



# Configuring iSupport Opportunity Functionality

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## 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.


Opportunity


 Save


 Save and Close

 Print


 Delete


 Counters

 Customer



 Company

Customer Company

 Correspondence

 Send Quote

Actions


 **Customer** 

Steve Johnson

LBLSoft, Inc.

360-397-1004

sj@example.com

Assignee:  Barry White

Modified Date: 6/14/2013 1:41:53 PM

Rule Group: Default Opportuni...

Stage:

Estimated Close Date: 6/30/2013


Probability: 60 %


Type:


Actual Close Date:


Total: \$160.00


Number: D6EE393238


Invoice: 

 Details


 Additional Info


 Campaign

 Products

 Attachments




Comments for Quote:  
Payment terms for all invoices are net 30

 Hardware Configuration Services


 Application Training Services

Accounting App

HR App

	Name	Short Desc.	Group	Description	Quantity	Rate	Total
	WS3100	Workstation	Hardware Configuration Services	Workstation Setup	<input type="text" value="1"/>	<input type="text" value="\$60.00"/>	\$60.00
	AA4587	Accounting App	Application Training Services	Accounting Application Training	<input type="text" value="1"/>	<input type="text" value="\$50.00"/>	\$50.00
	HR5393	HR App	Application Training Services	HR Application Training	<input type="text" value="1"/>	<input type="text" value="\$50.00"/>	\$50.00
							\$160.00

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.

	From customer profile of customer assigned to the opportunity	From support rep profile of the opportunity assignee																																																		
<p>Entered via Quote Info tab in Opportunity Management Basics screen</p> <p>Product groups defined via Product Groups screen</p> <p>Products defined via Products screen</p> <p>Comment entered via Opportunity screen</p> <p>Notes entered via Quote Notes tab in Opportunity Management Basics</p>	<div style="text-align: center;">  <h1 style="margin: 0;">iSUPPORT</h1> <p>110 East 17th Street Vancouver, WA 98663-3419 360-397-1000 fax/360-397-1007 <a href="http://www.isupport.com">http://www.isupport.com</a></p> </div> <div style="margin-top: 20px;"> <p><b>Quotation</b></p> <p>Prepared for: Steve Johnson sj@example.com 360-397-1004 LBLSoft, Inc.</p> <p>Prepared by: Barry White bw@lblsoft.com 360-397-1000</p> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 20px;"> <thead> <tr> <th style="width: 10%;">Item Qty</th> <th style="width: 50%;">Item Description</th> <th style="width: 15%;">Item Number</th> <th style="width: 15%;">Unit Price</th> <th style="width: 10%;">Extended Price</th> </tr> </thead> <tbody> <tr> <td colspan="5" style="text-align: center; background-color: #f2f2f2;"><b>Hardware Configuration Services</b></td></tr> <tr> <td style="text-align: center;">1</td><td>Workstation Setup</td><td style="text-align: center;">WS3100</td><td style="text-align: right;">\$60.00</td><td style="text-align: right;">\$60.00</td></tr> <tr> <td colspan="4" style="text-align: center; background-color: #f2f2f2;"><b>Hardware Configuration Services Total</b></td><td style="text-align: right; background-color: #f2f2f2;"><b>\$60.00</b></td></tr> <tr> <td colspan="5" style="text-align: center; background-color: #f2f2f2;"><b>Application Training Services</b></td></tr> <tr> <td style="text-align: center;">1</td><td>Accounting Application Training</td><td style="text-align: center;">AA4587</td><td style="text-align: right;">\$50.00</td><td style="text-align: right;">\$50.00</td></tr> <tr> <td style="text-align: center;">1</td><td>HR Application Training</td><td style="text-align: center;">HR5393</td><td style="text-align: right;">\$50.00</td><td style="text-align: right;">\$50.00</td></tr> <tr> <td colspan="4" style="text-align: center; background-color: #f2f2f2;"><b>Application Training Services Total</b></td><td style="text-align: right; background-color: #f2f2f2;"><b>\$100.00</b></td></tr> <tr> <td colspan="4" style="text-align: center;">Payment terms for all invoices are net 30</td><td></td></tr> <tr> <td colspan="4" style="text-align: center; background-color: #f2f2f2;"><b>TOTAL</b></td><td style="text-align: right; background-color: #f2f2f2;"><b>\$160.00</b></td></tr> </tbody> </table> <div style="margin-top: 20px;"> <p><b>Notes:</b> -- US dollars - pricing valid for 30 days from date of quotation.</p> <p style="text-align: right; margin-top: 10px;">Agree To Purchase _____</p> <p style="text-align: right;">Today's Date _____</p> </div>	Item Qty	Item Description	Item Number	Unit Price	Extended Price	<b>Hardware Configuration Services</b>					1	Workstation Setup	WS3100	\$60.00	\$60.00	<b>Hardware Configuration Services Total</b>				<b>\$60.00</b>	<b>Application Training Services</b>					1	Accounting Application Training	AA4587	\$50.00	\$50.00	1	HR Application Training	HR5393	\$50.00	\$50.00	<b>Application Training Services Total</b>				<b>\$100.00</b>	Payment terms for all invoices are net 30					<b>TOTAL</b>				<b>\$160.00</b>	<p>6/13/2013</p>
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# 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

