

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.

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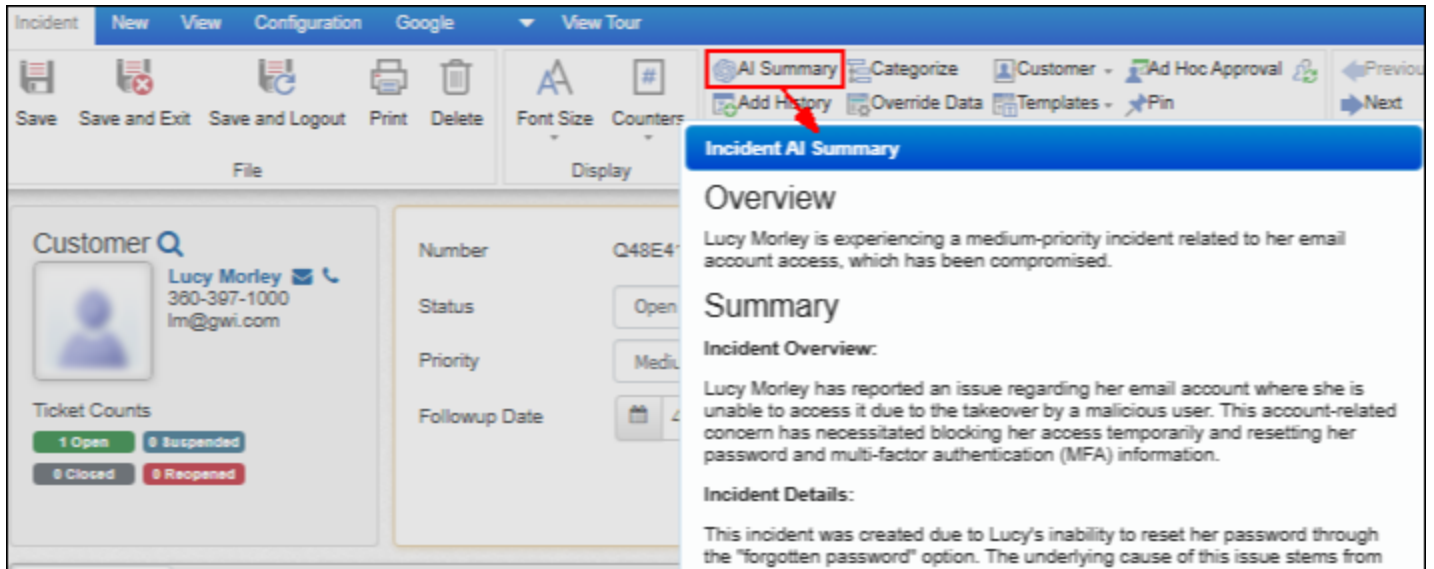
[Microsoft Excel .XLSX Format For View Subscriptions](#)

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.

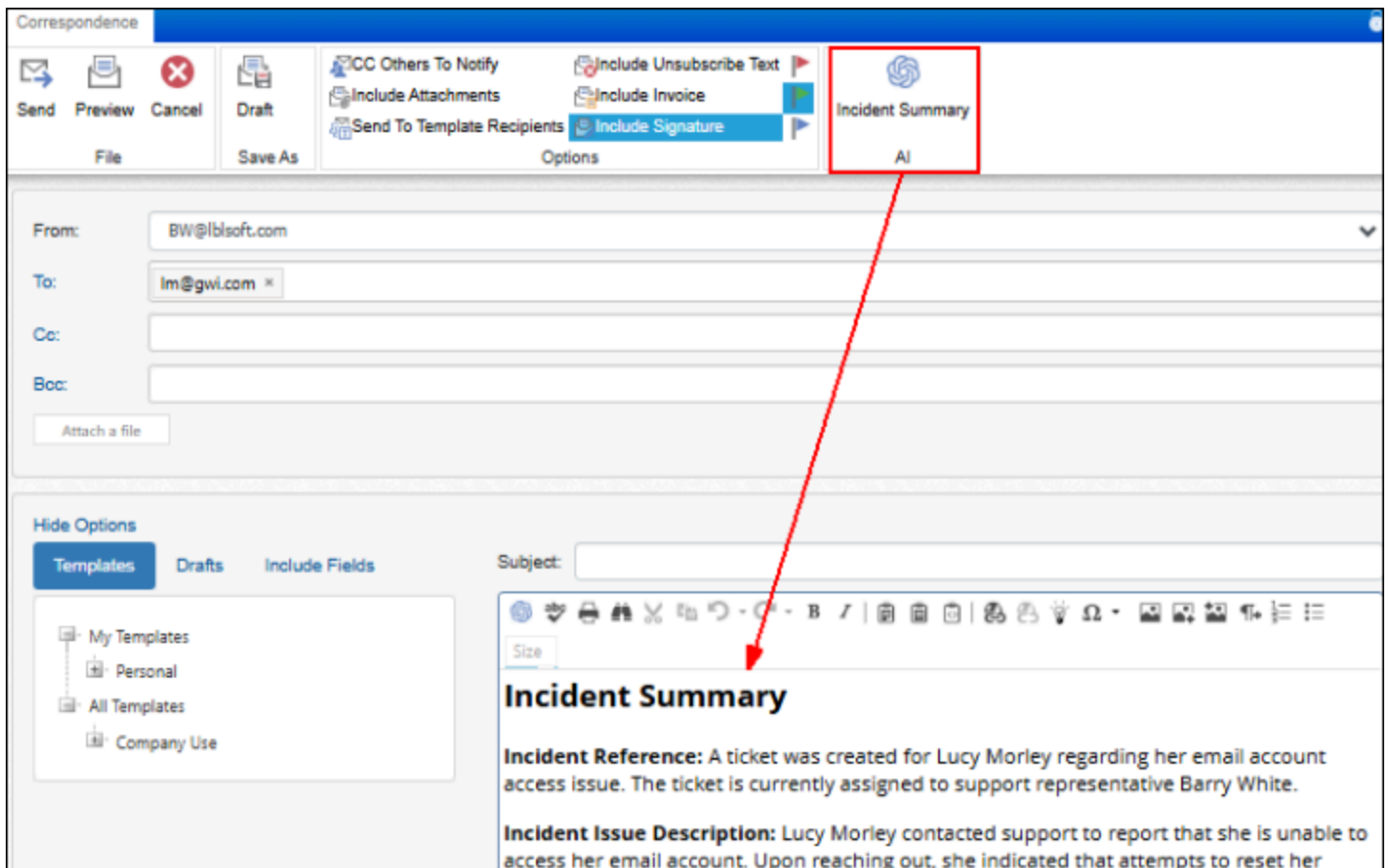
AI Summary For Incidents

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.



