



Release 4.4

ONE-TO-ONE SERVICE.COM[®]

iService[®] Email
and Customer Information
Management System

iservice[®]

Release Notes

Release Notes – Version 4.4

Improving the Release Notes

We need your help. The purpose of this document is to provide a release history for users and implementers of iService Assistant. This document contains the original request for change along with developer or tester notes regarding how the change was implemented. User interface changes are described within the User Interface Changes section.

You should use this document to:

- Become familiar with the changes in the system since your last release. Some changes may require user training because of a new interface or workflow.
- Develop a test plan for implementing the new release. Your test plan should cover the new functionality introduced within this release.

This release document is intended to help our users effectively utilize iService and we would like your feedback on whether it is helpful and how we can improve. Please send your comments to support@1to1service.com or contact your account manager directly. Thank you in advance for your help!

Sincerely,

The One-to-One Service.com Team

Please send your comments to:

support@1to1service.com

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Release Overview

Major Enhancements

| | | | | |
|----------------------------|----------------|--|-----------------------------|--|
| <p>788</p> | <p>Feature</p> | <p>01.40 - Forward to external agent (my queue and supervise)</p> | <p>Msg Queue - My Queue</p> | <p>Provide the ability to forward messages to an outside party for answering.</p> <p>iSA Agent Interface:</p> <ul style="list-style-type: none"> - The agent will select Forward to External Agent from the forward button. - After clicking on Forward to External Agent, the agent will be prompted to enter the address to which the message should be sent for update. - After entering the address the agent will click a forward button and the message will be forwarded to the external agent for answering. - After forwarding the message, the interaction will be assigned to the external agent (i.e., the email address) and will no longer appear in the original agents My Queue. <p>iSA Supervise Interface:</p> <ul style="list-style-type: none"> - After an interaction is forwarded, the operator is revised to the new external agent. Within the supervise view, the tag "address@domain.com" will be shown as the assigned operator. External agent interface: - The external agent receiving the interaction will get an email FROM iService using an autoresponse template for agent notify. - The subject and body of the message should be derived from a Notification maintained in the Admin Tools > Segment > Notifications tab. - The notification MUST include a link to the External Agent Answer Page, otherwise the forwarded message will not be answerable. - The receiving external agent will be able to forward the message to whomever they wish, and the embedded URL will still function for whomever is answering it. Once the interaction is answered, anyone attempting to click the link should receive a page indicating the question has already been answered. - There will be no provision for send the response pending or any of the extended functionality of the My Queue page. The external agent must simply enter an answer and send. Any desire for secure messaging etc will be addressed in a future release. |
|----------------------------|----------------|--|-----------------------------|--|

Minor Enhancements and Bug Fixes

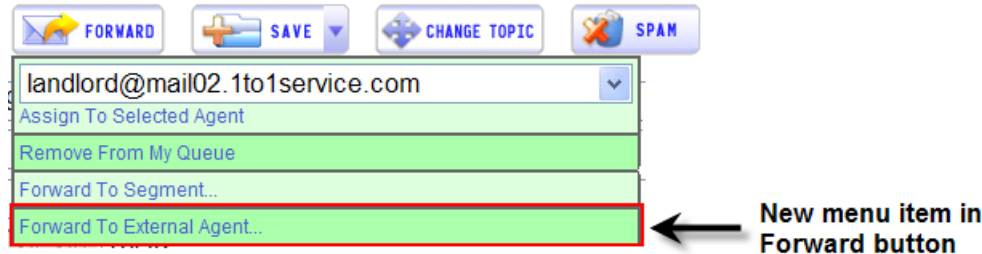
| ID | Type | Description | Category | Details |
|----------------------------|------------|---|-----------------------------|--|
| <p>931</p> | <p>Bug</p> | <p>01.01 - Downgrading Agent to customer leaves them in the Admin Tools>Agent list.</p> | <p>Admin Tools - Agents</p> | <p>When you change the usertype of an Agent (i.e., CSR) to type Customer, they contact continues to show up on the Agent listing...even though they are no longer an agent. The contact's access is properly restricted to that of a customer; however, they still show up in the Agent listing.</p> |
| <p>898</p> | <p>Bug</p> | <p>01.10 - Customer reply not reserved for the original agent</p> | <p>Msg Queue - My Queue</p> | <p>When a customer replies back to an agent response, the message should be reserved for the agent that provided the response. This is not functioning in version 4.2. 1. Sent an email from CUSTOMER@DOMAIN to info mailbox. 2. Answered this email as agent from my queue 3. responded back to</p> |