Entered via  
Quote Info  
tab

6/13/2013



# iSUPPORT

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

## Quotation

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

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

Item Qty	Item Description	Item Number	Unit Price	Extended Price
<b>Hardware Configuration Services</b>				
1	Workstation Setup	W53100	\$60.00	\$60.00
<b>Hardware Configuration Services Total</b>				<b>\$60.00</b>
<b>Application Training Services</b>				
1	Accounting Application Training	AA4587	\$50.00	\$50.00
1	HR Application Training	HR5393	\$50.00	\$50.00
<b>Application Training Services Total</b>				<b>\$100.00</b>
Payment terms for all invoices are net 30				
<b>TOTAL</b>				<b>\$160.00</b>


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

Agree To Purchase \_\_\_\_\_

Today's Date \_\_\_\_\_

Entered via  
Quote  
Notes tab

## 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.

Enable Features	QuickBooks®	Quote Info	Quote Notes	Miscellaneous
Asset Management	<b>Application Name</b>	LBLSoft Accounting		
Change Management	<b>Application Token</b>	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Configuration Management	<b>Consumer Key</b>	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Incident Management	<b>Consumer Secret</b>	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Knowledge Management	You are authenticated to QuickBooks.			
mySupport	<b>Access Token Expiration</b>	7/12/2016 12:55:53 PM	<button>Renew</button>	
<b>Opportunity Management &gt;</b>	<b>Send Access Token Expiration Reminder Email to</b>	bw@example.com		
	<b>Account</b>	Accounts Receivable		

**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](#).

Enable Features	QuickBooks®	Quote Info	Quote Notes	Miscellaneous
Asset Management	<b>Correspondence Template</b>		Opportunity - Quote Cover Letter ▼	
Change Management	<b>Address 1</b>		110 East 17th Street	
Configuration Management	<b>Address 2</b>			
Incident Management	<b>Address 3</b>			
Knowledge Management	<b>Address City</b>		Vancouver	
mySupport	<b>Address State</b>		WA	
<b>Opportunity Management</b> >	<b>Address Postal Code</b>		98663	
Problem Management	<b>Address Country</b>			
Purchasing	<b>Phone</b>		360-397-1000	
Service Contract Management	<b>Fax</b>		360-397-1007	
Survey	<b>Website</b>		http://www.isupport.com	
<b>Header</b>		 Choose Remove		
<b>Vendor Info (pdf)</b>		 Choose Remove		

**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.

QuickBooks®	Quote Info	Quote Notes	Miscellaneous
<div>CreateDelete</div>			
<input type="checkbox"/>		Note	Position ▲
<input type="checkbox"/>		If you respond within 10 days, you'll receive a 5% discount!	1





