

**iService®**

# **Release Notes**

*Version 5.11*

*Updates to the iService  
customer interaction solution.*



## 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. 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](mailto: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](mailto:support@1to1service.com)***

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# Release Overview

## Major Enhancements

ID	Type	Description	Category	Details
1652	Feature	<b>Options for Rename Input and Process 1st Record Added to Batch Form Submit GUI</b>	Admin Tools - Forms	<p>The options “Rename Input File After processing”, and “Process 1<sup>st</sup> Record Only” are now available. If a user wants to be sure that they do not process the same file more than once, they simply go under options and check the box next to “Rename File After Processing and then click the “Start Submit” button below. This will append the current date to the beginning of the file name that is processed.</p> <p>If you have a large file to process and want to test one record to make sure your file format is correct, check the box next to “Process 1<sup>st</sup> Record Only” and click the “Start Submit” button. This option will only process the first record of the file.</p>
1705	Feature	<b>Add user to agent table when any non-customer tab is assigned</b>	Admin Tools - Agents	<p>Any contact that has access to the non-public tabs (Customer Info, Message Queue, or Admin Tools) has now been designated as an agent. This allows you to create new AgentTypes that have more limited access, such as the Customer Info pages only.</p> <p>Keep in mind that any agent with access to the Customer Info page can create agent emails, and any agent with access to the Find Answers page can see private Find Answer articles within segments to which they have access.</p>
1712	Feature	<b>Variables for user logged into forms</b>	Admin Tools - Forms	<p>New variables can display details of an iService user that is logged into an iService form.</p> <p><u>\$loggedin -name\$</u> - This will display the full name of the iService contact that is logged into a form. If the contact has no name defined, it will display their email address.</p> <p><u>\$loggedin -contactid\$</u> - This will display the ID of the contact that is logged into the form.</p> <p><u>\$loggedin -sessionID\$</u> - This will display the SessionID of the contact that is logged into the form.</p>

1746	Feature	<b>JQuery Data Picker</b>	Web Interface	The old date selection drop downs have been replaced with a JQuery calendar based date picker.
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## Minor Enhancements and Bug Fixes

ID	Type	Description	Category	Details
1665	Feature	<b>Remove the old Address property from interface display</b>	Admin Tools – Contact Summary	The old Address field (multi-line property) was deprecated in a prior release, and it has now been removed from the Admin Tools-Contact Summary page and Cust Info - Search results page. However, the field will continue to be in the database and will be viewable by the Landlord.
1381	Feature	<b>Change Interaction Search results “From” column to “Contact Name” and “Contact Email”</b>	Message Queue - Search	In Message Queue - Search, after performing a search as list of results is displayed. The “From” column has been renamed “Contact Name” and the “Email” column renamed “Contact Email”. There was some confusion previously when viewing a response sent by an agent to a contact, because the message is actually “from” iService and to the contact. The operator is still shown in the results.
1694	Feature	<b>Make default mail popping method on new tenants “Serial” instead of “Async”</b>	Desktop App	When creating a new tenant, their mail processing will be of type Serial by default. This is a more efficient popping method and is now the new default for new tenants.
1707	Feature	<b>Create a displayable address for Cust Info - Search by compiling address, city, state and zip fields</b>	Customer - Info	<p>An address in the Customer Info search results is now displayed by compiling information from the Address 1, Address 2, City, State, Postal Code, and Country fields in that respective order.</p> <p>If there is no Address 2 or Country, we suppress the extra comma.</p>
1704	Bug	<b>Batch submit errors</b>	Utility – Contact Import	The Batch Submit Utility was generating error upon deadlock, even though the deadlock was resolved with a second attempt at the web service. This has been resolved.
1693	Bug	<b>When login is used for lookup, don't</b>	Utility – Contact Import	When importing contact properties (account number, etc.) the record lookup field is only used for finding the contact, and only the other properties

