iSupport® 18.2 Release Notes

This document includes new features, changes, and fixes in iSupport v18.2. The Readme.txt file included with the download has a list of known issues.

AI Integration

iSupport now integrates with OpenAI (or an OpenAI-compatible model publicly hosted or downloaded and set up on a local server) for generating a one-sentence overview and summary that can cover the customer, customer's company, and their incidents. You can also create prompts for actions such as fixing grammar, elaborating, or shortening text, and more via the text editor toolbar. Note that the results are completely generated by the integrated AI provider, and the length of the overview is dictated by the system prompt in configuration. Administrators can change the system prompt and included data.
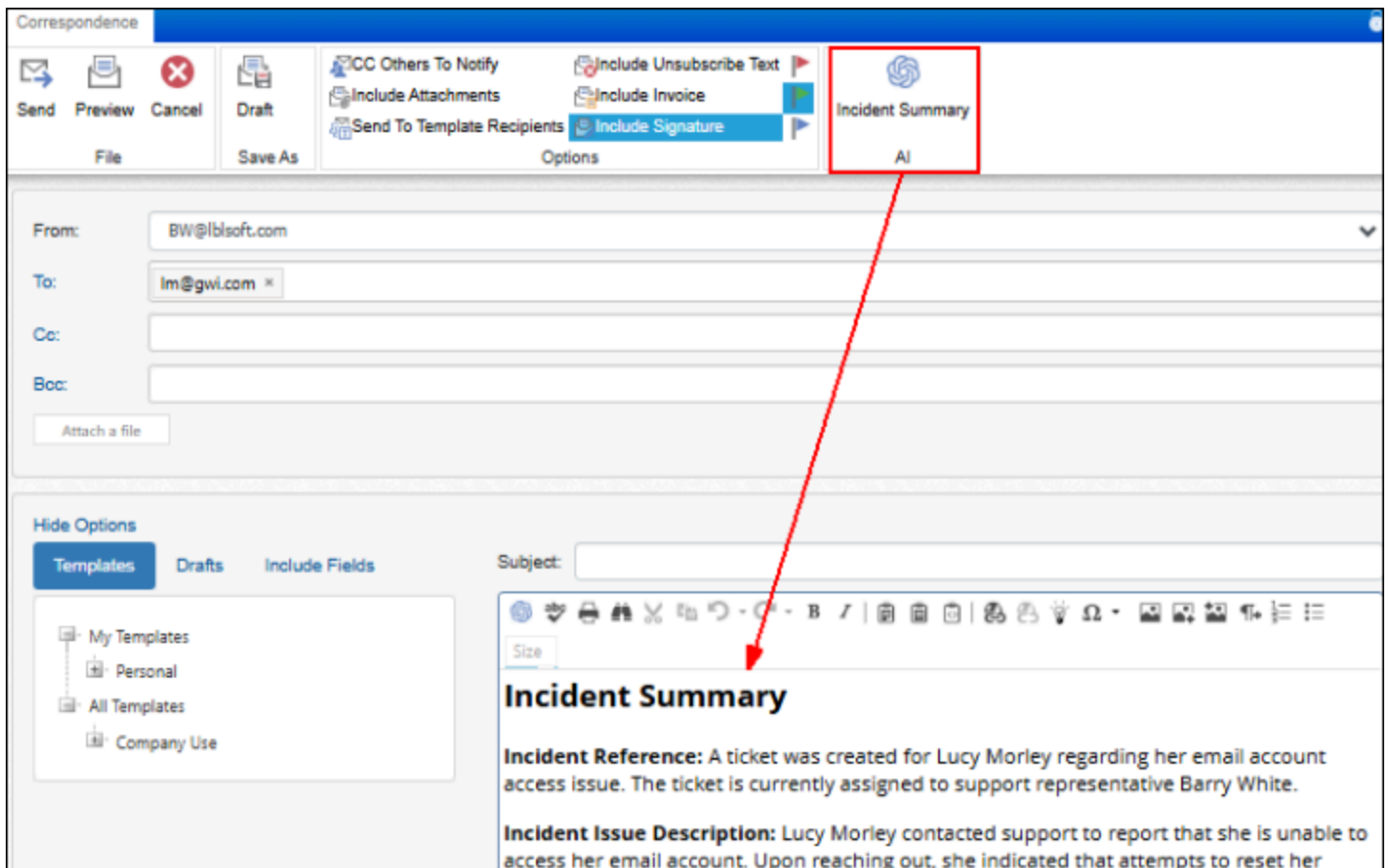
AI Summary For Incidents

