



Release 4.8

ONE-TO-ONE SERVICE.COM[®]

iService[®] Email
and Customer Information
Management System

iService[®]

Release Notes

Release Notes – Version 4.8

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:

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Release Overview

Major Enhancements

1054	Feature	Implement Find Answers layout	Find Answers	We migrated the primary functionality of the iService3 knowledge base to iService4.
1000	Feature	Add Update Property step to filters	Admin Tools - Filters	<p>The mailbox filter functionality was significantly upgraded to allow the following actions when any regular expression is matched against an incoming message To, From, Subject Line, or Body.</p> <ul style="list-style-type: none"> • Change Topic – this will set the topic for the message as specified. • Set Property – Any interaction property of the tenant can be set to a specified value. • Select Agent / Send Auto Response – An auto response template can be generated and sent to the specified agents. • Run Filter – after above actions are taken, an additional filter can be triggered.
1026	Feature	Allow interaction skills to be used for routing	Admin Tools - Interaction Properties	Interaction properties can now be used for routing purposes. They are available for inclusion in skill definitions that are assigned to agents, and are associated with topic as required skills.

Minor Enhancements and Bug Fixes

ID	Type	Description	Category	Details
1056	Bug	Spaces inserted in Supervise display	Msg Queue - Supervise	Spaces are used in certain fields within the supervise page to ensure line breaks are properly managed. A change was made to limit the chances that the space could appear within words rather than long text strings.
1089	Bug	Error on interaction search	Msg Queue - Search	When searching for Resolved By AND Interaction Status an Internal Error was displayed. This has been corrected.
1064	Bug	Use of [+] button in Msg Queue>Search causes page to load without anchor	Msg Queue - Search	If you had many items open in the Msg Queue>Search page, there was an issue when you attempt to edit an interaction property. If the property allowed multiple values and had the [+], when you clicked the button the page reloaded to the top of the page. An anchor was added to correct this issue.
1079	Bug	Error using Get Next on msg with NULL	Msg Queue - Search	<p>The following error was returned when attempting to get a message with invalid characters. This has been corrected.</p> <p>Server Error in '/' Application. ----- - ':', hexadecimal value 0x00, is an invalid character.</p>
1047	Bug	Operator shown as unassigned for sent	Msg Queue - Search	When you search for interactions Sent by a particular agent, the resulting history listed the agent as "unassigned." It should be showing the agent that provided the response.

		messages in Interaction Search		
1039	Bug	CSR search shows no agents and errors on submit	Msg Queue - Search	When logged in as a CSR, the Msg Queue Search returns no agents for the Assigned To and Resolved By search options. When you submit the search, you get the error "Resolved by search string must be an integer ID" This was corrected.
1091	Bug	Forward to external agent link does not work unless logged in	Msg Queue - My Queue	The forward to external agent link does not work unless the person is actually logged into iService as an agent. This page should not require any type of login as the user is a non-iService agent.
1036	Bug	"To" address not displayed when navigating inside MsgQueue - My Msg Inbox	Msg Queue - My Queue	<p>The "To" address is not displayed when composing a response in the following scenario.</p> <ol style="list-style-type: none"> 1. Get Next or open an existing message. 2. Click on Contact Details panel for the selected msg. 3. Click the Save button inside the Contact Details panel. 4. Return to the Message Details. <p>The "To" line is now blank. However, the message does still send properly.</p> <p>This was corrected.</p>
1060	Bug	Topic changes should be labeled as such in history	Interaction History	The topic changes should be labeled Topic Changed and shown within Interaction History for the affected message.
1085	Feature	Add HTML checkbox to Find Answers article creation	Find Answers	When creating an article, we need to know whether the article contains HTML markup. If not, we will insert breaks for the line returns. If it is HTML, we will simply display the markup entered for the article.
1100	Feature	Add topic and # views to article list	Find Answers	Added topic to the list of fields displayed for an article, along with number of views once stored.
1066	Bug	Stock Responses not shown for Create Note, Email or Ticket	Cust Info - Contacts	When creating a note, agent email, or ticket the segment stock responses are not shown. Only the agent specific responses are shown.
1061	Bug	Do not substitute email address for name on contact summary page	Cust Info - Contacts	On the contact summary page, do not substitute the email address for the full name if the contact has no name on his record. It should be left blank if unknown.

