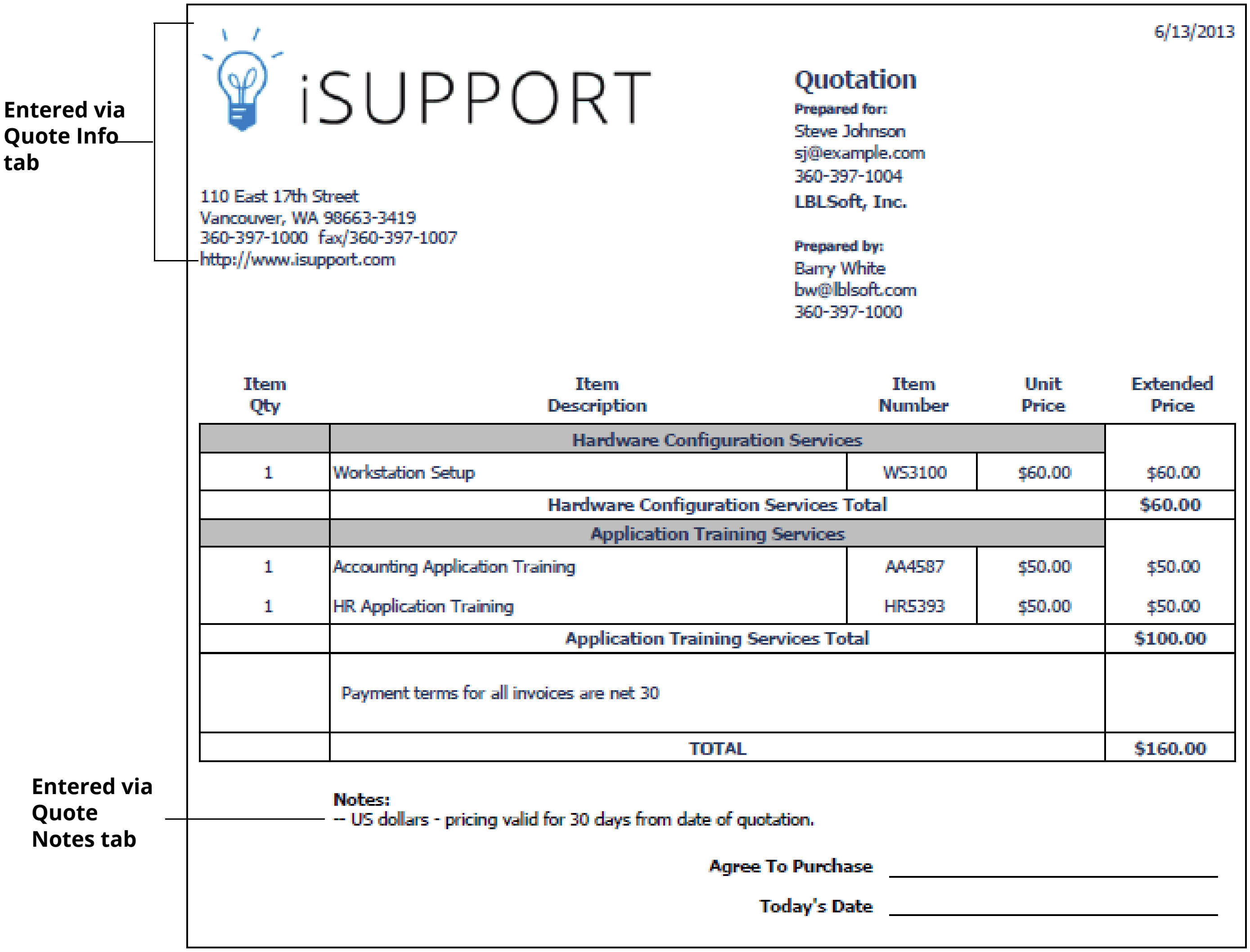
Agree To Purchase ____________________

Today's Date ____________________

Setting Opportunity Basics Configuration Options

Use the Opportunity Basics screen to configure Intuit® QuickBooks® integration and enter information to include on quotes generated via the Opportunity screen.

Example



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	TOTAL			**$160.00**

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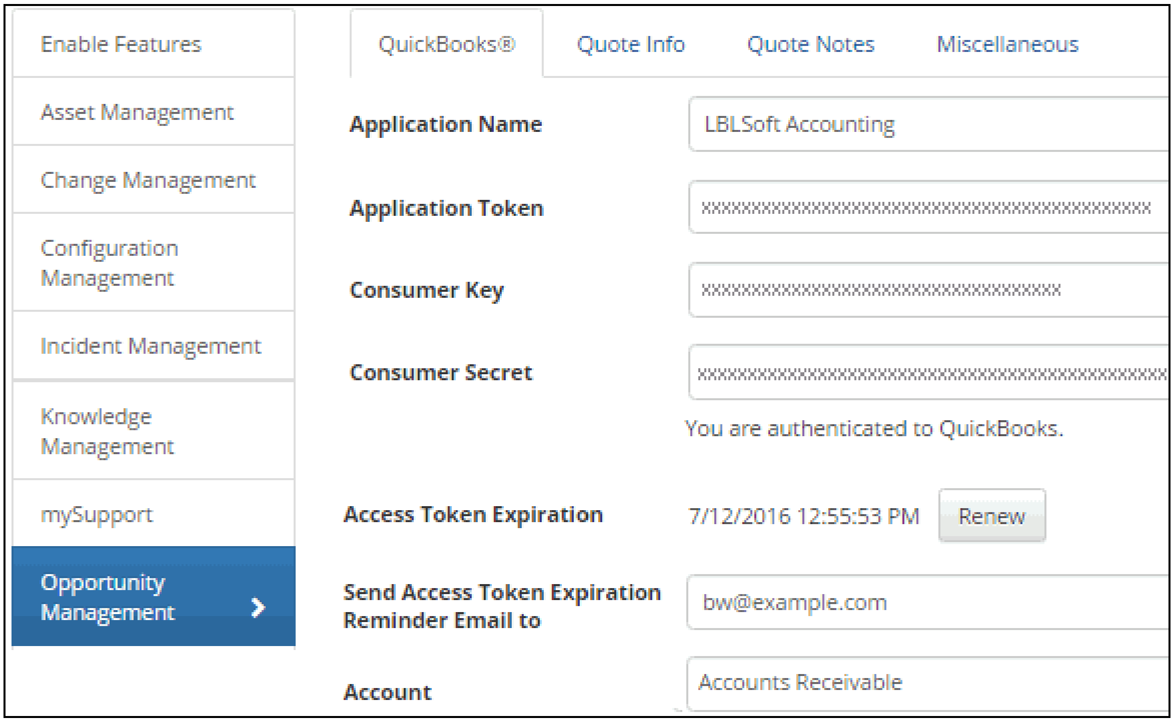
Configuring QuickBooks Integration

Use the QuickBooks tab to enable iSupport's Intuit® QuickBooks® integration functionality, which enables an Export to QuickBooks icon to appear in the Opportunity screen for sending opportunity information to QuickBooks to create an invoice. (Note that display of the Export to QuickBooks icon is controlled by a permission in the Rep Profile screen.) When information is exported to QuickBooks, if the customer's company does not exist in QuickBooks, a

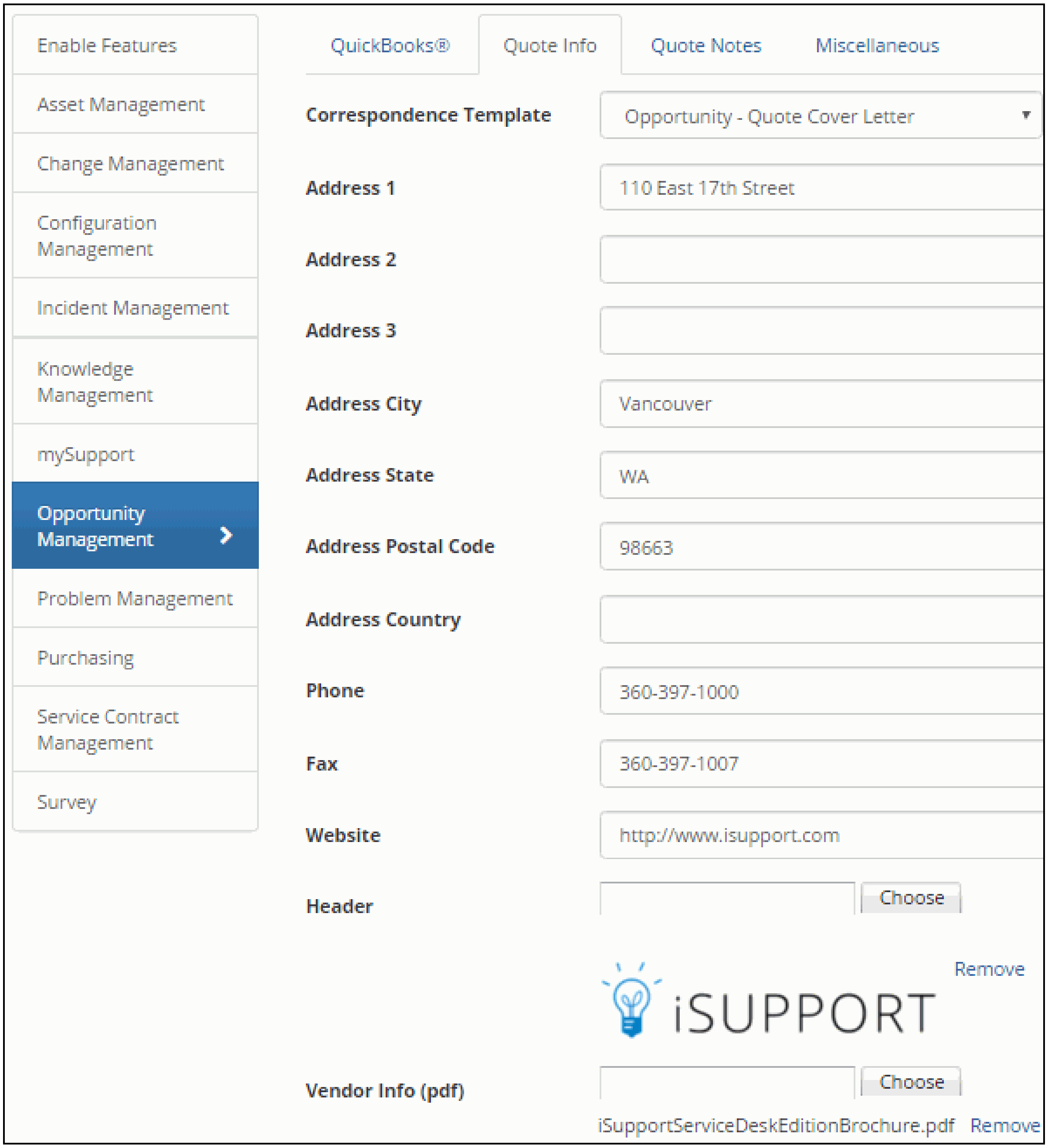
Sync Company to QuickBooks dialog will appear with a list of the companies in QuickBooks and a Create New button for adding the new company to the QuickBooks system.



