



June 2018
Feature Requests
Documentation
14.2.12.x

Table of Contents

1. ServicePRO	3
1.1. Renaming ServicePRO Functions	3
1.2. Option to not Allow Users to Re-Open Closed Requests.....	6
1.3. Save As option for Duplicating or Creating New Templates from Existing.....	8
1.4. Multi fields copy-paste implementation within Custom Object Designer	9
1.5. Preferred domain list selection for ServicePRO and ServicePRO Web	10
2. ServicePRO Web	11
2.1. Fast Mode	11
2.2. Option to not Allow Users to Re-Open Closed Requests.....	18

Feature Requests

The following client-requested features have been implemented as of ServicePRO 14.2.12.x version.

1. ServicePRO

1.1. Renaming ServicePRO Functions

- **Automation**

Located under ServicePRO -> Design Tab, Business rules:

Previous	Changed To
Business Rules <ul style="list-style-type: none"> • Requests • Inbound Email 	Automation <ul style="list-style-type: none"> • Business Rules • Email Rules
Tab – Service Request Business Rules	Tab – Business Rules
Tab – Email Business Rules	Tab – Email Rules
Grid Title – Service Request Rules	Grid Title – Business Rules

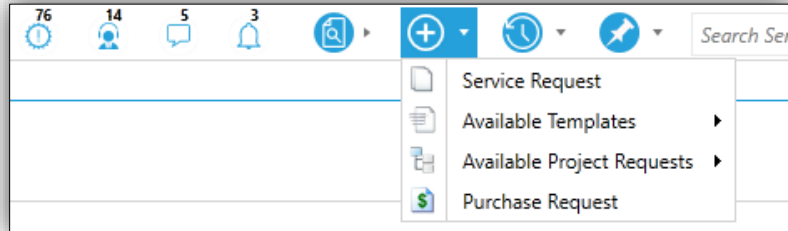
- **Service Catalog**

Located under ServicePRO -> Design Tab, Service Catalog, all three are combined in the Service Catalog:

Previous	Changed To
Project Templates	Project Templates
Custom Object Designer <ul style="list-style-type: none"> • Tab Title – Object Designer – ServicePRO • Left-Side Title – Predefined Objects • Right-Side Title – Object Structure • Ribbon – Object Type 	Custom Forms <ul style="list-style-type: none"> • Tab Title – Design Custom Forms • Left-Side Title – Available Custom Forms • Right-Side Title – Fields • Ribbon – Form
Quick Request Templates <ul style="list-style-type: none"> • Tab Title – Quick Requests Templates • Grid Title - Template List • Grid Menu Title – Quick Requests • Ribbon Menu – Create Quick Request • Ribbon Menu – Quick Request • Ribbon Menu – Quick Request Templates 	Templates <ul style="list-style-type: none"> • Tab Title – Templates • Grid Title - Available Templates • Grid Menu Title – Templates • Ribbon Menu – Create Request • Ribbon Menu – Request • Ribbon Menu – Templates

- **Top Tool Bar Menu labels**

Located under the Top Menu Bar.



Previous	Changed To
Quick Request	Available Templates
Project Request	Available Project Requests

- **Memo Templates**

Located under ServicePRO -> Design Tab -> Memo Templates.

Previous	Changed To
Customize Memo Templates	Canned Responses
Memo Templates	Canned Responses
Ribbon – Memo Templates	Ribbon – Canned Responses
Grid – Memo Templates	Grid – Canned Responses
Edit Template – Memo Template Designer	Edit Template – Canned Response Designer
New – New Template	New – New Canned Response

- **Notification Templates (Rule, Project, Custom Reports, Queries, Charts)**

Located under ServicePRO -> Analytics and Design tabs -> Custom Reports, Queries, Charts, Automation, and Project Templates Notifications, “Template” is replaced.

Previous	Changed To
Grid - Caption	Grid - Recipients
Grid - Template	Grid - Name
Preview/New/Edit: <ul style="list-style-type: none"> • Email Template • Reminder Template 	Preview/New/Edit: <ul style="list-style-type: none"> • Name • Name

<ul style="list-style-type: none"> Alert Template Text Messaging Template 	<ul style="list-style-type: none"> Name Name
---	--

• **Request Detail/Update/Workspace**

Located under Service Request -> Main Tab -> General Information.

Previous	Changed To
Type	Form Type

• **Audit Trail Reports**

Located under ServicePRO -> Analytics -> Custom Reports -> Audit Trail Reports.

Previous	Changed To
Base Report – BusinessRule	Base Report – Rule
Base Report – UDF <ul style="list-style-type: none"> UDF Audit Trail Report To list Audit Trail on ServicePRO UDF Name 	Base Report - Custom Forms <ul style="list-style-type: none"> Custom Form Audit Trail Report To list Audit Trail on ServicePRO Custom Forms Form Name

• **Shortcuts Widget**

Located under ServicePRO Home Page -> Shortcut widgets for the options are renamed.

Previous	Changed To
Designing Request Business Rules	Designing Business Rules
Designing Email Business Rules	Designing Email Rules
Custom Object Designer	Custom Forms
Memo Templates	Canned Responses
Manage Quick Request Templates	Manage Template
Quick Request Template Designer	Template Designer

• **License Information**

Located under About ServicePRO -> License Information.

