ONE-TO-ONE SERVICE.COM®

iservice®

Quick Start Guide

V022009

Improving the Quick-Start Guide

We need your help. As you use this document to implement iService, please provide feedback on its effectiveness. The easiest way to do this is to send us an email at support@1to1service.com.

Please let us know if:

- Any words were unfamiliar to you.
- There is text that you misunderstood when you first read it, or that you didn't understand at all.
- Any sentences or paragraphs that were unnecessarily complex.
- You have comments on any illustrations that you feel were too complex to communicate clearly and tell us why.
- You have comments on any illustrations that you feel were misleading and tell us why.
- You identify any concepts that would have been easier to understand if accompanied (or replaced) by a graphic.
- You identify anywhere that you lost your train of thought because you were required to move to another page. In each case, tell us how the layout created a problem.
- See places where the text was too small, tightly spaced, or otherwise hard to read.

Thank you in advance for your help!

Sincerely,

The Team at One-to-One Service.com

Please send your comments to:

support@1to1service.com

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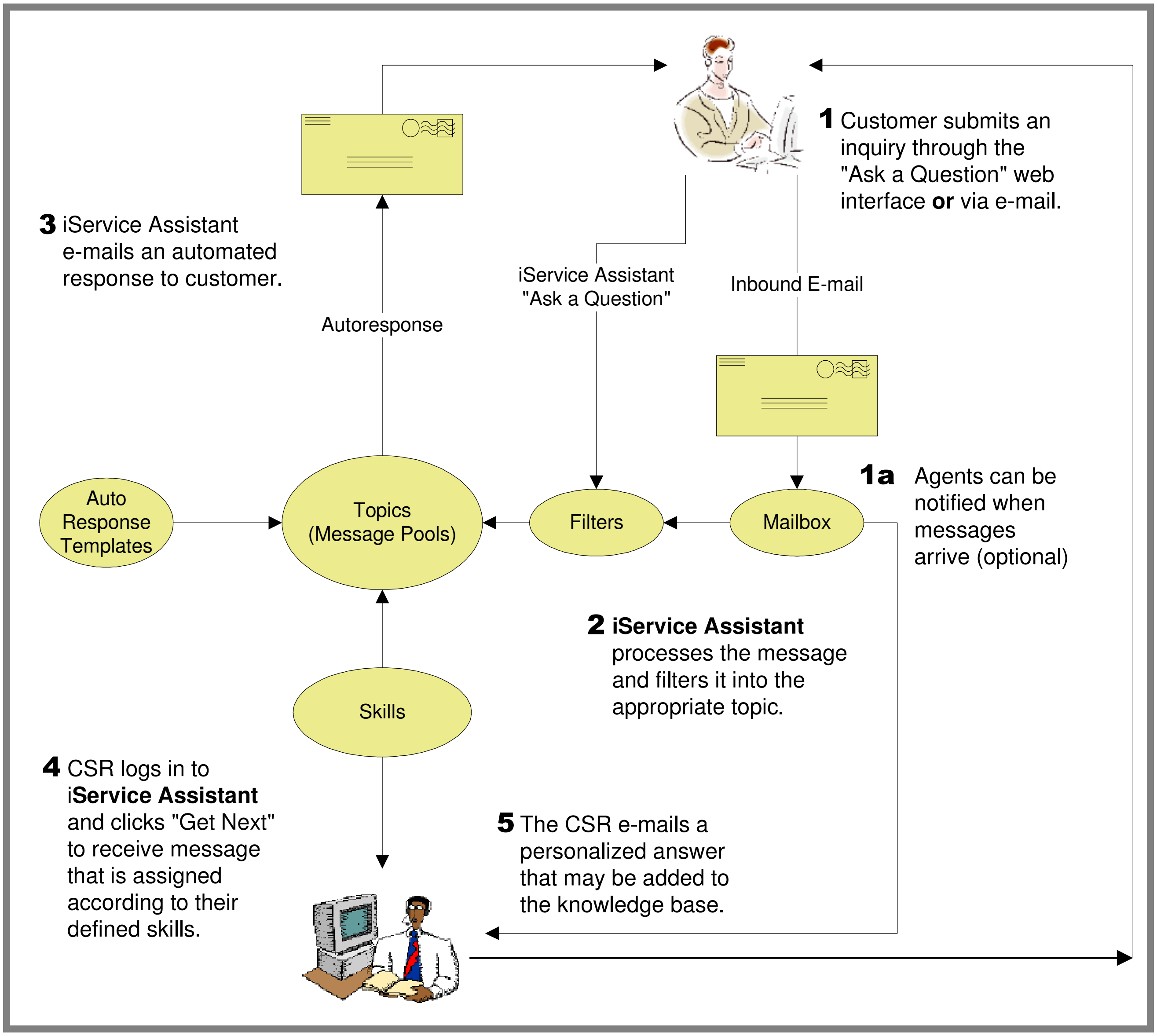
Step 1 Familiarize yourself with the iService process flow

