



**January 2020**  
***Feature Requests***  
*Documentation*  
*14.2.16.x*

## Table of Contents

I. ServicePRO feature Enhancements .....	3
1. ServicePRO® Mobile.....	3
1.1. Highlights .....	3
1.2. Installation of the ServicePRO App .....	3
1.3. Login Page .....	5
1.4. Home Page .....	6
2. End-User Email Reply Behavior .....	7
3. Advanced Search in Assets.....	9
4. Allow to update request when past “Due By” date.....	10
5. Control visibility of Business Rule and StarWatch activities .....	12
6. Create a Quick Request/Project Template with Custom Field Information in Title .....	16
7. ServicePRO – Business Rule Workflow-Close Behavior .....	19
7.1 Business Rule Designer - Workflow section changes:.....	19
8. ServicePRO Web API .....	20
ServicePRO Add-on Feature Enhancements .....	20

## I. ServicePRO feature Enhancements

The following client-requested features have been implemented as of ServicePRO 14.2.16.x version.

### 1. ServicePRO® Mobile

The ServicePRO® Mobile app offers enterprise wide workflow management at your fingertips. With the ease and convenience of an app, you can quickly answer customer queries and resolve issues through your phone. You can also create requests, categorize them and send out notifications with just a few clicks.

#### 1.1. Highlights

- *Updating a request* - Change request details like category, priority, status, assignment
- *Custom Forms* - Capture additional information and facilitate simple to sophisticated workflows
- *Workspace* - Review all requests in your workspace or in a custom view
- *Push Notifications* - Notify customers by sending out emails and quick messages
- *Prioritizing* - Resolve requests by priority
- *Scheduling* - Get organized by scheduling out requests
- *Time & Cost Tracking* - Log the time you spend working on a request
- *Workflow Templates* - Access templates for creating new workflows
- *Parent-child requests* - Enable related requests to be grouped together
- *Best Solutions* - Search best solutions for resolving issues

#### 1.2. Installation of the ServicePRO App

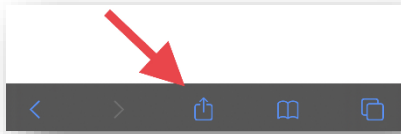
The “ServicePRO Mobile” app can be installed from the Google Play Store on Android devices. ServicePRO Mobile works with ServicePRO's "ServicePRO Web" application / Self-service portal. ServicePRO Web URL is required when you launch the app for the first time. Your ServicePRO Administrator can provide this URL.



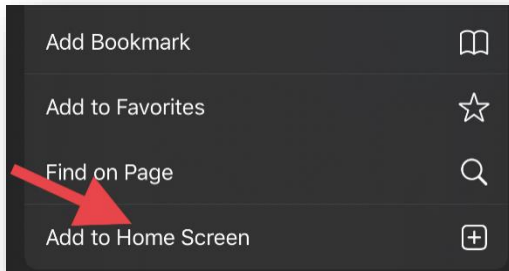
For iOS devices, ServicePRO Web can be added to the Home Screen for easy access through your Safari browser.

1. Open Safari.
2. Navigate to the ServicePRO Web URL.

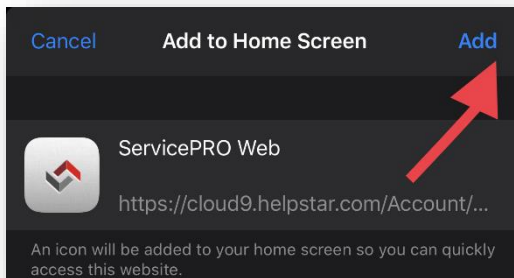
3. Tap the **Share** button at the bottom of the page.