## 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.

Enable Features	QuickBooks®	Quote Info	Quote Notes	Miscellaneous
Asset Management	<div>Default Correspondence Template</div>			
Change Management	<div>Default Opportunity Correspondence T ▼</div>			
Configuration Management	<div></div>			
Incident Management				
Knowledge Management				
mySupport				
Opportunity Management >				

## 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.

<div>CreateDelete</div>			
		Name	Position ▲
<input type="checkbox"/>	 	<input type="text" value="Services Only"/>	3 ▼
<input type="checkbox"/>		New Licenses	1
<input type="checkbox"/>		Maintenance Renewal	2

## 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.

<div>CreateDelete</div>				
		Name	Requires Win/Loss Reason	Position ▲
<input type="checkbox"/>	 	<input type="text" value="Lost"/>	<input checked="" type="checkbox"/>	5 ▼
<input type="checkbox"/>		Won	No	1
<input type="checkbox"/>		Demonstration	No	2
<input type="checkbox"/>		Evaluation	No	3
<input type="checkbox"/>		In Purchasing	No	4

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:

Details
 Campaign
 **Products**
 Attachments

Comments for Quote:  
 Payment terms are net 30

+

Hardware Configuration Services

+

Application Training Services

Accounting App

HR App

Name	Short Desc.	Group	Description	Quantity	Rate	Total
WS3100	Workstation	Hardware Configuration Services	Workstation Setup	1	\$80.00	\$80.00
AA4587	Accounting App	Application Training Services	Accounting Application Training	1	\$50.00	\$50.00
HR5393	HR App	Application Training Services	HR Application Training	1	\$50.00	\$50.00
						\$160.00

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

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

6/13/2013

**Quotation**  
Prepared for:  
Steve Johnson  
sj@example.com  
360-397-1004  
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Item Qty	Item Description	Item Number	Unit Price	Extended Price
<b>Hardware Configuration Services</b>				
1	Workstation Setup	WS3100	\$60.00	\$60.00
<b>Hardware Configuration Services Total</b>				<b>\$60.00</b>
<b>Application Training Services</b>				
1	Accounting Application Training	AA4587	\$50.00	\$50.00
1	HR Application Training	HR5393	\$50.00	\$50.00
<b>Application Training Services Total</b>				<b>\$100.00</b>
Payment terms for all invoices are net 30				
<b>TOTAL</b>				<b>\$160.00</b>

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

Agree To Purchase \_\_\_\_\_

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.

<div> <div>Create</div> <div>Delete</div> </div>			
		Name	Position ▲
<input type="checkbox"/>	<div> <div></div> <div></div> </div>	<input type="text" value="Network Administration"/>	<input type="text" value="1"/> ▼
<input type="checkbox"/>	<div> <div></div> <div></div> </div>	Hardware Configuration	2
<input type="checkbox"/>	<div> <div></div> <div></div> </div>	Application Training	3

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

<div> <div>Products</div> </div>						
<div> <div>Create</div> <div>Delete</div> </div>						
<input type="checkbox"/>		Name ▲	Short Desc.	Group	Description	Rate
<input type="checkbox"/>	<div> <div></div> <div></div> </div>	AA4587	Accounting App	Application Training	Accounting Application Training	\$50.00
<input type="checkbox"/>	<div> <div></div> <div></div> </div>	HR5393	HR App	Application Training	HR Application Training	\$50.00
<input type="checkbox"/>	<div> <div></div> <div></div> </div>	WS3100	Workstation	Hardware Configuration	Workstation Setup	\$50.00

# 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.

Parameters	
iSupport Field	Parameter Name
Number	Number
Assignee	Assignee
Customer	Customer

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.