iService is a web-based customer interaction solution that helps your customers find answer, submit questions, and manage their overall interaction with your organization. Since email response is a significant component, it is helpful to understand the overall flow of messages in the system.

The following five-step diagram illustrates how customers generally interact with iService and customer service representatives (CSRs) as they receive answers to their questions:



This example highlights a few of the key entities within the iService system (mailboxes, filters, auto responses, topics, and skills). These entities will be reviewed in this document along with other key concepts.

Step 2 Review terminology

Thoroughly understanding the following terms will aid you in your setup of the iService Assistant:

- **Segments** iService supports a multiple business segment concept in which each segment may have its own unique configuration.
- **Contacts** People that interact with iService are all defined as contacts. Agents are a special type of contact that are granted access to various pages for answering questions, updating the knowledge base, etc.
- **Mailboxes** E-mail addresses monitored by iService to receive incoming mail and send responses.
- **Interactions** Parts of a conversation with or about a contact are known as interactions. These might be customer emails, agent responses, tickets created for a customer, notes added to an account, etc.
- **Topics** Categories, organized in a tree-like hierarchy, to which customers may send messages.
- **Auto responses** Responses assigned to topics that are automatically sent to contacts upon the receipt of their messages. There are six different types of auto responses that are used in various scenarios.
- **Skills** Attributes assigned to topics and CSRs that determine with agents are able to respond to questions and tickets.
- **Filters** Processes that are applied to incoming email and “Ask a Question” submissions. A filter contains a regular expression condition and a set of actions that are taken when a match occurs on the condition.
- **Custom Properties** An unlimited number of custom properties can be added to extend the information for Contacts and Interactions.

Although there are other entities that you will use, these nine items have the greatest impact on your configuration decisions.

Step 3 Perform a planning assessment

As you begin to work with iService, you should answer the following questions:

- How many unique business units will be using iService? Do you have requirements for separately branded self-help portals or have confidential data that must be segregated?

Answering this question will help you determine how many business segments to use.

- How many mailboxes receive incoming customer email? Do you need to keep your responses isolated to a specific domain (e.g., @example.com, @somethingelse.com)?

Answering this question will help you determine how many mailboxes to setup.

- Do you have some questions that can only be answered by certain agents, or can all agents handle all questions?

Answering this question will help you determine the types of skills required.

- Will most of your customer requests be unique or similar in nature?

Answering this question allows you to think about the types of Stock Responses you will need to create, and whether you want to invest much time in building out the Find Answers KB.

- Where do you currently store customer's contact information? Will that system need to be updated to include information from iService, or vice versa?

Answering this question allows you to consider if any database integrations might be necessary.

- If you have been capturing customer information in the past, is there any additional customer information you have been meaning to capture? For instance, the lead source of the contact.