4. Scroll down until you see **Add to Home Screen** and tap this.

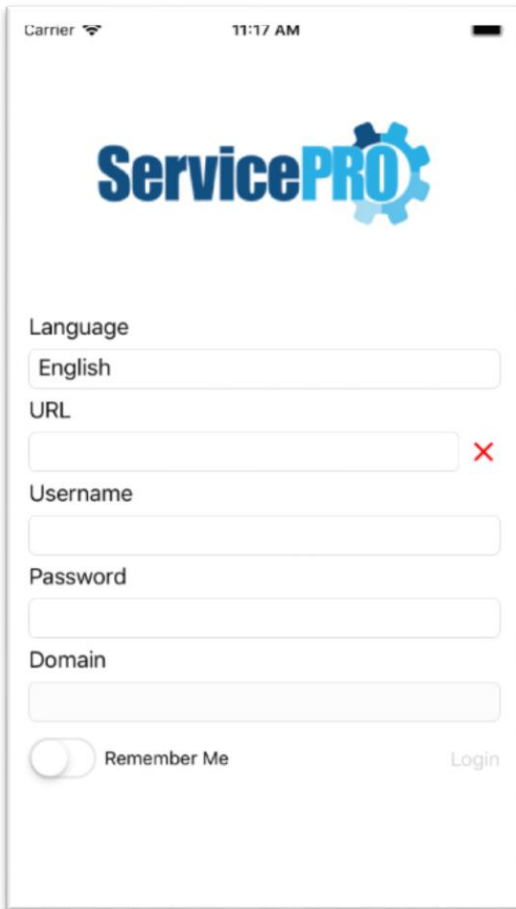


5. On the next screen, you'll see the link as well as the website's icon. **Click on Add** to confirm.



6. Now tap the new app on your home screen, and it will open the website in its own navigation window, independent of Safari.





### 1.3. Login Page

The login page is the main entry point to the application. See below for details on each control.

#### Language

Choose from 5 supported languages including *English, French, German, Slovenian, and Spanish.*

#### URL

Enter the URL of your ServicePRO Web instance.

*Example: <https://cloud9.helpstar.com>*

Once the URL is entered, the app will attempt to verify that the URL is correct, and that ServicePRO Web is online and available. If successful, you will see a green check mark, if unsuccessful, you will see a red X as shown below.

#### Username

Enter the username you use to login to either ServicePRO Web or ServicePRO.

#### Password

Enter the password for the username you use to login.

#### Domain

Choose from a list of domain names available to your instance of ServicePRO web.

#### Remember Me

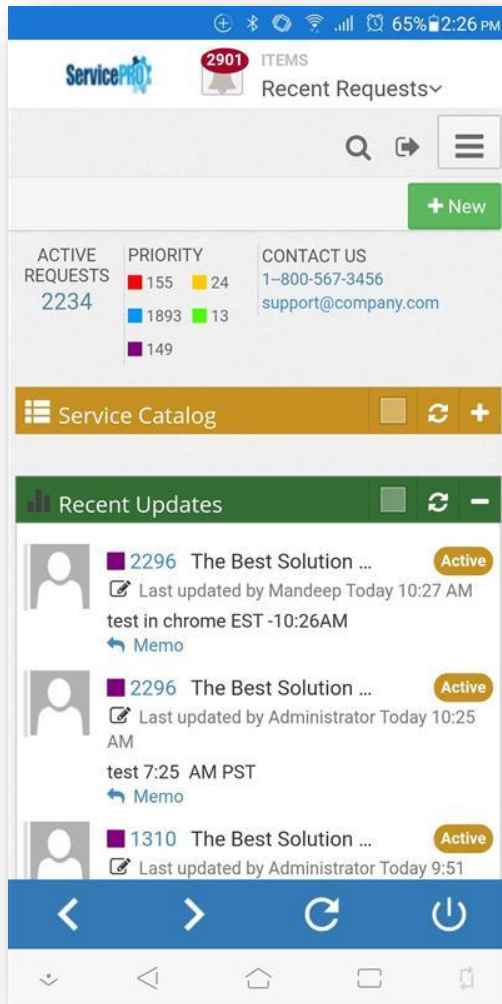
A switch control that allows the app to remember your credentials so you can skip this screen entirely the next time you load the app.

#### Errors

If the app cannot find the domain, the login credentials are invalid, or any other error that could occur, a message will be shown in red underneath the 'Remember Me' and 'Login' button to indicate the issue.

### 1.4. Home Page

The home page encapsulates all of the current functionality that exists within ServicePRO Web. See below for details on additional controls located at the bottom of the screen.



#### Back

The back button (indicated by the left facing arrow) allows you to go back to the previous page within the application much like a web browser.

#### Forward

The forward button (indicated by the right facing arrow) allows you to go forward to the next page within the application much like a web browser.

**Refresh**

The refresh button (indicated by the circular arrow) allows you to refresh the content on the current page within the application.

**Logout**

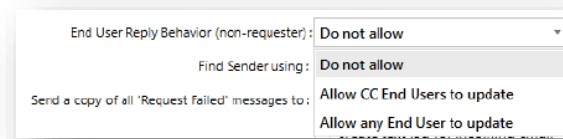
The log out button (indicated by the power indicator) will show a popup if tapped and ask you if you wish to log out. If you select yes, the app will send you back in to the Login Page. If you select no, the dialog will close and you will remain on the same page.

## 2. End-User Email Reply Behavior

ServicePRO end users are able to update requests that belong to them by replying to any System emails that they have received from the request.