The screenshot shows the Incident toolbar with the 'AI Summary' icon highlighted by a red box. The toolbar includes options like 'New', 'View', 'Configuration', 'Google', and 'View Tour'. Below the toolbar, the 'Incident AI Summary' panel is visible, showing an 'Overview' and a 'Summary' section. The 'Overview' states: 'Lucy Morley is experiencing a medium-priority incident related to her email account access, which has been compromised.' The 'Summary' section includes an 'Incident Overview' and 'Incident Details'.

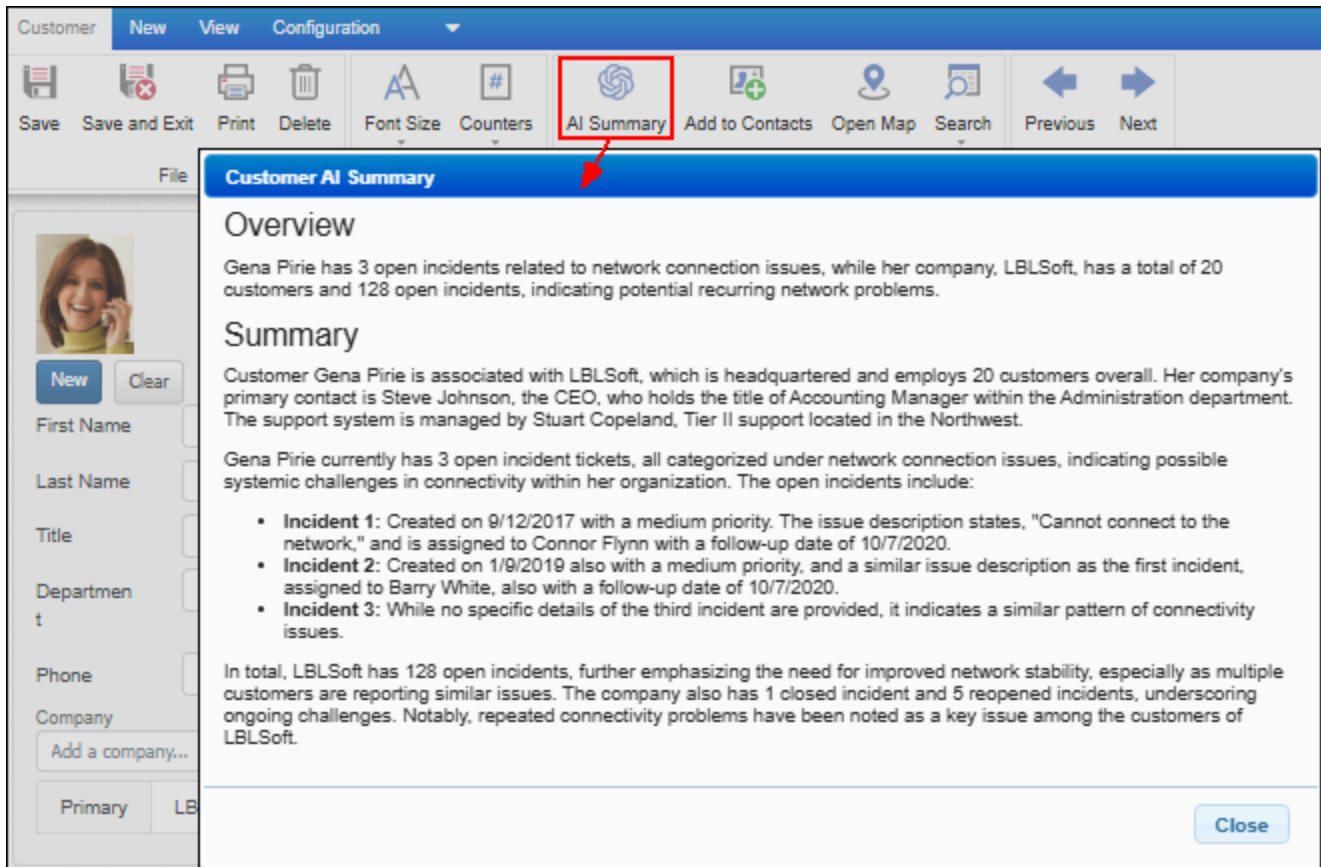
Select the AI Incident Summary icon on the Correspondence toolbar to append this summary to the end of a new correspondence.



The screenshot shows the Correspondence toolbar with the 'Incident Summary AI' icon highlighted by a red box. The toolbar includes options like 'Send', 'Preview', 'Cancel', 'Draft', 'CC Others To Notify', 'Include Attachments', 'Send To Template Recipients', 'Include Unsubscribe Text', 'Include Invoice', and 'Include Signature'. Below the toolbar, the 'Incident Summary' panel is visible, showing an 'Incident Reference' and an 'Incident Issue Description'.

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.



