

Core Release Bulletin

***IDI Platform
25.11 Release***

November 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
Orders	FR 3672	Enhancements for linking service addresses in web orders When linking a service address on an order, the search field auto-populates with the account's primary contact address. Also, the results display the MSAG and Address Validation status for each address.
Orders	FR 3709	Miscellaneous web sales enhancements The following enhancements are provided in this release: <ul style="list-style-type: none"> The button to add new tender formerly labeled +ADD is now labeled +ADD TENDER. When selling a retail installment plan and the Min Number of Installments = Max Number of Installments, the Number of Installments field defaults to that value. The quantity is displayed for staged items when assembling a transaction in the Orders web app
Field Service Management	FR 3670	Field Service Management Extended Data integration This enhancement provides robust two-way integration for custom-defined extended data, improving efficiency and flexibility. You can easily add extended data to work orders, offering valuable extra information to assist your technicians and Zinier in completing tasks more effectively. The system also automatically retrieves, stores, and displays data collected by technicians, delivering a unified view of all information related to the work order.
Customer Portal	FR 3683	Exporting Customer Portal users Customer Portal Administration in Customer Care has a new page that lets you quickly view and export all Customer Portal users.

1.2 Resolved Known Issues

The following known issues have been resolved in this release.

Functional Area	PR	Description
Accounts Receivable	84968	Batches could be voided before loading completed Previously, it was possible to void a batch before all payments or adjustments had finished processing. The system now checks that all records have completed processing before allowing a batch to be voided.
Customer Portal	85020	Impersonating Customer Portal user failing This addresses an issue when Customer Portal user impersonation would fail if the account's market was not explicitly assigned to a profile.
Customer Portal – Subscriber Experience	84972	Incorrect plan details displayed in Customer Portal The plan breakout for a selected service on the Plans & Service page now correctly shows details.
Scheduled Jobs	84989	Scheduled jobs intermittently skipping a run A timing issue sometimes caused a scheduled job to miss being run. A grace period was added to address this issue.
Workflow	84999	Links were not working for bulk updates in Workflow Tasks Hyperlinks in the Task Name column now take you to the specified task.
Customer Care	85023	Issue when editing a Directory Listing A Directory Listing's <i>Listing Text Type</i> in the <i>Additional Line of Text</i> section was deleted after saving changes to the listing. The <i>Listing Text Type</i> is now preserved after you save changes.
Workflow	85019	Trigger History page not loading The Trigger History view could take a long time to load or cause an <i>HTTP 500</i> error on triggers with a high volume of historical records. To improve performance, the page's default filter for the number of days has been reduced from thirty to seven.
Orders - AdvancePay	85035	Price Points showing incorrect charge When adding and editing Price Points in the Orders web app or the Order Placement web service, Price Points sometimes showed an incorrect charge. This was introduced in the web service 25.09 release where the service was referencing the wrong data. The Order Placement web service has been updated to use the correct data and return the correct Price Point values.

Functional Area	PR	Description
E-Rate	85039	<p>Updated E-Rate Manual Utilization 474 report for One Time Adjustments</p> <p>This removes the grouping on the records with One-Time frequency in the 474 file to make them separate line items. Prior to this, One-Time manually entered records had been grouped by FRN, SPIN, and Frequency which created a summarized line in the 474 file.</p>

2 Enhancements for Linking Service Addresses

When linking a service address on an order in the Orders web module, the search field auto-populates with the account's primary contact address. Also, the MSAG and Address Validation status are displayed for each address.

Link Addresses

702 SW 8TH ST

Street Number From

To

Address ^

702 SW 8th ST Bentonville AR 72716

Approve

MSAG

Not Validated

Address Validation

Successful

Selected Addresses To Link

OK

Cancel

3 Field Service Extended Data Integration

The Field Service Management application now provides robust two-way integration for custom-defined extended data, greatly enhancing both efficiency and flexibility. You can easily add extended data to work orders, offering valuable extra information to assist your technicians and Zinier in completing tasks more effectively. The system also automatically retrieves, stores, and displays data collected by technicians, delivering a unified view of all information related to the work order. This release provides the following:

- Ability to configure and automatically populate extended data for each work order type.
- Ability to view, update, and synchronize the extended data from the work order.
- Automatically collect and display data captured by field service technicians.
- Automatically collect and attach the Zinier *close-out package* to the work order.
- Automatically update a ticket's status when the work order is completed.