Use the AI Summary option on the Incident toolbar to generate a one-sentence overview and summary of the incident that can cover the customer, customer's company, and related incidents.
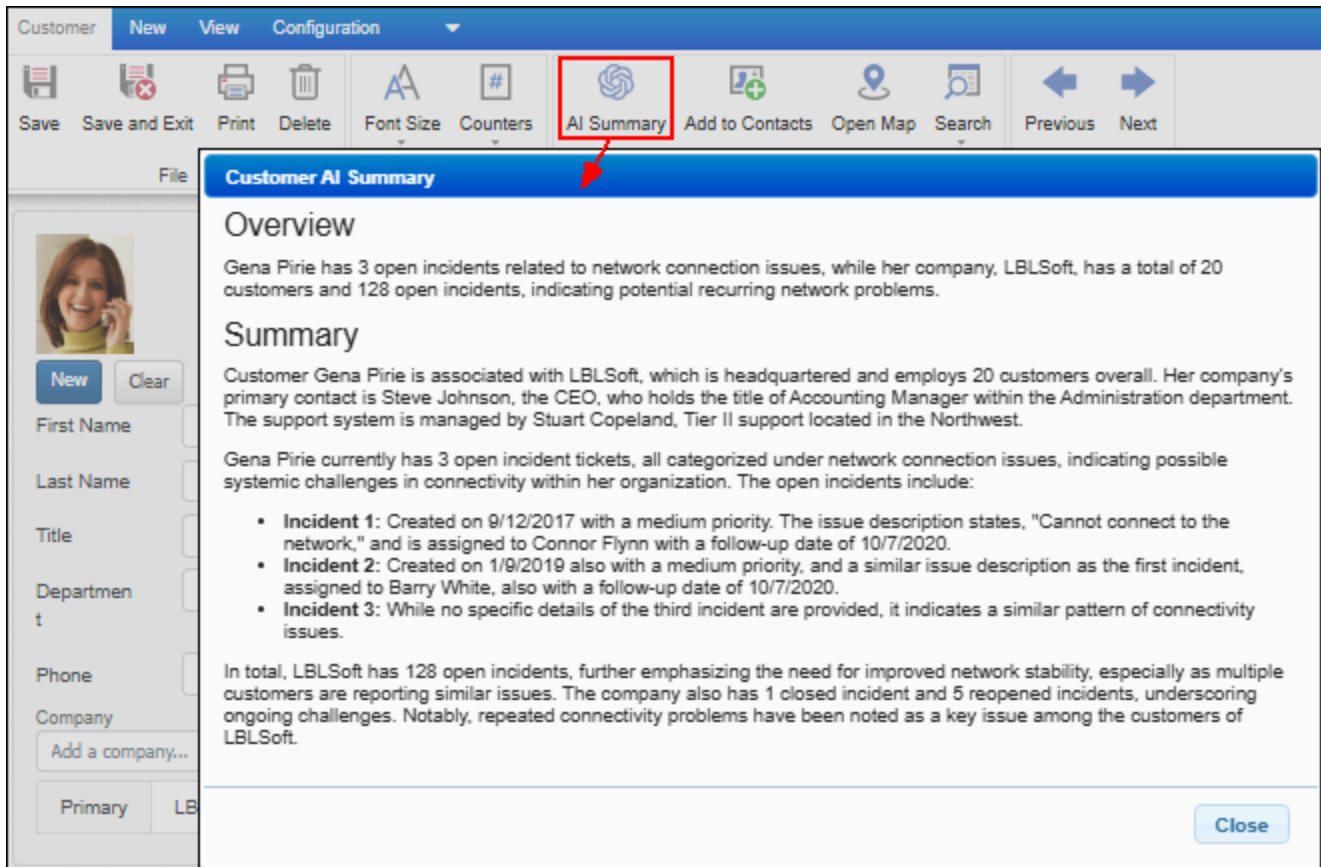

Select the AI Incident Summary icon on the Correspondence toolbar to append this summary to the end of a new correspondence.

AI Summary For Customer Profiles

You can use the AI Summary option on the Customer toolbar to generate a one-sentence overview and summary that can cover the customer, customer's company, and their incidents.