Answering this question allows you to consider whether you need to add additional contact properties to your segment.

- Do you have customer requests and answers (FAQs) already captured that you want to input into the iService knowledge base?

Answering this question allows you to decide how long it will take to input data and configure the initial iService knowledge base.

Step 4 Gather information

The setup process for iService will flow more smoothly if you can gather the following information prior to actually configuring the system:

- **Segments** Determine how many unique configurations will be required? Fill out copies of Appendix A as needed. If you have many users
- **Agents** Who are your users? Fill out copies of Appendix B as needed. If you have many users, consider using the iService Contact Import utility to import them in batch mode.
- **Mailboxes** What are the mailboxes you are going to have iService receive mail from? Fill out Appendix C.
- **Topics** Define how you will categorize your incoming questions. Consider documenting your topic tree structure using Appendix D.
- **Auto responses** What topics do you want to have assigned a set auto response? See examples and draft an auto response using Appendix E.
- **Skills** What common skills will your CSRs and topics share? See Appendix F.
- **Filters** What filters do you want to apply to inbound messages? What topics should filters send messages to when successful? For example filters see Appendix G.
- **Contact and Interaction Properties** Decide upon the types of custom properties you want to see when you view a contact (Contact Properties), and when you receive and answer questions (Interaction Properties). See Appendix H.

Step 5 Configure the iService Assistant

After you have planned and gathered your setup information, you can input it into the iService Assistant through the Admin Tools tab. Some information is interdependent, and for this reason the suggested order for configuring the Assistant most efficiently is:

1. Segments
2. Skills
3. Auto responses
4. Agents (will require skills and segments)
5. Topics (will require skills; may utilize auto responses and/or filters [see note]
6. Filters (will require topics)
7. Mailboxes - (will require topics; may utilize filters)

Note Because topics *may* use filters but filters *require* a target topic, some backtracking will be required in configuration. Creating your topics and then your filters is the best way to proceed. Later you may return to the topics section and assign filters as needed.

Appendix A ■ Segments

iService supports the concept of multiple business segments. This configuration is used to satisfy the following business requirements.

1. Unique Configurations Needed – If you have different business units that will use iService and each of them needs their own complete configuration, you should create a segment for each unit. For instance, you might have an internal tech support group, a human resources group, and a contact center using iService. Each of these business units could have their own completely configurable segment.

2. Unique Branding Needs – If you need to customize the self-service portal for different brands, then you should consider a separate segment for each brand.

3. Confidential Information – If you need to keep access to interaction history or contact properties restricted, that confidential information and correspondence should be managed within its own segment.

Appendix B ■ Users

iService supports various user types and can be easily customized to create new user types:

- **Customers** ask questions and browse the iService knowledge base.
- **CSRs** answer customer questions and update the iService knowledge base.
- **CSR Managers** supervise CSRs and can act as a CSR
- **Administrators** configure iService settings and can act as CSR managers.

The iService requires the following information for each user:

User 1			
First Name		Last Name	
E-Mail Address		Password	
Segment Access		User Type	
Departments		Skills	
Receive Notifications	(Yes/No)	Empty Inbox on Logout	(Yes/No)
Timeout Threshold (min)			

User 2			
First Name		Last Name	
E-Mail Address		Password	
Segment Access		User Type	
Departments		Skills	
Receive Notifications	(Yes/No)	Empty Inbox on Logout	(Yes/No)
Timeout Threshold (min)			

User 3			
First Name		Last Name	
E-Mail Address		Password	
Segment Access		User Type	
Departments		Skills	
Receive Notifications	(Yes/No)	Empty Inbox on Logout	(Yes/No)
Timeout Threshold (min)			

User 4			
First Name		Last Name	
E-Mail Address		Password	
Segment Access		User Type	
Departments		Skills	
Receive Notifications	(Yes/No)	Empty Inbox on Logout	(Yes/No)
Timeout Threshold (min)			