With extended data set up on a work order type, any work order created using the work order type will include that extended data. Then you can view and edit the extended data directly on the work order.

3.1 Prerequisites

Zinier customers need to be on Zinier **External API version 1.3** to start sending extended data to Zinier. **Note:** A bug in the Zinier External API version 1.2 causes tasks to be duplicated when the work order includes extended data.

You also need to enable sending extended data to Zinier. Go to *Workflow > Configure > Field Service Configuration* and review the *Enable Sending Extended Data to Zinier* setting, which is disabled by default. The new setting lets you configure and test your extended data in the IDI application before sending it to the Zinier production organization.

- If disabled, you can configure extended data and view it on the work order, but it will not send the data to Zinier. This lets you configure and test your data without impacting the work orders in Zinier.
- If enabled, the system will send extended data to Zinier.

Field Service Configuration

Zinier Connection Settings

Host
https://devsol-minlab.devzinier.net

Login
[Redacted]

Password
[Redacted]

Organization
idapps

Zinier Extended Data Settings

☒ Enable Sending Extended Data to Zinier

Cancel Save

If disabled, warning messages will display on the extended data sections, alerting the user that the data will not be sent to Zinier.

Work Order 9823 Open ▾

LINK Order 12 ▾ TYPE abc mwishart CREATED ON 10/15/2025

Work Order Details **Extended Data** Task Data

ⓘ Sending Extended Data to Zinier is disabled

☒ Auto-sync with Provider on Edit Sync Now

Label	Value
1 - Lists	1
2 - date	2025-10-17
3 - integers	23

3.2 Managing Extended Data on a Work Order Type

You can now enhance the work order type by adding extended data, letting you customize information based on the specific work being carried out. For instance, you can provide specific details for a trouble request vs. an installation, or distinct data points for different types of services.

When adding or editing a work order type in Workflow, a new **Extended Data** tab is available for specifying additional data. The example below shows several extended data specifications on a work order type.

Work Order Types

View and manage the Work Order Types in the system

Search	Q
New Type	
Name	Enabled
{{UniqueWOTypeName}}gf213	✓
a	
abc mwishart	✓
bla	✓
Break Fix	✓
Create New WorkOrder Hydra UI Test	✓
Dan Smart Data Test	✓
Dan Test 1	✓
DISABLED	
ENABLED	✓

Showing 1 - 10 of 78

Break Fix

Details **Extended Data**

Extended Data

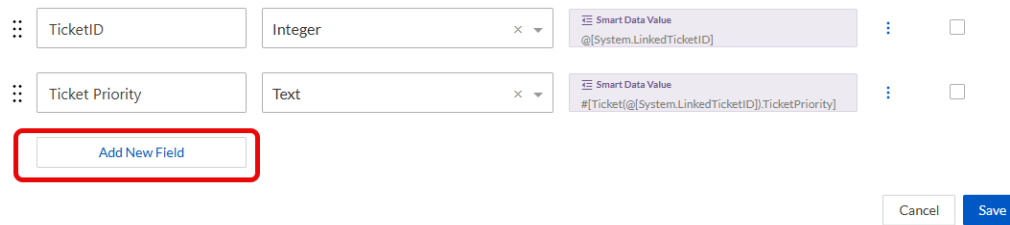
Configure the user-defined extended data for this Work Order Type

Field Label *	Type *	Default Value	Required
Replace Equipment	Yes/No	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Router Firmware	Text		<input checked="" type="checkbox"/>
Plan	List × Work Order - Product Line ×	Hosted Voice ×	<input type="checkbox"/>
Title	Text ×	Smart Data Value #{Ticket[System.LinkedTicketID].Title}	<input checked="" type="checkbox"/>
Ticket Type	Text ×	Smart Data Value #{Ticket[System.LinkedTicketID].JournalItemType}	<input type="checkbox"/>
TicketID	Integer ×	Smart Data Value @System.LinkedTicketID	<input type="checkbox"/>

Add New Field

Cancel Save

You can add additional extended data specifications by clicking the **Add New Field** button.

