



Release 4.6

ONE-TO-ONE SERVICE.COM[®]

iService[®] Email
and Customer Information
Management System

iService[®]

Release Notes

Release Notes – Version 4.6

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

ID	Type	Description	Category	Details
976	Feature	Interaction and contact property audit trail	Admin Tools - Interaction Properties	iService now provides an audit trail for all changes to contact and interaction properties. This information is tracked similar to status changes to interactions. The display of the audit trail is done in a separate feature enhancement. The requirements for this item are to store the changes within an audit trail that can be used initially for reporting and at a later date integrated with the Contact Details and Interaction History pages.
816	Feature	Create base version of iService reports in SSRS	Reports	<p>The iService database is now fully integrated with SQL Server Reporting Services (SSRS). This provides a convenient reporting interface where customers can access pre-written reports or generate their own reports.</p> <p>The following are the initial reports for SSRS:</p> <ol style="list-style-type: none"> 1. Agent Summary Report 2. Topic Summary Report 3. Mailbox Summary Report 4. Random Audit Report
998	Feature	Assign ticket to agent when created	Cust Info - Contacts	Agents now have the ability to assign a ticket directly to an agent when it is created (from all locations, whether inside a thread or in the Create Ticket page). The list of agents is presented in the Message Properties panel to the right of the message body. It is below the Segment and Topic list. Only those agents within the selected segment are presented. Agents that have MGR or above access can pick any agent in the segment, while CSRs can only pick agents that have the required skills of the topic.
1010	Feature	Provide segment access level security for admin users	Admin Tools - Agents	Users are now not allowed to grant access to other agents that do not match their own access rights. For instance, S1Topic123MGR (Segment1 Manager) cannot grant S2 to any agent including, themselves. The superuser will have to grant the S2 access to an admin or mgr, and that person could then provide it to others. Also, users cannot perform any system admin at the Segment level to Segments to which

				they do not have access. An audit trail is now maintained for all changes to Segment access that includes the agent who changed the access along with the before and after values. This access control extends to departments since those also provide segment access.
936	Feature	Add Topic, Status, and Date to Interaction Search	Msg Queue - Search	Topic, status, and date received fields are now added to the interaction search page.

Minor Enhancements and Bug Fixes

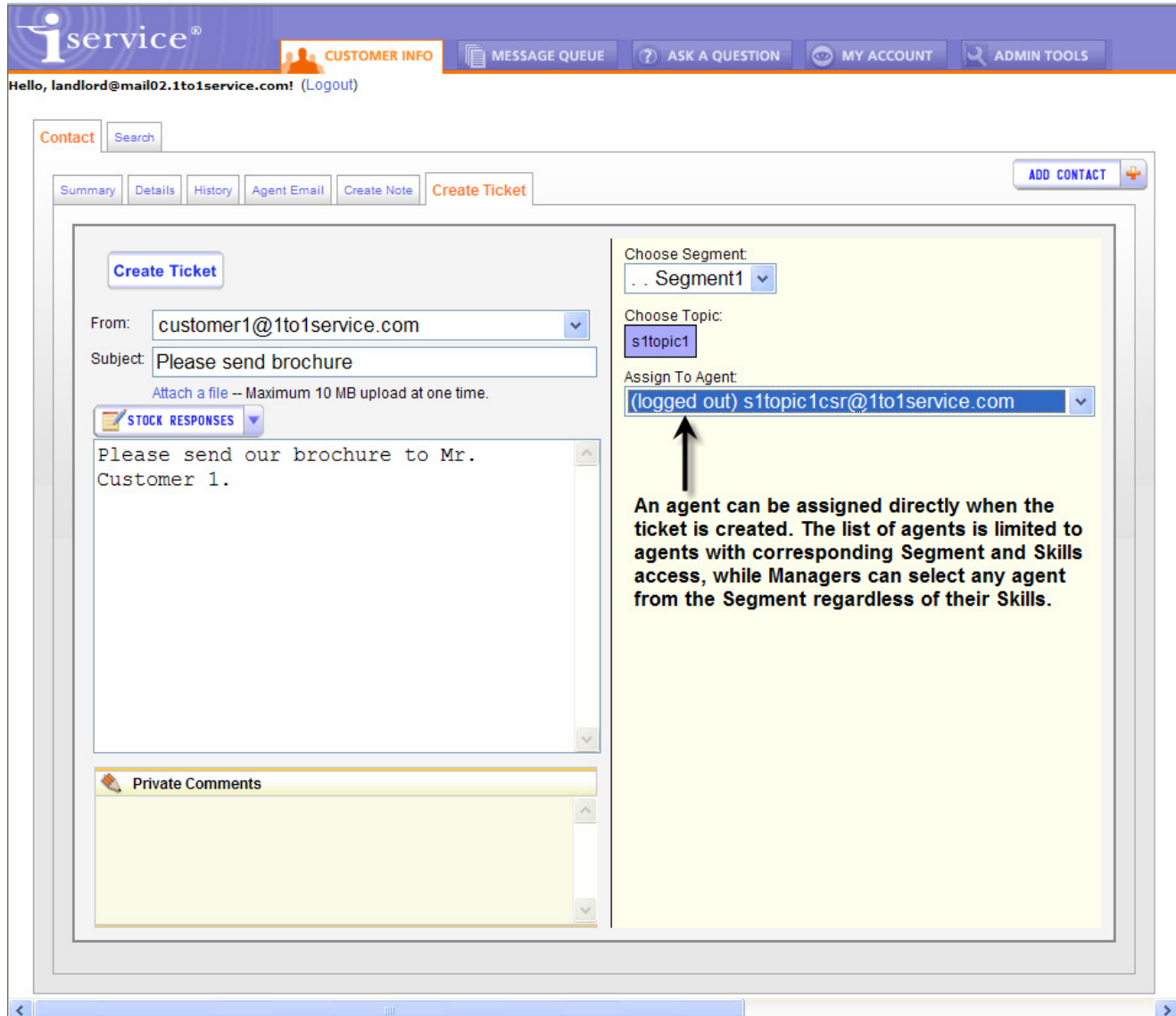
ID	Type	Description	Category	Details
1013	Task	Change Remove/Add in Customer Search from buttons to text links	(None)	The Add/Delete buttons for additional search terms to text links has been changed with a label over last IN FIELD: input box of search terms. This required a change of input type and potential DIV changes to ensure proper placement during rendering. This item has CSS class/id changes. See Item 986.
810	Feature	Canned phrases inserts at beginning of message	Admin Tools - Canned Phrases	Canned phrases are now placed where the cursor is, and if not, at the end of the message.
996	Feature	Add Company and Job Title to standard contact values	Cust Info - Contacts	"Company" and "Job Title" are added to standard contact values. These are inserted after LastName.
984	Feature	Keep drop down menus open until click	Msg Queue - My Queue	Delay changed from 300 ms to 2000ms
986	Feature	Customer Search -- adjust space between input fields for Advanced Search	Web Interface	Adjusted spacing between search fields per Heidi's email -- see http://www.happyheidi.com/iservice/walk_thru1/CustomerInfo_Search_Tab_b.jpg
989	Feature	Change "Add Contact" to image (not link) and move into Contact related tabs	Web Interface	Add Contact is an image and visible only on the "Contact Details" tab.
988	Feature	Move Search Button on Customer Search	Web Interface	Search button replaced with image and moved to lower right.
987	Feature	Adjust style for input boxes in Customer Search	Web Interface	Aadjusted field styles to match: STYLE: for Search Where, In Field, Search For, Operation (currently not tagged with anything) .search-reference-label { color:#666666; font-family:Geneva,Helvetica,Arial,sans-serif; font-size:9px; } IMAGE:
964	Feature	Ask a Question should	Ask a Question	Currently, it is allowed to send the

