Project Release Notes

Release 3.1 (January 2021)

What's new

Fork Merge

With the Fork Merge feature, you can merge records from two separate child objects to create child records for a newly forked record or the same record on which the app user triggers the fork action. For example, sales managers can automatically assign goals or allocate bonuses and performance awards to their team members in the same fork action.

See more…

Subqueries

Use Subqueries to refine the scope and relevance of lookup results. For example, in the Technicians lookup for service order assignments, you can include only those technicians who have closed a similar problem type in the last three months.

See more…

Maps

Using Maps, app users on Web client can plan and prioritize their work with location-based information visualization. They can also access and update the record associated with the location directly from the map. For example, while attending to a customer in a different city, an accounts manager can use the opportunity to visit other customers nearby. Dispatchers can assign new work orders to technicians available in that locality.

See more…

New Feature in Android App

Lookup field Prefilters are now supported in the Android app. When you create Prefilter rules on any lookup field, your Android app user can quickly choose the required value from a compact and relevant list of values instead of searching for it in a long list of unrelated items.

For example, in the Contacts lookup for service order creation, when you add Prefilters rules to list contacts belonging to the account mentioned in the current service order, the user can now choose from a small list of valid contacts for only that account.

Fork merge

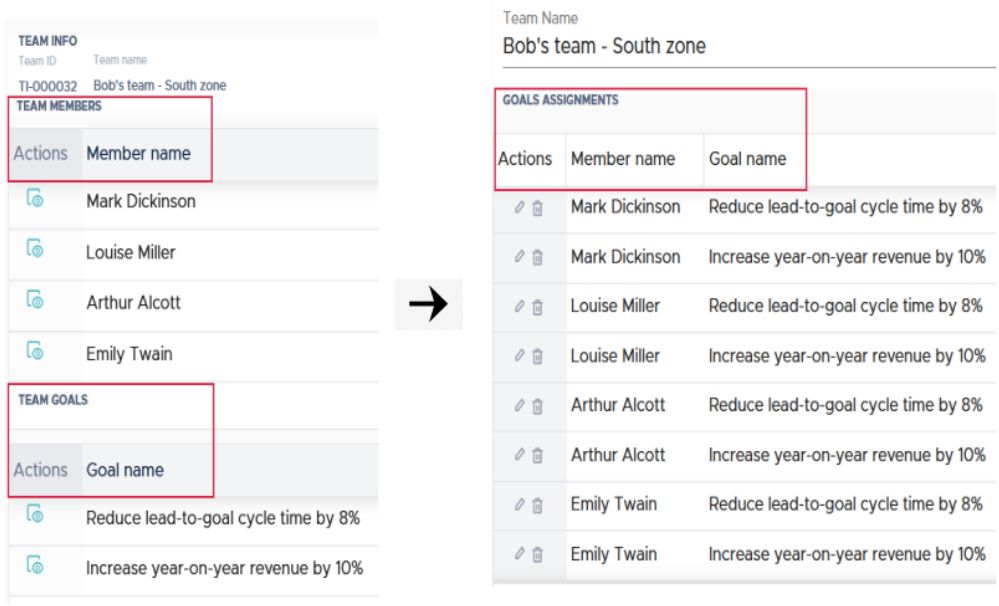
With the Fork merge feature, you can merge records from two separate child objects to create child records for a newly forked record or the same record on which the app user triggers the fork action.

Your app users can instantly update the record and simultaneously create child records by running a single fork action. For example, sales managers can automatically assign goals or allocate bonuses and performance awards to their team members in the same fork action.

The figure below illustrates how records in two child objects, Team members and Team goals are merged to form records in Goal assignments.

Figure 1

Records from Team members & Team goals merged to create records in Goal assignments



Enabling merge

Enable Merge from the fork action configuration page by clicking ‘Merge’ in the ‘Fork type’ field and choosing - the source, target, and target child objects. For all existing fork actions, the Fork type is ‘Regular’, the default value.

To update the same record on which the user runs the fork action, choose ‘Same record’ in the Target object field. This is the default value when merge is enabled. You can’t disable merge in any fork action after you enable it.

Designing the layout

The Standard and Lines sections are automatically added for the configured target header and child objects in the UI designer. You can’t delete the Lines section. Drag and drop the fields to the Standard and Lines sections as needed.

Associating fields

To associate source and target fields, choose ‘Field Associations’ from the dropdown at the top of the page.

Header fields

If you chose ‘Same record’ as the target header, the source and target objects are pre-set and aren’t editable. In the field association section, you can add the source-target field pairs by clicking the plus icon, choose the target field, and enter a default value in the ‘Copy value from’ field.