Appendix C ■ Mailboxes

iService will require the following information for a mailbox you plan to monitor (in-house installations will use there own mail server information rather than forwarding):

Mailbox 1
Display Name
Reply To Address
Pop Server Name
Pop Server Port
User Name
Password
SMTP Server Name
Filter

Mailbox 2
Display Name
Reply To Address
Pop Server Name
Pop Server Port
User Name
Password
SMTP Server Name
Filter

Mailbox 3
Display Name
Reply To Address
Pop Server Name
Pop Server Port
User Name
Password
SMTP Server Name
Filter

To improve performance for hosted sites, we suggest forwarding mail to an account that is local to the iService production system. This is important because using POP3 to retrieve messages with large attachments via the Internet can result in a timeout that will prevent messages from being retrieved.

Appendix D ▪ Topics

iService categorizes customer inquiries by topic and uses topics to organize knowledge base articles (the Find Answers page). Topics are similar to individual message queues. All the topics for your organization are tied together in a hierarchical manner referred to as a topic tree.

Use the following outline to draft your topic tree:

Root Topic	First-level Topics	Second-level Topics
	A	A1
		A2
		A3
		A4
		A5
	B	B1
		B2
		B3
		B4
		B5
	C	C1
		C2
		C3
		C4
		C5
	D	D1
		D2
		D3
		D4
		D5
	E	E1
		E2
		E3
		E4
		E5
	F	F1
		F2
		F3
		F4
		F5

Appendix E ■ Auto responses

Auto responses are used to notify various contacts when certain actions occur. There are six types of auto responses as shown in the table below. You can create an unlimited number of auto responses and use the variables shown in the table below.

Contact Creation – A message sent to a contact the first time they submit a question to the iService system. This notification informs them that they have an account created in the support portal.

Message Acknowledgment – Acknowledgments are sent in response to incoming questions, and are unique to each topic.

Agent Notification – These templates are sent to agents to inform them of incoming messages, or to provide access to an external agent answering page.

Password Reset – Sent to a contact when they request a password reset.

Secure Notification – Sent to a contact when an answer has been provided to their question, but is marked as a secure response.

Alert – Templates used within the Alert system notify users of various system conditions.

Variable Name	Description	Contact Creation	Message Acknowledgment	Agent Notification	Password Reset	Secure Notification	Alert
Name; First Name; Last Name (always the “customer’s” information)	Recipient's full/first/last name, if known; otherwise, recipient's email address. Note – this is always the contact’s name that sent the message.	X	X	X	X	X	
Email	Recipient's email address, if known. Otherwise blank.	X	X	X	X	X	X
Original Date; Original Time	Date/Time of the original message. For email, the date/time it was sent; for Ask a Question, the date/time it was asked.	X	X	X	X	X	X
Today	Today's date, in the form Sunday, May 12, 2002.	X	X	X	X	X	X
Original Subject; Original Body	The subject/body of the original message.	X	X	X	X	X	X

Forward URL (populated only when sent from Forward External)	This is the URL where external agents answer a forwarded message. It must be included in the Agent Notification used when forwarding messages to external agents.			X			
NotifyResponseID	This is used within an Agent Notification to allow agents to reply directly to the notification, rather than logging into iService. This is used to identify the notification interaction and enables the mail processor to connect the agent reply to the original interaction, since the notification interaction ID is not part of the subject line. This can be used within a Forward to External Agent or Agent Notification on receipt of new messages. NOTE – do not set the No-Reply option for auto responses that are used for accepting email responses from agents. Otherwise, the message will not be delivered to iService.			X			
NotifyResponseBody	This is where the quoted question appears and where the agent enters their answer. It includes a special start and end markers which must not be corrupted by the agent in his reply. This can be used within a Forward to External Agent or Agent Notification on receipt of new messages. NOTE – do not set the No-Reply option for auto responses that are used for accepting email responses from agents. Otherwise, the message will not be delivered to iService.			X			
Password	Displays the user's password necessary to log into the iService	X					