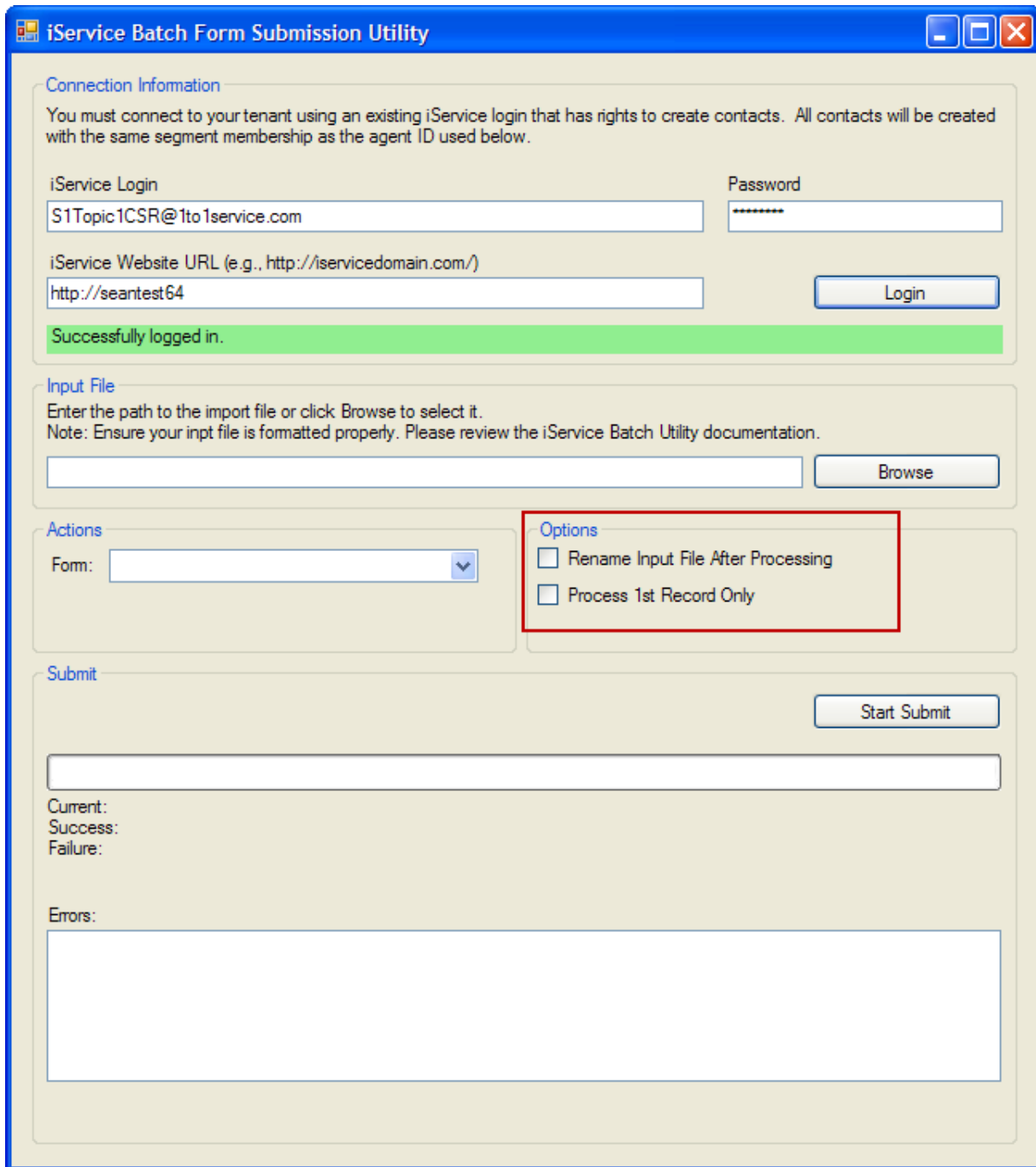
		<b>delete other logins</b>		listed are now affected. Previously, there was risk of removing additional logins for contacts that have more than one email address in iService.
1667	Bug	<b>Suppress the segment names in my account unless needed</b>	My Account	In the My Account-Details page, the segment name is only displayed if both the contact has access and there are properties to display that the contact can see.
1269	Bug	<b>Enhance date error handling and display</b>	(None)	When an invalid date is selected, a proper error message should be displayed. We now use the jQuery date picker which eliminates this issue.
1668	Bug	<b>Variable Original Time used current time instead of the msg time</b>	Admin Tools - Autoresponses	When used in forward external, the variable \$Original Time\$ now inserts the original date/time of the message and no longer the current time.
1699	Feature	<b>Web service URL not set error</b>	Desktop Application	<p>Another input box has been added for capturing the URL for web services when creating a tenant. This allows a specific .asmx file to be specified.</p> <p>We have determined that the ideal configuration is to use separate application pools in MS IIS for the ASP.net website and the web services. This change allows an administrator to specify the location for the web services which may be separate from the actual iService website.</p>
1252	Bug	<b>Customer responses shown as External: in Supervise</b>	Message Queue – Supervise	<p>When a customer responds to an agent answer, the incoming response is assigned to the agent automatically. However, this used to be displayed in the Supervise page as <code>External: Agent Name</code>.</p> <p>Since the agent is not an external agent it no longer says External. That label is only used when a message is assigned to an external agent not defined in iService.</p>
1678	Bug	<b>UserType changes cause erratic behavior</b>	Admin Tools – User Types	Incorrectly configured UserType had the potential to affect the display of agent information within the Admin Tools – Agents tab. This has been corrected.
1498	Bug	<b>Add “FindAnswers.Subscribe” default User Type for Anonymous</b>	Find Answers	Tab.FindAnswers.Subscribe has been enabled for anonymous users. In this way, they are presented the option to login and subscribe to an article.