As for end users who are not the requester of a service request, by default they are not allowed to update the request by replying to any emails they have received from the request.

In the case where the environment has access to a floating license, the system can be configured to allow end users to update requests for which they are not the requester. This feature could be allowed for CCed users in the request notifications section or could be allowed for any end user that has received any prior system emails for that specific request.

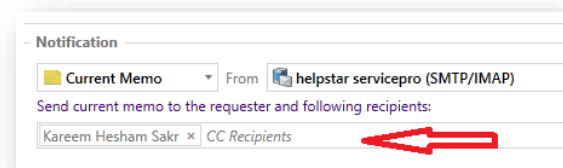


**1. Do not allow:**

When this option is selected, if an end user is not the requester, they are never able to update the request by replying to system mails, even if they are in the notification cc list.

**2. Allow CC users only to update:**

In this option only end users that are CCed in a request notification can update the ticket by replying to system emails. CCed users can be found as per the below screenshot:



### 3. Allow all end users to update:

In this option, if a user receives any system email for that request (via the social tab, request notification, a business rule or a project notification), that user will be able to update the request by replying to the email.

#### Prerequisites

In order for option 2 and 3 to be available, the system must have a floating license. If not, option 1 will be selected by default.

**Configure System Email Account**

Mail Server Type:  POP3/SMTP  Exchange Server (EWS)  IMAP/SMTP

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

**Account Information**

Display Name:

Email Address:

Mail Account Name:

Account Password:

Logon Using Email Address

Domain:

**Server Information**

IMAP Settings | SMTP Settings

IMAP Server:

IMAP Port:

Require logon using Secure Password A

IMAP Server requires authentication

Enable SSL over IMAP

IMAP Secure Protocol:

**Properties**

Process Emails from Users with the 'Email' option disabled in User Properties

End User Reply Behavior (non-requester):  No floating license in the system

Find Sender using:

Send a copy of all 'Request Failed' messages to:

Create text log for incoming email  Create text log for outgoing email

**Test Settings**

After filling out the information on this screen, we recommend that you test your account by clicking on the button below. (Requires network connection)



### 3. Advanced Search in Assets

ServicePRO will now facilitate users to perform advanced search in Assets on “Allocated To” fields using the match filters "Not Equal" and "Does not contain" along with the exiting options like ‘Contains’ ‘Starts With’, ‘Ends With’ and ‘Equal To’.

As shown in the below screenshot, there are now 6 options under ‘Match’ criteria which can filter the results accordingly by the selection of the ‘Search’ dropdown field and the ‘Value’ provided by the user. The implemented enhancement facilities searching on the following criteria using the additional ‘Match’ criteria filters “Not Equal” and “Does not Contain”.

- Allocated to Organizational Unit
- Allocated to Company
- Allocated to User
- Allocated to Asset

Define Criteria

Search [Allocated to Organizational Unit] ▾

Match Does not contain ▾

Value Contains

Selection Starts With Or

Add Ends With

[Allocate Equal To] Does not contain so

Not Equal

Does not contain

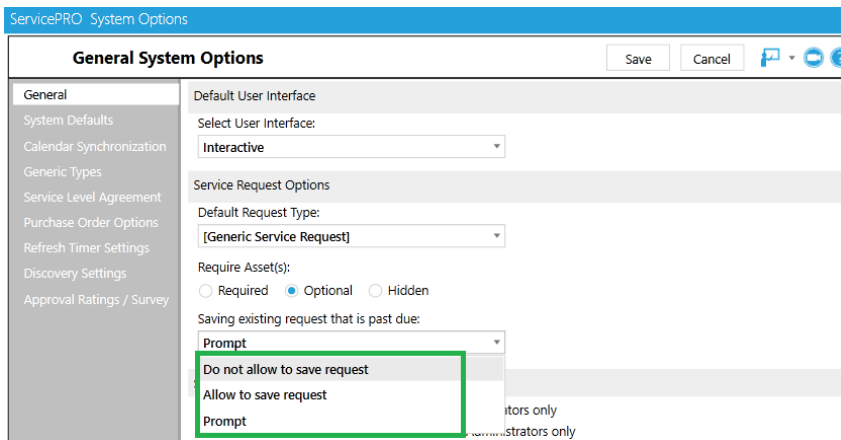
Find Cancel Open Save Search

## 4. Allow to update request when past “Due By” date

ServicePRO facilitates the administrator to control the update of an existing service request that has a Due by date in the past. If the administrator wishes to configure this setting, this can be done from within ServicePRO’s System Options under the General tab. By default, the option “Do not allow to save request” is selected.

As shown in the below screenshot, there are three options under “System Options” to save an existing request that is past due.