The screenshot displays the iSupport Customer profile interface. At the top, a blue toolbar contains various icons, with the 'AI Summary' icon (a brain) highlighted by a red box and a red arrow. Below the toolbar, the 'Customer AI Summary' panel is open, showing an 'Overview' and a 'Summary' section. The 'Overview' section states: 'Gena Pirie has 3 open incidents related to network connection issues, while her company, LBLSoft, has a total of 20 customers and 128 open incidents, indicating potential recurring network problems.' The 'Summary' section provides more detail: 'Customer Gena Pirie is associated with LBLSoft, which is headquartered and employs 20 customers overall. Her company's primary contact is Steve Johnson, the CEO, who holds the title of Accounting Manager within the Administration department. The support system is managed by Stuart Copeland, Tier II support located in the Northwest. Gena Pirie currently has 3 open incident tickets, all categorized under network connection issues, indicating possible systemic challenges in connectivity within her organization. The open incidents include:'

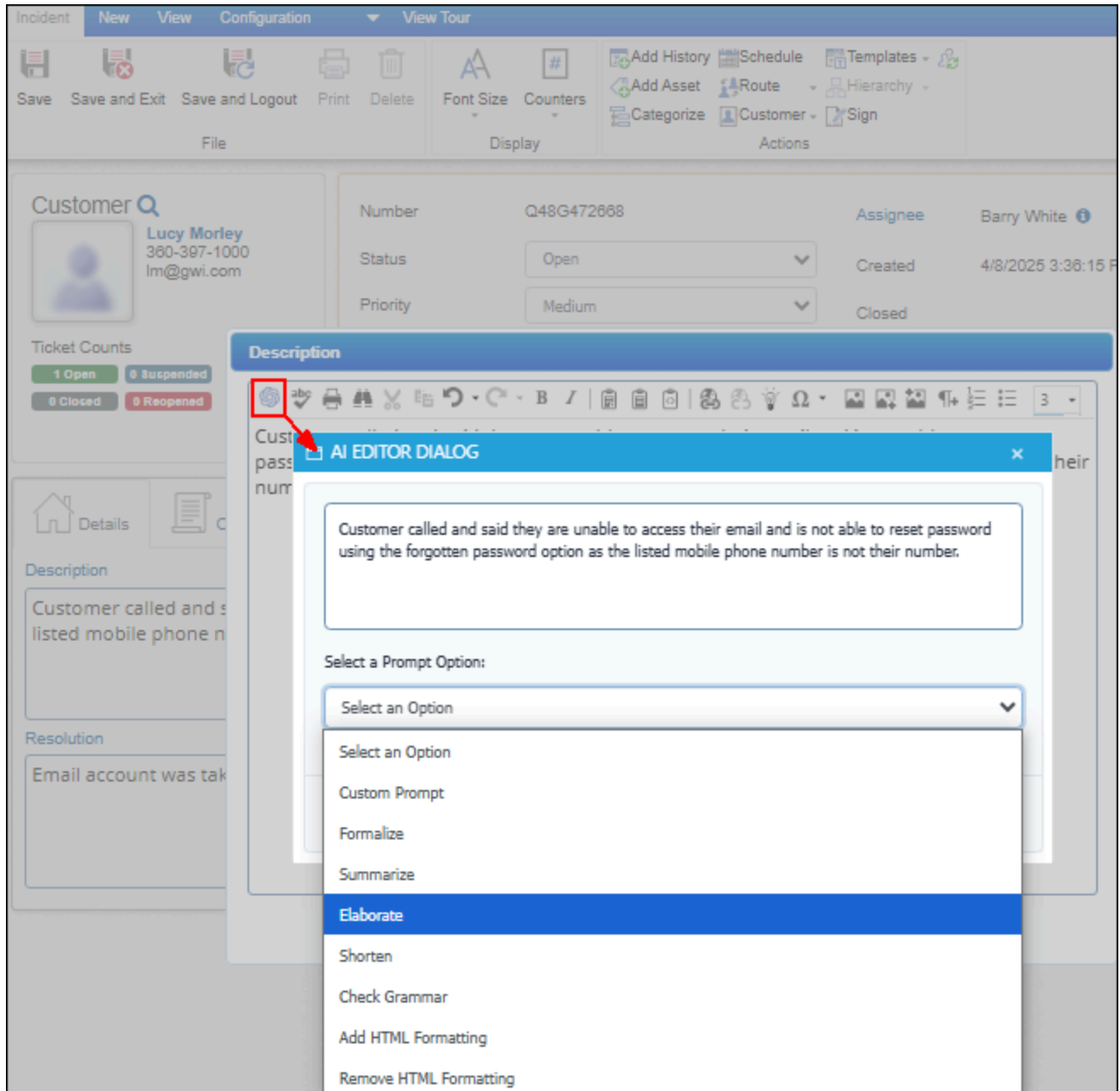
- **Incident 1:** Created on 9/12/2017 with a medium priority. The issue description states, "Cannot connect to the network," and is assigned to Connor Flynn with a follow-up date of 10/7/2020.
- **Incident 2:** Created on 1/9/2019 also with a medium priority, and a similar issue description as the first incident, assigned to Barry White, also with a follow-up date of 10/7/2020.
- **Incident 3:** While no specific details of the third incident are provided, it indicates a similar pattern of connectivity issues.

In total, LBLSoft has 128 open incidents, further emphasizing the need for improved network stability, especially as multiple customers are reporting similar issues. The company also has 1 closed incident and 5 reopened incidents, underscoring ongoing challenges. Notably, repeated connectivity problems have been noted as a key issue among the customers of LBLSoft.