1735	Bug	<b>Invalid characters are causing http 400 bad request in forms</b>	Admin Tools – Forms	We added better trapping within the Forms.aspx pages to identify invalid characters.
1682	Bug	<b>Bounced e-mail address for agent causes improper display</b>	Admin Tools – Agents	If an agent e-mail address is marked as bounced, the agent no longer displays as AgentID # in all drop downs where message assignment occurs. Messages are allowed to be assigned to agents even if their e-mail addresses marked as invalid.
1689	Bug	<b>Incorrect error message on Supervise page for bounce message</b>	Admin Tools – Forms	When attempting to respond to a message from Supervise that is marked as bounced, the error message is “Specified email address does not belong to the contact” has been replaced with a more accurate “is bounced” error message.
1502	Bug	<b>Mailprocessor errors are not updating contact as IsBounce</b>	Mail Processor	<p>When the SMTP send process attempts to process a message with an invalid email address, an error is generated and the message is not sent. This error is shown in the Admin Tools-Segments-Maiboxes tab.</p> <p>Before the Contact’s login did not get marked as IsBounce, and users would continue trying to email over and over. Now, the login is marked as IsBounce when it cannot receive email.</p>
1386	Bug	<b>Autoresponse is sent to customer without valid email address</b>	Admin Tools – Autoresponses	Changing a current customer’s valid email to a non-email login no longer allows Ask A Question to send an autoresponse to the actual email address after the creation of the AAQ.
1727	Feature	<b>New .asmx web services created for forms</b>	Admin Tools – Forms	This release includes new web services that accept iService form input, and return full HTML for use by AJAX code.
1728	Feature	<b>Write retries to separate log file</b>	Admin Tools – Logs	Previously, the iService website log files included details about a second attempt to process a web service request, even when that attempt was a success. These are now written to a separate log file with the extension .log.successfulretry.

# Significant Interface Changes

## Changes to the Batch Form Submit GUI

The batch form submission utility was updated to allow users to have their file automatically renamed after processing, and to process the 1<sup>st</sup> record of a file for testing purposes.



## Changes to the Desktop App

You can now specify the URL for the web services used for a new tenant.

The screenshot shows a 'New Tenant' dialog box with the following fields:

- Tenant Name: Testing Tenant
- Domain Name: testing.iservice.com
- Full Web Service URL: https://testing.iservice.com/iService.asmx (highlighted with a red box)
- Administrator Login Name: TheLandlordLogin
- Administrator Password: apasswordgoeshere

Buttons: OK, Cancel

## Date Picker Used for Date Properties

When you specify that a property (Contact or Interaction) is of type “Date”, the input box will be replaced by a date picker automatically by the iService website.

The screenshot shows a date picker interface with the following details:

- Month: Sep
- Year: 2011
- Calendar grid showing days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (1-30).
- The date '10' is highlighted in yellow.
- A 'Save' button is visible at the bottom left.

## Changes to Web Services

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

### Changes from Release 5.10 to Release 5.11

There were no changes to existing web services between release 5.8 and 5.9. However, new web services have been added for iService Forms. To see a full set of available web services, visit the following link.

<https://1to1service.iservicecrm.com/iservice.asmx>