QuickBooks Integration fields - Use the information in your QuickBooks API project to make entries in the **Application Name**, **Application Token**, **Consumer Key**, and **Consumer Secret** fields on the QuickBooks tab and then click the Sign in with intuit button to authenticate to QuickBooks.

Configuring Quote Info

Use the Quote Info tab to select the correspondence template to display by default when generating a quote, and to enter the address, web site, logo, and vendor information to appear on a quote as shown in the "Example" on page 4.



Correspondence Template - Select the predefined correspondence template to display by default when generating quotes from the Opportunity screen.

Address 1-3, City, State, Postal Code, Country, Phone, Fax - Enter your company information to include in the upper left corner of the quote under the header logo.

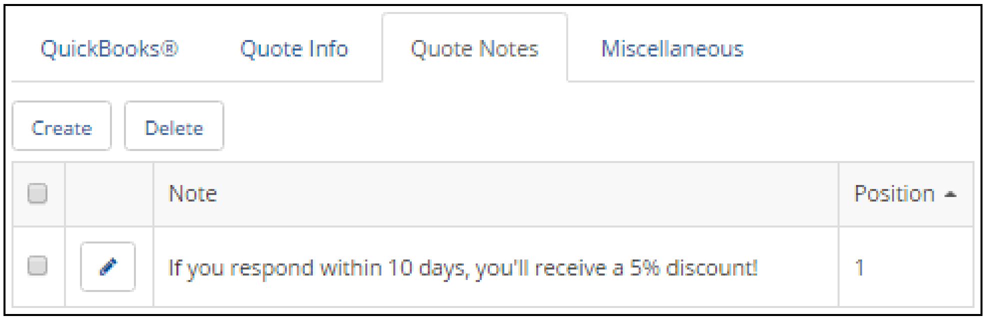
Website - If applicable, enter a URL to include in the upper left corner of the quote under the contact information.

Header - Select an image to include in the upper left corner of the quote.

Vendor Info (PDF) - If applicable, select a PDF file to include as the second and following pages in the generated quote PDF.

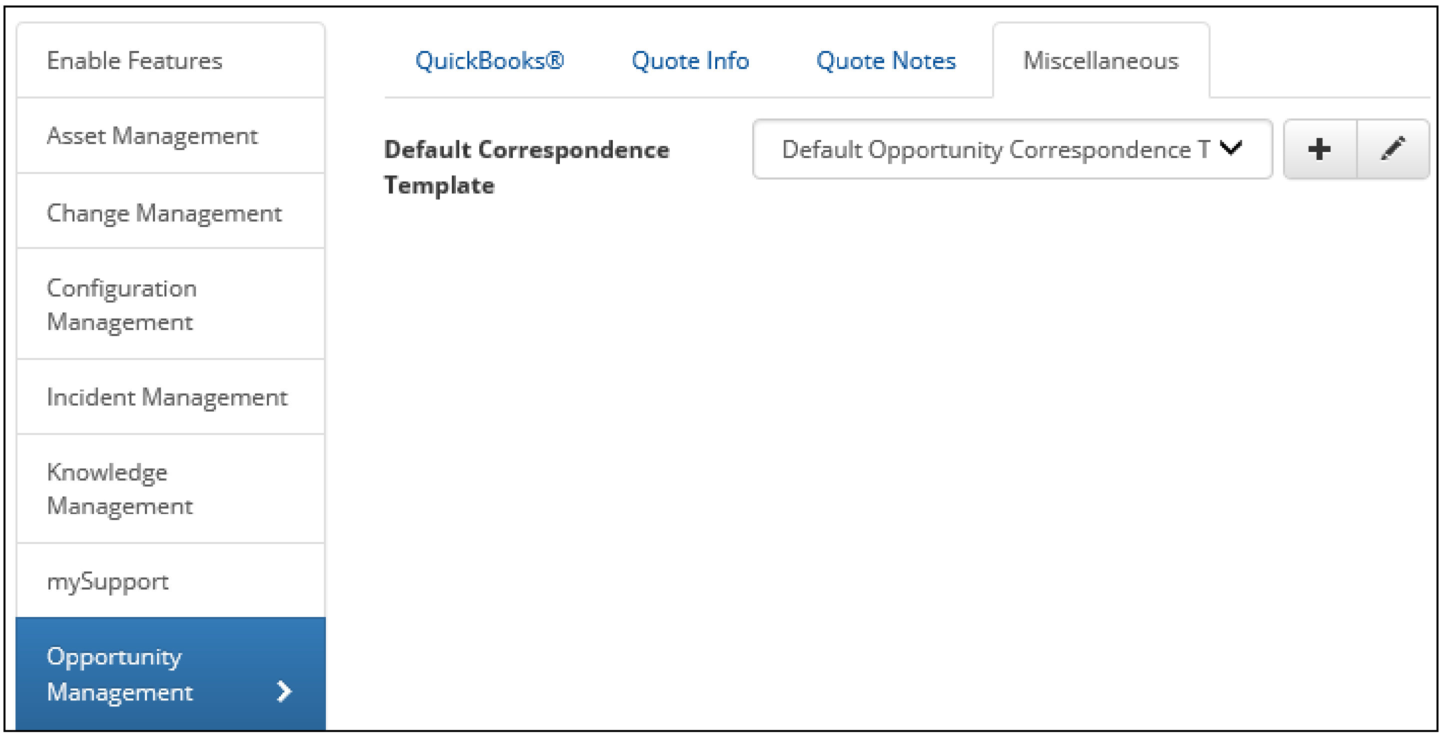
Configuring Quote Notes

Use the Quote Notes tab to enter information to include under the products on a quote.



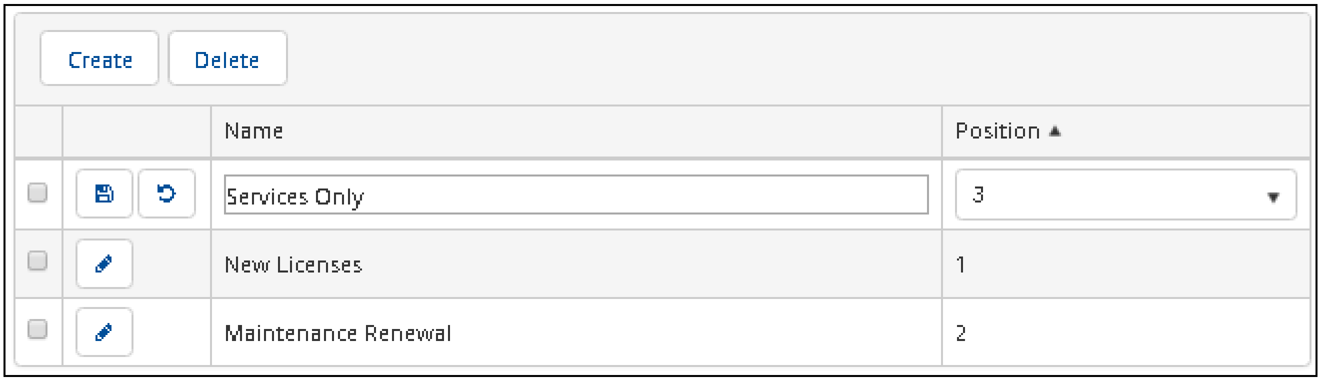
Setting a Default Correspondence Template

Use the Default Correspondence Template field on the Miscellaneous tab to select the correspondence template that will apply by default when a support representative initiates a correspondence via the Opportunity entry screen. Correspondence templates that are active and enabled for the Opportunity module will be available for this feature. Use the Create New and View/Edit icons to access the Correspondence Template screen.



Creating Opportunity Types

Use the Opportunity Types screen to create opportunity types for grouping opportunities in a descriptive manner for reporting. Types are assigned to opportunities in the Opportunity screen, and you can configure rules to change the type.