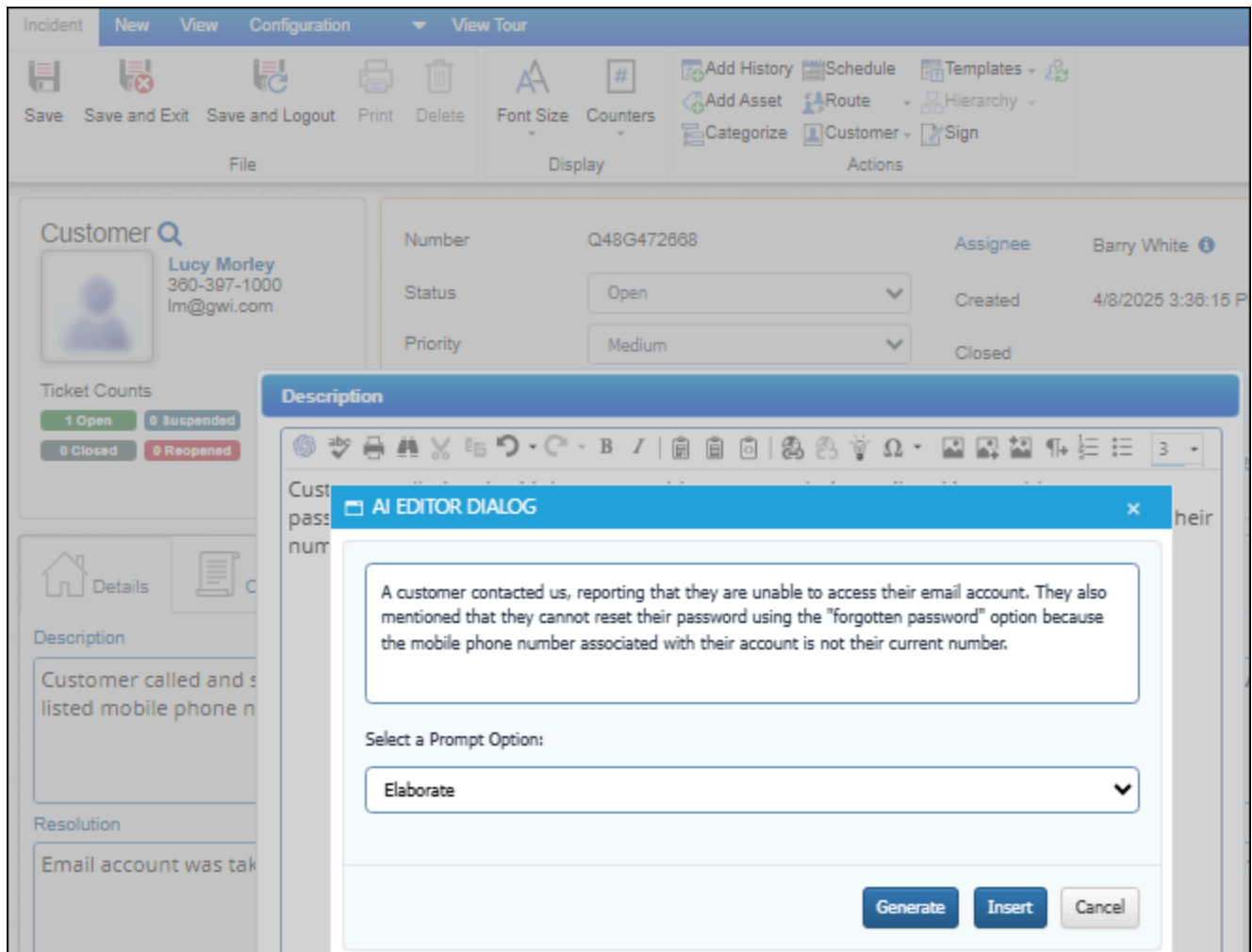
The interface also shows a sidebar with customer details (First Name, Last Name, Title, Department, Phone, Company) and a 'Close' button at the bottom right of the AI Summary panel.

Using AI Via the Text Editor Toolbar

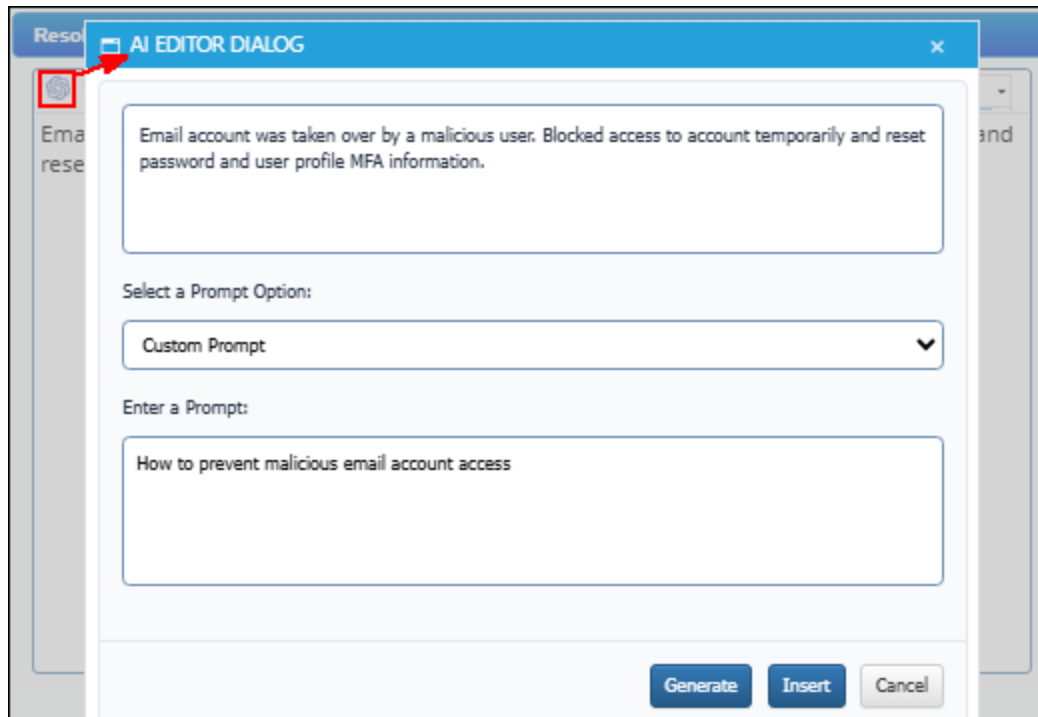
An AI Editor icon (or AI) is included on the text editor toolbar in fields throughout iSupport. (Display of this toolbar is controlled via Desktop Preferences.) You will be able to select from a list of prompts for actions such as fixing the grammar, formalizing the text, elaborating or shortening the 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.