<u>1030</u>	Feature	Add contact first and last name to Customer Info > Contacts	Cust Info - Contacts	The contacts name should be displayed for all sub tabs within Customer Info > Contacts. The name should appear below the Contacts tab and above the Summary, details, agent email, etc tabs. It should be a separate class so it can be styled in the CSS as desired. Substitute email/login if there is no first or last name.
<u>1094</u>	Bug	Update Contact Summary page with standard layout	Cust Info - Contacts	When a new tenant is created, use a standard layout in Contact Summary.
<u>1090</u>	Bug	Error loading contact summary page without segment access	Cust Info - Contacts	The contact summary page was not loading unless the agent had access to ALL segments of the contact. Instead, we now display only the values that are accessible to the contact.
<u>1022</u>	Bug	Contacts allowed with no segment	Cust Info - Contacts	We allowed an agent to save a contact with no segment membership, and to remove all the segments from a contact. This created a contact that could only be viewed by the super user. We now enforce our business rule of contacts must belong to at least one segment.
<u>1041</u>	Bug	Correct text box size in Topics menu	Admin Tools - Topics	The text box for the Topics selection of interaction properties is too small. Reduce the size of the topic list and widen the interaction properties text box.
<u>805</u>	Bug	Limit view access to segment details based on segment access	Admin Tools - User Types	Administrators should not be able to browse the details of segments to which they don't have access. Also, managers should not be able to browse the stock answers for segments in which they don't have access.

Significant Interface Changes

Find Answers

The Find Answers page provides a convenient knowledge base for agents and customers. This section of iService allows agents to create articles (FAQs) that are organized by topic. These articles can be labeled as public for external access by customers, or as private for agent only access.


Articles are created by clicking the Add Article button.

ADD ARTICLE 

Topic	Count
Segment1 -- All Topics	1
_Spam	0
_Undeliverable	0
s1topic1	1
s1topic1a	0
s1topic1b	0
s1topic12	0
s1topic123	0
s1topic2	0
s1topic3	2
Segment2 -- All Topics	2
_Spam	0
_Undeliverable	0
s2topic1	2
s2topic1a	0
s2topic1b	0
s2topic12	0
s2topic123	0
s2topic2	0
s2topic3	0

Include All Sub-Topics

Create Answer



Public Question And Answer Is HTML

Subject:

[Attach a file](#) -- Maximum 10 MB upload at one time. **4**

Question:

5

Answer:

6

Cancel

1 – Select Public for the article to be displayed to anonymous and customer users.

2 – If you are using HTML in the display of the article, select the Question and Answer is HTML box. This will render the contents of the article assuming it contains HTML markup. Otherwise, the article will display as plain text and breaks will be inserted where carriage returns are entered.

3 – This is the subject of the message that is displayed in the article list.

4 – You can attach an unlimited number of files to the article. Click the Attach a file link and then browse to the files location. When the article is saved, the file will be uploaded to the iService database.

5 – This is the Question section of the article.

6 – This is the Answer section of the article.

Filters Changes

A “Set Property” feature was added that allows filters to set interaction properties based on condition matches within a filter.

Segment Name	Standard
<input type="checkbox"/> seantest5	False
<input checked="" type="checkbox"/> Segment1	True
<input checked="" type="checkbox"/> Segment2	True

New Segment

Details | Contact Properties | Interaction Properties | Mailboxes | Auto Responses | Stock Responses | Topics | **Filters**

Filters | Groups

Filter Name
Billable
Bounced Messages
Spam Subject
Topic1
Topic12
Topic123
Topic1a
Topic1b
Topic2
Topic3

New Filter

Name: Billable

Description: Interactions with Microsoft are not billable. This sets that property.

Expression: @microsoft.com

Match In: Subject Body To From

Filter Action:

Set Interaction Property

Property: Segment1 -- Billable

Value: FALSE

Up Down Delete

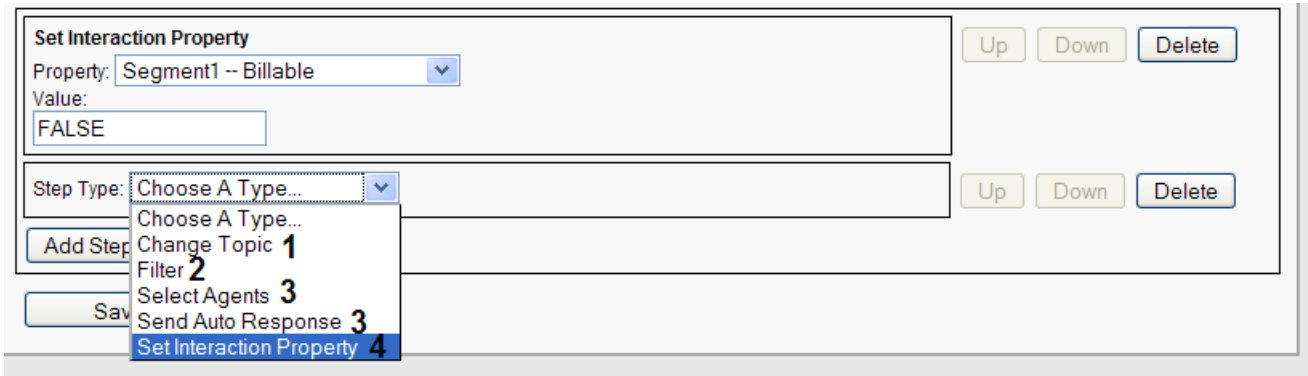
Add Step

Save

This filter looks for any email message that arrives from an address @microsoft.com.

When that condition exists, it sets the interaction property of "Billable" to a value of FALSE for the message.

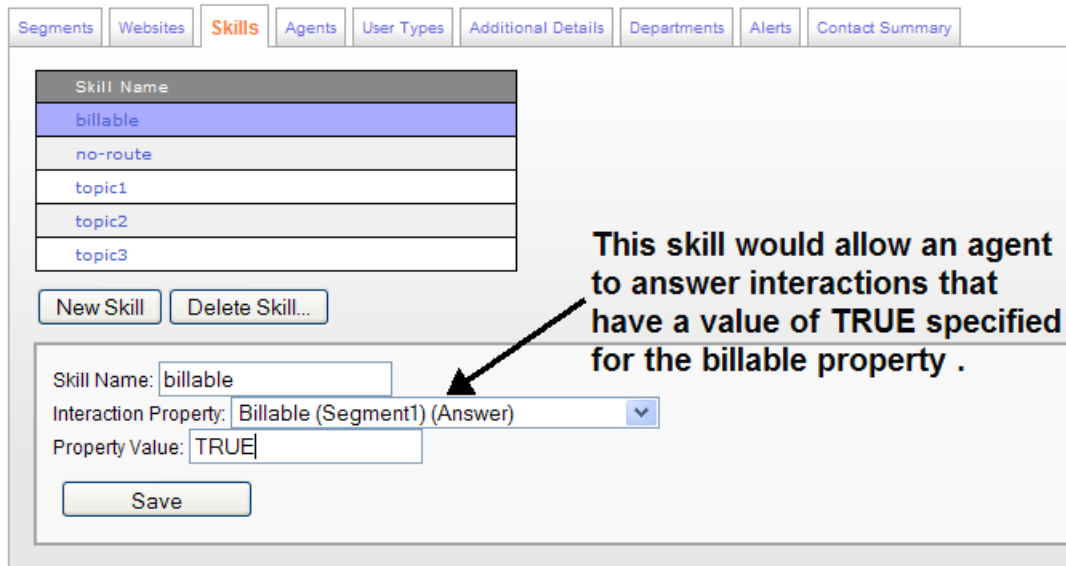
In addition to setting interaction properties, filters can also execute the following actions.



- 1 – Change Topic. The topic can be changed to any topic within the Segment.
- 2 – Filter. After the initial set of actions are executed, another filter can be specified to execute.
- 3 – Select Agents / Send Auto Response. An auto response can be sent to a list of selected agents. This is useful when a topic may not have an agent notification sent, or the agent does not have the skills for the topic but should be notified of incoming messages with matching criteria.
- 4 – Set Interaction Property. As shown in this example, any interaction property from the tenant can be set.

Using Interaction Properties in Skills

Interaction properties can now be used for message routing purposes. The property can be added as a required skill to a topic, and also associated with agents that are capable of handling the interaction.



Setting Properties in Alerts

The ability to set properties has been extended to the Admin Tools > Alerts page, and functions identically to the filter process. That is, when an alert condition is met any interaction property can be set.

Changes to Web Services

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

Changes from Release 4.7 to Release 4.8