Using AI Via the Text Editor Toolbar
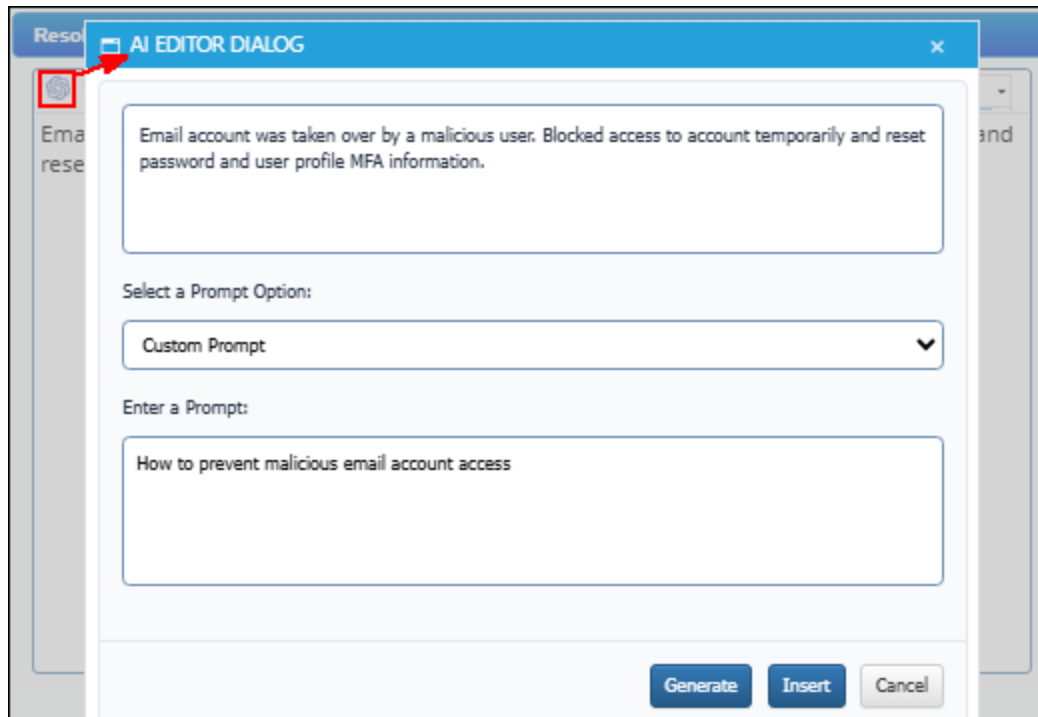
An AI Editor icon (🌀 or **AI**) is included on the text editor toolbar in fields throughout iSupport. (Display of this toolbar is controlled via Desktop Preferences.) You will be able to select from a list of prompts for actions such as fixing the grammar, formalizing the text, elaborating or shortening the text, and more.
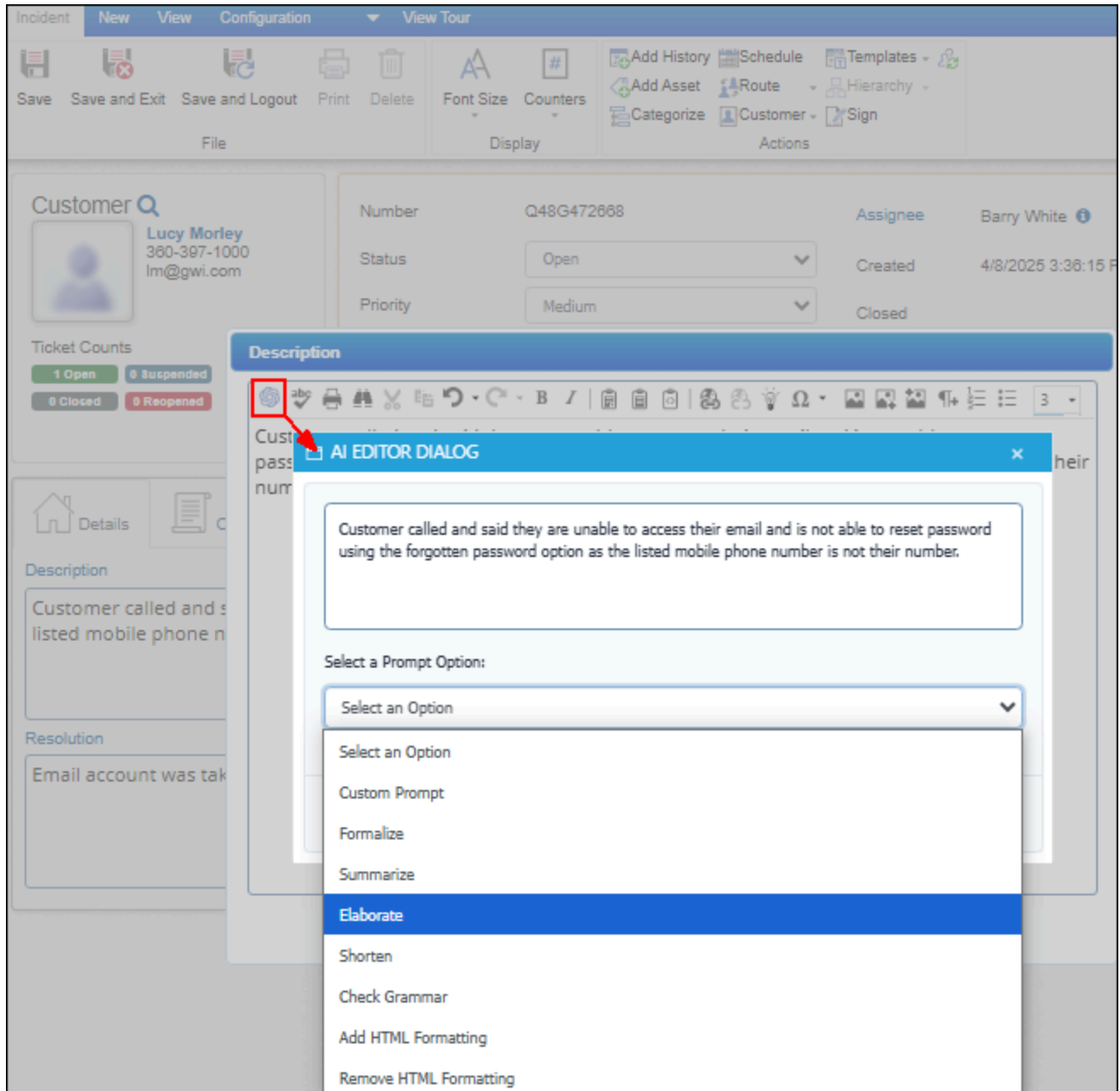