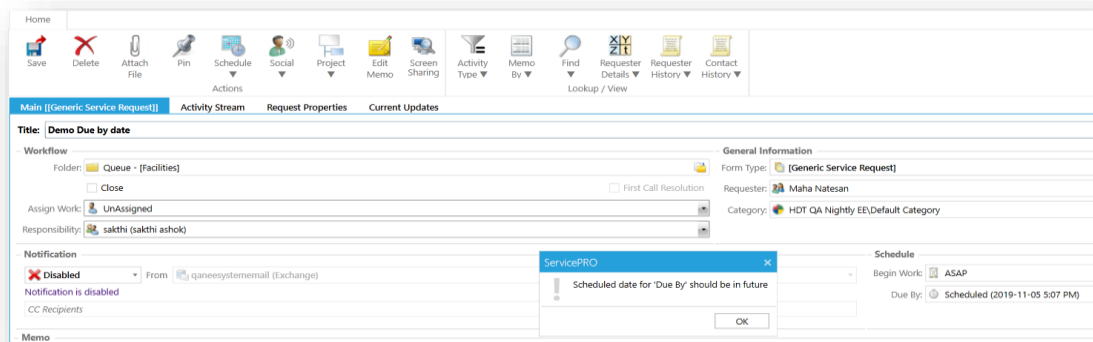
- **Do not allow to save request**
- **Allow to save request**
- **Prompt**



### Option 1 – “Do not allow to save request” when “Due By” is in the past

This is the existing behavior where the user is not allowed to save the service request when the ‘Due by’ field had been set with a past date.

**Example:** - Sam created a service request on 3<sup>rd</sup> October 2019 where the ‘Due by’ field is set to 4<sup>th</sup> Oct 2019. On 5<sup>th</sup> October if any of the fields other than ‘Due by’ is updated in the service request and saved, the service request will not get saved. It would ask the user to select a due by date in the future.



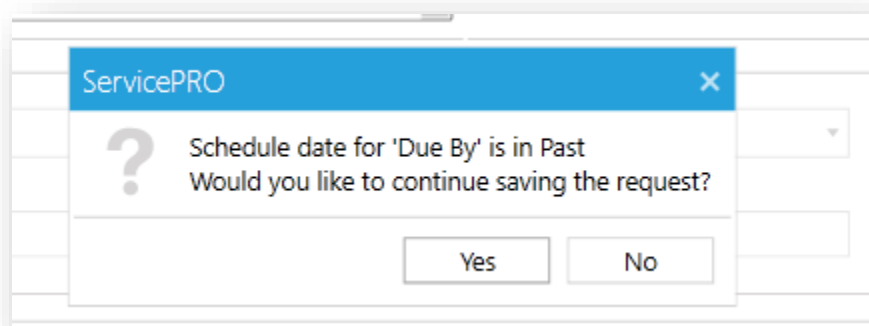
### Option 2 – “Allow to save request” when “Due By” is in the past

When the option ‘Allow to save request’ is set, the user is allowed to update and save the service request even though the ‘Due by’ field has been set with a past date. There will be no message or prompt or notification for the user.

**Example:** - Sam created a service request on 3<sup>rd</sup> October 2019 where the ‘Due by’ field is set to 4<sup>th</sup> Oct 2019. On 5<sup>th</sup> October if any of the fields other than ‘Due by’ is updated in the service request and saved, the service request will get saved.

### Option 3 – “Prompt” when “Due By” is in the past

When the option ‘Prompt’ is set, the user will be prompted as shown in the screenshot below while updating and saving the service request when the ‘Due by’ field has been set with a past date.



- If the user clicks on “Yes”, then the request will be updated successfully and saved.
- If the user clicks on “No”, then the request will not be updated and the user will remain on the same page.

