

# Project Release Notes

Release 4.5 (May 2022)

## What's new

### Advanced search

Set up advanced search options to include close matches in the search result when an exact match is not found for a search text. Use search rules such as Trim extra spaces, Ignore common words, and Match similar sounding words.

For example, when searching for a manufacturer in the Manufacturer object, you can enable the rule to ignore common words to match manufacturer names such as "The ABC Co," "ABC Ltd," and "The ABC Corp" by ignoring "The, Ltd, Co, Corp."

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### Reference controls

You can control the values in reference fields using other fields from the object with reference controls. Depending on the values in the controlling fields, the reference field's values are automatically resolved.

For example, you can automatically populate the product field value based on the field values set for the Manufacturer and Model number.

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## Import from Excel

Web client users can directly import records from their MS Excel worksheets into the child sections. For example, technicians can import equipment details from an MS Excel file shared by the customer directly into the equipment section in a Service order flow.

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## Duplicate record check

Add validation to ensure that the combined value of a set of fields in a record is unique across the object. For example, add a validation rule in the Products object to ensure that no two records have the same combination of manufacturer, model, and product name.

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# Advanced search

With advanced search, you can expand the search scope for objects. This allows the search result to include close matches when an exact match is not found for a search text. Use the new *Advanced search* tab on the object settings page from the object modeler. A few common use cases are given below.

## Handling extra spaces in advanced search settings

When searching for an asset in the Asset object using the tag ID, users may enter a tag ID containing leading, trailing, or repeated spaces in the text that may not match any asset if matched exactly. You can enable Trim spaces to allow a search text such as “ CT 000- 2022 ” with a field value “CT-000-2022.”

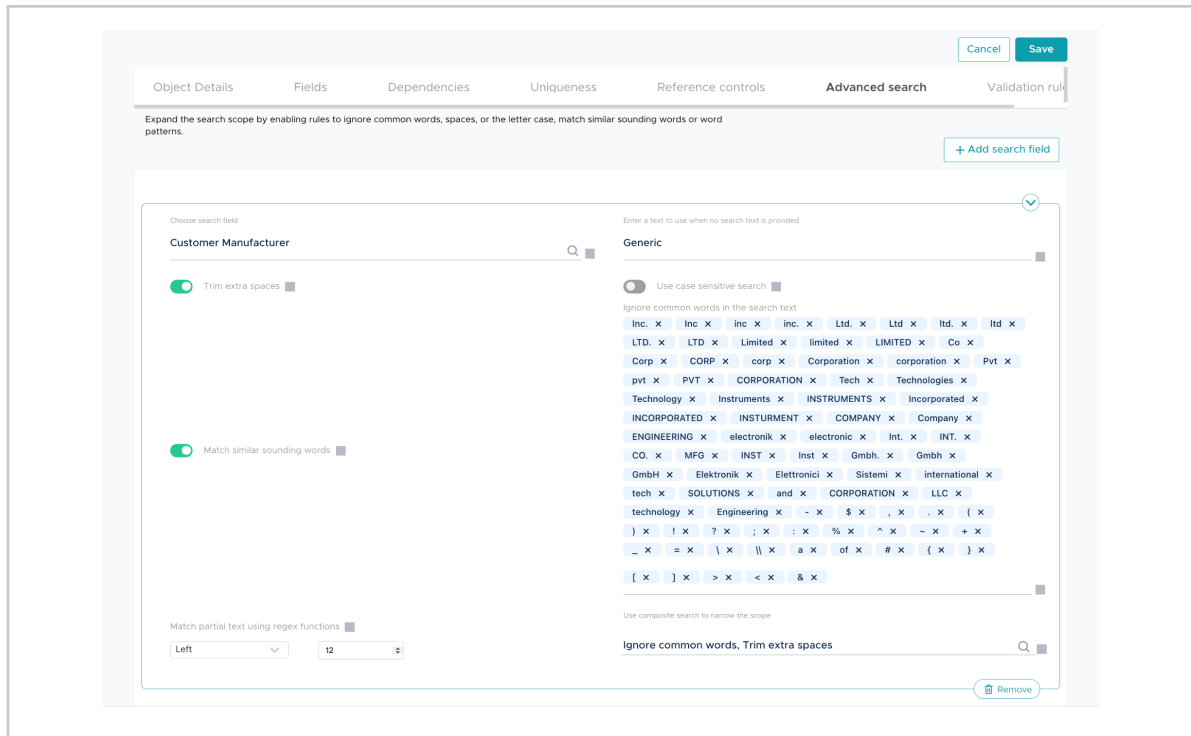
## Handling common/similar terms in advanced search settings