You can use the Generate button to place the generated text in the top portion of the dialog; an example of the Elaborate option is shown below. You can use the Insert button to replace the existing text with the generated text in the applicable field.
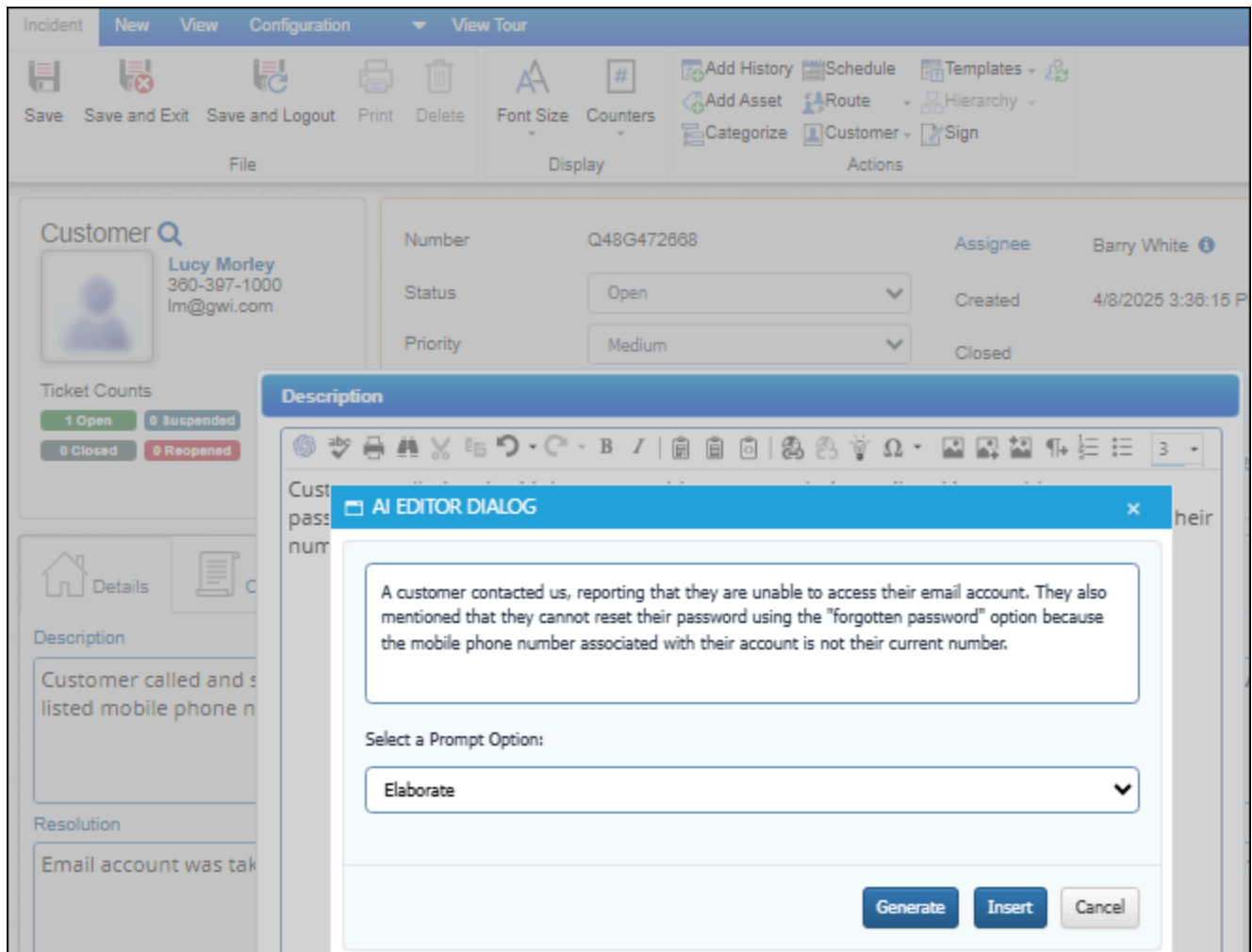
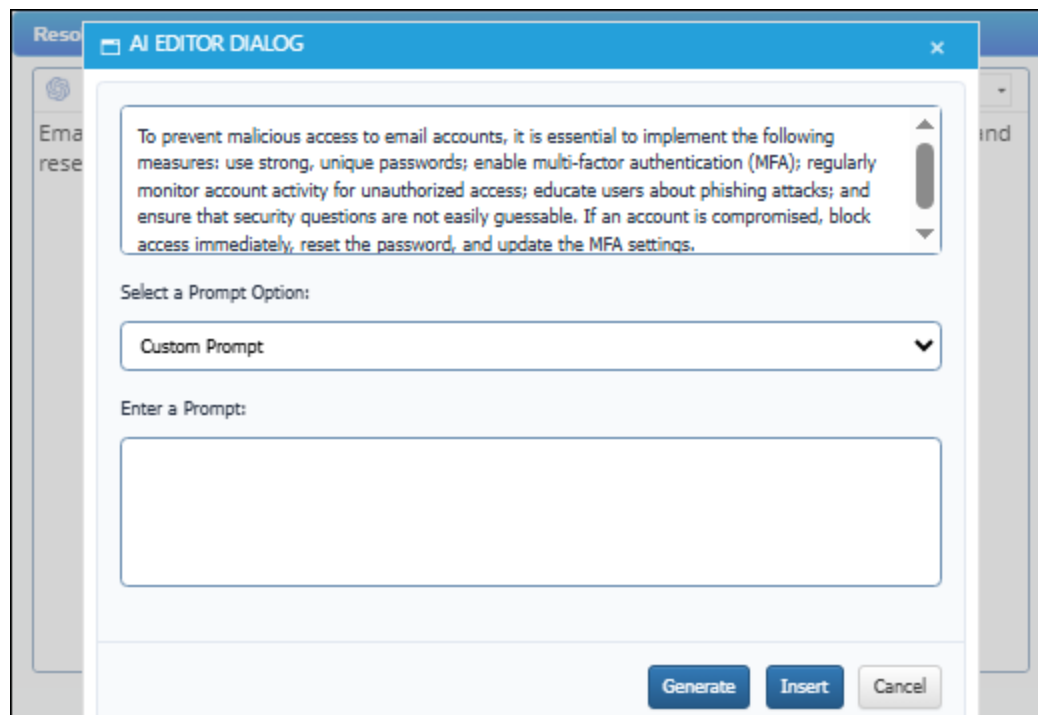You can also enable an Custom Prompt option for the rep to enter their own prompt.