Previous	Changed To
Number of Quick Request Templates	Number of Templates

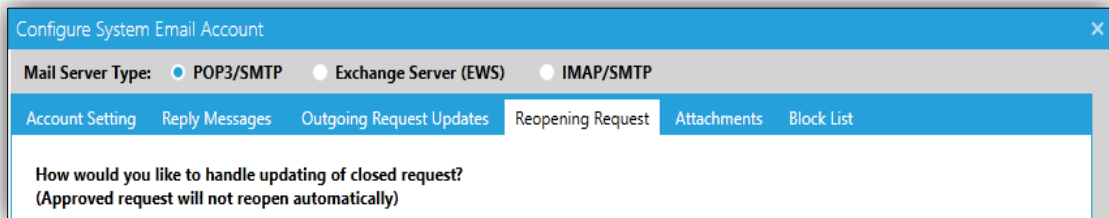
1.2. Option to not Allow Users to Re-Open Closed Requests

This feature will allow you to set "Do not re-open" option for closed requests when end users update requests through either emails or ServicePRO Web portal.

NOTE: Approved requests will not reopen automatically.

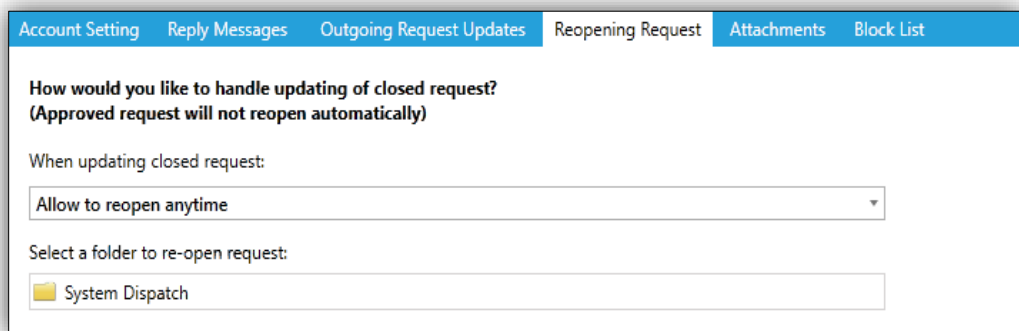
System Email Account Options – Reopening Request

Under System email account, there is an additional tab to control how requests are reopened for each system email account. For information about ServicePRO System email account please refer [here](#).



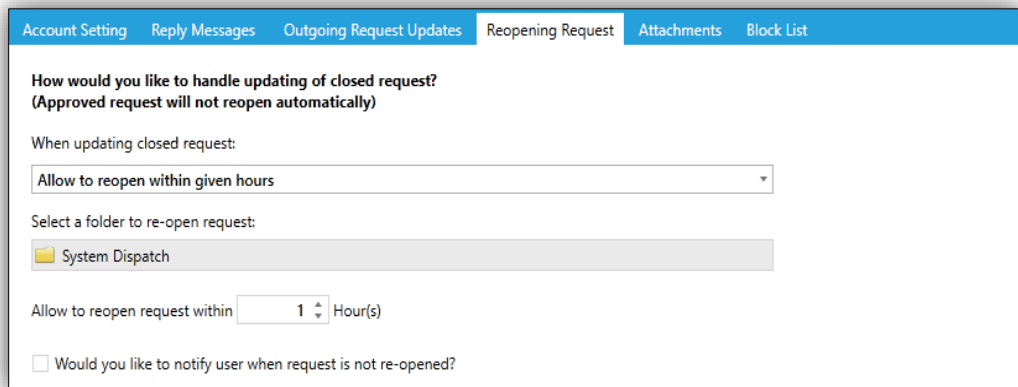
ServicePRO Administrator may configure one of the following options for when users update closed requests through email:

1. Allow to Reopen Request Anytime:



- a. Only allows to open the request in the specified folder anytime.

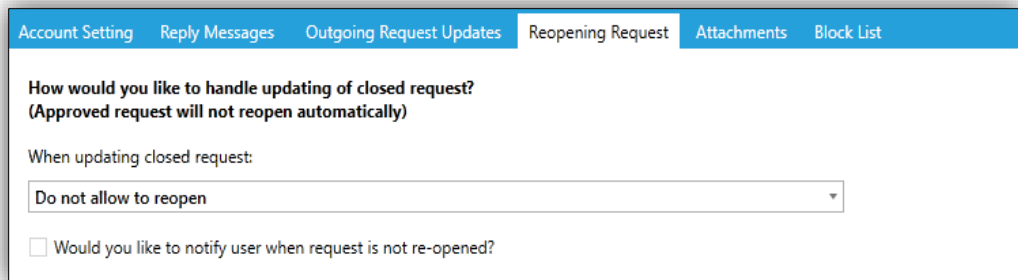
2. Allow to Reopen Within Given Hours:



The screenshot shows the 'Reopening Request' configuration page. The title is 'How would you like to handle updating of closed request? (Approved request will not reopen automatically)'. Under 'When updating closed request:', the dropdown menu is set to 'Allow to reopen within given hours'. Under 'Select a folder to re-open request:', the 'System Dispatch' folder is selected. The 'Allow to reopen request within' field is set to '1 Hour(s)'. There is an unchecked checkbox for 'Would you like to notify user when request is not re-opened?'.