**Configure Conditions**

Rule type is: On Incident Save

Hours of Operation: None

Match **all** of the following conditions:

- Category Is Categorization: Web Site - Access Request

**Configure Actions**

Execute Webhook: Incident Webhook

## 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.

**Name** Notify Manager When Probability Over 50%

**Configure Conditions**

Rule type is On Opportunity Save

Hours of Operation: Default Hours of Operation

Match All of the following conditions:

Probability Greater Than 50 %

**Configure Actions**

Notify - Email Assignee - First Rep to Notify With Custom Notification High Probability Opportunity

**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.

Name

### Configure Conditions

Rule type is

Hours of Operation:

Match  of the following conditions:

### Configure Time Frame Intervals and Actions

Intervals  Time  Minutes/Hours/Day(s)

With

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.

Name

### Configure Conditions

Rule type is

Hours of Operation:

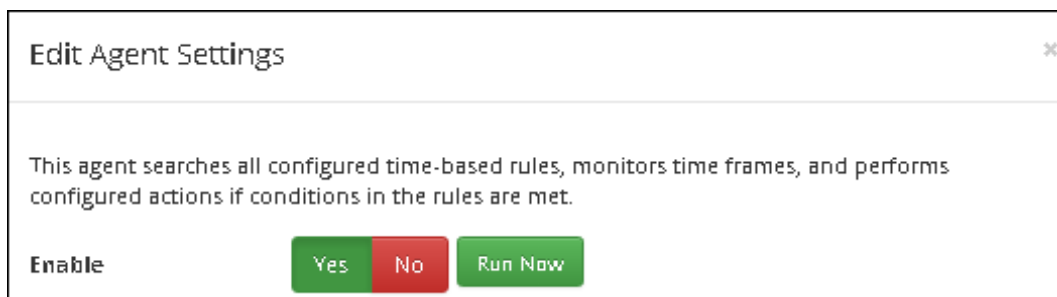
Match  of the following conditions:

### Configure Time Frame Interval and Actions

Day(s)

To

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.



The dialog box is titled "Edit Agent Settings" with a close button (X) in the top right corner. Below the title bar, there is a descriptive text: "This agent searches all configured time-based rules, monitors time frames, and performs configured actions if conditions in the rules are met." At the bottom left, there is a label "Enable". To its right are three buttons: a green "Yes" button, a red "No" button, and a green "Run Now" button.

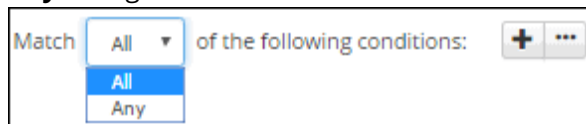
**Note:** If you change a condition, time interval, or time value in an existing time-based rule and interval timers are in process for any records associated with it, the timers will be reset.

## 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

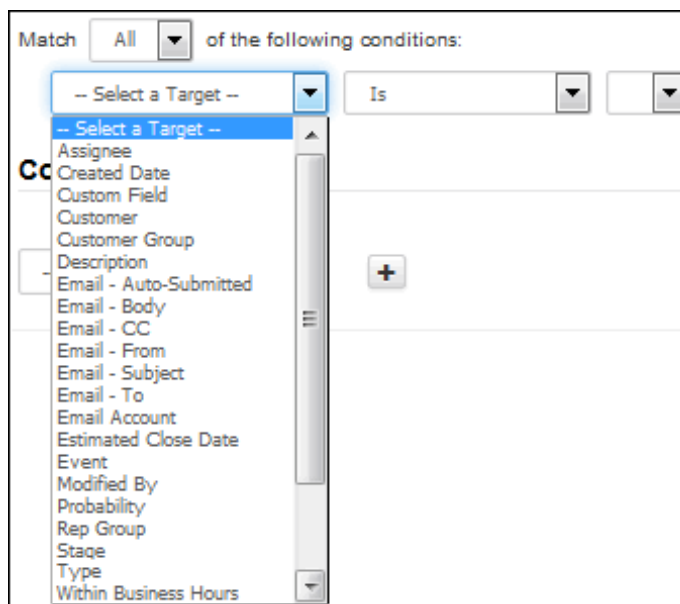
Use the first Match <All/Any> of the Following Conditions field to specify whether you want **every** configured condition in this rule to be met, or **any** configured condition in this rule to be met.