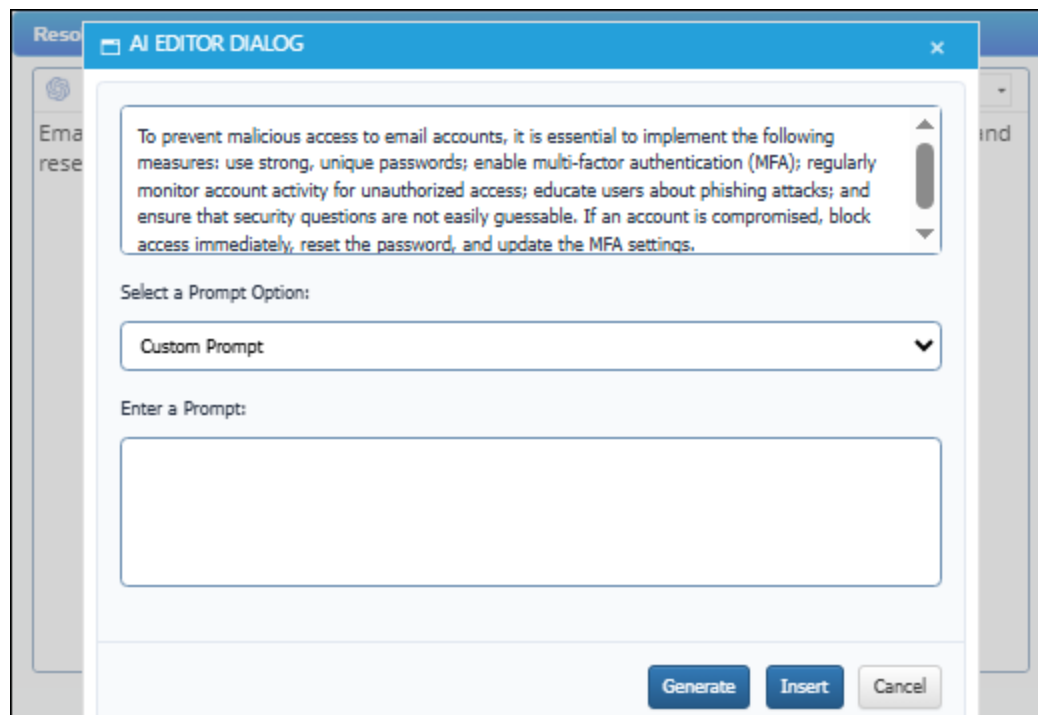


You can also enable an Custom Prompt option for the rep to enter their own prompt.



The screenshot shows the 'AI EDITOR DIALOG' window. At the top, there is a blue header bar with the title 'AI EDITOR DIALOG' and a close button. Below the header, there is a sidebar on the left with a 'Reso' tab and a 'Generate' button. The main area of the dialog contains a text box with the text: 'Email account was taken over by a malicious user. Blocked access to account temporarily and reset password and user profile MFA information.' Below this text box, there is a section titled 'Select a Prompt Option:' with a dropdown menu showing 'Custom Prompt'. Below the dropdown, there is a section titled 'Enter a Prompt:' with a text box containing the text: 'How to prevent malicious email account access'. At the bottom right of the dialog, there are three buttons: 'Generate', 'Insert', and 'Cancel'.

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





The screenshot shows the 'AI EDITOR DIALOG' window. At the top, there is a blue header bar with the title 'AI EDITOR DIALOG' and a close button. Below the header, there is a sidebar on the left with a 'Reso' tab and a 'Generate' button. The main area of the dialog contains a text box with the text: 'To prevent malicious access to email accounts, it is essential to implement the following measures: use strong, unique passwords; enable multi-factor authentication (MFA); regularly monitor account activity for unauthorized access; educate users about phishing attacks; and ensure that security questions are not easily guessable. If an account is compromised, block access immediately, reset the password, and update the MFA settings.' Below this text box, there is a section titled 'Select a Prompt Option:' with a dropdown menu showing 'Custom Prompt'. Below the dropdown, there is a section titled 'Enter a Prompt:' with an empty text box. At the bottom right of the dialog, there are three buttons: 'Generate', 'Insert', and 'Cancel'.


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 screenshot shows the 'AI Integration' configuration screen. On the left is a sidebar with a 'Basics' menu item and four sub-items: 'AI Editor Prompts', 'Customer AI Summary', 'Incident AI Summary', and 'Correspondence Incident AI Summary'. The main area has a top bar with 'Enabled' set to 'On'. Below this are fields for 'API Provider' (OpenAI), 'API Key' (sk-svcacct-mY90xzdgQ16_5YGzvYnrCh2QWFG56x), and 'Model' (gpt-4o-mini). A 'Test Integration' button is located below the model field. At the bottom, there are five toggle switches, all set to 'Yes': 'Enable AI Editor', 'Enable AI Editor Custom Prompt', 'Enable Customer AI Summary', 'Enable Incident AI Summary', and 'Enable Correspondence Incident AI Summary'.

The icon for iSupport's AI functionality will depend the type of AI Provider:  for OpenAI or  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 ( 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 >			
Customer AI Summary			
Incident AI Summary			
Correspondence Incident AI Summary			
	Name	Position ↑	
	<input type="checkbox"/> Formalize	1	
	<input type="checkbox"/> Summarize	2	
	<input type="checkbox"/> Elaborate	3	
	<input type="checkbox"/> Shorten	4	
	<input type="checkbox"/> Check Grammar	5	
	<input type="checkbox"/> Add HTML Formatting	6	
	<input type="checkbox"/> Remove HTML Formatting	7	

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

AI Editor Prompt

Name

Prompt

Position

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.