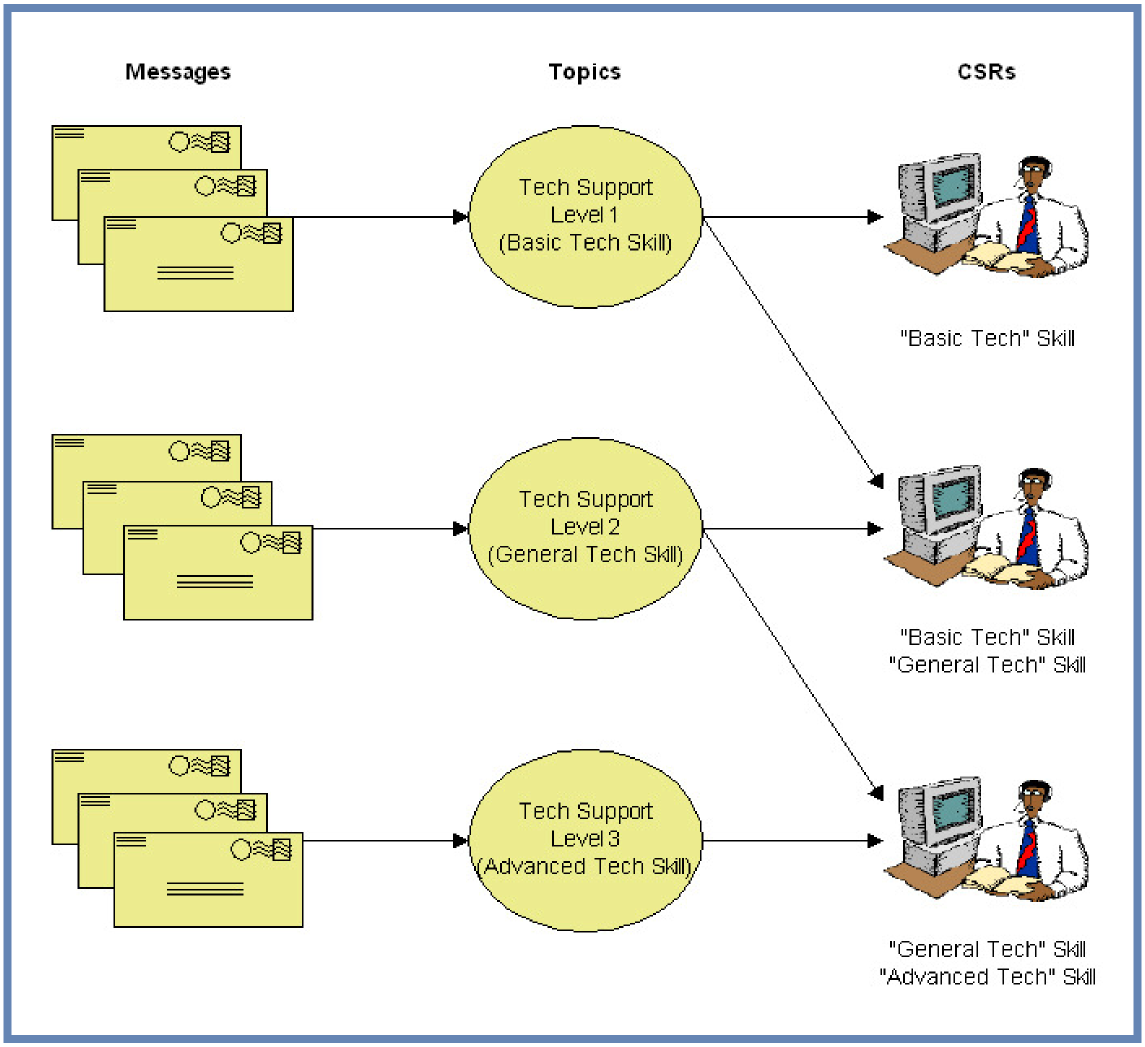
	interface.						
Reset URL	The URL at which the recipient must change their password. It has the full URL to the reset confirmation page and is generated by the web front end web site (not the web service back end) and actually has <Reset GUID> embedded into it. Note – there is a space between the word Reset and URL.				X		
Reset GUID	The GUID of the user to whom the password reset was sent. This would probably never be used directly by an administrator in the auto response. Note – there is a space between the word Reset and GUID.				X		
Reset IP	The IP address of the user to whom the password reset was sent. Reset IP is optional but can be useful for the user to investigate if someone else is trying to hijack their account. Note – there is a space between the word Reset and IP.				X		
AlertName	This will return the name of the Alert.						X
AlertCount	This will return the total number of items included in the alert.						X
<AlertItems> (.*) <AlertItemsEnd>	This is similar to a /Body tag within HTML. All AlertItem tags must be embedded within these tags. You must replace (*) with the actual tags listed below.						X
AlertItemID	This is the ID of the interaction included within the detailed listing section of the alert.						X
AlertItemAgent	This is the Agent assigned to the interaction included within the						X