- a. Option allows to reopen the request in the specified folder.
- b. Option allows the end user to reopen the request after certain hours and the maximum hours allowed are 672 business hours.
- c. Option also allows to send a notification to the user that the request is not reopened.

3. Do Not Allow to Reopen:



The screenshot shows the 'Reopening Request' configuration page. The title is 'How would you like to handle updating of closed request? (Approved request will not reopen automatically)'. Under 'When updating closed request:', the dropdown menu is set to 'Do not allow to reopen'. There is an unchecked checkbox for 'Would you like to notify user when request is not re-opened?'.

- a. Email content will be added to the existing request as a memo.
- b. Alerts will be created as follows:
 - i. If request is in dispatch folder then it will generate an alert for all dispatchers on that folder.
 - ii. If request is assigned to a support rep then it will generate an alert for the assigned support rep
 - iii. If request is assigned to queue then it will generate an alert for all the support reps assigned to that queue folder.
- c. If System Text Messaging is configured, Support reps will be notified according to the scenarios listed above in step 3.b.
- d. Request will remain closed.

4. **Do Not Allow to Reopen but Create a New Request:**

Account Setting	Reply Messages	Outgoing Request Updates	Reopening Request	Attachments	Block List
-----------------	----------------	--------------------------	-------------------	-------------	------------

**How would you like to handle updating of closed request?
(Approved request will not reopen automatically)**

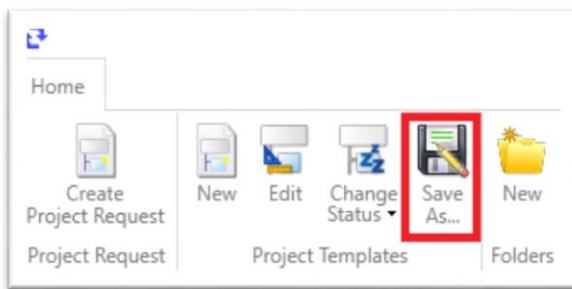
When updating closed request:

Do not reopen but create a new request

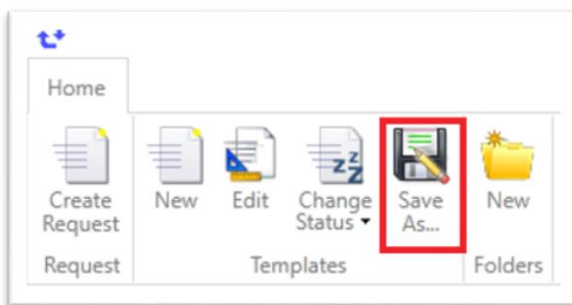
Would you like to notify user when request is not re-opened?

1.3. **Save As option for Duplicating or Creating New Templates from Existing.**

Project Templates: Save As option is added to duplicate or create a new Project template from an existing templated Project under ServicePRO Catalog.

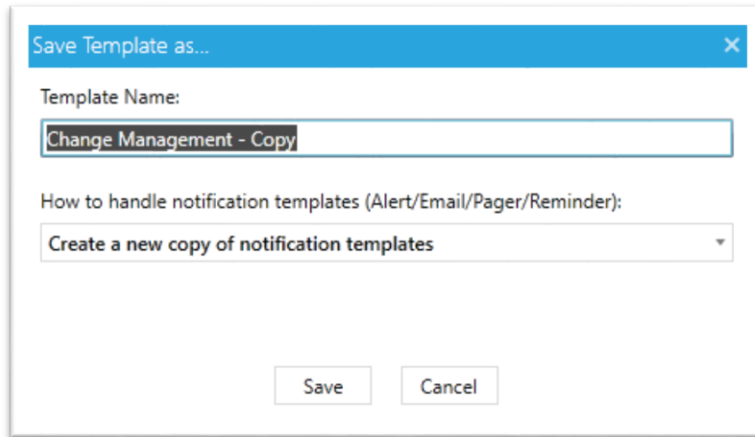


Templates: Save As option is added to duplicate or create a new template from an existing template under ServicePRO Catalog.



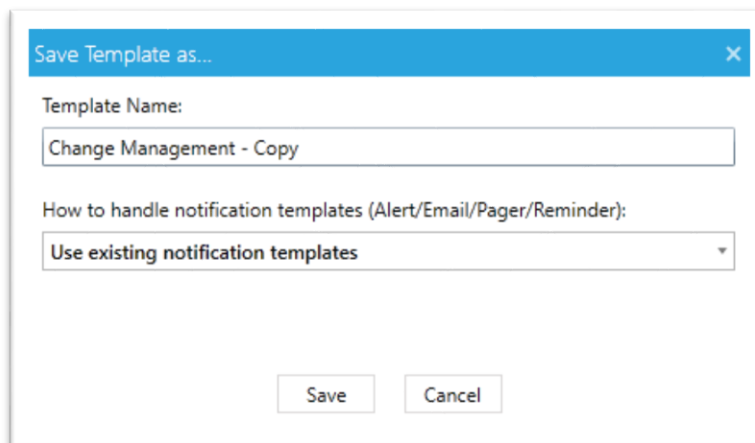
When creating a new template from an existing, there is a choice on “How to handle notification templates (Alert/Email/Pager/Reminder):” and two options are listed below.

Option 1: Create a new copy of notification templates.



