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Core Release Bulletin

IDI Platform 25.8 Release

August 2025

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About this Document

IDI's Core Release Bulletins describe new Core functionality introduced with the release through either Adaptive (AR) or Feature (FR) requests. Core functionality is defined as a capability that is available to all customers that upgrade to the release, although in some cases additional custom work may be required to use it. This document includes an overview of the new capabilities as well as the required configuration or setup information. Supporting documentation can be found on E-Support under Resources > Knowledge Center and Resources Help Resources.

Additional training opportunities are also available through IDI University. Please contact your Account/Project Manager for more information.

1 Release Summary

1.1 Change Orders/Enhancements

The following change orders and other enhancements are included in this release.

Functional Area	AR/FR	Description
Field Service Management	FR 3670	**Field Service Management enhancements** This feature: • Provides a Work Order Summary option in the Orders information center. This lets you review the work order status and inform internal and external stakeholders. • Prevents unnecessary technician dispatches – New functionality was added to keep Work Order objects synchronized. The system will automatically update open work orders to *Canceled* when the associated Order is canceled or the Ticket status is set to *Closed*.
Web Orders	FR 3677	**Miscellaneous enhancements** This release provides these formatting improvements and updates: • Presentation enhancements on the Add/Edit Starting Block page. • *Receipt Number* search on Billing Order OmniSearch (was already a searchable parameter on other Orders OmniSearches). • The width of the *Action* selector when completing a service agreement has been increased to make options easier to read.
Provisioning	FR 3428	**Standard Provider renamed as HTTP Provider** This applies to the Provisioning web application when adding a new provider. In **MANAGE** > **Provider Settings**, when creating a new provider, the option that was formerly labeled *Standard Provider* is now labeled *HTTP Provider*.

1.2 Resolved Known Issues

The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Care	84947	**Usage records not displaying on Unit Balance view** When trying to view usage on the Unit Balance page, an incorrect filter for retrieving the records from the Unit Balance Ledger was causing the usage record(s) to not display. The filter criteria have been updated to properly display usage records.
Orders	84940	**Children of one-time charge package incorrectly reconnected** When reconnecting a service with a one-time charge package, and the package is not being reconnected, its children may be reconnected. This has been updated to never reconnect the children of one-time packages when the package is not being reconnected.
Orders	84960	**Inventoried service numbers not being updated** The Update Inventoried Service Number API in the Number Inventory Management web service did not update the inventoried service number's inventory status from *Aging* to *Available* when the Available Date was updated to the current day. Inventory status is now updated when the Available Date is changed.
Make Sale Orders	84951	**Client allows incompatible SIM class between device and SIM card** When adding a new service via IDI Client Make Sale, the device SIM class was not checked for compatibility with the SIM card SIM class. This allowed for a device to be sold with a SIM card that it does not support. The application now validates device and SIM card compatibility.
Tickets	84970	**Link to open ticket from template-based email not working** This was caused by a security-related update. This has been fixed such that the links in template-based emails work as intended.

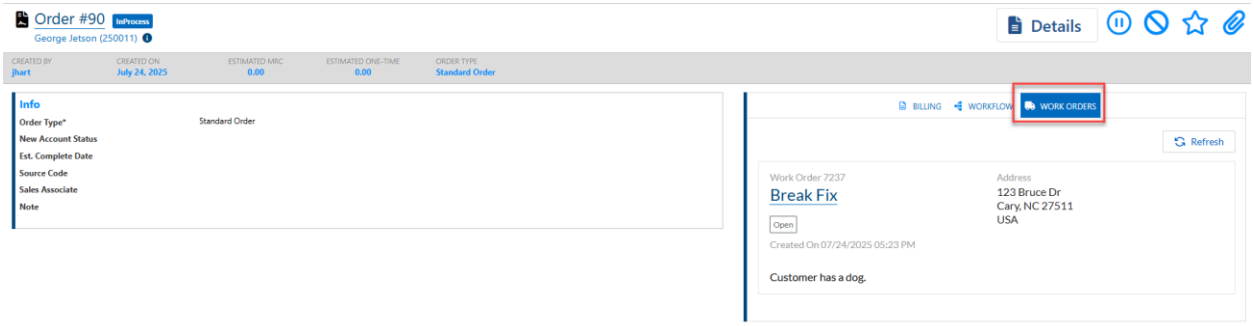
2 Field Service Management Enhancements

The following enhancements have been made to Field Service Management:

- A Work Order Summary in the Orders information center. This lets you review the work order status and inform internal and external stakeholders.
- Preventing unnecessary technician dispatches – New functionality was added to keep Work Order objects synchronized. The system will automatically update open work orders to Canceled when the associated Order is canceled or the Ticket status is set to *Closed*.

2.1 Work Order Summary on Orders

The Work Order Summary tab in the Orders Information Center displays all work orders related to the Order. The summary view shows the work order type, status, site address, and notes. Clicking the link opens the work order in Workflow, where you can view more details, manage the work order, or schedule an appointment.