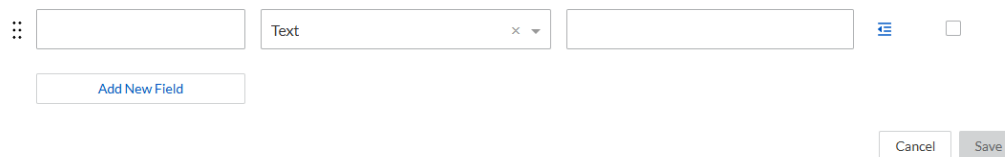


The interface shows two existing specifications:

- Field 1: TicketID, Integer, Smart Data Value: @[System.LinkedTicketID]
- Field 2: Ticket Priority, Text, Smart Data Value: #[Ticket([@System.LinkedTicketID]).TicketPriority]

Below these is a button labeled "Add New Field" which is highlighted with a red rectangular box. At the bottom right are "Cancel" and "Save" buttons.

This displays a new line where you can either specify the data manually or use a data lookup to auto-populate the data.



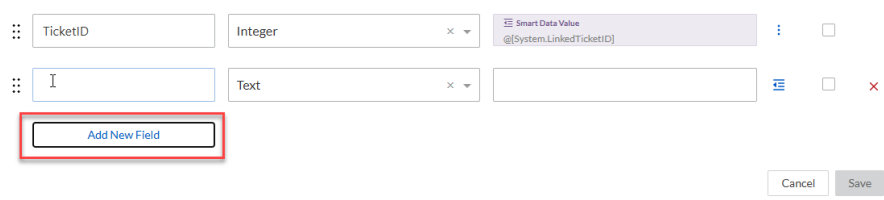
The new line consists of three input fields: a text box for the field name, a dropdown menu for the data type (currently set to "Text"), and a text box for the Smart Data Value. To the right of the third field is a "Data Lookup" icon (three horizontal lines) and a checkbox. Below the first field is a button labeled "Add New Field". At the bottom right are "Cancel" and "Save" buttons.

3.2.1 ADDING DATA MANUALLY

For each specification:

- Enter the field name in the first field.
- Select a data type from the drop-down menu.
- Optionally enter a default value.
- Choose whether or not the field is required using the check box at the end of the line

You can remove a field by clicking the associated red **X** at the end of the row. Use the ellipses on the left to modify the way the properties are displayed.



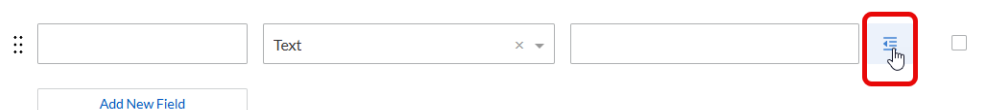
The interface shows two specifications:

- Field 1: TicketID, Integer, Smart Data Value: @[System.LinkedTicketID]
- Field 2: I, Text, Smart Data Value: (empty)

Below these is a button labeled "Add New Field" which is highlighted with a red rectangular box. At the bottom right are "Cancel" and "Save" buttons.

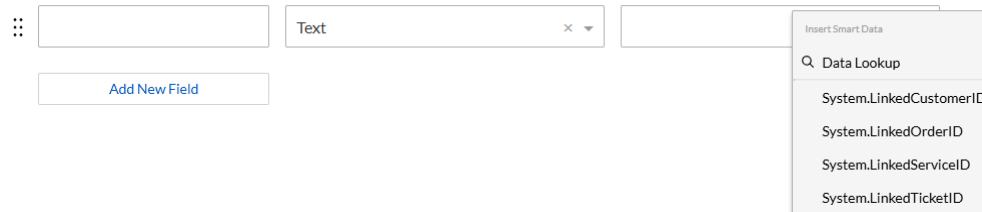
3.2.2 AUTOMATICALLY POPULATING EXTENDED DATA

Leverage powerful Smart Data and data lookup features to effortlessly and accurately populate your data, ensuring a seamless and efficient work order creation process. To perform a data lookup (smart data) on an extended data specification, click the *Data Lookup* icon as shown below.



The new line consists of three input fields: a text box for the field name, a dropdown menu for the data type (currently set to "Text"), and a text box for the Smart Data Value. To the right of the third field is a "Data Lookup" icon (three horizontal lines) which is highlighted with a red rectangular box and a mouse cursor. To the right of the icon is a checkbox and a red "X" icon. Below the first field is a button labeled "Add New Field".

The icon lets you select one of four predefined (*System.*) Data Lookups or create your own custom data lookup.