The screenshot shows a dialog box titled "Save Template as...". It has a blue header bar with a close button (X). Below the header, there is a "Template Name:" label followed by a text input field containing "Change Management - Copy". Below that is a label "How to handle notification templates (Alert/Email/Pager/Reminder):" followed by a dropdown menu with "Create a new copy of notification templates" selected. At the bottom, there are two buttons: "Save" and "Cancel".

Option 2: Use existing notification templates.



The screenshot shows a dialog box titled "Save Template as...". It has a blue header bar with a close button (X). Below the header, there is a "Template Name:" label followed by a text input field containing "Change Management - Copy". Below that is a label "How to handle notification templates (Alert/Email/Pager/Reminder):" followed by a dropdown menu with "Use existing notification templates" selected. At the bottom, there are two buttons: "Save" and "Cancel".

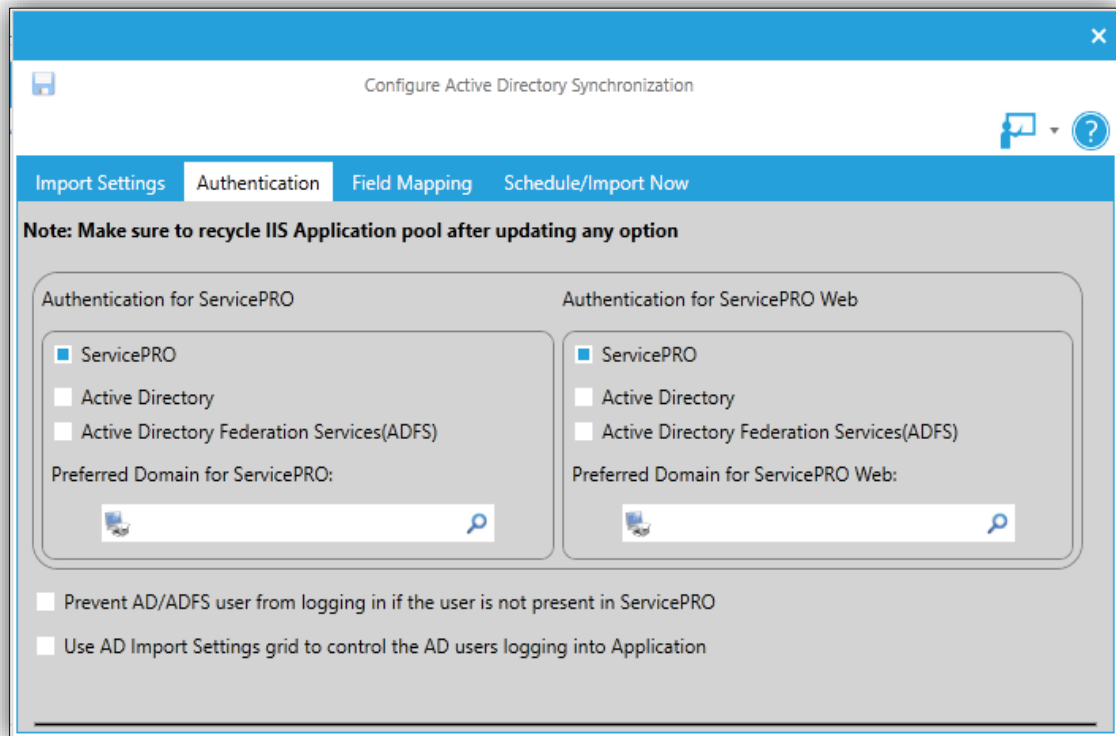
1.4. Multi fields copy-paste implementation within Custom Object Designer

Copy/Paste field(s) is now allowed for any type of field including reference, lookup, function fields and legacy labels.

- In case of a Function Field, if the destination Custom Form is same as the Source Custom Form, copy/paste is still allowed.
 - If Destination and Source Custom forms are not the same, the user will be prompted with a warning message.
- If the copied field contains FRXField property rules (visibility or validation), when the field is pasted the user will be prompted with a warning as Dependency properties are not retained in the destination form.

1.5. Preferred domain list selection for ServicePRO and ServicePRO Web

Under Active Directory Synchronization Settings, a new option is enabled under Authentication tab where Preferred domain list is selected for ServicePRO and ServicePRO Web.



ServicePRO:

Domain Name caching.

- If there is cached domain from previous application run, that will be set as default domain.
- If there is no cached domain, then it will use the “Preferred domain for ServicePRO” set in the Active Directory Configuration as the default domain.

ServicePRO Web:

Domain Name caching.

- If there is cached domain from previous application run, that will be set as default domain.
- If there is no cached domain, then it will use the “Preferred Domain for ServicePRO Web” set in the Active Directory Configuration as the default domain.