The results will appear in the top portion of the dialog.

Configuration

Go to https://platform.openai.com and create a project and API key for it, or download an OpenAI API-compatible model and set it up on your server. Then enter the information in the Options and Tools | Integrate | AI Integration screen in configuration.

The icon for iSupport's AI functionality will depend the type of AI Provider: for OpenAI or AI for OpenAI API-compatible.

In addition to entering the information from the project, you can enable the AI Editor and its Custom Prompt option as well as the AI Summary menu option in the Customer Profile, Incident, and Correspondence screens.

Use the AI Editor Prompts screen to create, copy, edit, and delete prompts on the list that appears when the AI icon (⑯ or **AI**) is selected on the text editor toolbar on fields throughout iSupport.

Desktop / Configuration / Options and Tools / Integrate / AI Integration		
Basics	Create Copy Delete	
AI Editor Prompts ›	Name	Position ↑
Customer AI Summary	☐ Formalize	1
	☐ Summarize	2
Incident AI Summary	☐ Elaborate	3
Correspondence Incident AI Summary	☐ Shorten	4
	☐ Check Grammar	5
	☐ Add HTML Formatting	6
	☐ Remove HTML Formatting	7

Desktop / Configuration / Options and Tools / Integrate / AI Editor Prompts

AI Editor Prompt

Name Elaborate

Prompt Please elaborate the following text

Position 3

Use the Customer AI Summary, Incident, and Correspondence Incident AI tabs to customize the system prompt sent to the AI engine for the applicable screen.