| | | | | |
|---------------------|---------|--|-----------------------------|--|
| | | | | the agent response expecting it to be either in the agent queue or reserved for the agent. * the message was not in My Message Inbox and when I logged in as landlord the message was assigned to the landlord, instead of the original agent. |
| 888 | Bug | 01.20 - Ask a Question does not populate auto response variables for name | Ask a Question | The auto responses for Ask a Question are not populating any variables for name. |
| 927 | Feature | 02.01 - Add Status to Msg Properties panel | Msg Queue - Search | In the message properties displayed for a message, add the Status to the display. This would be below Topic Name and Above Attachments. |
| 869 | Feature | 02.10 - Allow exclusion from default acknowledgment | Admin Tools - Autoresponses | The default auto response should not apply to the system standard _SPAM and _Undeliverable topics. These topic are designed to gather message that will never send an acknowledgment and should not be subject to the default. Otherwise, the default setting becomes unusable in practice. There are potentially other topics that also should not receive any auto response. Create a --None-- option for the auto response drop down within the Topic menu that will allow some topics to get the default and other to be fully excluded. |
| 893 | Bug | 02.30 - Contact creation labeled Secure Response in history | Cust Info - Contacts | Contact creation responses are labelled Secure Response in the contact history. These should be labelled Contact Creation Notification. See image. |
| 733 | Feature | 03. - Cannot delete auto responses. | Admin Tools - Autoresponses | In Admin Tools under Segments - Auto Responses there needs to be the ability to delete an auto response. |
| 738 | Feature | 03. - Cannot delete skills | Admin Tools - Skills | In Admin Tools under Skills there needs to be the ability to delete skills. |
| 907 | Bug | 03. - Change label for Contact Properties to Contact Details | Admin Tools - Agents | The label within AdminTools>Agents for contact details is written Contact Properties. Contact Properties is a separate Segment Tab. The label should read Contact Details consistent with the other pages in iSA. |
| 901 | Feature | 04. - Update release number to 4.4. | Web Interface | Update release number to 4.4. |

Significant Interface Changes

Forward to External Agent

To forward an interaction to a person that is not an iService agent, click on the Forward button and select the Forward to External Agent link.



This will display a text box where you can enter the external agent's email address, pick the notification message used to forward interactions, and click the Forward Now button.



After the interaction is forwarded, it will appear in the supervise page as assigned to the external agent rather than the original agent. This action will also be logged in the audit trail for the interaction. The external agent will receive an email with a link that will open the answer page. This email can be customized from the Admin Tools>Segments>Auto Responses page.

Hello -

You have been assigned a message from iService. To answer this message, please click the URL below.

<http://seantest5/Forward.aspx?id=4d633d82-323e-4fd6-866c-afba4895d193>

Clicking the link opens the following page in which the external agent can complete the answer.

Version: 4.4.3084.16314 (Login)

Please confirm your information:

Email Address: externalcsr@domain.com

Email Address: externalcsr@domain.com (Confirm)

First Name: External (Optional)

Last Name: UserName (Optional)

To: customer8@1to1service.com

Subject: Re: [ref#: 31-31] Test8

[Attach a file](#) -- Maximum 10 MB upload at one time.

Hello,

This is the answer you are looking for.

Regards,

An External Agent

On 2/4/2007 12:07:17 AM, Customer 8 <customer8@1to1service.com> wrote:
> Body of message for Test8 Sent to Email Address
s1topic2@1to1service.
> com

Private Comments
These are my private comments about this question.

Reference Number: 31
Segment Name: Segment1
Topic Name: s1topic2
Operator Name: externalcsr@domain
Attachments:
Original Message.eml