		handle secure messages without sending the body in a Message Acknowledgment.		original body back to the contact in the Message Acknowledgment autoresponse. However, if the message is secure, it will not be sent back to them in an autoresponse.
1014	Bug	Move Operation selector of Customer Search to left of last search term in Customer Search	(None)	OPERATION selection is moved to left of last search term of Customer Search and inserted between field label and select box. Required for completion of Item 986.
1012	Bug	Assigned auto-responses not released when auto-response type changes.	Admin Tools - Autoresponses	When an auto response had its Type changed (Secure Notification, Agent Notification, Message Acknowledgement, etc.), the display of the auto response was not updated in the Segment > Details page where the item is referenced as a default item. This caused the response to continue being sent even though it was no longer designated as a Agent Notification.
1007	Bug	Stock Answers do not work inside history for Agent Email	Interaction History	Inside the History tab, when an agent is added, the Stock Answers insert link displays the answers and pastes into the message body.
939	Bug	Do not allow -none- for secure msg template	Msg Queue - My Queue	-None- is not allowed as a secure message template. All usage of the SEND button actually sends something to the contact.
1019	Bug	Hidden segment value (name) is deleted from contact properties page	Admin Tools - Contact Properties	For new tenants, the delete contact property button does not when there are no properties shown for the segment.
608	Bug	Timeout in Cust Info search page	Cust Info - Search	When searching customers, the web page times out when trying to render the page. It was returning the entire set of data rather than just the items to display.
1027	Feature	Updating from older database versions is now more reliable.	(None)	Patched up the database update code so that it will work more reliably if making the jump from several releases ago to the current release.
1028	Feature	Database rollback now uses transaction code.	(None)	The database update now uses the transaction code, so if an update does fail or crash the entire update will be rolled back. Still, backups should be done each time before the update is run on any live database.

Significant Interface Changes

Assign ticket to agent when created

Tickets can now be assigned directly to an agent when created. They can also be left unassigned and routed similar to other interactions based on the Segment and Topic assigned.



Changes to Web Services

The following information is provided for clients that are accessing the iService Web Services directly.

Changes from Release 4.5 to Release 4.6

- As part of searching interactions based on status, topic, and date:
 - New function **MessageSearchGetStatuses** returns new type **StatusesList**.
 - Type **SearchParameter** got new fields **useStart**, **useEnd**, **timeStart**, **timeEnd**.
- Function **MessageQueueSuperviseGetAgents** lost parameter **recursive**.
- Type **AgentEmailCreateDetails** got new field **assignToAgentID** for use when creating tickets.
- Enum **MessageQueueAnswerAction** lost options **RESOLVE_RESPONSE_IN_MYACCOUNT** and **RESOLVE_RESPONSE_IN_MYACCOUNT_EXPECT_REPLY**.

Use **SEND_NOTIFY** versions instead and specify a valid **notificationID**.