You can edit the text in the upper portion of the screen and restore the default if needed. Use the AI System Prompt Assistant field to describe what you would like the summary to include and how it should be formatted using plain English; the system will generate the prompt text in a way that will be optimized for the platform to give the desired result. Add or remove fields in the Fields To Include section to customize the work item field data sent to the AI engine.

The OpenAI web site includes information on how OpenAI uses your data:
- **Data controls in the OpenAI platform**
  Understand how OpenAI uses your data, and how you can control it.
  Your data is your data. As of March 1, 2023, data sent to the OpenAI API is not used to train or improve OpenAI models (unless you explicitly opt in to share data with us).
- **How we use your data**
  To help identify abuse, API data may be retained for up to 30 days, after which it will be deleted (unless otherwise required by law). For trusted customers with sensitive applications, zero data retention may be available. With zero data retention, request and response bodies are not persisted to any logging mechanism and exist only in memory in order to serve the request.
  OpenAI. "Data controls in the Open AI platform." https://platform.openai.com/docs/guides/your-data#data-usage-policies
- **Enterprise-level privacy, security, and OpenAI partnership**
  No training on your data, Dedicated workspace with custom data retention and domain verification.
  OpenAI. "Redefine work in the age of AI" https://openai.com/chatgpt/enterprise/

Work History Updates

Work History Layout Option

Use the Work History layout option for Incident, Problem, Change, and Purchase layouts to place a field that includes only work history.

Work History Feed Date Format Setting

Support representatives can now set the date/time format displayed in their work history feed: Standard (actual date and time) or Relative (date/time relative to the current date/time such as "one minute ago").

Edit Authored Work History Permission Added

Administrators can now enable support representatives to edit their own work history entries via the Edit Authored Work History permission. It is included in Incident, Problem, and Change permissions.
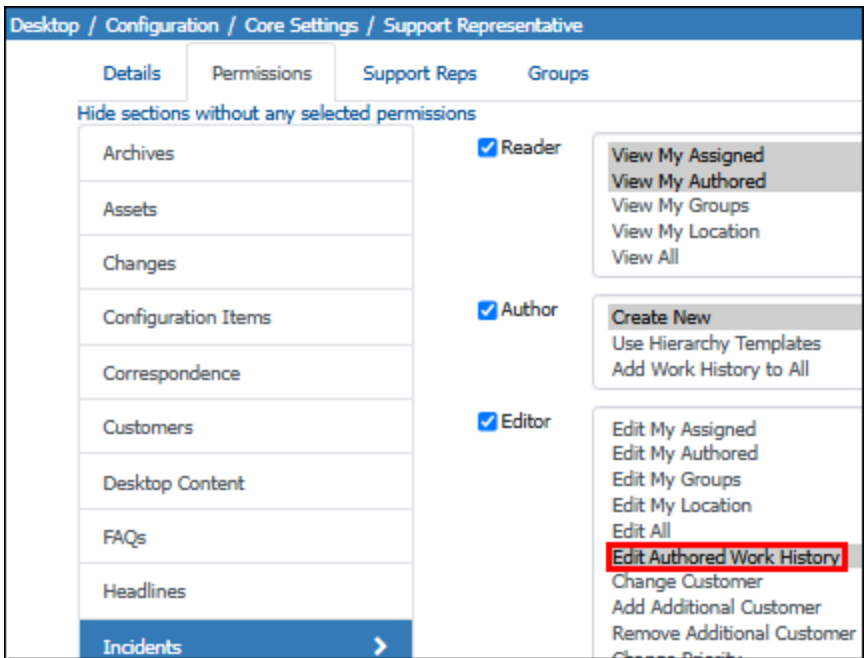