## 5. Control visibility of Business Rule and StarWatch activities

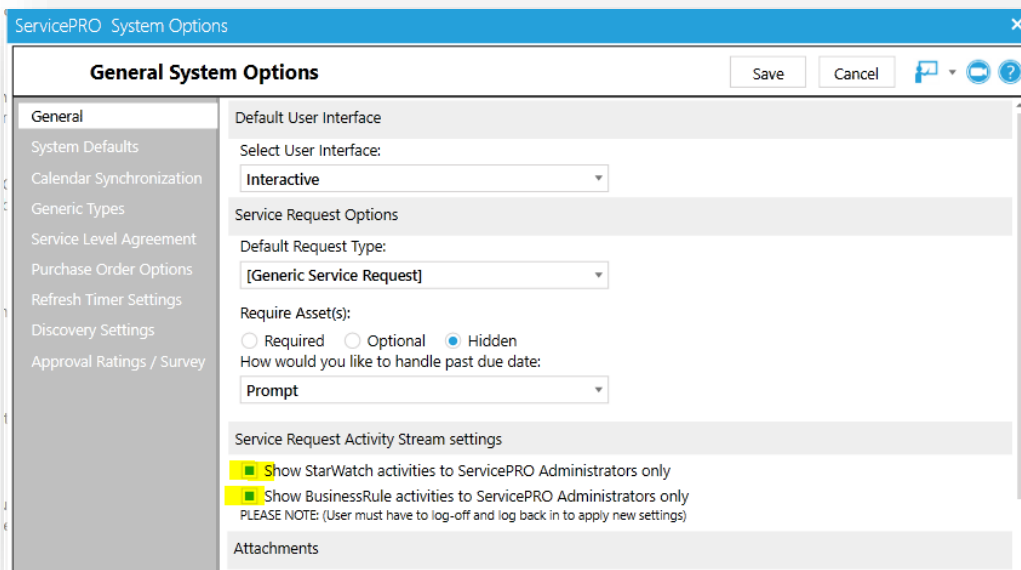
ServicePRO now facilitates the administrator to control the visibility of StarWatch and Business Rule Service activities in the Service Request Activity Stream for *Support Reps*.

By configuring the settings in the “System Options”, the administrator can restrict the visibility of these activities to *ServicePRO Administrators* only.

As shown in the screenshot below, there are two checkboxes under “Service Request Activity Stream settings”, which can be configured to control the visibility of StarWatch and Business Rule activities for Non-Administrative Reps in ServicePRO.

When both these options are unchecked, all the support reps in the system will be able to see both type of activities in the activity stream based on their selection in the ‘Memo By’ and ‘Activity Type’ filters in the request.

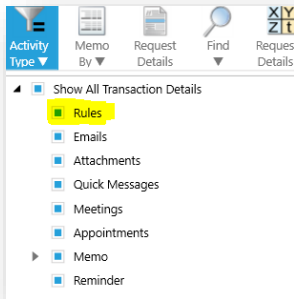
When either of these options are checked, then the Support Reps will not see the respective activities in the activity stream of the request.



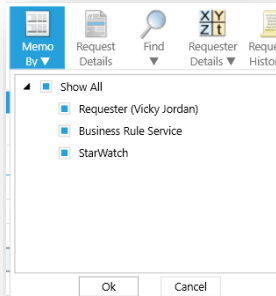
### Behavior for ServicePRO Administrator

Whether both the options under “Service Request Activity Stream settings” in the System Options are checked or unchecked, ServicePRO Administrators will always see the following options:

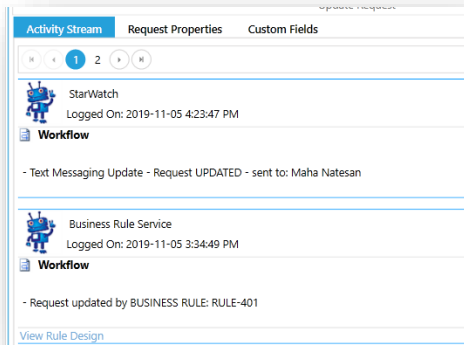
- 1) The “Rules” option under the “Activity Type” filter in the Service Request preview as shown in the screenshot below:



- 2) “StarWatch” and “Business Rule Service” options under the “Memo By” filter in the Service Request preview as shown in the screenshot below:



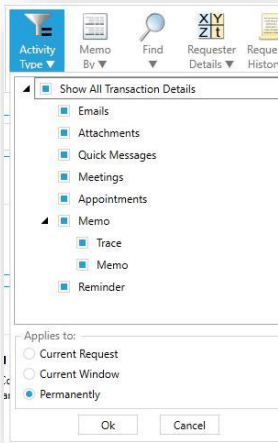
- 3) If the options as described in 1) and 2) are checked, then the administrator will see the Business Rule and StarWatch activities in the Activity Stream:



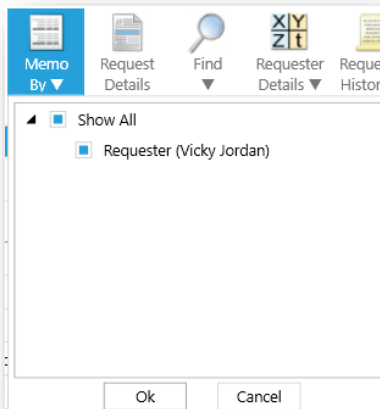
### Behavior for Support Reps

When both the checkboxes under “Service Request Activity Stream settings” in the System Options are checked, the following options will **not** be visible to the Support Reps who do not have the ServicePRO Administrator privilege assigned to them:

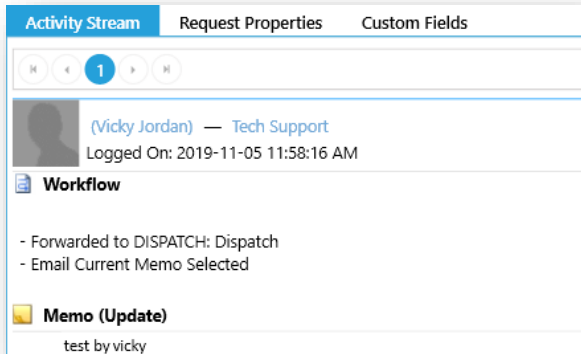
- 1) The “Rules” option under the “Activity Type” filter in the Service Request preview as shown below:



- 2) “StarWatch” and “Business Rule Service” options under the “Memo By” filter in the Service Request preview as shown below:



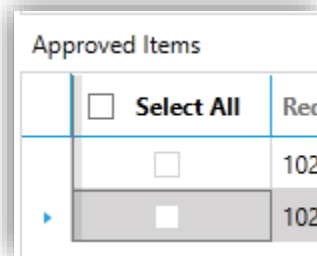
As a result, Business Rule and StarWatch activities will **not** be displayed in the Activity Stream for these users:



The screenshot shows the 'Activity Stream' interface with tabs for 'Request Properties' and 'Custom Fields'. The user profile for Vicky Jordan (Tech Support) is displayed, with a login time of 2019-11-05 11:58:16 AM. The workflow section lists the following steps:

- Forwarded to DISPATCH: Dispatch
- Email Current Memo Selected

A memo update is also shown with the text 'test by vicky'.

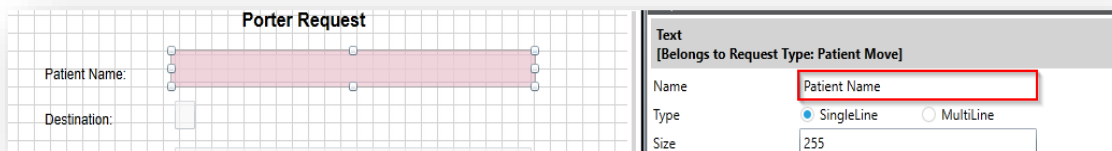


Approved Items		
<input type="checkbox"/>	Select All	Rec
<input type="checkbox"/>		102
<input type="checkbox"/>		102

## 6. Create a Quick Request/Project Template with Custom Field Information in Title

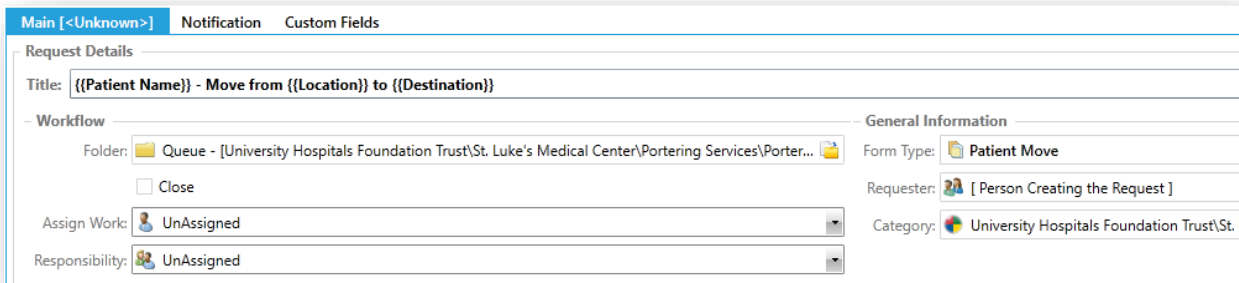
ServicePRO enables system administrators to prepopulate the template(s) titles with Custom Fields information when the user submits a new service request. The following steps are needed to configure this feature.

1. Determine the Field Names of the custom fields that are to be displayed in the Request Title. The Field Name for a selected field can be found in the Name property in the Properties window of the Form Designer.



**Note:** The Object Designer privilege is required to access the Form Designer.

2. Format the Quick Template/Project template titles manually using the Custom field variables enclosed in double curly braces in the format of {{Field Name}}.



**Example:**

{{Patient Name}} - Move from {{Location}} to {{Destination}}

In this example, 'Patient Name', 'Location' & 'Destination' are all Field Names. Entering tab names or form names is not required.