The image shows a dropdown menu for the "Match" field. The label "Match" is to the left of the dropdown. The dropdown is currently set to "All" and has a downward arrow. Below the dropdown, the text "of the following conditions:" is visible. To the right of this text are two icons: a plus sign (+) and a three-dot menu icon (⋮).

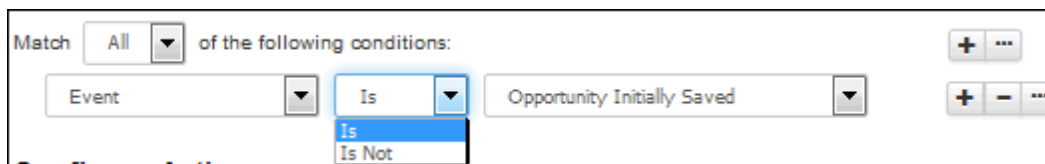
Use the Add Condition  and Remove Condition  icons to display and remove a set of condition dropdown fields (a list of fields, a list of comparison methods, and a list of values applicable to the selected field) to evaluate upon

opportunity save. In the Select a Target dropdown, select what to evaluate: an opportunity field or event, or whether it is within business hours.



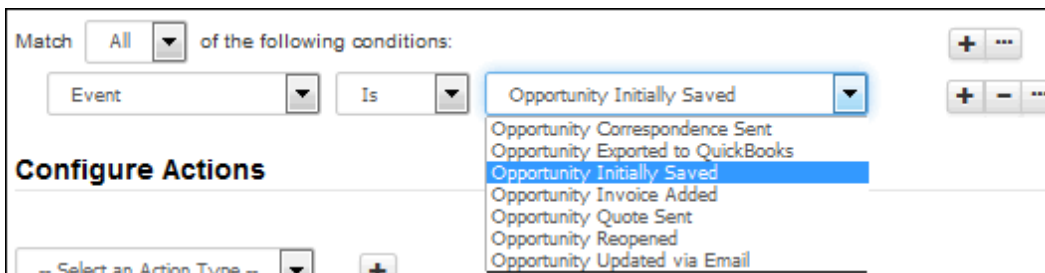
The screenshot shows a 'Match' dropdown menu with the text 'All of the following conditions:'. The dropdown is open, displaying a list of targets. The first two items are '-- Select a Target --'. The rest of the list includes: Assignee, Created Date, Custom Field, Customer, Customer Group, Description, Email - Auto-Submitted, Email - Body, Email - CC, Email - From, Email - Subject, Email - To, Email Account, Estimated Close Date, Event, Modified By, Probability, Rep Group, Stage, Type, and Within Business Hours. A '+' icon is visible to the right of the dropdown.

In the next dropdown, select the comparison method.



The screenshot shows the 'Match' dropdown menu with the text 'All of the following conditions:'. The dropdown is open, displaying a list of comparison methods. The first two items are 'Is' and 'Is Not'. The rest of the list includes: '+', '-', and '...'. A '+' icon is visible to the right of the dropdown.

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

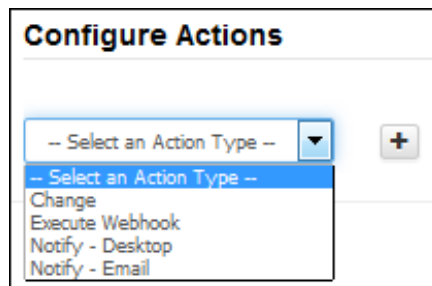


The screenshot shows the 'Match' dropdown menu with the text 'All of the following conditions:'. The dropdown is open, displaying a list of values. The first two items are 'Opportunity Initially Saved' and 'Opportunity Correspondence Sent'. The rest of the list includes: 'Opportunity Exported to QuickBooks', 'Opportunity Invoice Added', 'Opportunity Quote Sent', 'Opportunity Reopened', and 'Opportunity Updated via Email'. A '+' icon is visible to the right of the dropdown.