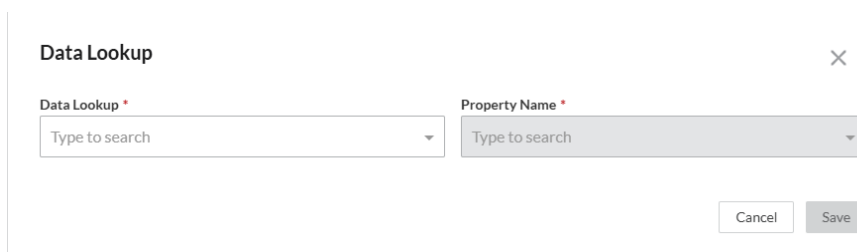
Using a Predefined Data Lookup

Using one of the predefined lookups returns the data as described below. It auto-populates the Customer, Order or TicketID as applicable, and determines the applicable Data Type. You can choose to make the field required or not.

- **System.LinkedCustomerID** – Returns the *Customer ID* for the work order.
- **System.LinkedOrderID** – Returns the *Order ID* when the work order is generated from Workflow.
- **System.LinkServiceID** – Returns the *Service ID* when an affected service is used to generate the work order from a Ticket.
- **System.LinkedTicketID** – Returns the *Ticket ID* when a work order is generated from a Ticket.

Specifying a Custom Data Lookup

The **Data Lookup** option opens a dialog that lets you create a custom lookup using one of the four predefined options described above.



- Start by selecting a **Data Data LookUp**: Data Lookups are organized by items within the application from which information can be retrieved. For example, *CustomerSummary* contains the customer details you want to send to the FSM provider. Selecting a Data Lookup enables the **Property Name** field and provides a Filters field.

Data Lookup

×

Data Lookup *

CustomerSummary

Property Name *

Type to search

Filters

All of the following

CustomerID =

Cancel Save

- **Property Name:** Select the field or value within the application that contains the data to send to the FSM provider. For example, send the Customer Type value.
- **Filters:** Informs the system which object to pull data from. For example, use *System.LinkedCustomerID* to uniquely identify the customer so IDI can retrieve the correct Customer Type for that account.

Data Lookup

×

Data Lookup *

CustomerSummary

Property Name *

CustomerType

Filters

All of the following

CustomerID =

@[System.LinkedCustomerID]

Cancel Save

Once a data lookup is set up, the icon changes to a kebob (elipsis) with options for managing the smart data specification.

⋮	Title	Text	×	Smart Data Value #{Ticket([System.LinkedTicketID]),Title}	⋮	<input checked="" type="checkbox"/>
⋮	Ticket Type	Text	×	Smart Data Value #{Ticket([System.LinkedTicketID]),Jc		<input type="checkbox"/>
⋮	TicketID	Integer	×	Smart Data Value @[System.LinkedTicketID]		<input type="checkbox"/>
⋮		Text	×			<input type="checkbox"/>

Add New Field

Note: Refer to the Workflow web help for more information on extended data and data lookups.

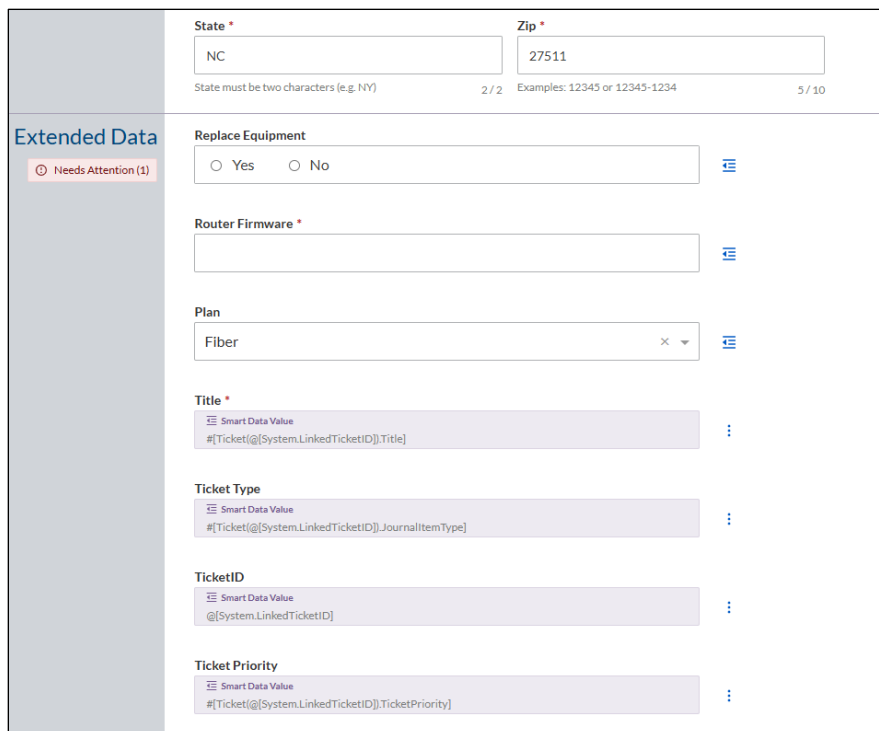
3.3 Managing Extended Data when Manually Creating a Work Order