Similarly, when searching for a manufacturer in the Manufacturer object, you can enable the rule to ignore common words to match manufacturer names such as “The ABC Co,” “ABC Ltd,” and “The ABC Corp” by ignoring “The, Ltd, Co, Corp.”

Advanced search helps improve the search resolution in search actions and reference field lookup while importing records to automatically resolve reference field values. You can set rules to trim spaces, remove common terms, use partial texts, and use similar-sounding words to return matching records.

## How to set up advanced search settings

You can set rules for search fields from the new Advanced search tab on the object’s settings page in object modeler.



Use *Add search field* to select fields for setting up advanced search rules. The following rules can be set for each field:

**Default search:** Use this rule to allow searching with a default text when there is no search text available. For example, while importing records, if a reference field value in the imported record is blank, the value is automatically resolved using the default search string.

**Trim extra spaces:** Enable this rule to remove leading, trailing, and repeated spaces in the search text.

**Ignore common words:** Use this rule to ignore words and characters from the search text. For example, ignore '#' to match '#1 Company' with '1 Company'

**Case-sensitive search:** Enable this to match only if the search text and field values are in the same letter case.

**Similar sounding words:** Use this rule to allow matching words that sound similar but may be spelled differently. For example, Catherine and Katherine.

Partial match using regex function: Use regex functions Left and Right and enter the number of characters to match. For example, match the first five characters from the search text with the field values.

Composite search: Composite search allows you to apply two or more search rules. For example, you can select - ignore common words - "The, #" and enable trim spaces to match 'The # 1 Company' with '1 Company'.

### Search resolution history

Search texts from previous successful searches that were resolved using the advanced search rules are saved. The resolved text is automatically applied to subsequent searches for the same text for that object.

### Rules precedence

The search rules are applied in the following sequence and stop when a single match is found.

- Use the original search text
- Use search text from search resolution history
- Use composite search
- Trim extra spaces
- Ignore common words
- Use case-sensitive search
- Match similar sounding words
- Use regex functions

# Reference controls

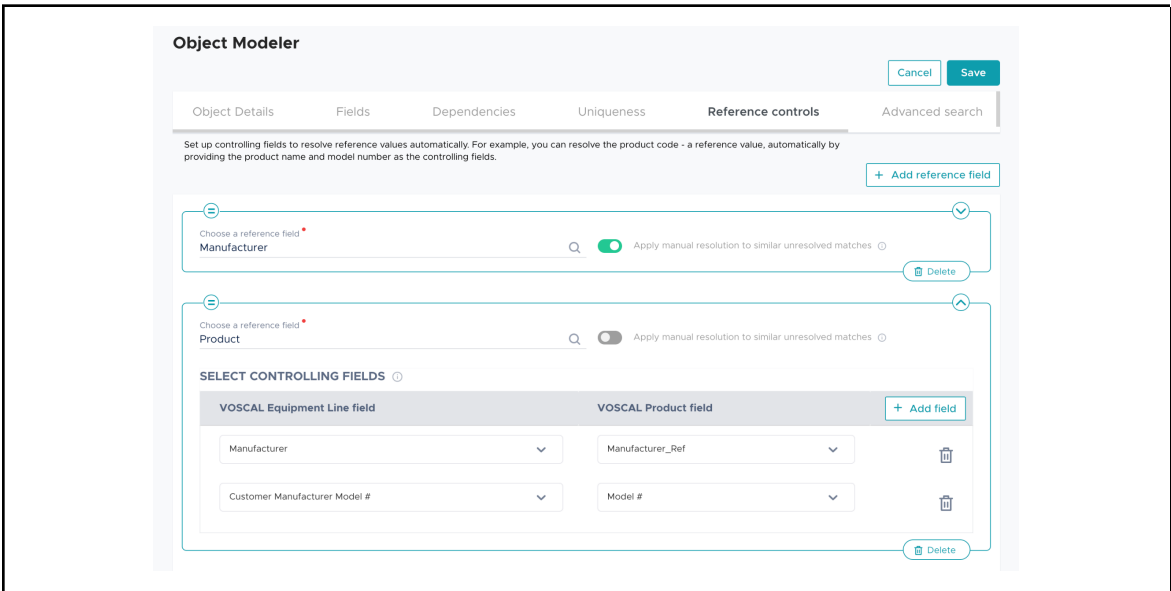
With reference controls, you can control the values in reference fields using other fields from the object. Depending on the values in the controlling fields, the reference field's values are automatically resolved.