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

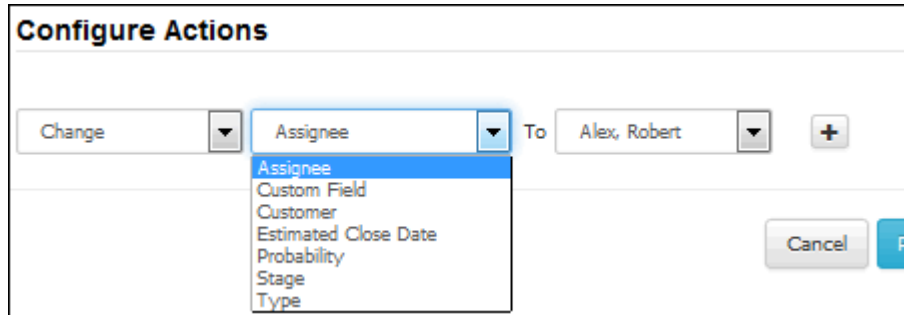
Use the Actions section to select the actions to perform when the conditions are met. After creating the first action you can use the Add Action **+** icon to create another action. Use the Remove Action **-** icon to remove any action lines.



The screenshot shows the 'Configure Actions' section. It has a title 'Configure Actions' and a dropdown menu with the text '-- Select an Action Type --'. The dropdown is open, displaying a list of actions: Change, Execute Webhook, Notify - Desktop, and Notify - Email. A '+' icon is visible to the right of the dropdown.

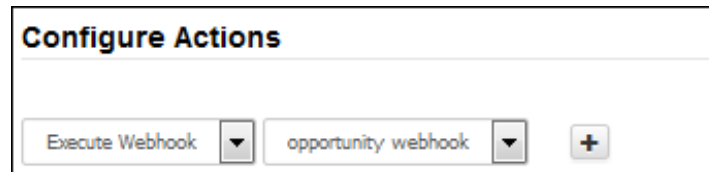
You can configure the following actions:

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




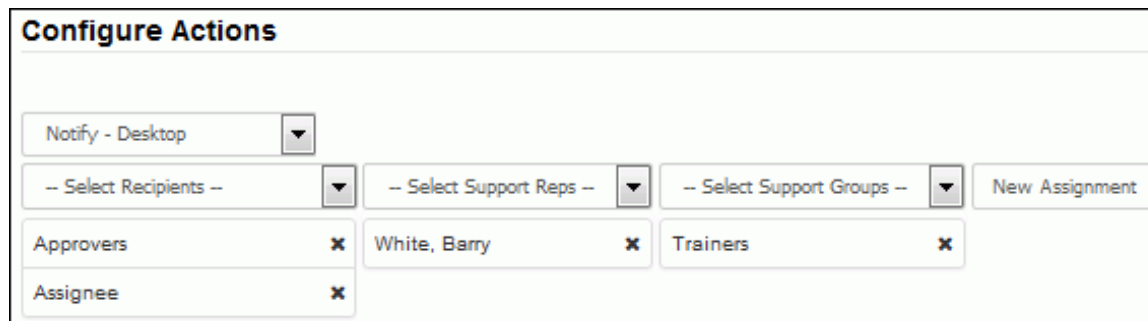
The 'Configure Actions' dialog box shows the 'Change' action selected. The 'Assignee' field is chosen from the dropdown menu, and the value 'Alex, Robert' is entered in the 'To' field. The 'Assignee' dropdown menu is open, showing options: Assignee, Custom Field, Customer, Estimated Close Date, Probability, Stage, and Type. The 'Cancel' and 'OK' buttons are visible at the bottom right.