**Note:** All custom field variables are case insensitive but will check for whitespace.



**Example:**

{{field name}} is the same as {{Field Name}}

{{ Field Name }} is not the same as {{Field Name}}

**Note:** The Project Designer privilege is required to create Project/Quick Request Templates.

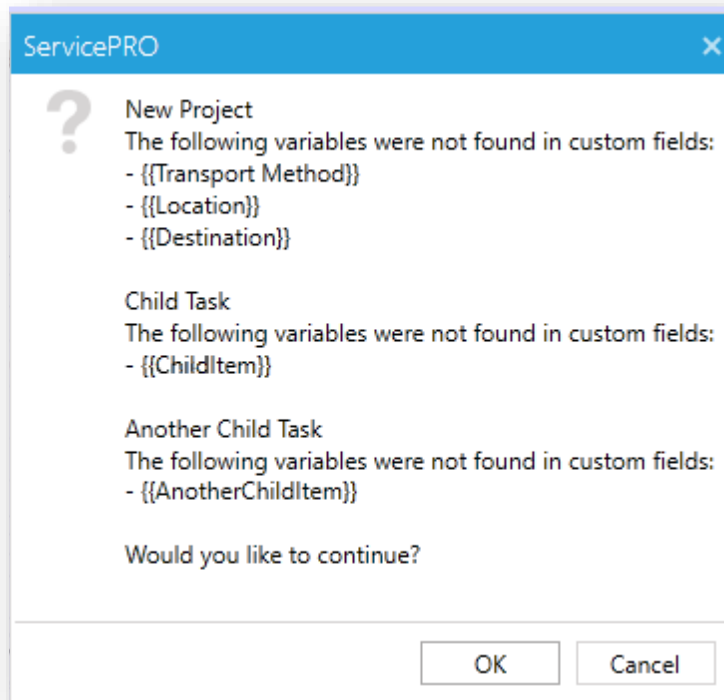
3. Whenever a New Project/Quick Request created using, the template the Title will be populated with the selected custom field information after the request is saved.
4. If a custom field is blank during initial request submission, then the Title will omit that specific field information. It is recommended to make these custom fields 'Required' at the form level.
5. If the custom field is updated or changed at a later time, the title will not be synchronized with the updated custom field value.

**Warnings:**

If you add a Field Name to the title that does not exist within the custom form associated with the Quick Template/Project template then a warning message will indicate as such when you try to save the template. You may choose to ignore this message and it will simply take the values as is and insert it into the title.

The warning message you may receive will be formatted in the following way:

1. Project Title or Child Service Request Title
2. The literal text: "The following variables were not found in custom fields:"
3. The list of variables that it cannot map to custom field names within the project title or child service request title.



### Create a Regular Service Request with Custom Field Information in Title

In addition to using custom field variables within the Quick Template/Project Template you may also use them when creating individual service requests in the same way. The Custom Field Name can be entered in double curly braces in the format {{Field Name}} in the title.

**Note:** You will not be warned if a custom field was not found within the service request and the title will be saved as is.

Limitations:

Using function type custom fields to populate the title is currently not supported.

## 7. ServicePRO – Business Rule Workflow-Close Behavior

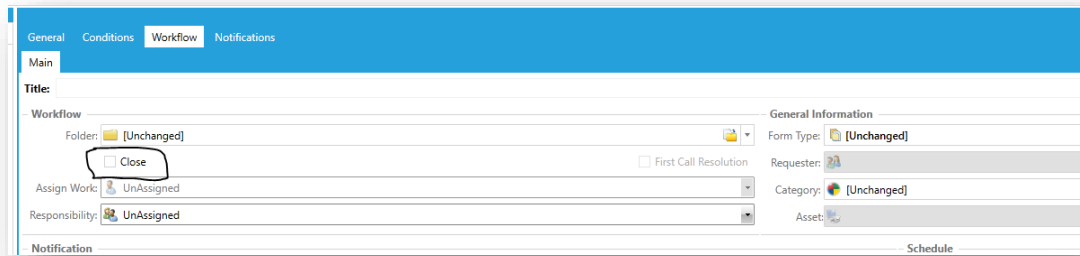
Business rule designer and service have been enhanced to accommodate the following scenarios:

- 1) To allow reopening multiple requests while still keeping them in their current folder
- 2) To allow moving multiple requests to a different folder without reopening them (i.e. keeping them closed/approved if they were originally closed/approved).