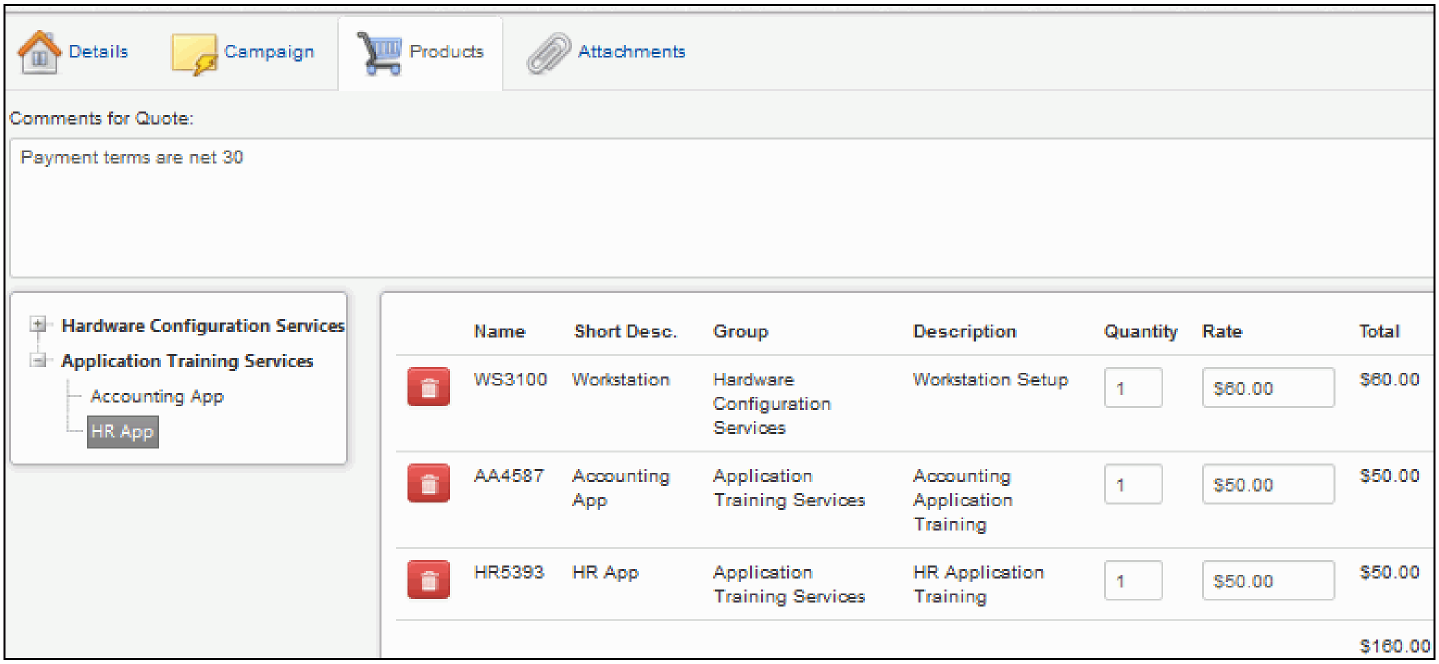
Creating Stages

Use the Opportunity Stages screen to create stages for describing the different parts of the sales process. Stages are assigned to opportunities in the Opportunity screen, and you can configure rules to change the stage.

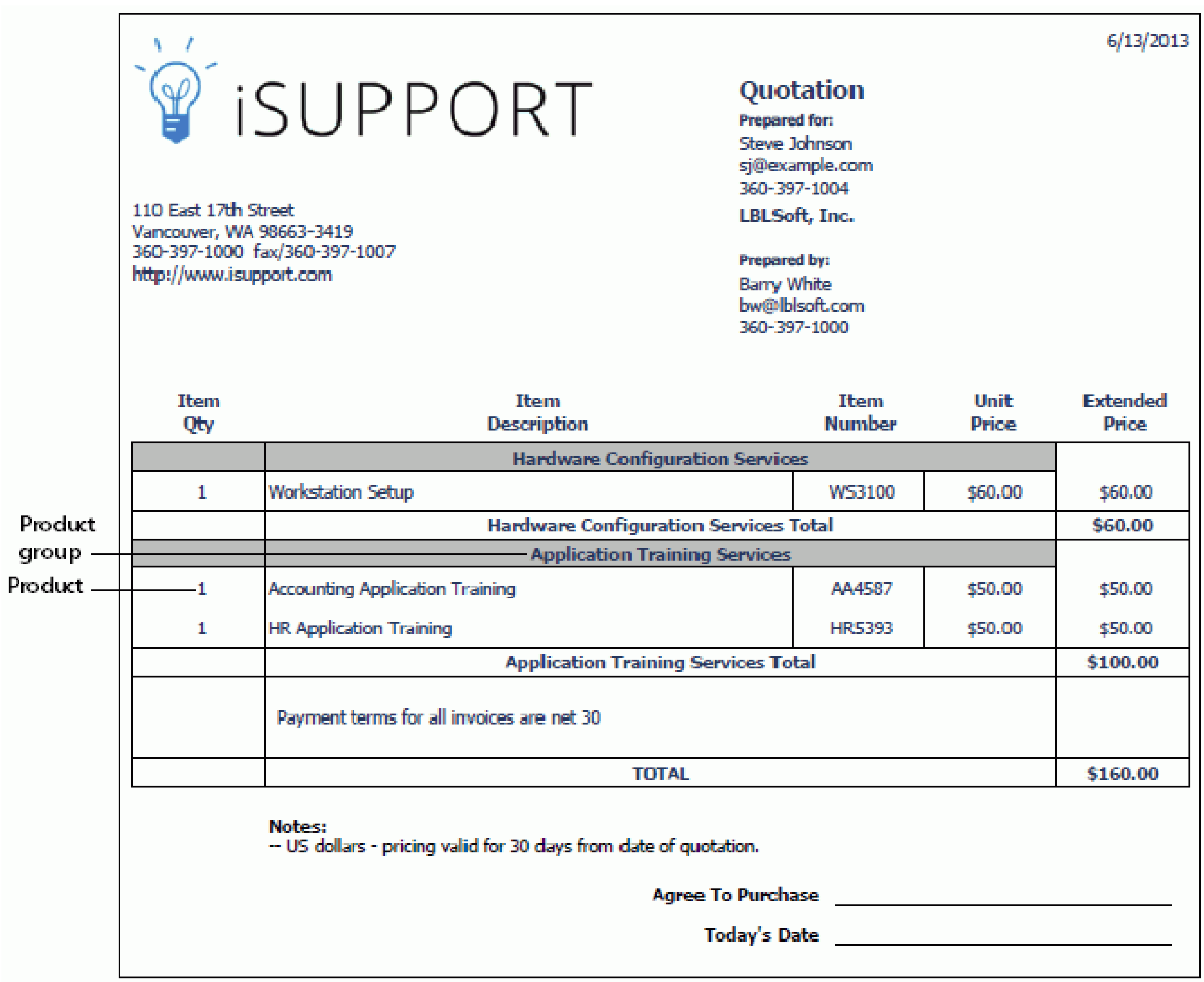
Use the Requires Win/Loss Reason field to require an entry in the Win/Loss Reason field and automatically populate the current date in the Actual Close Date field after selecting the status and saving an Opportunity record. This will also prohibit modification of the Assignee, Stage, Type, Estimated Close Date, Actual Close Date, Purchase Order, and Probability fields in the Opportunity screen. The Edit Closed Opportunity permission will enable modification of the Assignee, Stage, Type, Estimated Close Date, Purchase Order, and Probability fields after a stage requiring a win/loss reason is selected in the Opportunity screen and the opportunity is saved.

Creating Product Groups and Products

Products are selected in the Opportunity screen via the Products tab:



Product groups and products are included on quotes as shown in the example below:



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	TOTAL			**$160.00**

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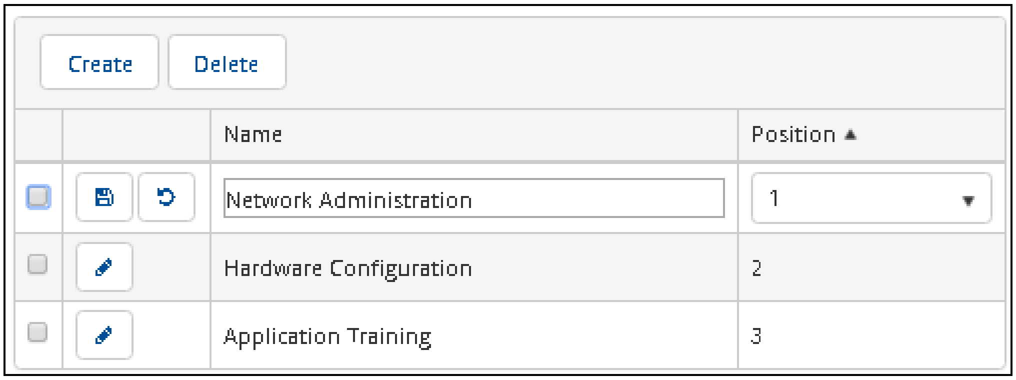
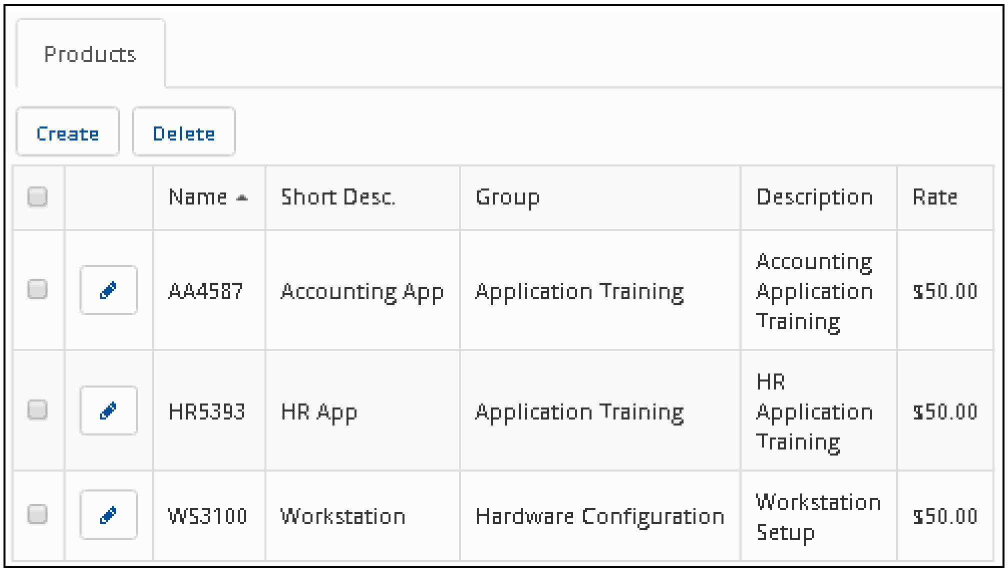
Today's Date ____________________

Use the Opportunity Product Groups screen to create product groups for classifying and filtering products that are available for selection in the Opportunity screen.