## Resolving reference values based on controlling fields

When you set Manufacturer and Model number as the controlling fields for the Product reference field, the product is automatically resolved when the Manufacturer and Model number fields are populated. Similarly, in a work order object, when the Account and Location fields are populated in a work order object, the Installed product can be automatically resolved.

## Reference control setup

You can add controlling fields for a reference field from the new Reference controls tab on the objects settings page in object modeler.



Use the *Add reference field* button to add the reference field and define the dependency rules. Click *Add fields* to add the controlling fields from the main object and map them to the fields from the reference object.

When the reference field value can't be resolved or matches multiple records, it returns an error stating that the value is unresolved or that it found multiple matches. Users will have to set the field value. If there are multiple controlling field rules for a reference field, the value is resolved based on the order in which rules are listed.



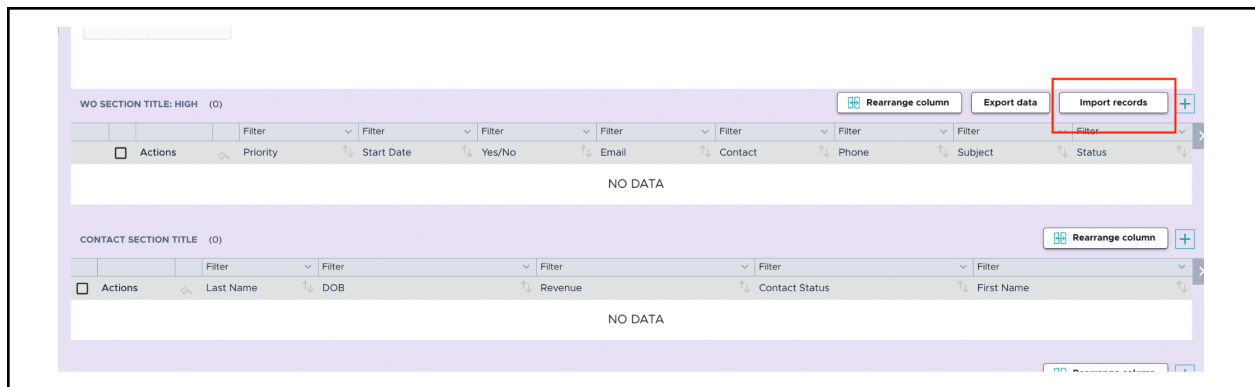
# Import from Excel

Web client users can directly import records from their MS Excel worksheets into the child sections. For example, technicians can import equipment details from an MS Excel file shared by the customer directly into the equipment section in a Service order flow.