### 7.1 Business Rule Designer - Workflow section changes:

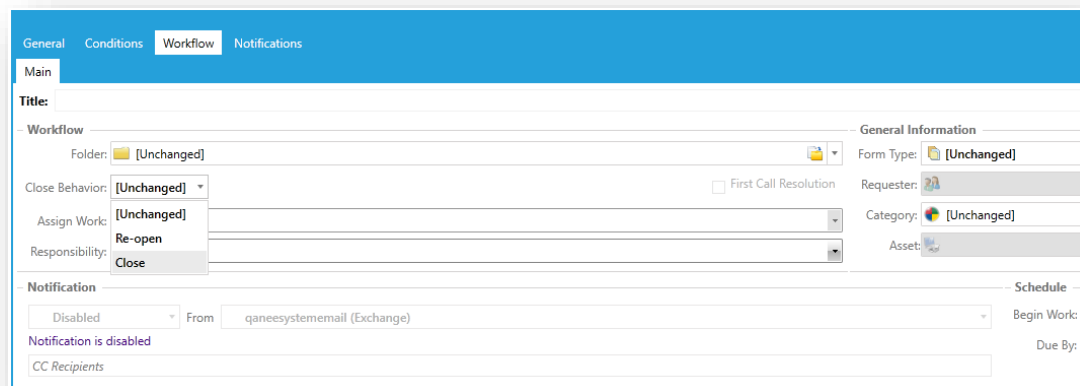
In order to accomplish the requirements detailed in the 'Overview' section, the "Close" checkbox under 'Workflow' tab in Business Rule Designer has been changed to a Drop-Down box called 'Close Behavior'.

'Close' Check box option before the feature enhancement:



'Close Behavior' option after the feature enhancement:

'Close Behavior' drop down has three options - *Unchanged, Re-open, Close*



1. For existing rules, the default value in this drop down is populated based on the 'Close' check box value that was selected.
  - a. In the existing rules, if 'Close' checkbox was checked
    - i. If *Folder* was set to 'Unchanged', 'Close Behavior' will be set to "Close" option.
    - ii. If *Folder* was set with a specific queue folder, 'Close Behavior' will be set to "Re-open".
  - b. In the existing rules, if 'Close' checkbox was unchecked
    - i. If *Folder* was set to 'Unchanged', 'Close Behavior' will be set to "Unchanged".
    - ii. If *Folder* was set with a specific queue folder, 'Close Behavior' will be set to "Re-open".
2. For the new rules, the default value for this drop down is "Unchanged" which is same as the other workflow options.

## 8. ServicePRO Web API

- Token authentication has been added for ServicePRO web API in addition to the existing Basic Authentication.
- A new API method has been added to return the currently logged in user's basic details like Name, Email address and Avatar.
- The Get Request API has been enhanced to return the last public memo with embedded images in base64 format.

Updated version of the ServicePRO Web API user guide will be available post release in the ServicePRO Wiki.

## ServicePRO Add-on Feature Enhancements

The following new features are introduced in the product and these are available based on custom request(s). Please contact our ServicePRO Customer Support Representatives if you are interested in these add-on features.

**\*\*Additional charges apply for enabling these features**

- **Customized Rating Survey** - A feature to facilitate rating of the Service Requests with Customized feedback questions has been implemented. While performing "Approval Rating" process, the requester will be prompted to answer additional questions, including the existing timeliness rating, quality rating and approval memo.
- **JAMES Chatbot** - Help Desk Technology has partnered with *Actionable Science* to incorporate their AI powered conversational Virtual Assistant called "James" in ServicePRO. James is a specialized IT Help desk virtual assistant that can provide instant support to your customers round the clock, increase usage of self-help tools and enhance SLA performances.
- **Integration with JIRA** - ServicePRO integrates with JIRA using the Zapier platform and ServicePRO JIRA Plug-in. Workflows introduced through this integration are as follows:

- i. Creation of a new JIRA issue when a ServicePRO request is placed in a specific queue.
  - ii. Two-way memo updates syncing between ServicePRO request and JIRA Issue.
  - iii. Closing of the corresponding ServicePRO request when a JIRA issue is closed
- **Best Solution Request for Publish, Review and Rating** - New feature to Review and Rate Best Solutions is introduced in ServicePRO and ServicePRO Web as a separate add-on. This feature allows privileged users, ends users, or both to rate and review published best solution articles. The feature to facilitate the Support reps to 'Request for Publish' a Best Solution has also been implemented in ServicePRO and ServicePRO Web as an add-on. This allows support reps to request a solution to be published by an Administrator in ServicePRO, which is the only role that can publish a draft solution. Another option, which separately tracks hits on a Solution by End users and Privileged users has been implemented as part of this add-on as well.
  - **Attachments Extraction Utility** - A utility to extract and export all the attachments from ServicePRO is available.