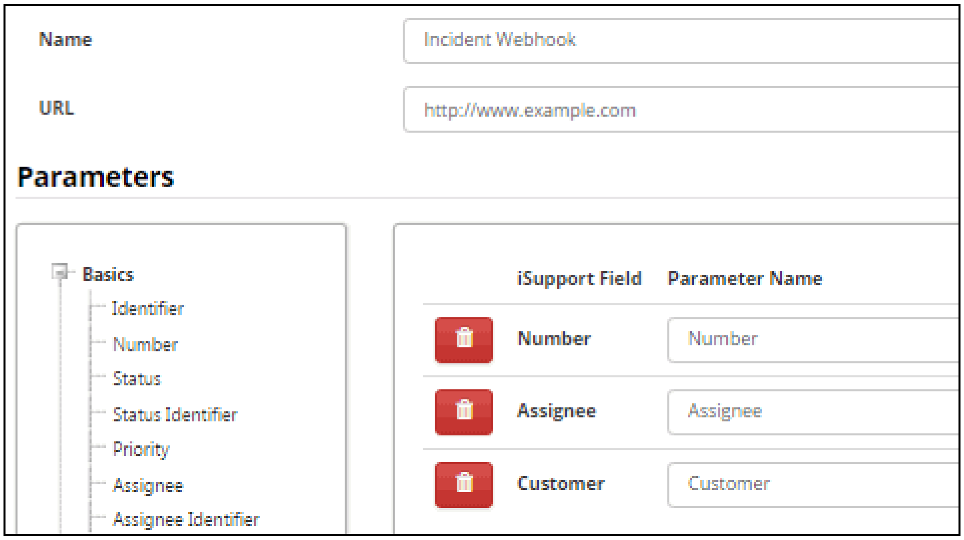
Use the Opportunity Products screen to create products that will be available for selection in the Opportunity screen.



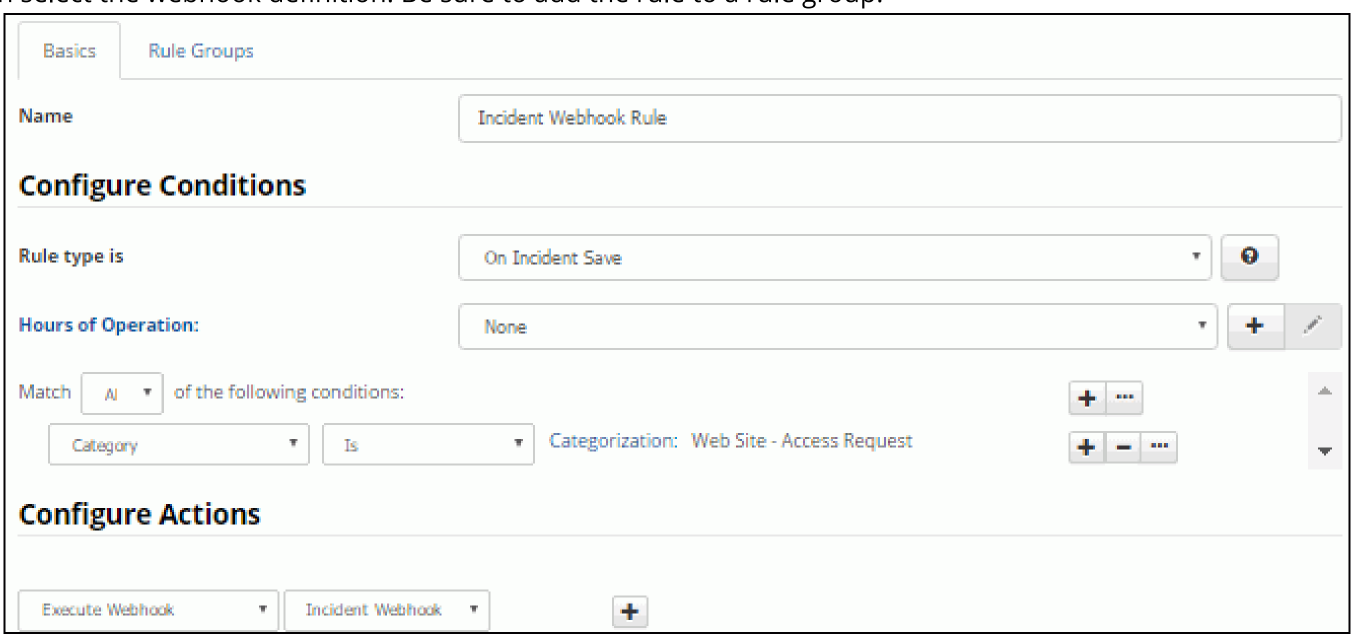
Configuring Webhooks

Use the Webhooks screen to configure webhooks for posting iSupport data to a web application. You will specify a web application URL for iSupport to post data to and the fields containing the data you want to receive, and iSupport will post the field data to the URL when configured rule conditions and time frames are met.

In the Webhooks screen, enter the name of the webhook definition that will be used in the Rule screen and URL to which iSupport data should be posted. Drag the iSupport data source fields containing the data you want to receive into the frame on the right, and enter the corresponding fields on your web form in the Parameter Name column. Note that you can drag field rows vertically to reposition fields.



Use the applicable Rule screen to configure the conditions and time frame on which the post action will occur. Select the rule type, enter the condition(s) to be met in order to initiate the post, select the Execute Webhook action, and then select the webhook definition. Be sure to add the rule to a rule group.



Configuring Rules and Rule Groups for Opportunities

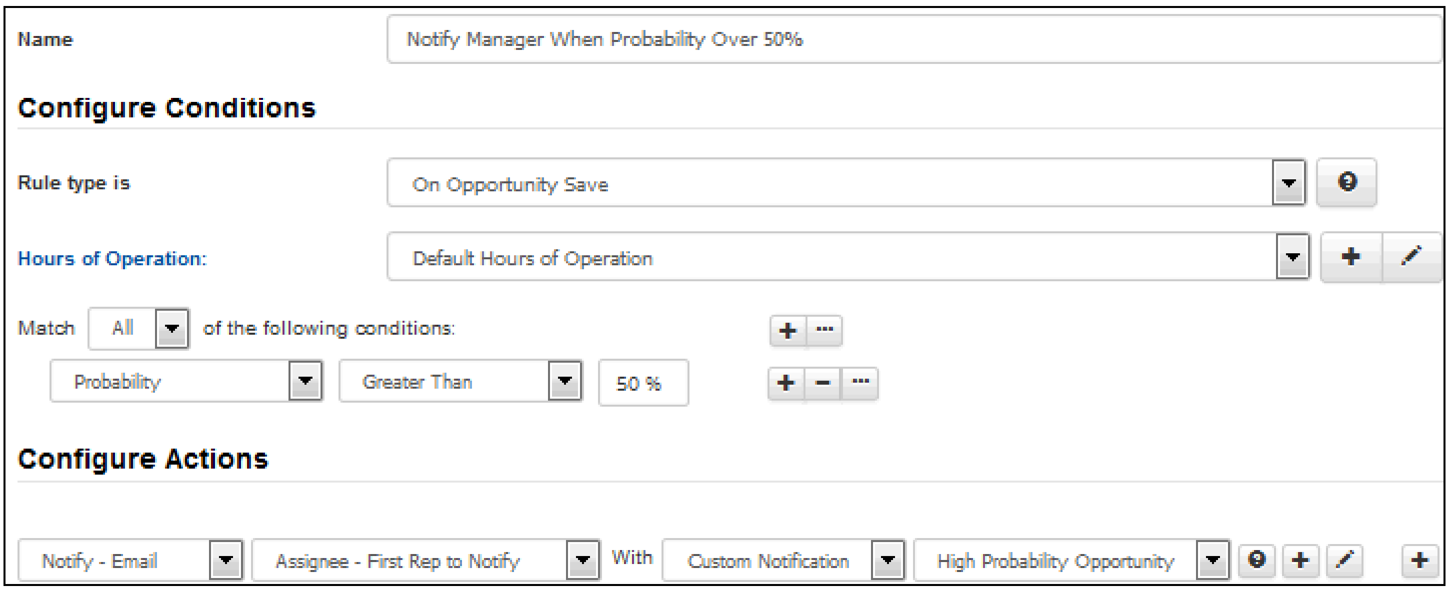
Use the Opportunity Rules screen to create **rules** that will perform actions when specified conditions are met. In order for a rule to be evaluated, it must be included in a **rule group**; rule groups are applied to opportunities through customers, companies, and support representatives. (A default rule group will apply if none are applicable.) When an opportunity is saved, the matching rule group is first determined. Then, all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed. This functionality can be used to:

- Change values in the Assignee, Customer, Probability, Stage, Type, Estimated Close Date, and custom fields for an Opportunity record
- Send notifications
- Execute a webhook for posting Opportunity data to a web application

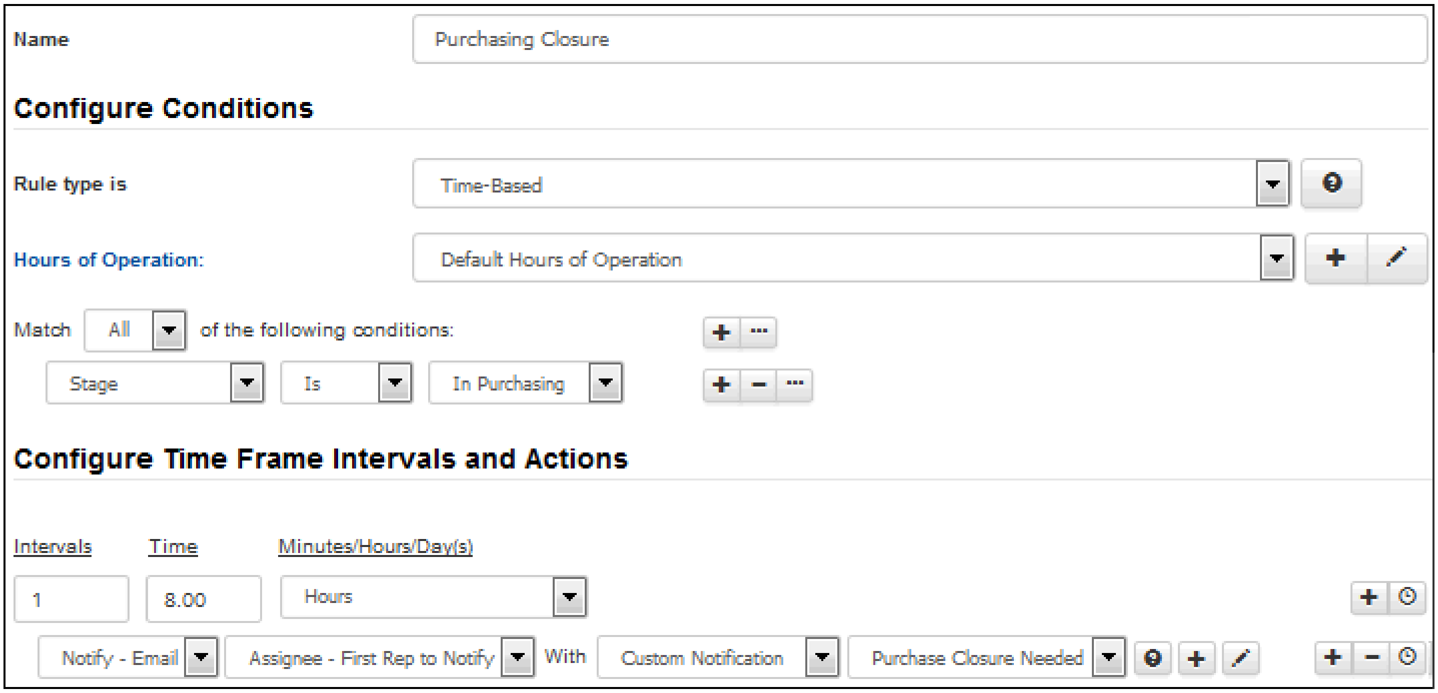
A default Opportunity rule group will be included in iSupport on installation or upgrade. Use the Opportunity Rule Groups screen to create new rule groups and assign them to customers, companies, and support representatives. (You can also assign rule groups via those entry screens.) See "Creating Rule Groups" on page 21 for more information.