Miscellaneous

Customer Profile Setting To Select Another Customer For a Work Item

The Customer Profile screen now includes a Can Select Customer field to enable the customer to select another customer while creating a work item on mySupport.
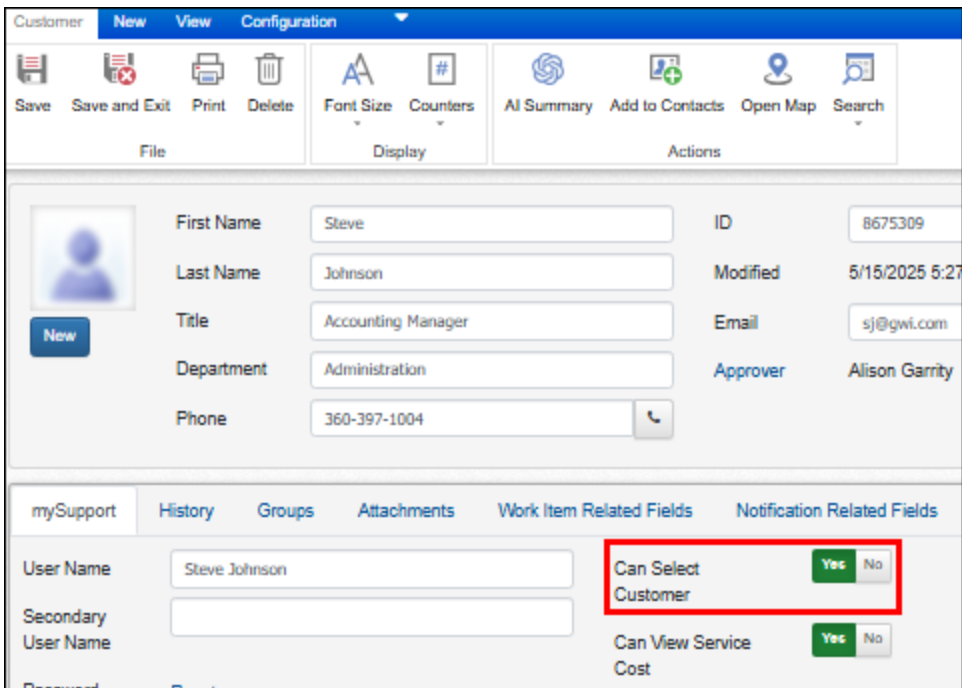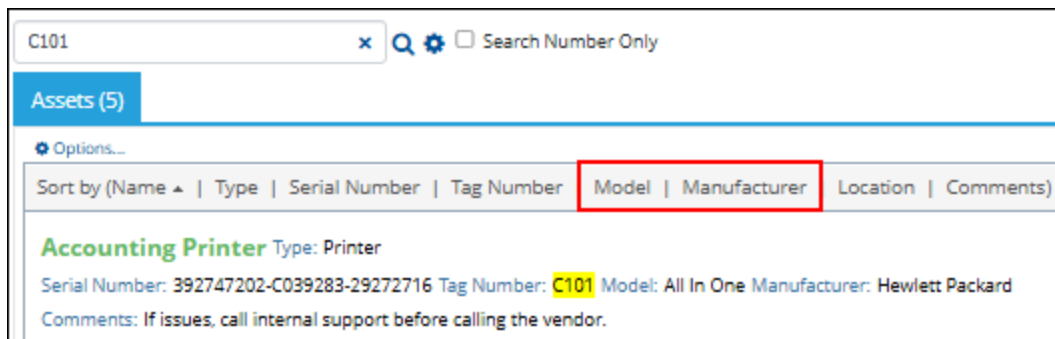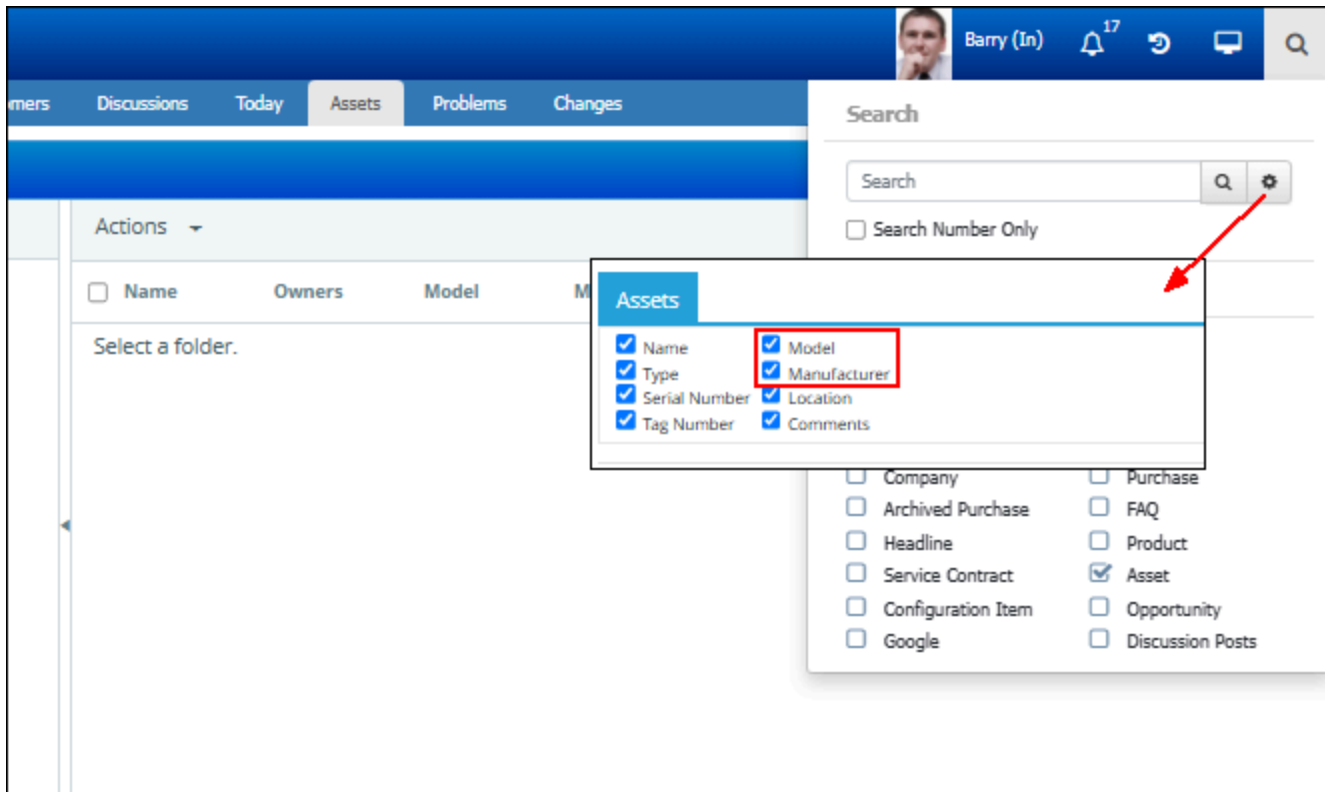
Last Login Date Field Added to Config - Support Representative Data Source