	detailed listing section of the alert.						
AlertItemName	This is the name of the contact for the interaction included within the detailed listing section of the alert (if known).						X
AlertItemEmail	This is the email address of the contact for the interaction included within the detailed listing section of the alert.						X
AlertItemSubject	This is the subject of the interaction included within the detailed listing section of the alert.						X

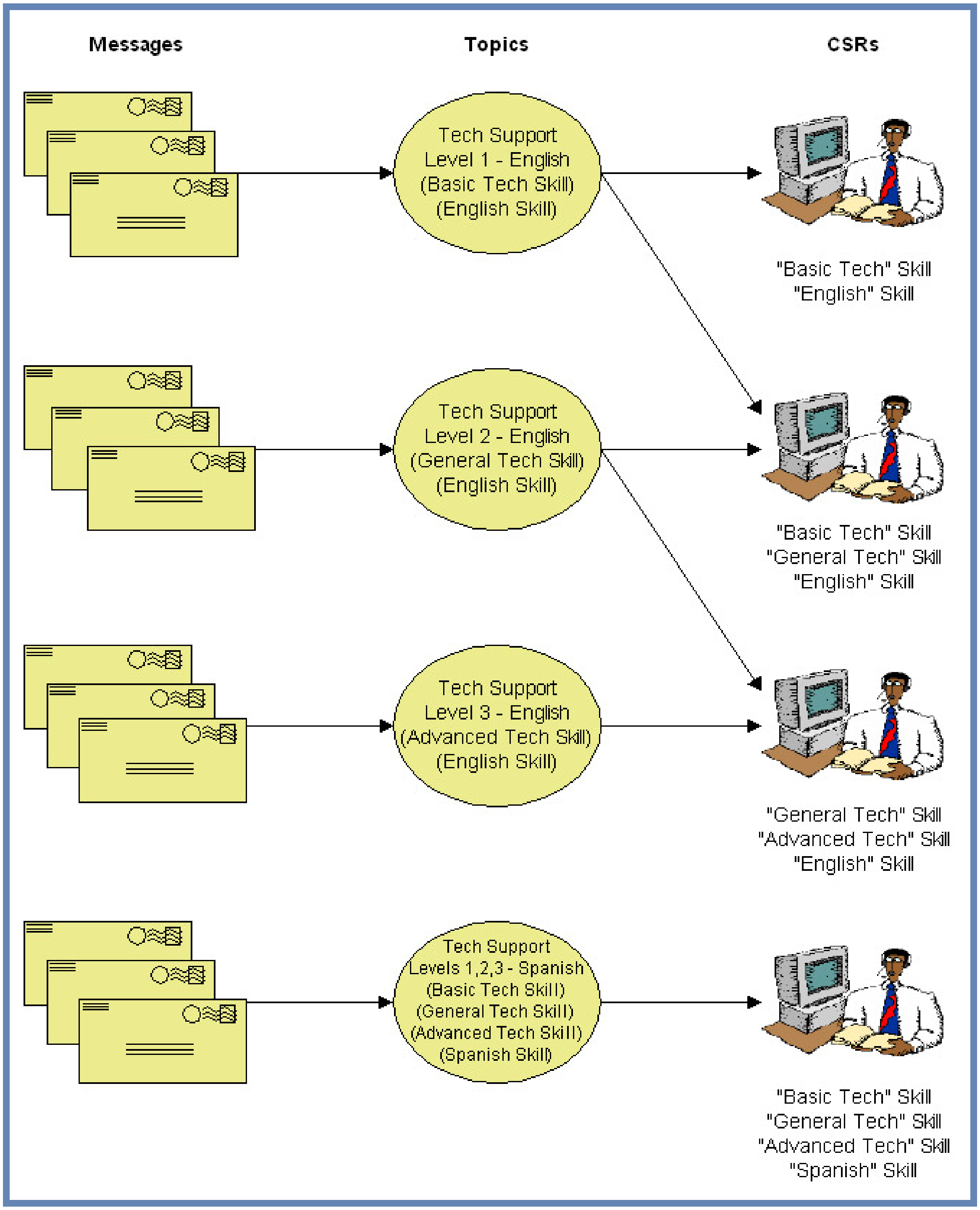
Appendix F ■ Skills

Note Skills are not required for implementations of iService that have only a few CSRs or that do not need skills-based routing. If skills are not used, all CSRs will be allowed to receive any inbound message, regardless of the topic. Keep in mind that adding a skill, or set of skills, to a topic will **prevent** CSRs from receiving messages from that topic, unless they also have the corresponding skill, or set of skills.

The figure below shows how tech support skills may be assigned to both topics and CSRs to ensure that CSRs are allowed to receive specific types of messages but are prevented from receiving others.



The next figure shows skill assignments to also provide additional tech support in Spanish through the addition of a Spanish-speaking CSR. To make sure that the Spanish-speaking CSR receives messages in Spanish and that the English-speaking CSRs receive messages in English, language skills have been assigned to both topics and CSRs.



Appendix G ▪ Filters