There are four types of Opportunity rules:

On Opportunity Save rules do not incorporate time frames; when an opportunity is saved, rules in the associated rule group are evaluated, and if conditions are matched, their actions are performed.



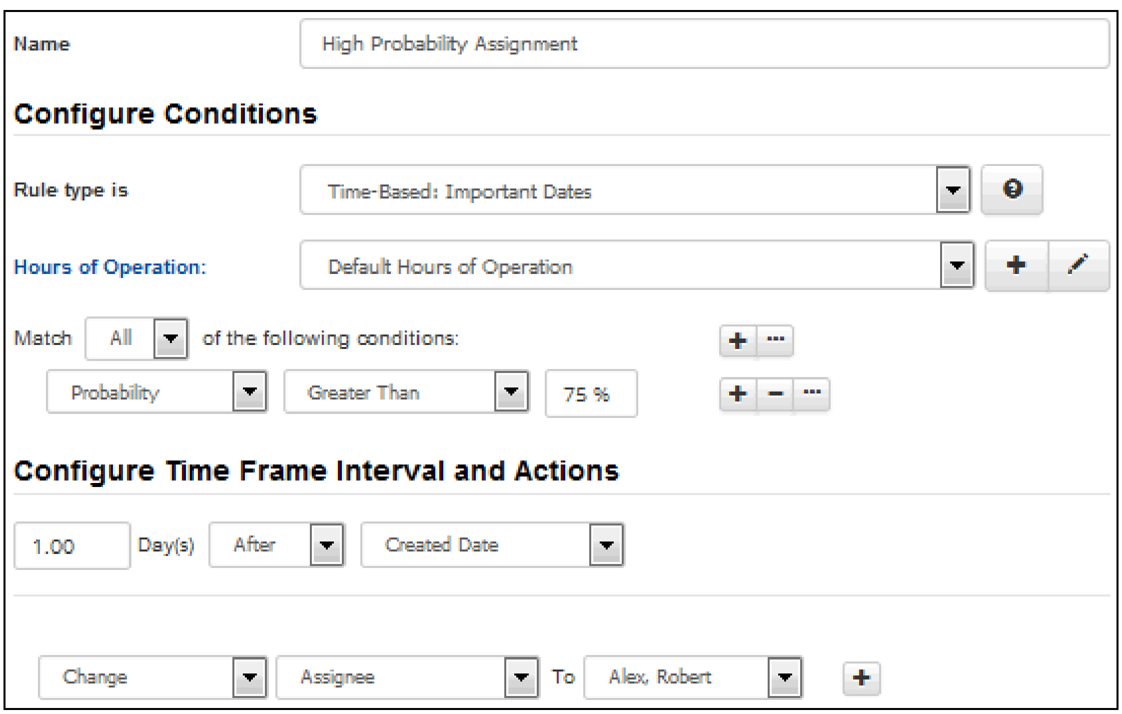
Time-Based and **Time-Based: Cumulative** rules incorporate time frames with conditions; when conditions are true upon save of an Opportunity record, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent.



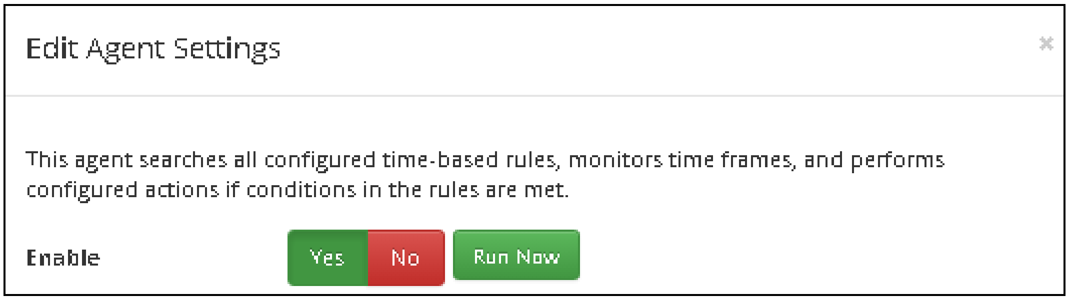
If the conditions required to meet the rule do not change before the interval time frame is reached, the agent performs the actions specified. If conditions change prior to the recorded date and time:

- **Time-Based** rules will clear all pending actions and if conditions are met again the time frame will restart.
- **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.

Time-Based: Important Dates rules will perform the specified action(s) when the defined number of days before or after the configured date (creation date or estimated close date) occurs.



If you are configuring Time-Based and Time-Based: Cumulative rules, ensure that the Time-Based Rules agent is enabled via the Agents button in the Rules opening screen.



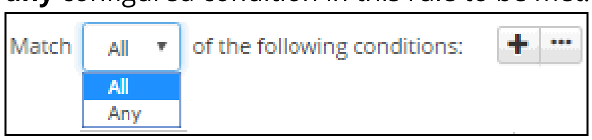
Note: If you change a condition, time interval, or time value in an existing time-based rule and interval timers are in process for any records associated with it, the timers will be reset.

Creating Rules

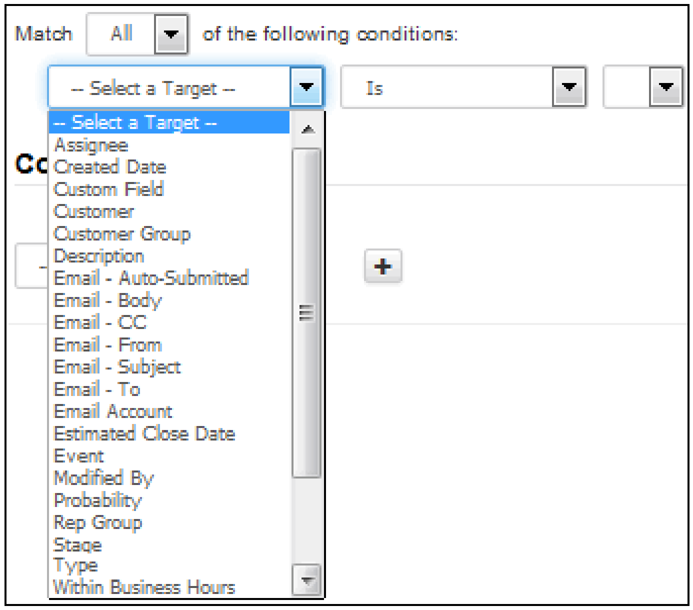
Rule creation involves entering a name for the rule, selecting the type of rule, selecting one or more conditions and time frame intervals if applicable, and then selecting one or more actions to perform if those conditions are met. The type of rule will determine the fields that appear. All rules include conditions and actions; see the following sections "Configuring Conditions" on page 14 and "Configuring Actions" on page 15 for more information. See "Creating Time Frame Intervals for Time-Based Rules" on page 18 for information on configuring interval time frames and actions to perform with each set of intervals.

Configuring Conditions

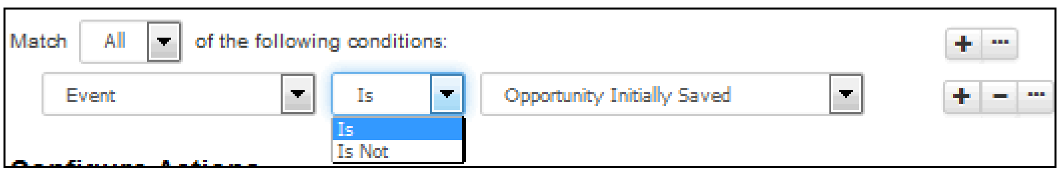
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



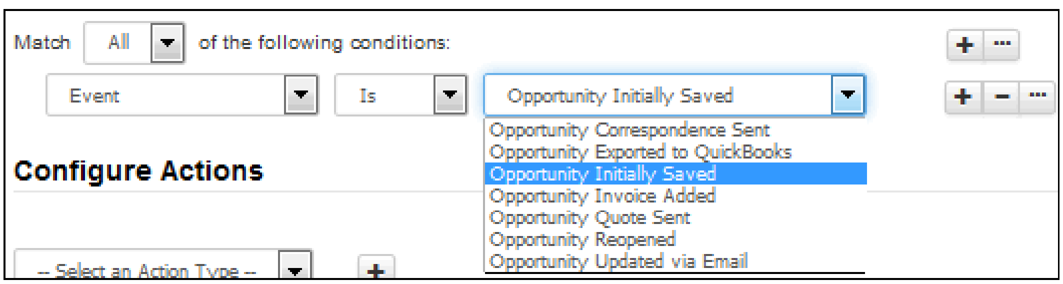
Use the Add Condition ✚ and Remove Condition ━ icons to display and remove a set of condition dropdown fields (a list of fields, a list of comparison methods, and a list of values applicable to the selected field) to evaluate upon opportunity save. In the Select a Target dropdown, select what to evaluate: an opportunity field or event, or whether it is within business hours.