A Last Login Date field was added to the Config - Support Representative data source in the View Designer.
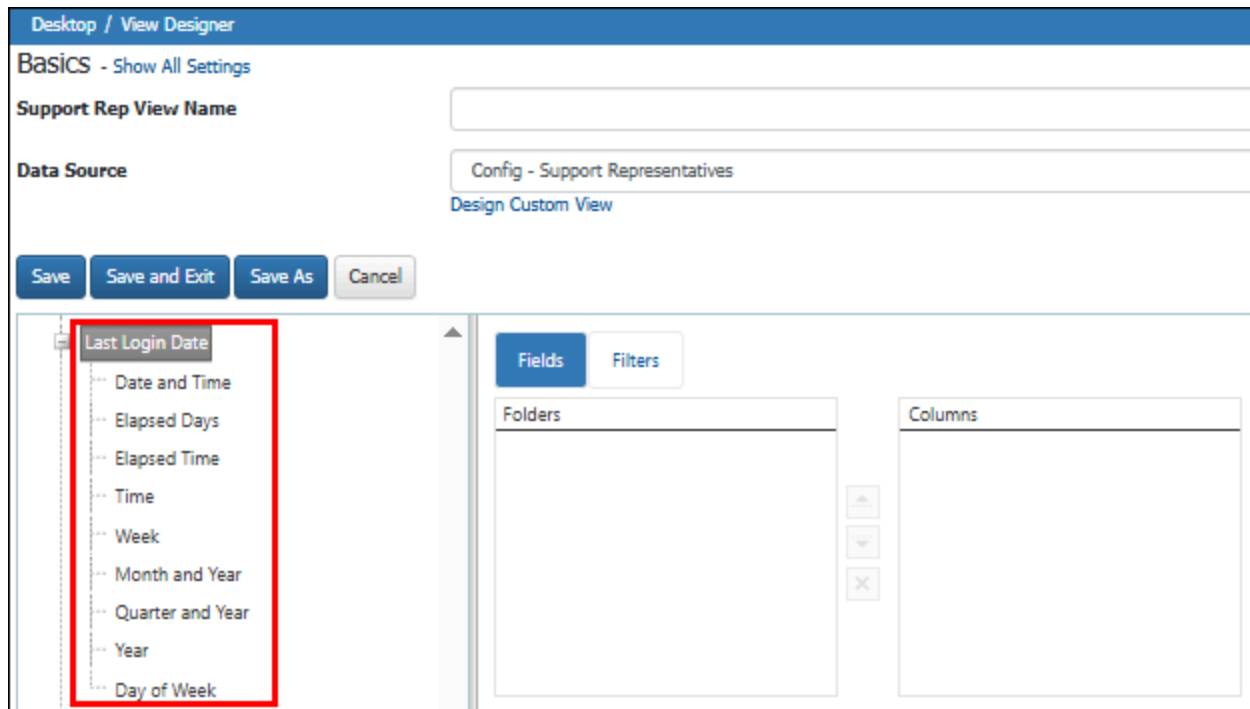
Model and Manufacturer Added To Global Asset Search Options

You can now include Model and Manufacturer while performing a global asset search.

Relative Date Setting For Change Rule Date, Date/Time Custom Field Intervals

You can now set the new value for a custom date field using the @today plus or minus integer function, setting the date to a date relative to the one when the rule is triggered.

Microsoft Excel .XLSX Format For View Subscriptions

View subscriptions can now be sent in a Microsoft Excel (.xlsx) file.