

iService®

Release Notes

Version 5.9

*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 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

Table of Contents

RELEASE OVERVIEW	4
MAJOR ENHANCEMENTS	4
REWRITE BATCH UTILITY WITH A NEW GRAPHICAL USER INTERFACE	4
ADD ATTACHMENTS TO FORWARD EXTERNAL AUTO RESPONSE TEMPLATE	4
NEW FUNCTIONS ADDED TO SUPPORT REPORTS	4
CREATE SEPARATE ADDRESS FIELDS IN GLOBAL SEGMENT	4
MINOR ENHANCEMENTS AND BUG FIXES	5
INTERNAL ERROR WHEN FORM TICKET FAILS FOR ACCESS RIGHT VIOLATION	5
UTILITY DOES NOT SET CONTACT PROPERTIES	5
EXPAND FORM BODY SIZE LIMITATION	5
ALLOW AGENT TO ALWAYS VIEW THEIR OWN CONTACT PROPERTIES.	5
SIGNIFICANT INTERFACE CHANGES	6
ISERVICE BATCH FORM SUBMISSION UTILITY	6
FORM WIZARD FOR CONTACT IMPORT	6
CHANGES TO WEB SERVICES	7
CHANGES FROM RELEASE 5.8 TO RELEASE 5.9	7

Release Overview

Major Enhancements

ID	Type	Description	Category	Details
1518	Feature	Rewrite batch utility with a new Graphical User Interface	Admin Tools - Utilities	<p>We've developed a new utility, the iService Batch Form Submission Utility that allows users to select a .CSV file and process it through a pre-defined form. This allows users to batch process any function that can be managed through a form including:</p> <ul style="list-style-type: none"> • Importing contacts and changing the property values for existing contacts • Sending agent email messages • Creating tickets • Creating notes <p>See the iService Batch Utility User guide for more details.</p>
1642	Feature	Add attachments to Forward External auto response template	Admin Tools – Forms	iService now includes all of the same attachments found in the Message Properties section of the My Queue page (original_message.eml, message attachments, etc.) on the Forward External auto response.
1657	Feature	New functions added to support reports	Reports	We've added a new set of functions to the iService database to support the use of times within iService reports.
1631	Feature	Create separate address fields in Global Segment	Website	<p>For new databases generated from the desktop app, the following will be placed into the Global Segment: Address1, Address2, City, State, Zip, and Country. Also, the current Address field that is in the Global segment will be marked as Not Shared. This will essentially remove any previously entered address in that field from view by agents other than Landlord.</p> <p>A script is included with the upgrade that can be used to revert the old Address back to shared, and therefore viewable by all agents.</p>
1669	Feature	Wizard for contact import form	Admin Tools – Forms	The Batch Form Submit utility allows users to bulk import and update contact information. This utility requires a form to accept the input (Name, Address, Etc.) that is being uploaded. This new wizard allows

users to select the properties being uploaded from a list of all contact properties defined in the iService tenant.

Minor Enhancements and Bug Fixes

ID	Type	Description	Category	Details
1638	Bug	Internal error when form ticket fails for access right violation	Customer Info – Contact	When a user tried to submit a form that required login and they didn't have credentials, an internal error was generated. This has been corrected.
1644	Bug	Utility does not set contact properties	Admin Tools – Utilities	The new batch utility was not setting contact property values. This has been corrected.
1637	Feature	Expand form body size limitation	Reports	The body in a form action was previously limited to 256 characters (also the Note field). All fields that will accept input that translates into a document (body, note, etc) have been revised to accepted unlimited text size.
1671	Bug	Allow agent to always view their own contact properties.	Message Queue	If an agent was not a member (i.e., customer membership) of the segment they were supporting (i.e., agent segment access), an error was generated when loading the my queue page. Agents must always be able to access themselves, regardless of the segment membership associated with the contact. This has been corrected so the agent can always access their contact details.

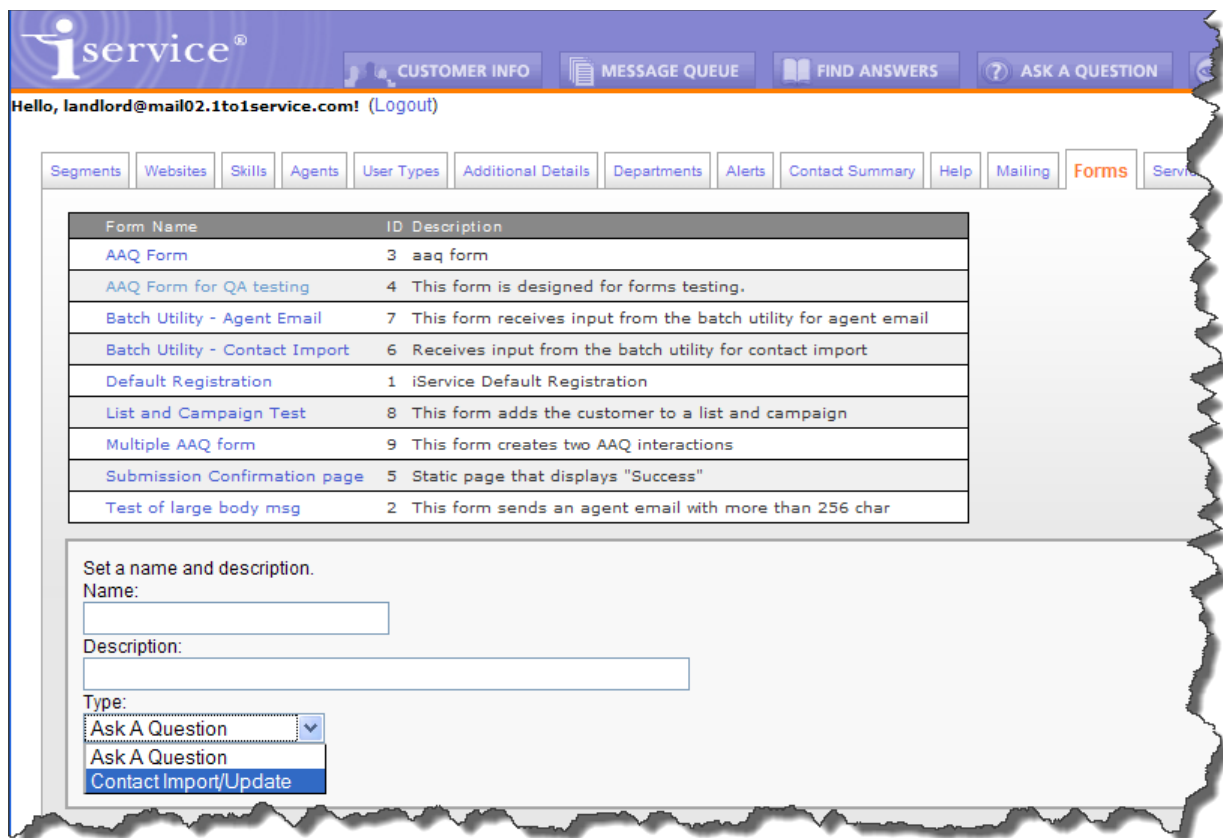
Significant Interface Changes

iService Batch Form Submission Utility

For details on the new utility, [see the Batch Utility User Guide](#).

Form Wizard for Contact Import

The Admin Tools - Forms interface now includes a wizard for generating contact import and update forms for use with the new Batch Form Submission utility. After selecting Contact Import/Update, you are presented with a full list of contact properties that can be included.



Changes to Web Services

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

Changes from Release 5.8 to Release 5.9

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>