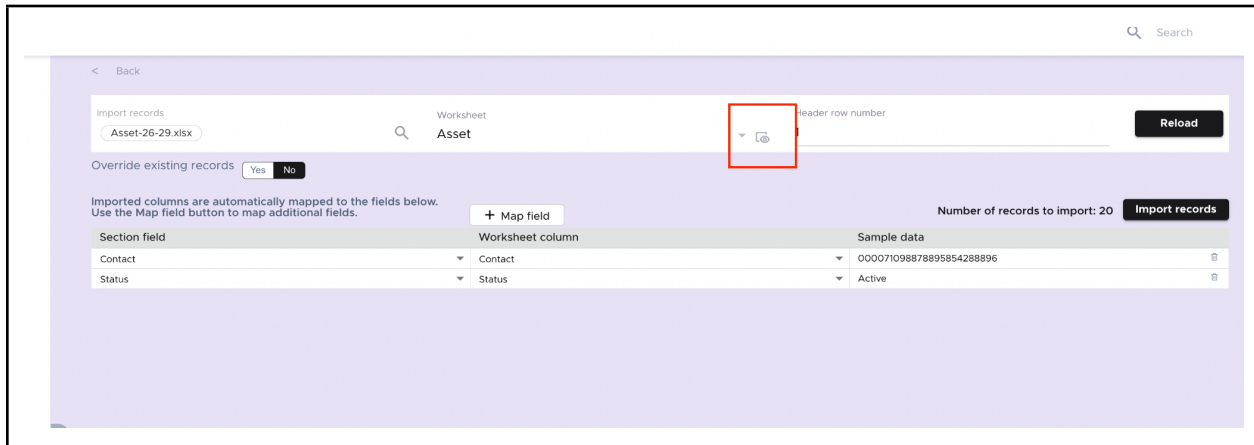
The import feature is available in all child sections of Edit actions.

## Import records

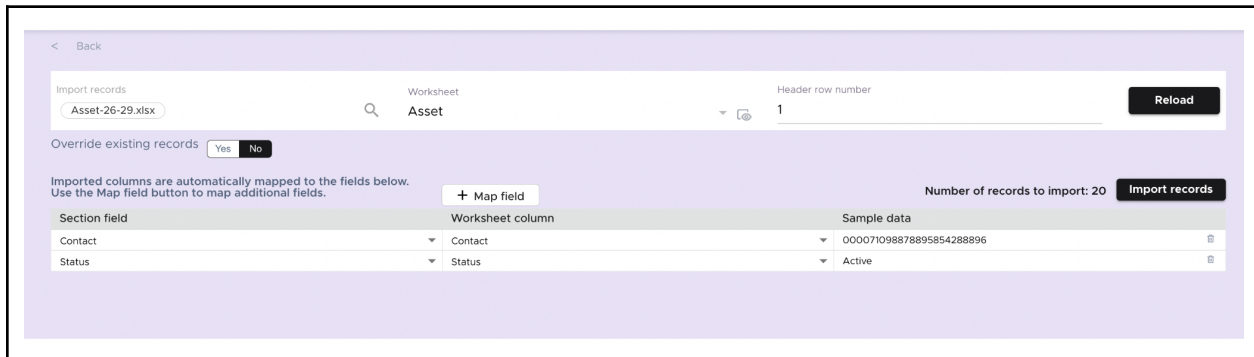
Web client users can import records using the 'Import records' button on the child and grandchild sections.



Users can choose the worksheet, preview it using the preview icon to the right of the worksheet field, and change the header row if it doesn't start on the first row.



The fields from the worksheet are automatically mapped to the section fields.



Alternatively, users can change the mapping from the worksheet column. All manual mappings made by app users are saved after each successful import. It uses the object label and the API name to store the mapping. The saved map is then used to auto-map the fields during import.

### Auto mapping precedence

All matches are case insensitive. The precedence for auto-matching is as follows:

- Use mappings saved from an earlier import

- Use partial match
- Use exact match
- Users can begin importing after mapping is done by clicking Import records. All the rows below the header row till the first empty row are imported

### Import status

A status summary appears on the screen after the import completes. An error report along with the records that failed to import is sent to the user's email address. Additionally, the status of each imported record appears under the *Import status* column in the child section.

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# Duplicate record check

With the record duplicate check, you can add validation to ensure that the combined value of a set of fields in a record is unique across the object. For example, in the Products object, add a validation rule to ensure that no two records have the same combination of manufacturer, model, and product name.

## Uniqueness setup

Look for the new 'Uniqueness' tab on the object's settings page of the object modeler. You can add the uniqueness validation for an object from the new Uniqueness tab on its settings page in the object modeler. Select and add the fields from the Unique field combination section. You can turn off the validation using the switch to Allow saving duplicate records.