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



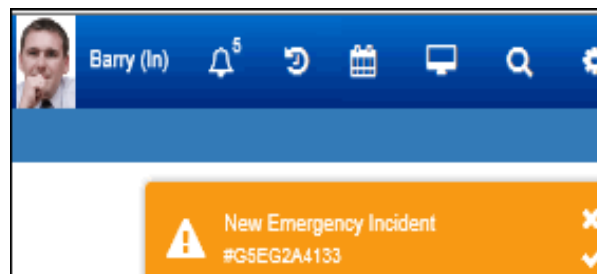
The 'Configure Actions' dialog box shows the 'Execute Webhook' action selected. The 'opportunity webhook' is chosen from the dropdown menu. The 'Cancel' and 'OK' buttons are visible at the bottom right.

- **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.



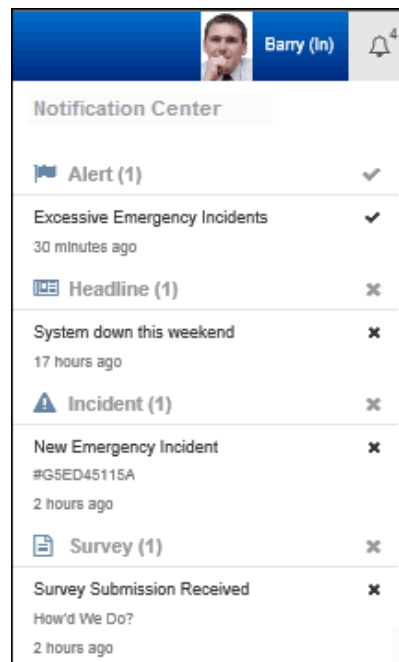
The 'Configure Actions' dialog box shows the 'Notify - Desktop' action selected. The 'Notify - Desktop' dropdown menu is open, showing options: Notify - Desktop, Notify - Email, and Notify - Push. The 'Select Recipients' dropdown menu is open, showing options: -- Select Recipients --, White, Barry, and Trainers. The 'New Assignment' button is visible at the bottom right.

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:

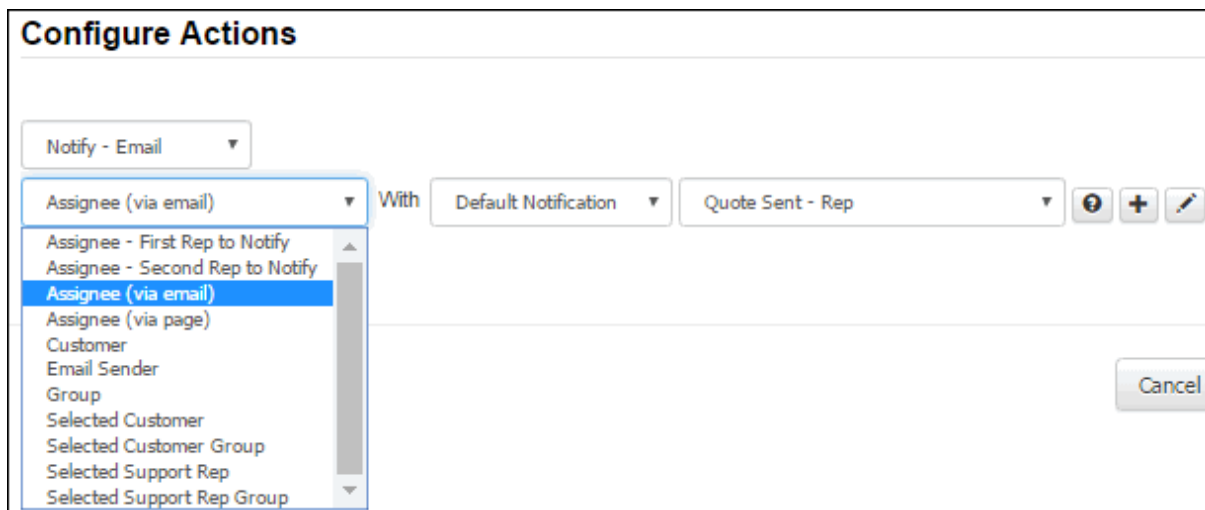






An example of the dropdown is shown below.



- **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.