If you chose an object for the target header, the configuration is similar to that of the existing fork action.

Child fields

To associate child object’s fields, click on the child object name, enter a rule name, choose two source child objects, and create filter criteria for each child as needed.

The ‘Copy value from’ field in the fields association section contains a combined list of fields from the two source child objects.

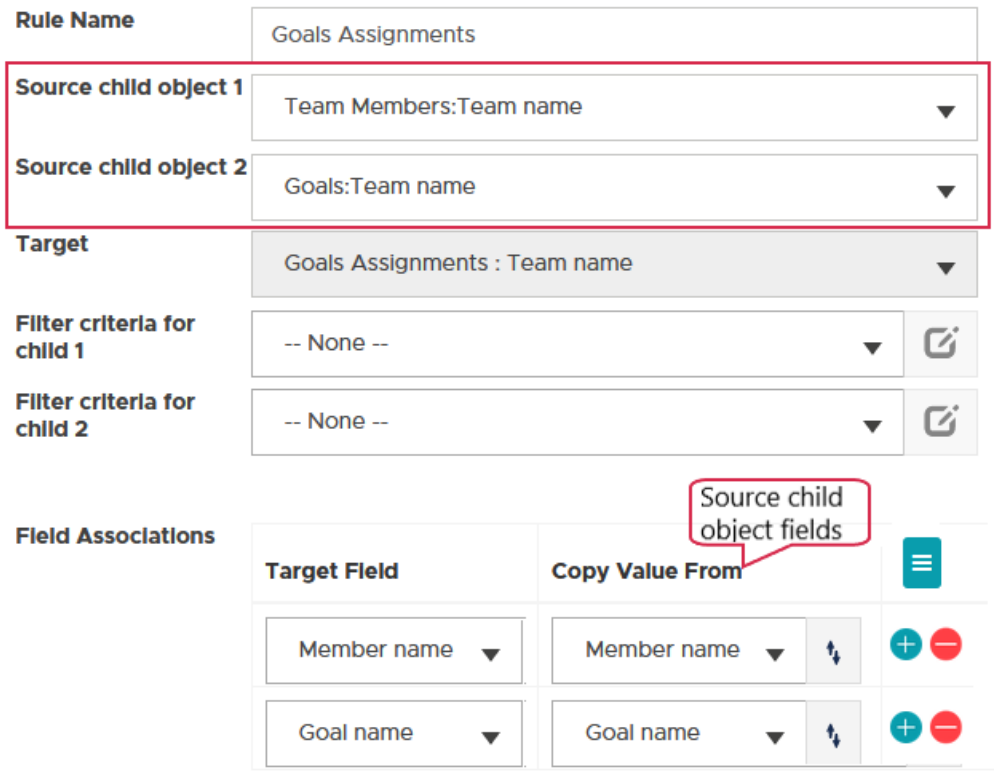
You can automatically associate fields between source and target child objects using the ‘Auto-create associations’ icon. You can change the association for these fields as needed.

To manually associate the fields, add field pairs using the plus icon, and choose the target and source fields from the ‘Target’ and ‘Copy value from’ dropdowns as needed.

Note: Only fields of the same data type can be associated. For example, if the chosen target field is type Text, only Text type fields are listed in the ‘Copy value from’ dropdown.

Figure 2

Configuring field associations for target child object



Support info

Supported Clients	Web client
Supported data sources	Flex and Oracle

Notes for app users

When the app user runs fork action on a record, it will automatically add child records to the Lines section of the target record if you have enabled merge.

Subqueries

Use Subqueries to refine the scope and relevance of lookup results. For example, in the Technicians lookup for service order assignments, you can include only those technicians who have closed a similar problem type in the last three months.