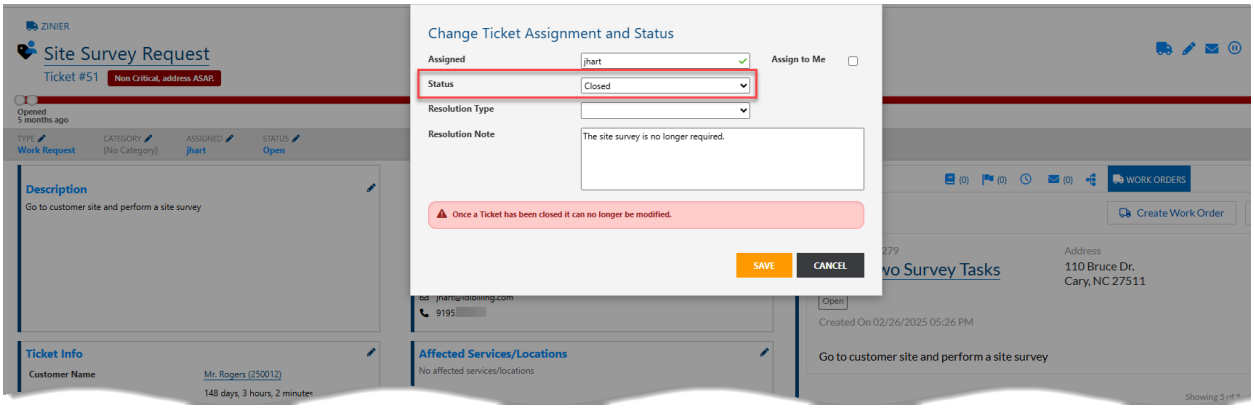
2.2 Keeping Work Order Object Synchronized

Work Orders can be generated from Orders and Tickets. To help reduce costs and prevent unnecessary technician dispatches, this enhancement automatically cancels any open work orders when the associated order or ticket status is set to *Closed*.

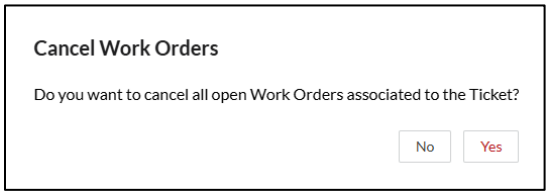
2.2.1 UPDATING THE TICKET STATE TO CLOSED

When a Ticket's status update results in the state being changed to *Closed*, the system will automatically close any open work orders related to the Ticket.

Edit the ticket and update the status to *Closed*, then click **SAVE**.

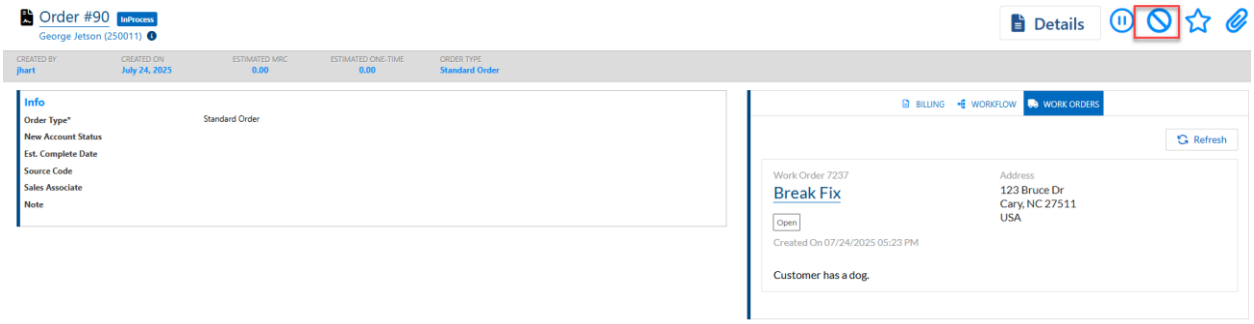


When you click **SAVE**, the system will check for open work orders linked to the ticket and ask if you want to cancel them. Choosing **Yes** will cancel the open work orders in the IDI platform and Zinier. Choosing **No** will keep the work orders open.

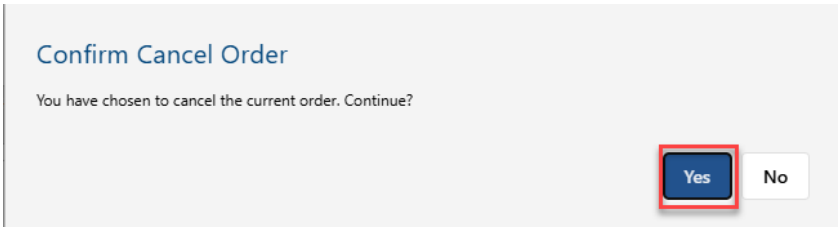
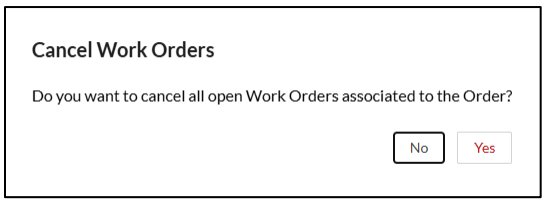


2.2.2 CANCELING AN ORDER

Canceling an Order will automatically cancel all open work orders associated with the Order. Click the *Cancel* icon on the order summary page.



Confirm the Order cancellation by clicking **Yes**.



Upon clicking **Yes**, the system will check for open work orders linked to the order and prompt you to confirm whether you want to cancel them. Choosing **Yes** will cancel the open work orders in the IDI platform and Zinier. Choosing **No** will keep the work orders open.