In the next dropdown, select the comparison method.



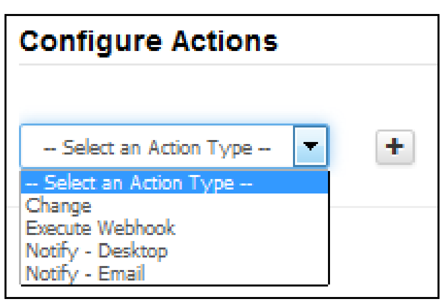
Finally, select the value to be used with the comparison method.



Click the Add Condition ➕ icon if you wish to include another condition. You can use the Add Condition Group ··· icon to put a set of conditions to be evaluated together in a group.

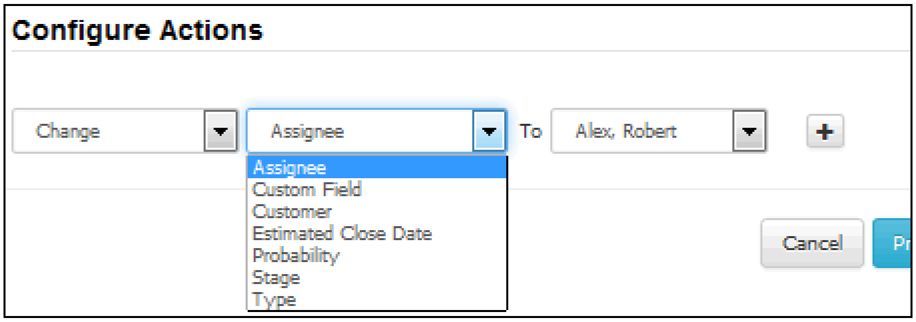
Configuring Actions

Use the Actions section to select the actions to perform when the conditions are met. After creating the first action you can use the Add Action ➕ icon to create another action. Use the Remove Action ➖ icon to remove any action lines.

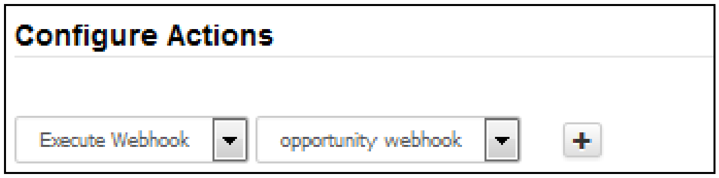


You can configure the following actions:

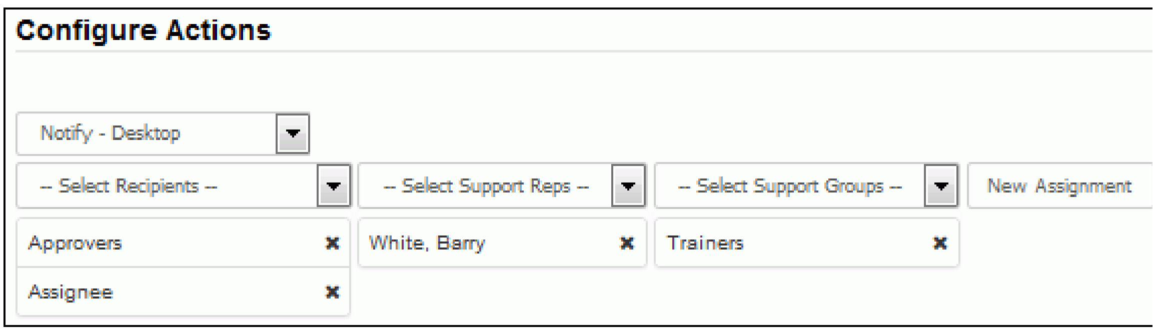
- **Change a field** by selecting Change, the field to change, and the value to change it to.



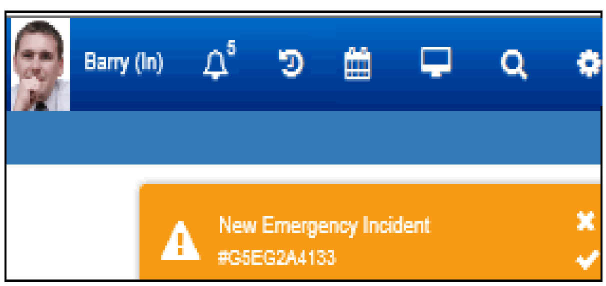
- **Execute a configured webhook** for posting Opportunity data to a web application.



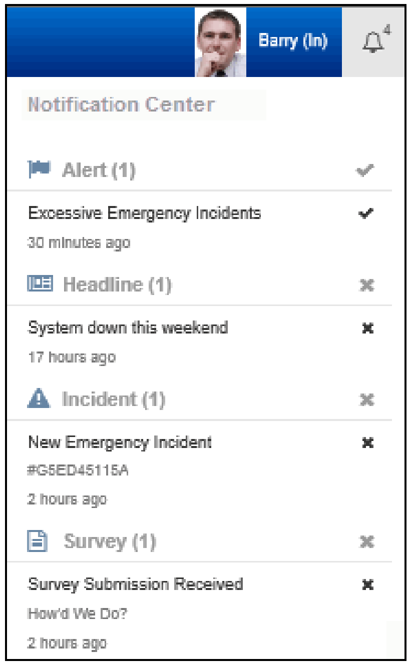
- **Send a notification** via desktop notification or email.
  - **Desktop notification:** To display an entry in the Notification list on the Desktop, select Notify - Desktop, one or more recipients, and the text to appear in the Desktop Notification dropdown and/or popup.



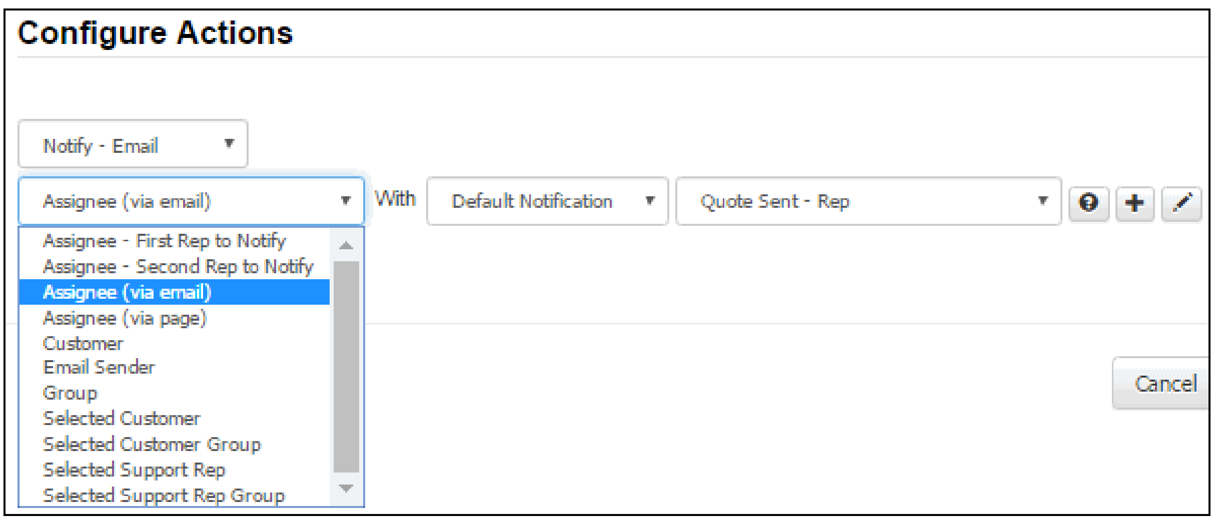
Options on the Desktop Notifications tab in Preferences (accessed by clicking the avatar/name) determine whether or not an entry will appear as a popup or list entry. An example of a desktop notification popup is shown below:



An example of the dropdown is shown below.

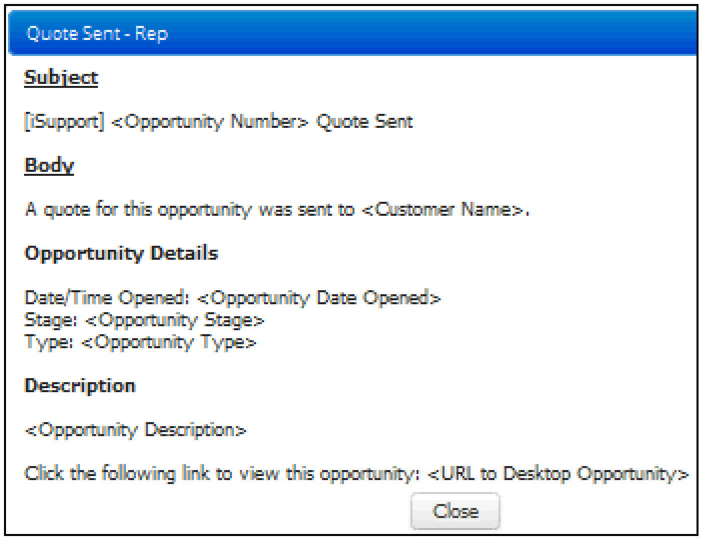


- **Email:** If sending a notification via email, select Notify - Email, the recipient, and the notification to be sent.



You can select the default or a custom notification. Notification options will include one of iSupport's default notifications that match the condition or recipient. Use the Create New + and View/Edit icons to access the Custom Notification screen.