2. ServicePRO Web

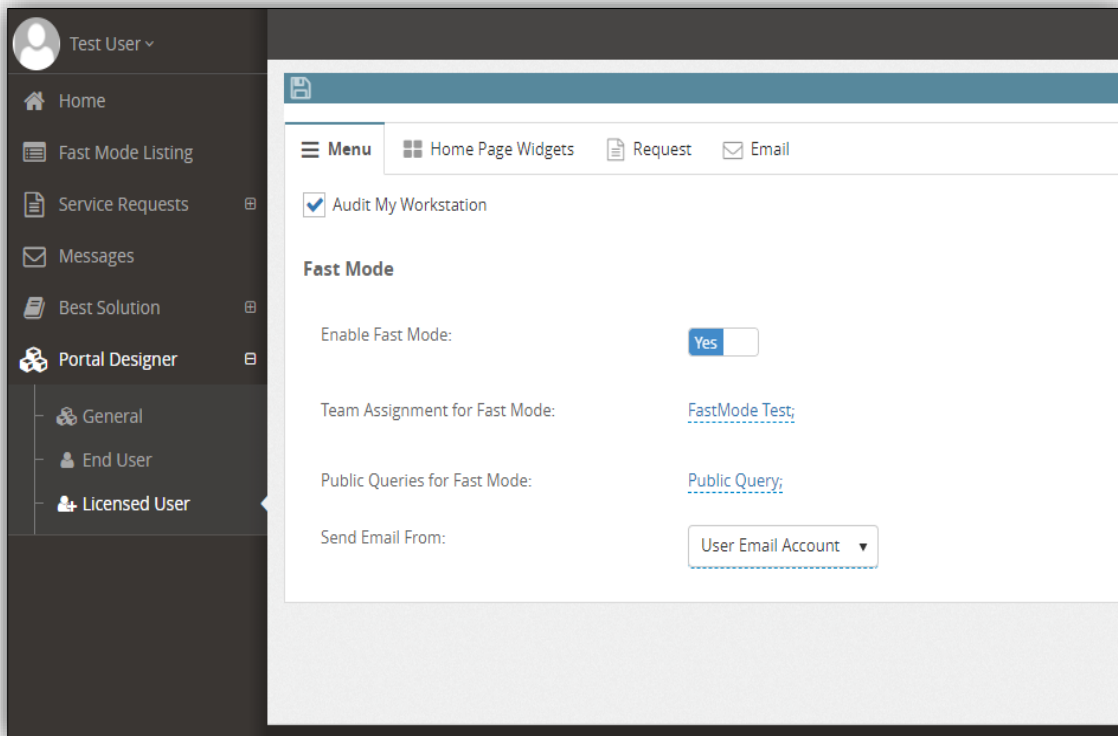
2.1. Fast Mode

ServicePRO Web fast mode presents the support rep with a simple, user friendly, request listing view. Fast Mode facilitates the performing of tasks by support rep - glancing through their requests, put them into their service, make quick updates and/or send email.

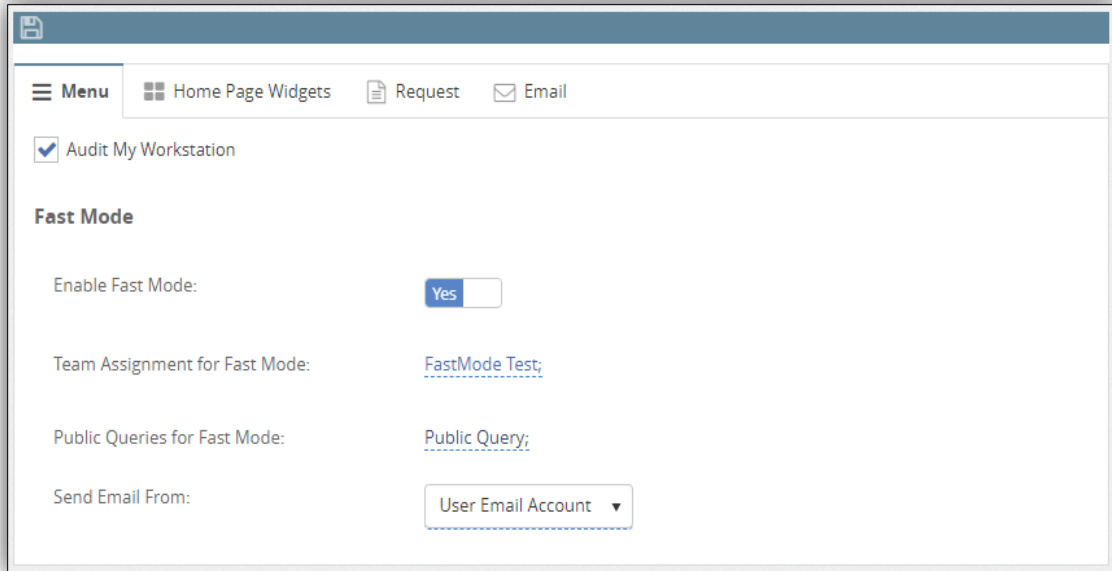
Enable Fast Mode

Fast mode is enabled from the Portal Designer – Licensed User Options.

NOTE: *Portal Designer is only available for ServicePRO Administrators. For more information, please refer to [ServicePRO Web Portal Designer](#).*



When fast mode is enabled, ServicePRO administrator will have three additional options to configure:



The screenshot shows the ServicePRO administrator interface. At the top, there is a navigation bar with a 'Menu' icon and links for 'Home Page Widgets', 'Request', and 'Email'. Below the navigation bar, there is a checkbox for 'Audit My Workstation' which is checked. The main section is titled 'Fast Mode' and contains four configuration options:

- Enable Fast Mode:** A toggle switch set to 'Yes'.
- Team Assignment for Fast Mode:** A text input field containing 'FastMode Test;'.
- Public Queries for Fast Mode:** A text input field containing 'Public Query;'.
- Send Email From:** A dropdown menu with 'User Email Account' selected.