Filters are very powerful "behind the scenes" mechanisms used to take actions on incoming messages. A filter is comprised on a set of conditions and a set of actions. Conditions are represented as a regular expression formula that evaluates the text within the Subject, Body, Header To, and Header From fields of an incoming message. Any regular expression formula can be used, ranging from a simple text match (ship|shipping which means the strings "ship" or "shipping" are found) to a more complex formula.

The actions within a filter can include the following:

<u>Change Topic</u> – This action will set the top as specified.

<u>Set Interaction Property</u> – This action will set the value of an interaction property to either a fixed value specified in the filter, or a variable taken from the incoming message.

<u>Select Agent & Send Auto Response</u> – These actions must be used together. The first step is to select the list of agents to be notified, and the second step is to designate the notification to send to the agents.

<u>Run Filter</u> – This will trigger the running of a second filter.

Individual filters can be organized into groups, which provide a convenient way to manipulate incoming messages. The recommended approach to building group filters is as follows.

1. Combine all individual filters that Change Topic into a single group. Organize them in a way that puts the most esoteric filters at the bottom of the group, and do not check "Run All Filter" so that the evaluation stops on the first match.
2. Combine all the filters that set interaction properties into a single group, and set that group to "Run All Filters." This will ensure that all properties are populated.
3. Combine all Agent Notification filters into a group similar to 2. above, and set the group to "Run All Filters."
4. Combine these three groups into a master filter that will "Run All Filters." Then apply this master filter to the appropriate mailboxes.