The screenshot shows the 'AI Integration' configuration page in iSupport. On the left is a sidebar with tabs: 'Basics', 'AI Editor Prompts', 'Customer AI Summary' (selected), 'Incident AI Summary', and 'Correspondence Incident AI Summary'. The main area is titled 'System Prompt' and contains a text editor with the following content:

Construct a response that provides an overview and detailed summary from provided data.

The following definitions should guide your understanding:

- **Incident**: A ticket in the iSupport help desk system, created when a customer reports a problem via the mySupport web interface, email, or calls a support representative.
- **Customer**: The owner of an incident ticket.
- **Support Representative**: Assists in creating, resolving, and closing the incident ticket on behalf of the customer.
- **Company**: The employer of the customer.

The details provided are about a customer record, its company's record, and the incident ticket records for customers of the specified customer's company.

Steps

1. **Identify Key Information**:
 - Extract essential details from the customer, company, and incidents information provided.
 - Identify the number of incidents associated with each customer and the total number of customers in the company.

Below the text editor is the 'AI System Prompt Assistant' section with a text input field containing 'Describe what you want the summary to include or how it should be structured.' and a 'Generate System Prompt' button. At the bottom is the 'Fields to Include' section with a dropdown menu showing 'Add a field' and a list of selected fields: 'Customer Name', 'Customer Title', and 'Customer Location'.

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.

Desktop / Configuration / Options and Tools / Customize / Layouts / Incident Layouts

Layout Colors Custom Menu Actions

Name Default

Tutorial None

Default Yes No

Customer Details

Title Customer

Display Avatar Left Right No

Display Microsoft® Skype/Lync® Status Yes No

Add a field

- (Display Name)
- (Title)
- (Location)
- (Department)
- (Phone)
- (Email Address)
- (Incident Counts)

Main Layout

- Basics
 - Number
 - Previous Assignee
 - Group
 - Group Type
 - Rule Group

Details

- Status
- Priority
- Created
- Assignee
- Category
- Work History**

Incident New View Configuration Google View Tour

Save Save and Exit Save and Logout Print Delete Font Size Counters

File Display Actions

AI Summary Categorize Customer Ad Hoc Approval

Add History Override Data Templates Pin

Add Asset Route Hierarchy Sign

Customer Steve Johnson Accounting Manager Headquarters Administration 360-397-1004 sj@gwi.com Ticket Counts 18 Open 1 Suspended 8 Closed 1 Reopened

Number Q47G4821A4 Assignee Barry White

Status Open Category Unlisted/Other

Priority Medium

Created 4/7/2025 3:37:10 PM

Followup Date 4/9/2025

Closed

Work History
Total Time Worked: 3 Minutes

Barry White 1 minute ago collapse Blocked access to email account and reset password. 0 Hr(s) 2 Min(s)
- Recorded Work Type: On-Site Service.
- Recorded Work Start: 4/21/2025 6:10 PM.
- Recorded Work Stop: 4/21/2025 6:12 PM.

Barry White 2 minutes ago expand Advised customer of email protection actions. 0 Hr(s) 1 Min(s)

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”).

Desktop / Preferences

Profile Details

Desktop Notification Center

Desktop Quick Access

Views

Correspondence

Personal Rules

Personal Correspondence

Personal Contacts

Display Time Zone

(UTC-08:00) Pacific Time (US & Canada)

The Display Time Zone is for display purposes only. Business hours escalation and statistics are based on the assignee's support center time zone.

Work Item Date Picker Format

None

Password

Reset

Default Event Duration

60

Work Item Toolbar

Classic

Text Editor Toolbar

PopupAlways ShowNever Show

Tab key inserts tabbed spaces in text editor fields

YesNo

Show Seconds on Countdown

YesNo

Default for Follow Option on Discussion Posts

YesNo

Work History Feed Date Format

Relative TimeStandard

Incident

NewViewConfigurationGoogleView Tour

SaveSave and ExitSave and LogoutPrintDeleteFont SizeCounters

AI SummaryCategorizeCustomerAd Hoc ApprovalAdd HistoryOverride DataTemplatesPinAdd AssetRouteHierarchySign

FileDisplayActions

Customer

Steve Johnson

Accounting Manager

Headquarters

Administration

360-397-1004

sj@gwi.com

Ticket Counts

157 Open1 Suspended6 Closed1 Reopened

StatusOpen

PriorityMedium

Created5/20/2025 3:17:09 PM

Followup Date5/22/2025

Closed

AssigneeBarry White

CategoryServer

Work History

Total Time Worked: 4 Minutes

Barry White

1 minute ago

Applied updates and restarted server

- Recorded Work Type: On-Site Service.

- Recorded Work Start: 5/20/2025 3:17 PM.

- Recorded Work Stop: 5/20/2025 3:21 PM.