1. Team Assignment for Fast Mode

- Select Teams for which Fast Mode will be enabled in ServicePRO Web.
- Fast Mode will be enabled for all the users under these teams when they log into ServicePRO Web.
- Users who are not part of any of these teams will be presented with the normal home page in ServicePRO Web.

2. Public Queries for Fast Mode

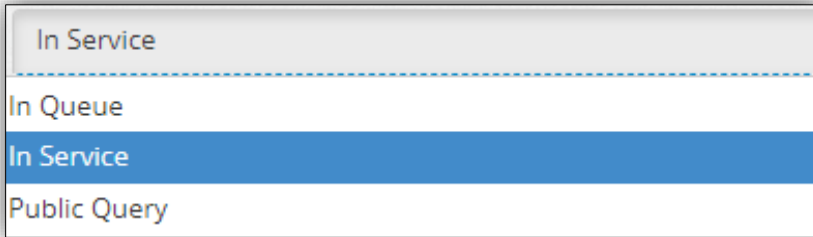
- Select List of Public queries to display in the dropdown option in the Fast Mode home page.
- The very first public query selected will be loaded in the fast mode request listing view by default.
- From the fast mode view itself, the support rep will be able to select from the available public queries, or from the In-Queue view and In-Service view. The selected view will be maintained for the user whenever they log back in.

3. Send Email from Fast Mode

- Option to specify if the User email account or the System email account is to be used while sending email from Fast Mode.

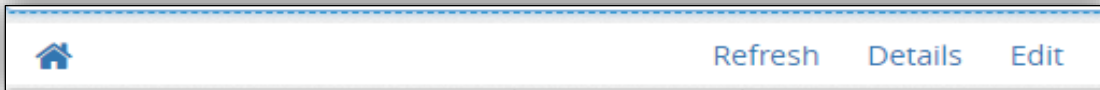
Fast Mode Request list view

In the Fast Mode Request Listing view, there are three drop-down Options:



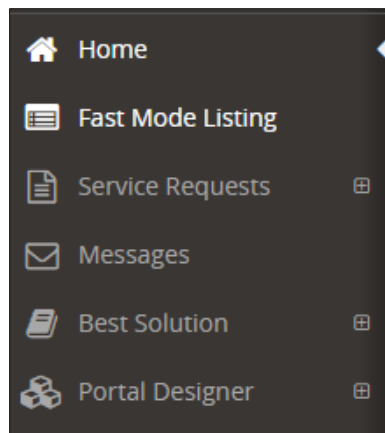
1. **In Queue** – Shows all the requests “In Queue” Status for current user.
2. **In Service** – Shows all the requests “In Service” for current user.
3. **Public Query** – Shows all public queries specified under Portal Designer, “Public Queries for Fast Mode”.

Tool bar options:



- **Home** - icon tool bar option takes the user back to the regular home page.

NOTE: User has the option to go back to “Fast Mode Listing View” from the Home Page.

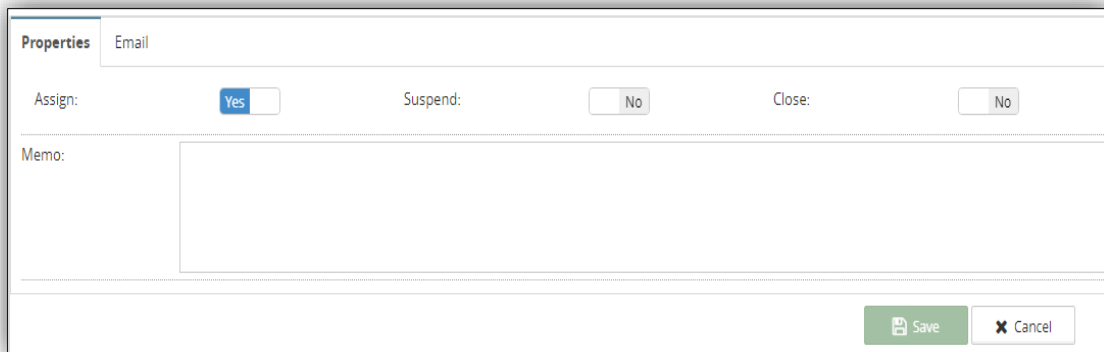


- **Refresh** – option refreshes the list
- **Details** – option opens the detailed preview of the request
- **Edit** – option enables to perform a quick edit inline in the grid.