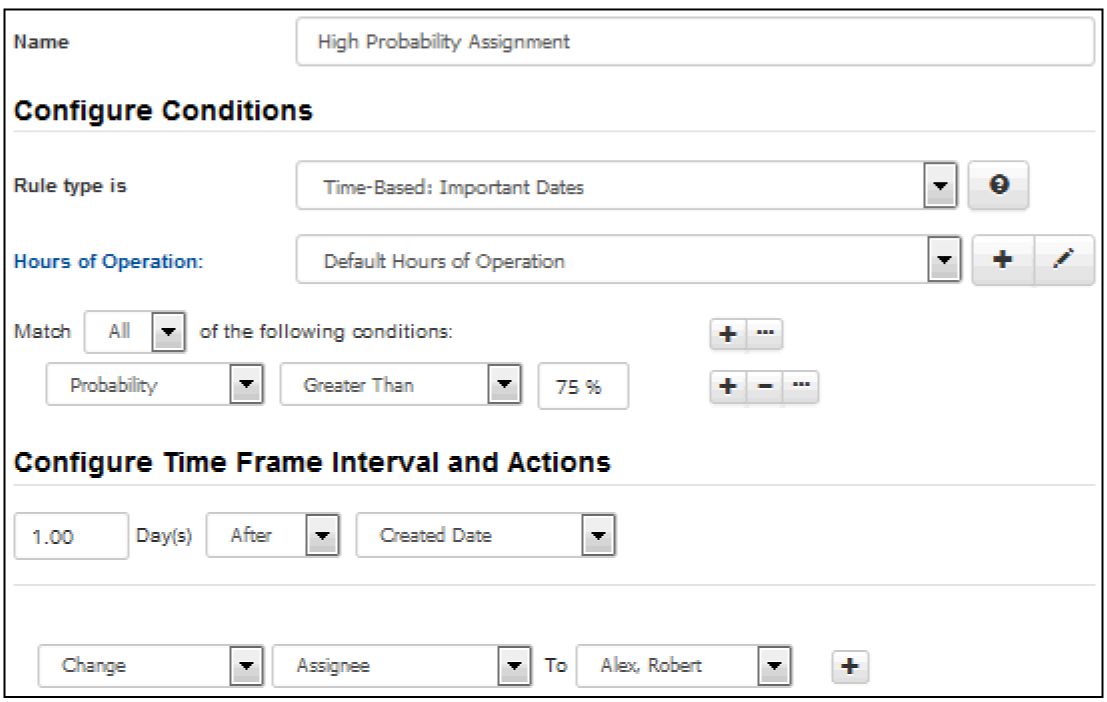
Click the Show Notification icon to display the contents of the selected notification.



Creating Time Frame Intervals for Time-Based Rules

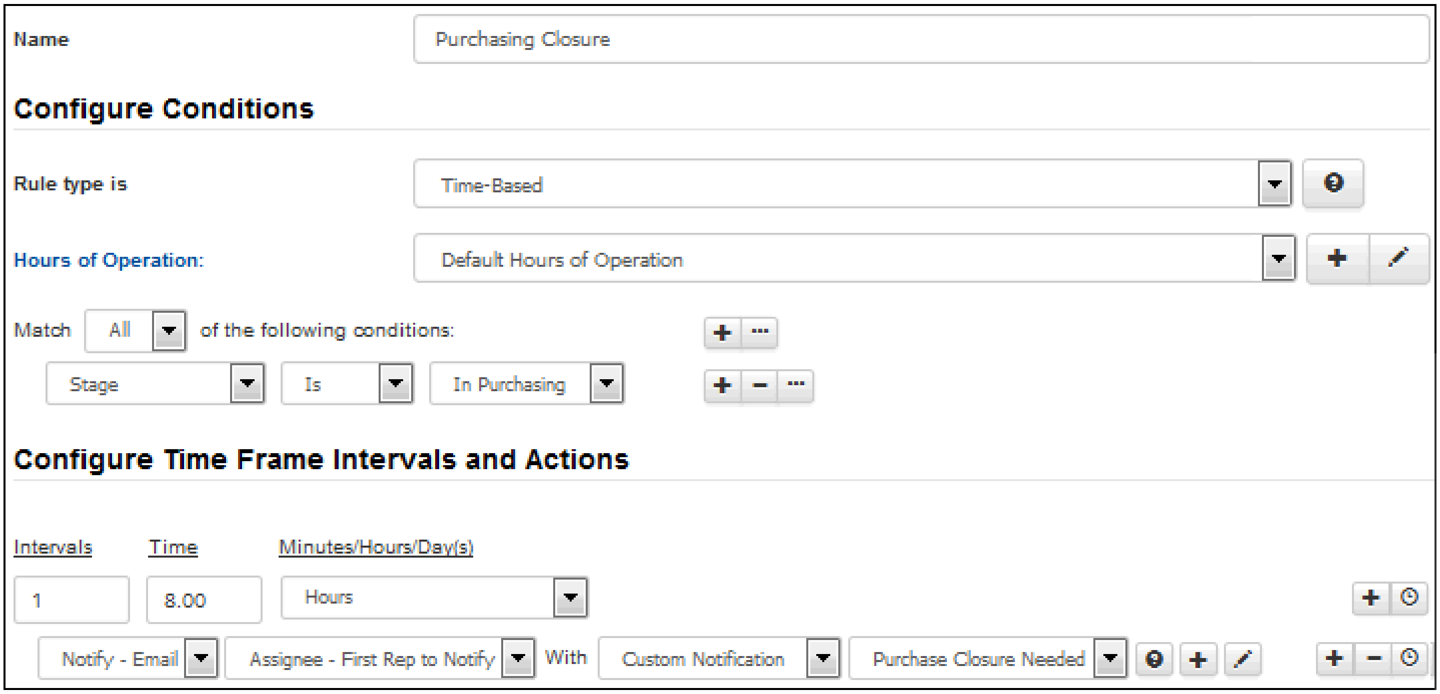
Time-Based: Important Dates Rules

A Time-Based: Important Dates rule will display a field for entering a number of days and a Before/After dropdown; the specified action(s) will be performed when the defined number of days before or after the configured date (creation date or estimated close date) occurs.



Time-Based and Time-Based: Cumulative Rules

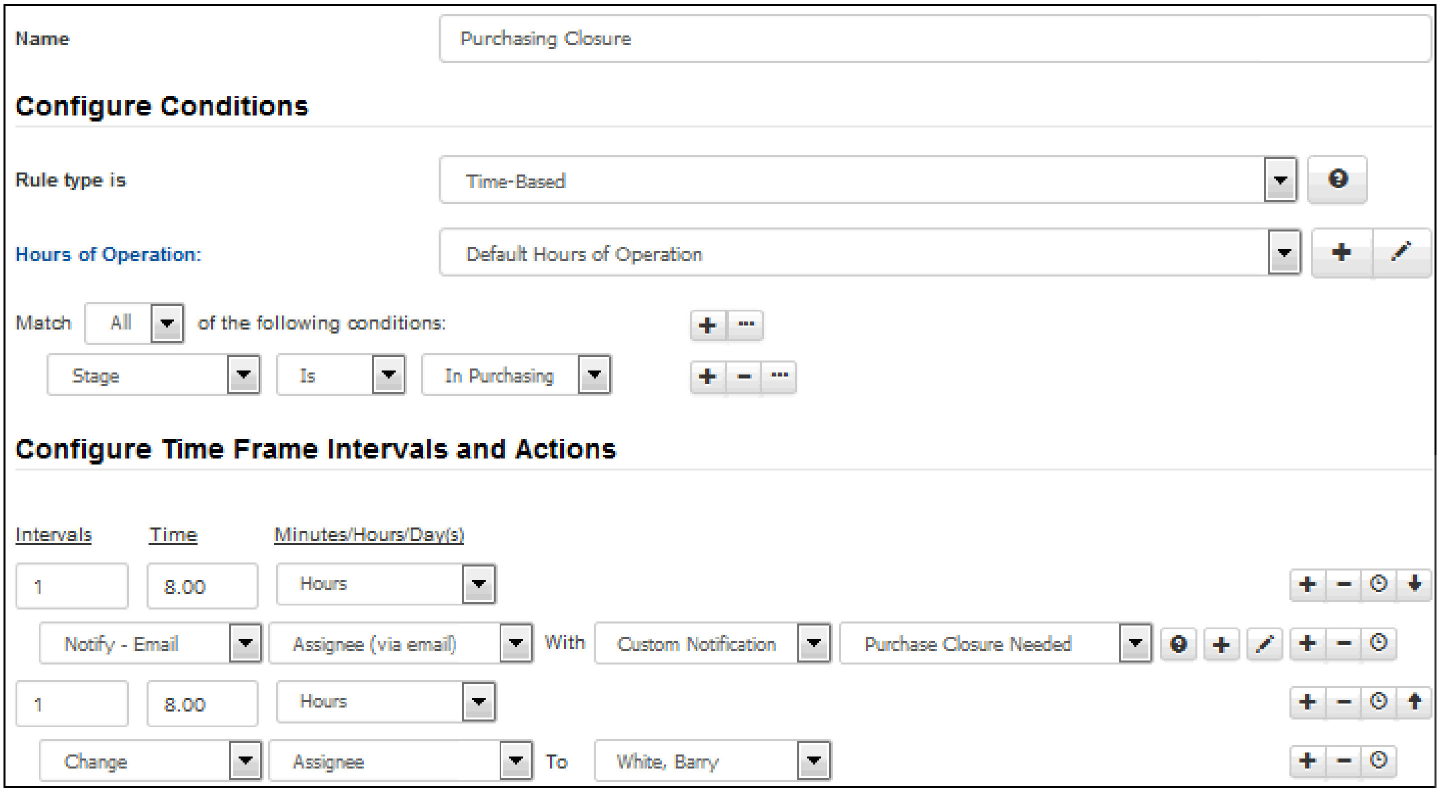
With Time-Based and Time-Based: Cumulative rules, the Time Frame Interval Settings section will include Intervals, Time, Minutes/Hours/Day(s) fields as well as a set of fields for entering an action to be performed when the condition is met for the interval time frame. The difference between these rules is that, if conditions change prior to the configured interval settings, **Time-Based** rules will clear all pending actions and the time frame will restart if conditions are met again; **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.



In the Configure Time Frame Intervals and Actions section, use the Intervals field to specify the number of times a time frame should be established and monitored, and use the Time and Minutes/Hours/Day(s) fields to specify the amount and unit of time (in minutes, hours, or days) in the time frame. Use the dropdowns in the indented actions line to specify the actions to perform if conditions are met for that interval time frame. In the example above, the opportunity will be monitored for eight hours after initial save; if the stage remains at In Purchasing for the entire eight hours, the Purchase Closure notification will be sent to the assignee’s first rep to notify.