Barry White

1 minute ago

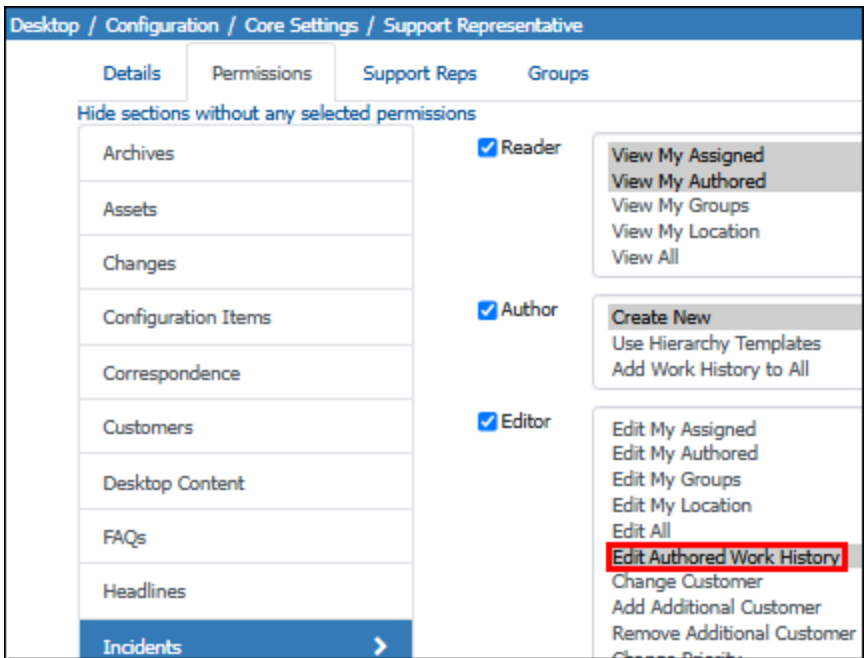
*** START SCRIPT ***

Verify contact information

*** END SCRIPT ***

Edit Authored Work History Permission Added

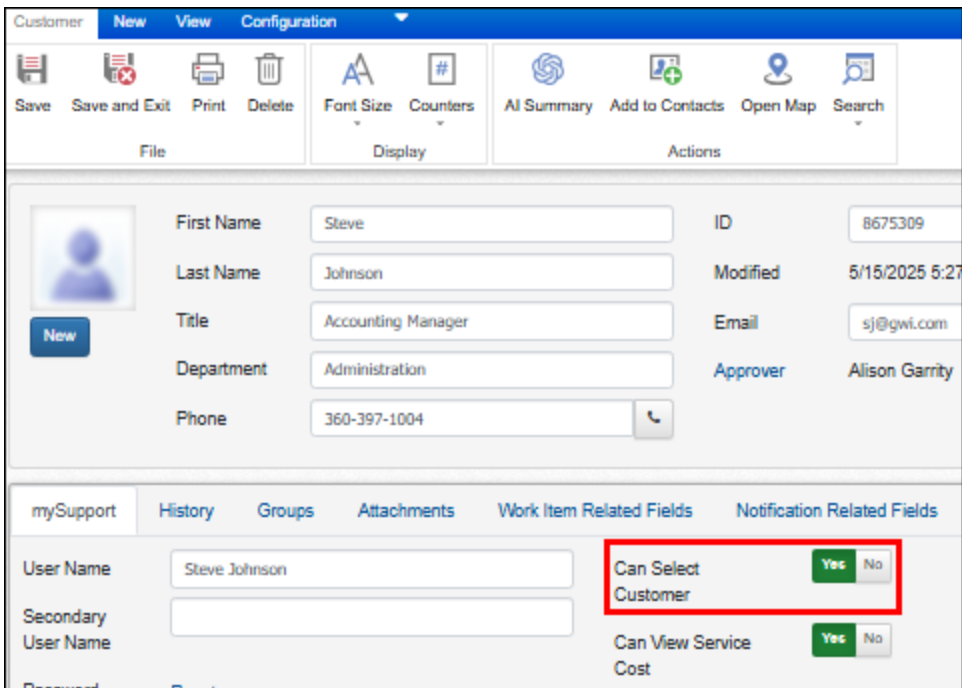
Administrators can now enable support representatives to edit their own work history entries via the Edit Authored Work History permission. It is included in Incident, Problem, and Change permissions.



Miscellaneous

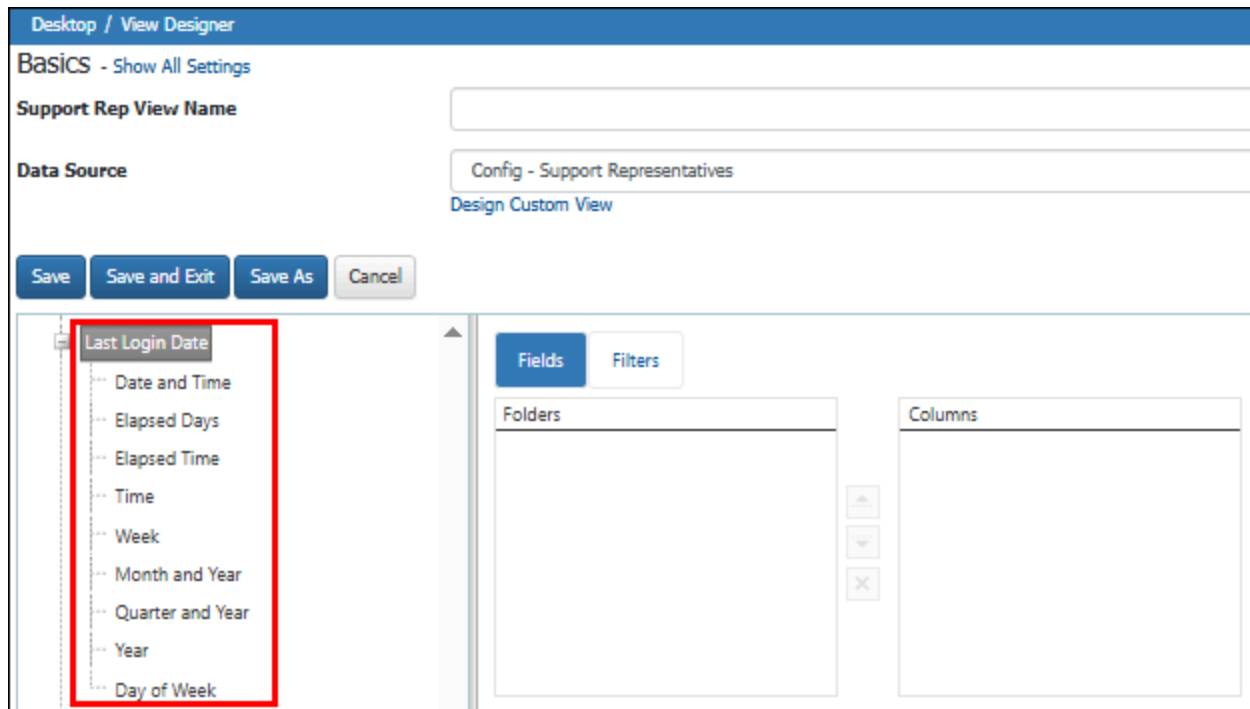
Customer Profile Setting To Select Another Customer For a Work Item

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.