Fast Mode Edit view

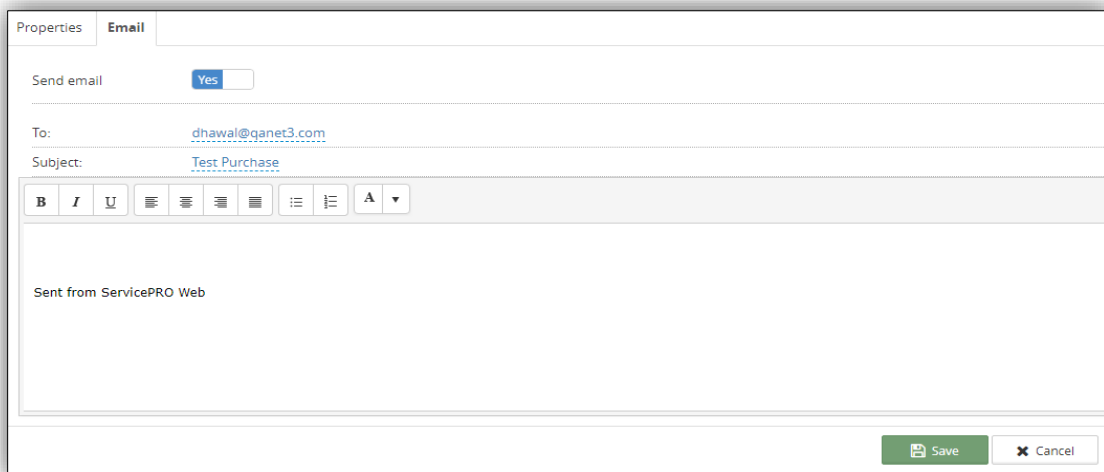
In Fast Mode Edit View, user will only be allowed to edit limited properties that are listed below and to send email:

Properties Tab:



- **Assign** – on/off switch option – facilitated the user in quickly assigning or unassigning the current request to themselves.
- **Suspend** – on/off switch option – facilitates the user to quickly suspending or activating (set to ASAP) the current request.
- **Close** – on/off switch option – facilitates the user in quickly closing or reopening the current request.
- **Memo** – Allows the user to enter a quick plain text memo.

Email Tab:



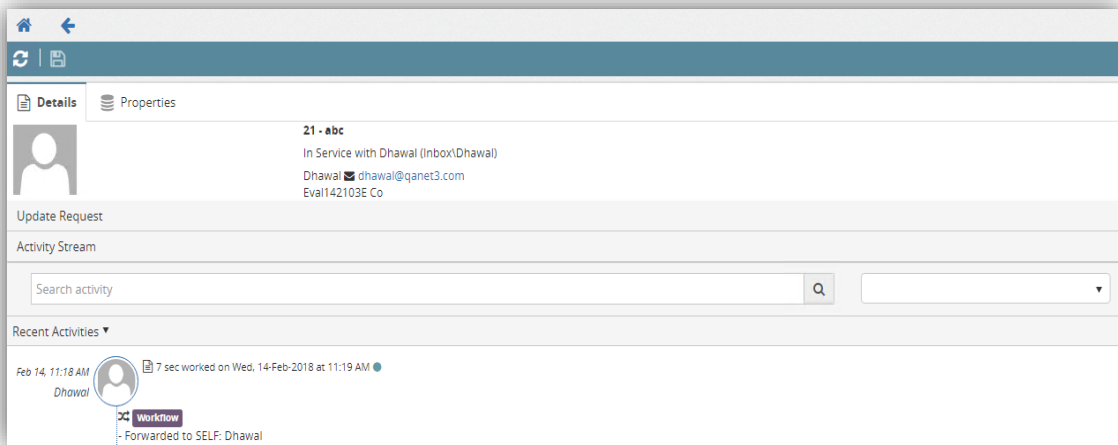
NOTE: 'From' email address will be taken as current user's email address or Default System Email Account based on the option set under 'Fast Mode' section in Licensed User Portal Designer options.

- **To field** – This field will be defaulted to the requester. The support rep will have the option to choose other user email addresses as recipients and the field has autocomplete feature enabled.
- **Subject** – This will be set by default with the title of the current request. If the 'From' email address is System Email Account, then the Subject field will be hidden.
- **Mail Body** – Allows the user to enter Rich Text memo.

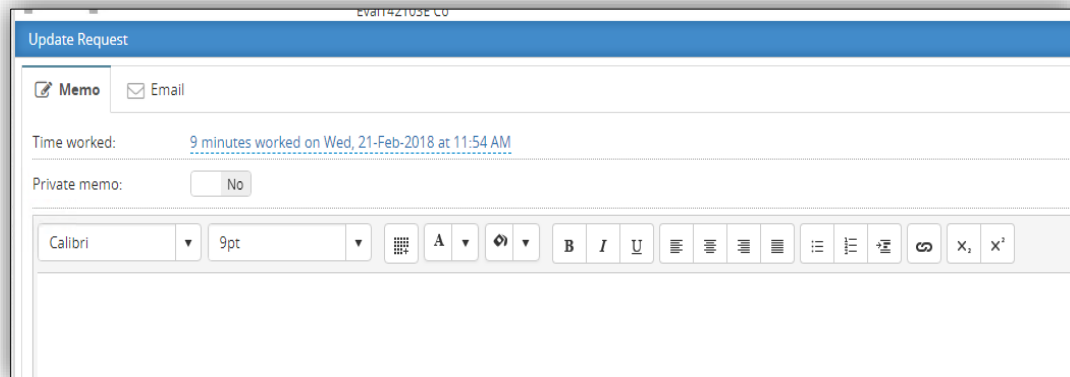
Fast Mode Details View

In Fast Mode Detail View, only limited fields as listed below are available to preview and edit:

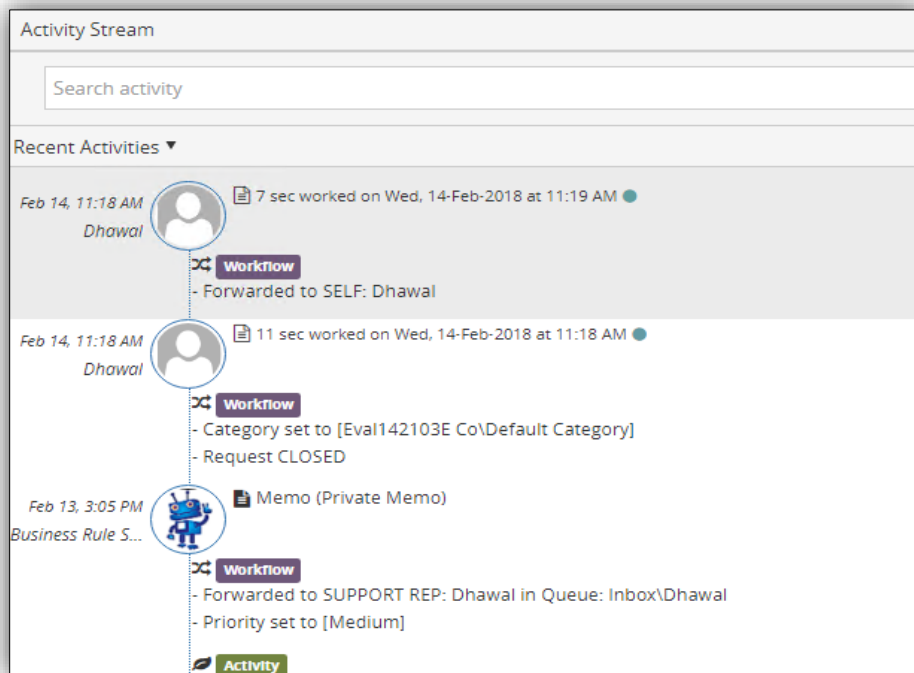
Details Tab:



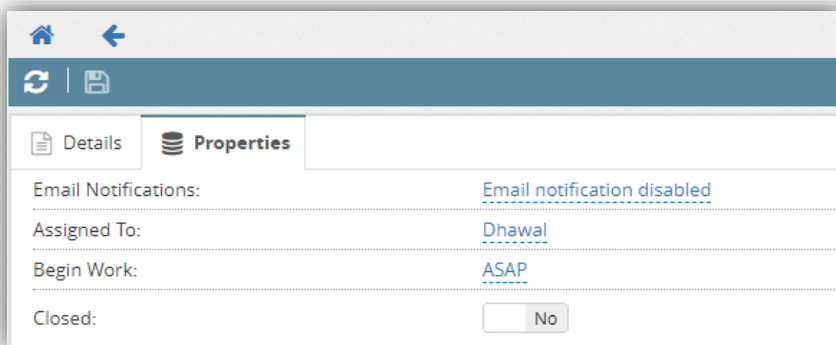
Update Request - User can update the current request and send an email under this option.



Activity Stream – Shows all the current and past activities related to the request.



Properties Tab:



- **Email Notifications** – Option to enable or disable Automatic Email Notification to Requester and CC list recipients.
- **Assigned To** – User has the option to Assign or Unassign the current request to themselves or other Support Reps.
- **Begin Work** – User have the option to change the Wait Status to ‘ASAP’, ‘Waiting for Response’, ‘Suspend’ or ‘Schedule’ the request
- **Closed** – on/off switch option – facilitates the user in quickly closing the current request.

Fast Mode Logout

Exit/Sign out option is located at the top-right corner as shown below.



Fast Mode New Request

New Request option is enabled via ServicePRO Database.



Please insert the following record in the table **tblOptions** in order to enable “New Request” Option.

```
If not exists(select * from tblOptions where LngObjectType = 16384 and OptionId = 16984)
  Insert into tblOptions values (0, 16384, 16984,1,null,'Fast Mode Licensed User - New Request')
else
  update tblOptions set LngValue = 1 where LngObjectType = 16384 and OptionId =16984
GO
```

When user clicks on “New Request”, they will be taken into the regular ServicePRO Web Interface to log a new request.

2.2. Option to not Allow Users to Re-Open Closed Requests

This feature will allow you to set "Do not re-open" option for closed requests when end users update requests through either emails or ServicePRO Web portal.

NOTE: Approved requests will not reopen automatically.

ServicePRO Web Portal Designer Options – End User

Option can be specified in the portal designer under End User ‘Request’ tab section. For information about ServicePRO Web Portal designer please refer [here](#).

ServicePRO Administrator has the following options to choose from:

- 1. Allow to reopen anytime**

Request - Preview/Update

When end user updates closed request (Approved request will not be automatically reopened)

- 2. Allow to reopen within given hours**

Option allows the end user to reopen the request within certain hours and maximum hours allowed are 672 business hours.

Request - Preview/Update

When end user updates closed request (Approved request will not be automatically reopened)

3. Do not allow to reopen

Request - Preview/Update

When end user updates closed request (Approved request will not be automatically reopened)

Do not allow to reopen

0

- a. Memo will be added to the existing request
- b. Alerts will be created as follows:
 - i. If request is in dispatch folder then it will generate an alert for all dispatchers on that folder.
 - ii. If request is assigned to a support rep then it will generate an alert for the assigned support rep
 - iii. If request is assigned to queue then it will generate an alert for all the support reps assigned to that queue folder.
- c. If System Text Messaging is configured, Support reps will be notified according to the scenarios listed above in step 3.b.
- d. Request will remain closed