New operators

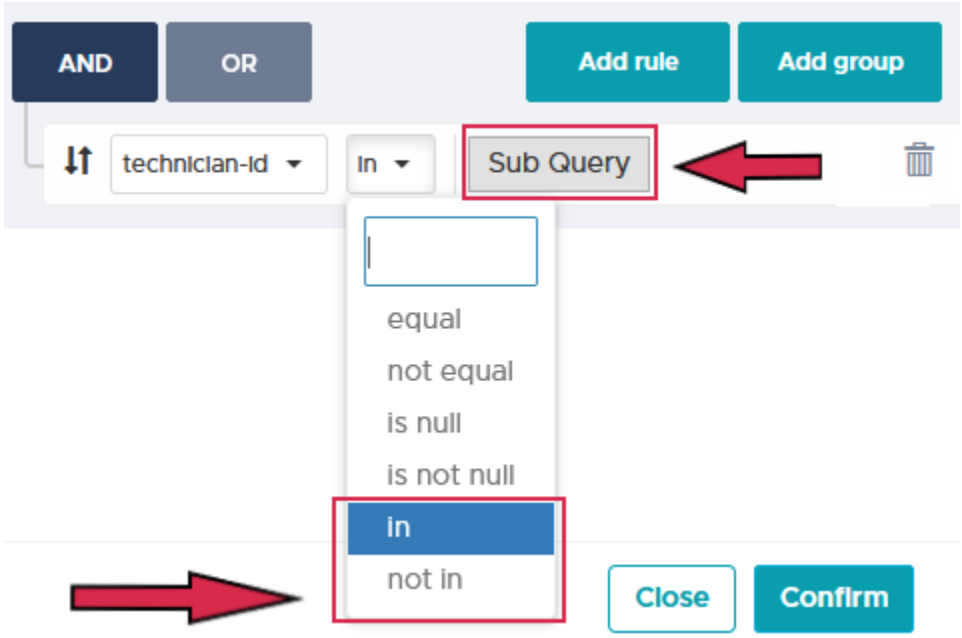
Two new operators, ‘IN’ and ‘NOT IN’, have been introduced to create rules to exclude or include records based on a group of values.

Configuring subqueries

Subqueries are configurable from the expression builders by clicking the ‘Configure subquery’ button that appears when you select ‘IN’ or ‘NOT IN’ as the operator.

To add a subquery, click the ‘Sub query’ button, click ‘Add rule’, choose the required object and field you want to filter, specify the filter condition as needed, and confirm. Refer to fig (1) below:

Figure 1
Subquery in expression builder



You can add up to three levels of subqueries to the main expression like so:

main-expression **IN** (subquery1 **IN** (subquery2 **NOT IN** (subquery3)))

Support info

Supported Clients	Web client
Supported data sources	Flex and Oracle

Notes for app users

When you configure lookup filters using subqueries, your app users will choose from a compact list of relevant records without having to scroll through a long list of unrelated records.

Maps

Using Maps, app users on Web client can plan and prioritize their work with location-based information visualization. They can also access and update the record associated with the location directly from the map.

For example, while attending to a customer in a different city, an accounts manager can use the opportunity to visit other customers nearby. Dispatchers can assign new work orders to technicians available in that locality.

Accessing the map

To open a map, users can click the Maps icon on the left menu bar and choose from the list of maps.

Using the map

In the map, users can view the locations related to their work, such as work orders, cases, and accounts. They can view related nearby locations such as storehouses by clicking ‘Show nearby’.

They can view the route for the pin locations by clicking ‘Show routes’, and get driving directions to the chosen destination by clicking ’Get directions’.

Figures 1 and 2 below illustrate how to access and view maps.

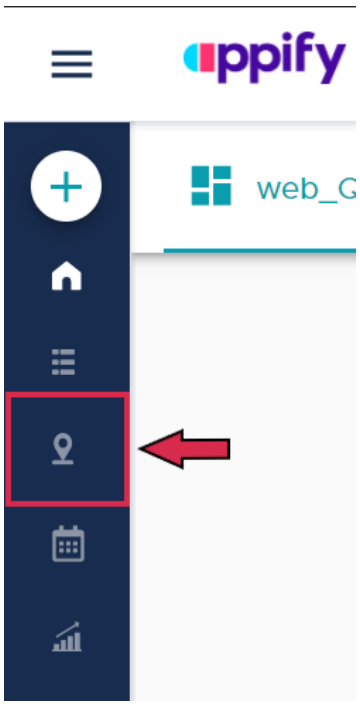


Figure 1
Open maps

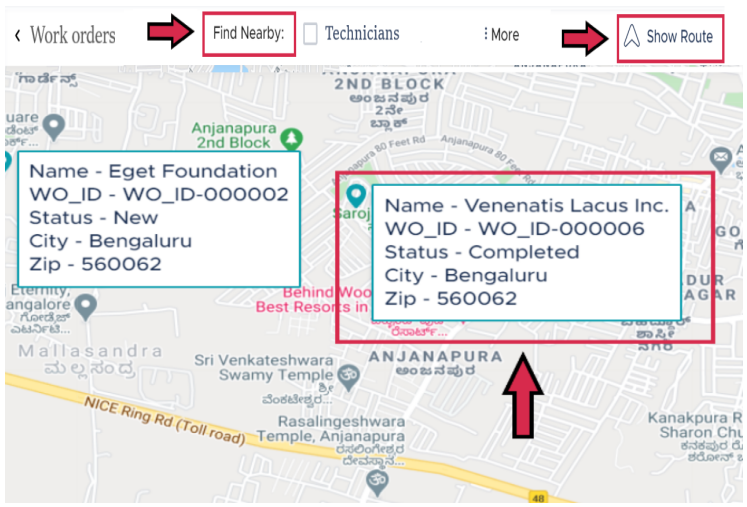


Figure 2
View pin locations, nearby locations, and routes

Accessing and updating the record for a pin location

When the users click the pin location or the label if you have enabled it, a panel appears on the right from where they can do the following:

- Run an action on the record by choosing from the ‘Actions’ drop-down
- View the record summary
- Access the record view by clicking the ‘View more details’ button

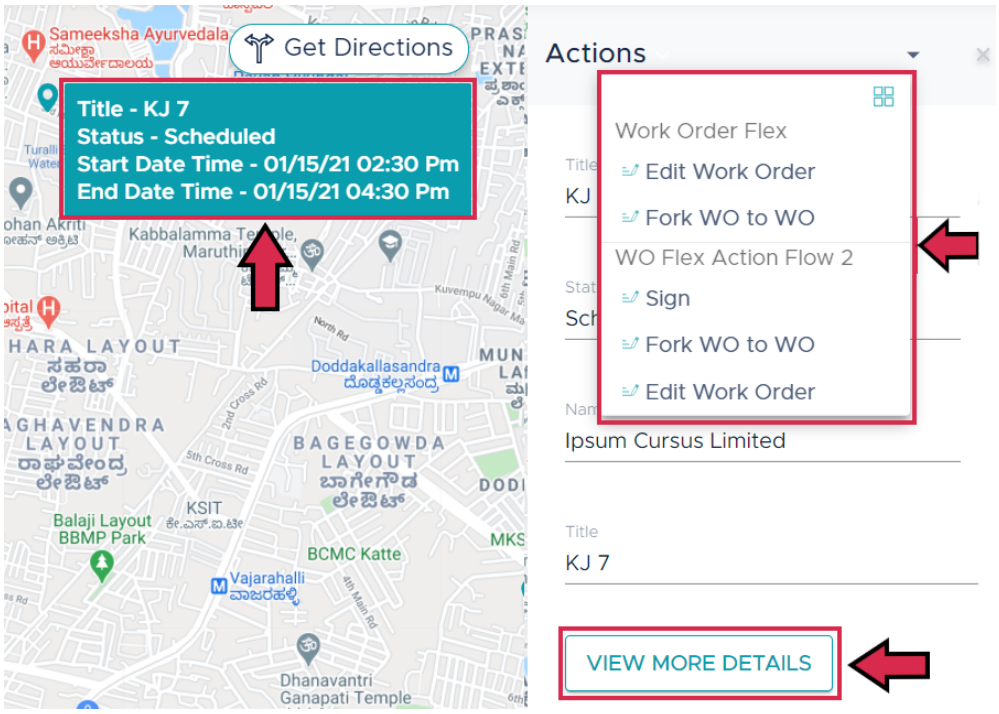


Figure 3

Accessing and updating the record for a pin location

Support info

Supported clients	iPad, iPhone, Android, and newly added in Web client in this release
Supported data sources	Flex

Note for app users

Using maps, your app users can do the following:

- View their work based on location
- Get routes and driving directions
- Run actions on the record associated with the location pin

Fixed issues

The following customer issues are fixed in this release:

Issue ID	Product area	Issue description
CD-835	Android	Uploading images to the app from the device gallery caused the app to close unexpectedly on older Android models such as OnePlus A6010 and ASUS ZenFone Max M1 when the device processor is loaded.
CD-876	Android	Configured validation rules were not getting evaluated in edit actions when the app user saved the record.
CD-878 CD-1010	Android	Auto-line create/update was not working in create, edit, or fork actions when 'run in silent mode' was enabled. Users had to add/update the lines manually.
CD-1058	Studio	Creating Fork actions of Regular type failed. There was no error message displayed or any indication of the failure in the Fork configuration window.
CD-1074	Web client	In lists, if you had configured any reference fields as additional fields, it showed up empty in the app. This issue occurred only when the data source is Oracle.
CD-1087	Web client	App users saw an empty list if you had configured the list with a filter criteria that contained a boolean value on the right-hand side of the condition expression. This problem occurred when the data source used was Salesforce.

CD-1104	Studio	App users saw an empty list if you had configured the list with a filter criteria where the right-hand side of the condition expression contained a number field.