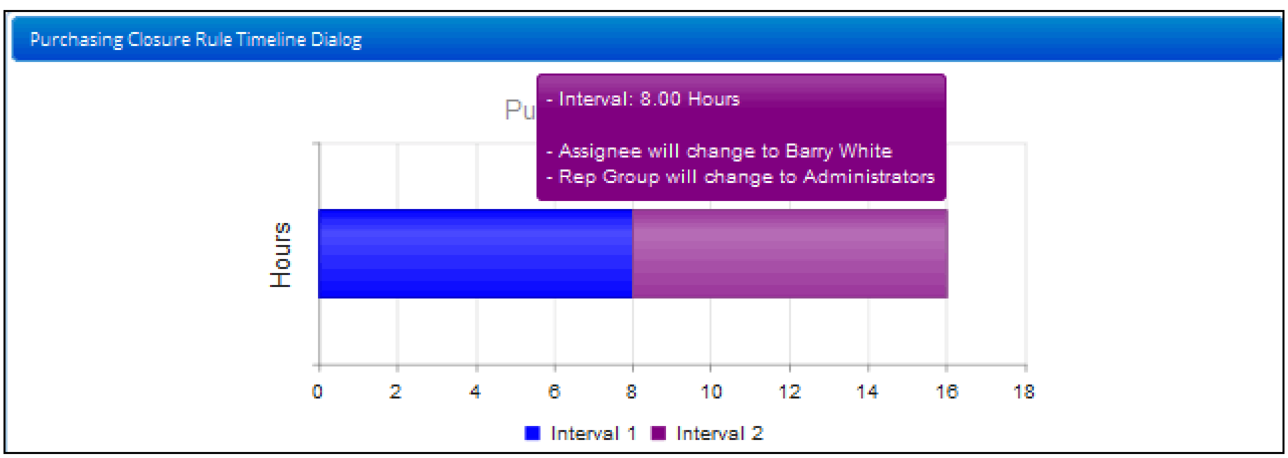
Configuring Multiple Time Frame Intervals

You can use the Add Interval icon to add another interval time frame set and actions to perform if conditions are met for that interval time frame. The Move Down and Move Up icons will appear for changing the order in which the interval time frames will be evaluated. In the example below, after the change is monitored for the first eight hour time frame, the opportunity will be monitored for an additional eight hour time frame. If the stage remains at In Purchasing for the entire eight hours, the opportunity will be reassigned to the support representative Barry White.



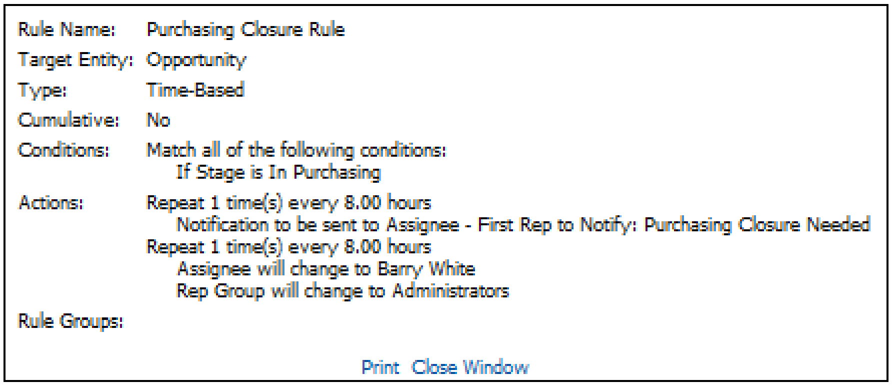
Displaying a Timeline for Configured Time Frame Intervals

Use the View Timeline button at the bottom of the screen to display a dialog with a gauge chart depicting the time frames for each interval; actions will appear when you hover over a time frame with your mouse.



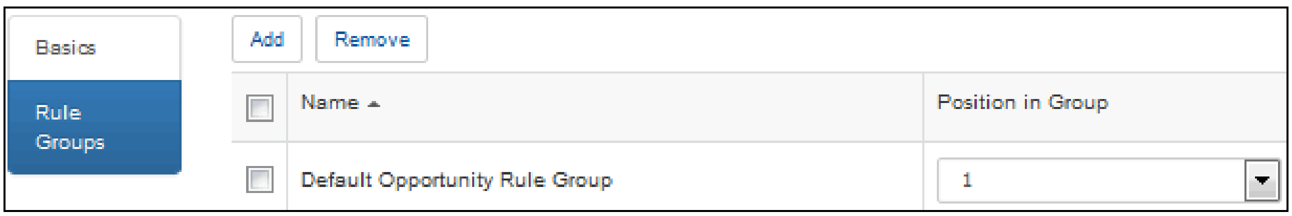
Printing a Rule

Click the Print button to display a summary of your entries; you can click the Print link in the dialog to send the information to the printer.



Associating Rules With Rule Groups

After creating a rule, you'll need to include it in a rule group. You can do this via the Rule Group tab in the Rules screen, or via the Rule Group screen. On the Rule Groups tab, click the Add link. Rule groups configured via the Rule Group screen appear; select the applicable group(s) and click OK. The rule group displays along with its position as shown below:

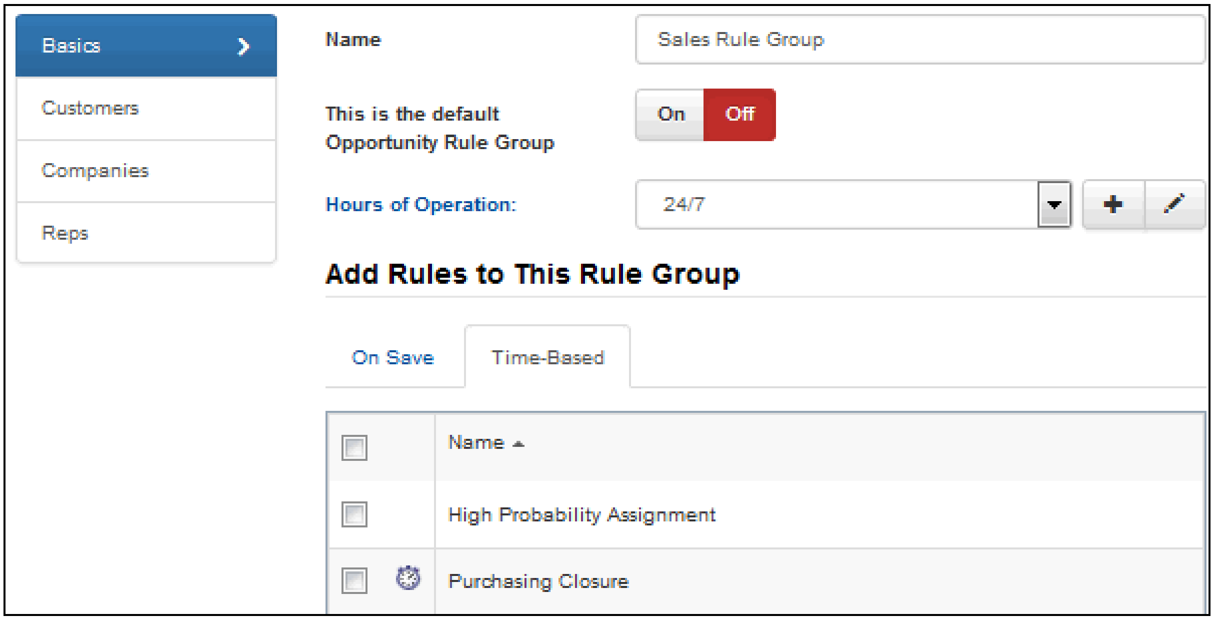


All rules in the rule group associated with an opportunity are evaluated when an opportunity is saved; the Position field determines the order in which actions are taken when conditions are met. If rules in a group contain duplicate actions, the position will determine the rule that will take precedence.

Creating Rule Groups

Click the Create link in the Opportunity Rule Groups screen to create a rule group that can be designated as the default Opportunity rule group and applied to customers, companies, and support representatives.

Complete the fields at the top of the Rule Groups screen.



Name - Enter a name for the rule group; this name will appear in the Opportunity screen when the rule group is in effect for an opportunity.

This is the Default Opportunity Rule Group - Select this checkbox to designate the rule group as the one to apply if no rule group is associated with the customer, company, or support representative associated with an opportunity.

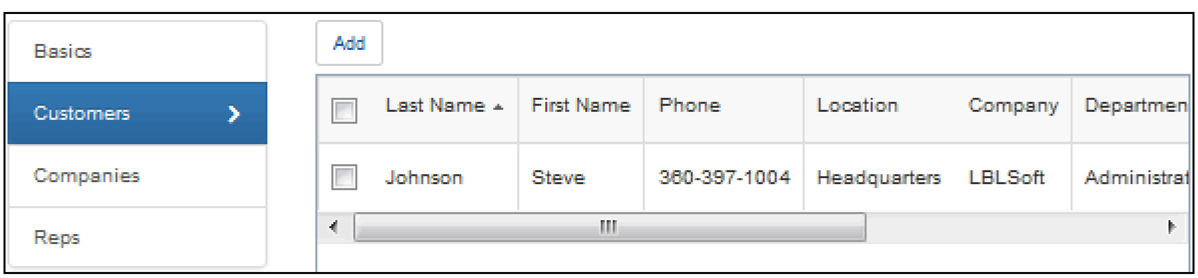
Hours of Operation - Select or create the Hours of Operation definition with the time frame to be used to determine the time intervals set in time-based rules. You can click the Hours of Operation link to display details on the selected definition. Note that an assigned Hours of Operation only applies to On Opportunity Save rules if Within Business Hours is used in a condition.

Adding Rules

Use the Add link on the On Save and Time-Based tabs to add previously configured rules to the rule group. All rules in the rule group associated with an opportunity are evaluated when an opportunity is saved; 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.

Assigning a Rule Group

Use the Add link on the Customers, Companies, and Support Representative tabs to associate the rule group with one or more customers, companies, and support representatives. You can also do this via the Customer Profile and Company screens.



Printing the Rule Group Summary

Click the Print button to display a summary of your saved entries; you can click the Print link in the dialog to send the information to the printer.

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