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.

**Name** Purchasing Closure

**Configure Conditions**

Rule type is Time-Based

Hours of Operation: Default Hours of Operation

Match All of the following conditions:

Stage Is In Purchasing




**Configure Time Frame Intervals and Actions**

Intervals	Time	Minutes/Hours/Day(s)
1	8.00	Hours

Notify - Email Assignee - First Rep to Notify With Custom Notification Purchase Closure Needed

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.

Name

### Configure Conditions

Rule type is

Hours of Operation:

Match  of the following conditions:

### Configure Time Frame Intervals and Actions

Intervals	Time	Minutes/Hours/Day(s)
1	8.00	Hours

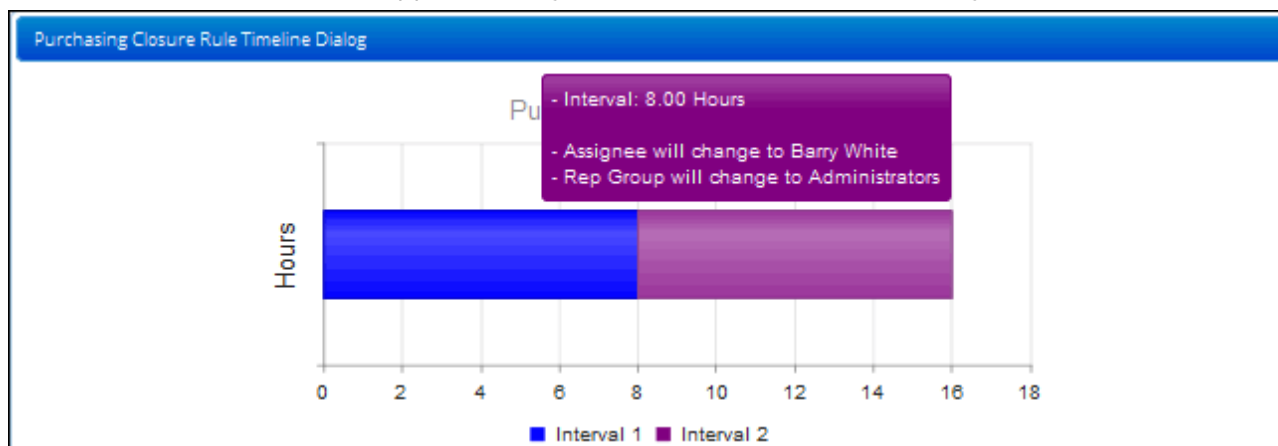
With

1	8.00	Hours
---	------	-------

To

### 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.



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

Basics

**Rule Groups**

Add

Remove

<input type="checkbox"/>	Name ▲	Position in Group
<input type="checkbox"/>	Default Opportunity Rule Group	<input type="text" value="1"/> <input type="button" value="▼"/>

## Creating Rule Groups

Change



Email

Incident

Knowledge Entry

Opportunity >

CreateCopyDeleteRules

	Name ▲	Default
	Default Opportunity Rule Group	Default
	Sales Rule Group	

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

The screenshot shows the 'Rule Groups' configuration screen. On the left is a sidebar with tabs: Basics (selected), Customers, Companies, and Reps. The main area has a 'Name' field with the value 'Sales Rule Group'. Below it is a checkbox labeled 'This is the default Opportunity Rule Group' which is currently 'Off'. The 'Hours of Operation' is set to '24/7'. A section titled 'Add Rules to This Rule Group' contains two tabs: 'On Save' and 'Time-Based'. Under the 'Time-Based' tab, there is a list of rules with checkboxes: 'Name', 'High Probability Assignment', and 'Purchasing Closure'.

**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.

The screenshot shows the 'Rule Groups' configuration screen with the 'Customers' tab selected. An 'Add' button is visible. Below it is a table with the following data:

Last Name	First Name	Phone	Location	Company	Department
Johnson	Steve	360-397-1004	Headquarters	LBLSoft	Administrat

### 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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