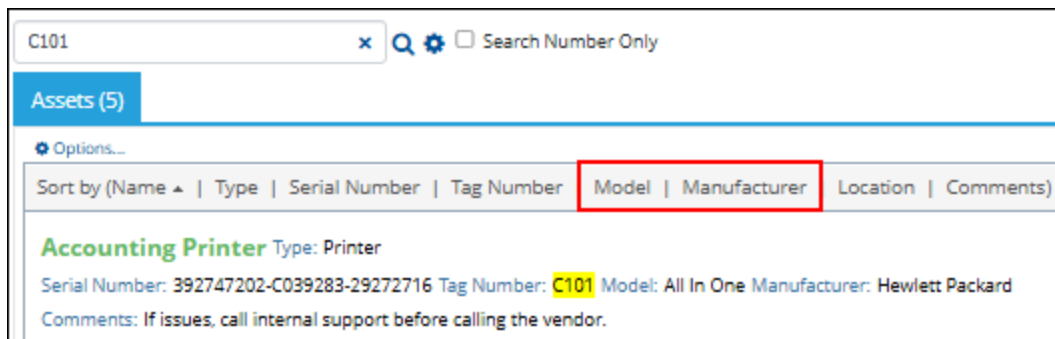
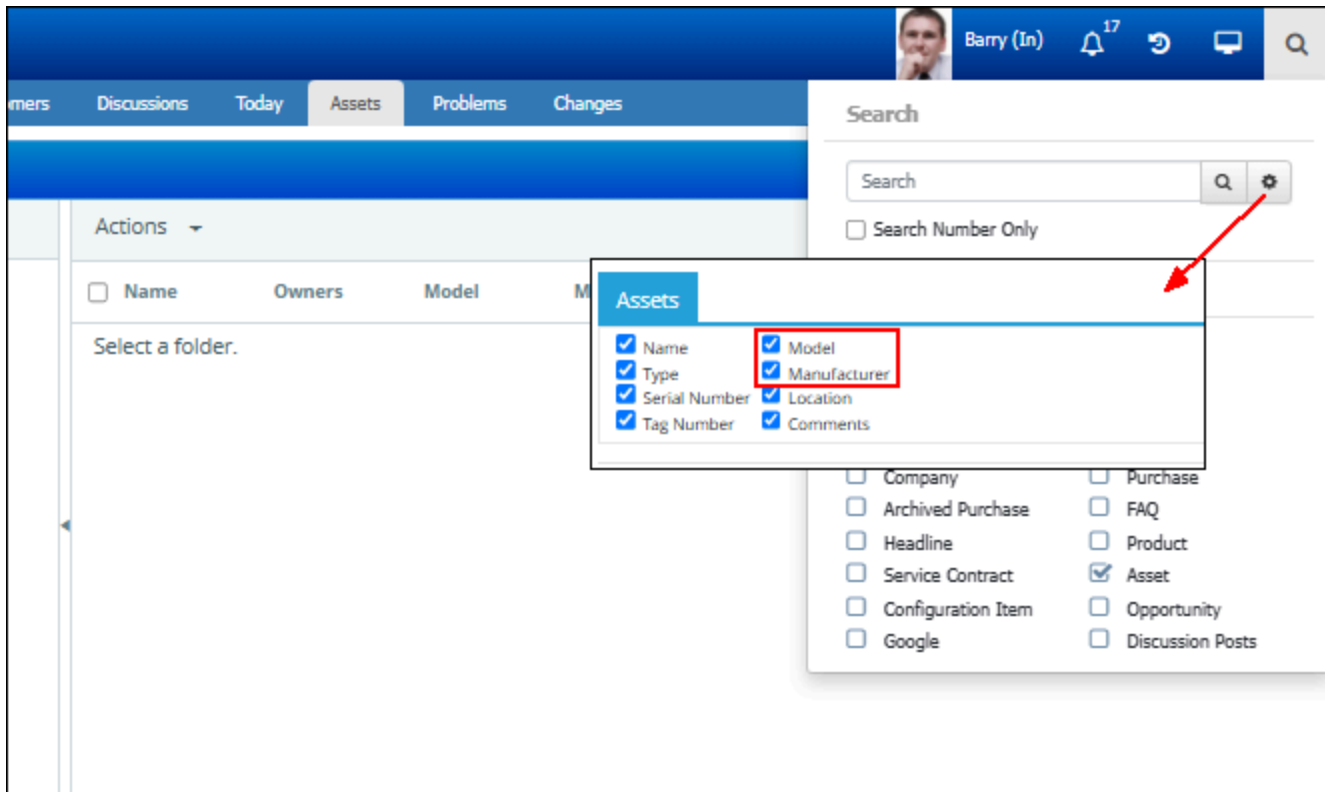
Last Login Date Field Added to Config - Support Representative Data Source

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.

Desktop / Configuration / Options and Tools / Automate / Change Rules

Basics

Rule Groups

Name Relative Date Change

Configure Conditions

Rule type is Time-Based: Important Dates

Hours of Operation: None

Match **All** of the following conditions:

Assignee Is Kienle, Abby

Configure Time Frame Interval and Actions

1.00 Calend Day(s) Before Custom Field Date and Time

Change Custom Field Date and Time To **Set Value: @today + 7**

Microsoft Excel .XLSX Format For View Subscriptions

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

Incidents Schedule Customers Discussions Today Assets Blah Problems Changes Configuration Items

All Incidents by Date Created

Details Schedule Recipients

Name Weekly Incidents by Assignee Report For CEO

Format Excel (.xlsx)

Send From Me (BW@lblsoft.com)

Message Details

Subject Weekly Incidents by Assignee Report

Message Hi Connor,
Here's a report of incidents by assignee for LBLSoft as of end of day today. Thanks!
Barry