A new Extended Data section has been added to the New Work Order page. The section will display once the work order type has been selected.

Notes:

- Required extended data values must be filled in before saving and creating the work order.
- Users can change or edit any values before saving.
- Data lookups are executed upon clicking **Save**. As a result, the property will display the configured data lookup syntax.

Tip: When configuring the extended data values, move the values being populated manually to the top and the data lookup values to the bottom.



3.4 Setting Extended Data on a Work Order via Workflow Action

The new *Set Work Order Extended Data* workflow action lets you automate setting extended data on a work order. This action is available under the *Field Service* category in the Actions gallery. The new action gives you the flexibility to determine when in your business process you want to update the extended data.

Updates have also been made to the existing *Create Work Order* action to support updating extended data.

3.4.1 UPDATES TO THE CREATE WORK ORDER ACTION

Capabilities have been added to Workflow and new parameters added to the *Create Work Order* action.

Create Work Order

Details Data Links

Action* Create Work Order Parameters ^

Customer	
Customer ID*	@[CustomerID]
Customer Name*	@[Customer Name]
Site	
Address Reference ID*	@[PrimaryContactID]
Contact Name	@[Contact Name]
Address 1*	@[Address1]
Address 2	
Address 3	
Phone Number	@[Primary Phone]
Email	@[Primary Email]
Region*	@[Region]
Site Name*	@[Customer Name] - @[Address1]
City*	@[City]
State*	@[State]
Country	USA
Zip*	@[Zip Code]
Workflow Signal Name	@[Signal Name]
Work Order Type*	Installation - Fiber Drop and Install x
Description	Customer has a dog.
Extended Data Output Key	WorkOrderID
Primary Link Reference Type	Order
Primary Link Reference ID	@[CartID]
Primary Link Reference Display Name	@[CartID]

You can now use the *Extended Data Output Key* parameter to capture the ID of an object created by a workflow action so it can be used in subsequent workflow steps. For example, when you use the *Create Work Order* action, the system will capture the Work Order ID to let you use it in the *Set Work Order Extended Data* action.

To use the Extended Data Output Key:

- Create a User-Defined Extended Data property on the Workflow. For example, *WorkOrderID*.
- Add *WorkOrderID* to the *Extended Data Output Key* parameter on the Workflow action. This tells the system to capture and save the newly created work order ID to the *WorkOrderID* extended data value.

Note: Do not use @ or open and closed brackets ([,]) when entering the extended data value. That would direct the system to *Write* the value versus **Read** the value.

The other new parameters on the Create Work Order are as follows:

- **Primary Link Reference Type:** Include the object type of the item you want to associate the work order with. You can choose *Order*, *Customer*, or *Ticket*.
- **Primary Link Reference ID:** Include the object ID of the item you're linking the work order to. For example, use `@CartID` to link to the order or `@TicketID` to link to a Ticket.
- **Primary Link Display Name:** This lets you customize the display name of the *Link* value on the Work Order display page. The system concatenates the Primary Link Reference Type and the Primary Link Reference Display Name into the Link value. In the example above, if `CartID = 1234`, the system would display *Order 1234*.

3.4.2 SET WORK ORDER EXTENDED DATA ACTION

The new *Set Work Order Extended Data* action lets you update the extended data on the work order based on your specific business process. The new action is available under the Field Service category.

The action has two parameters:

- **Work Order ID:** This is the ID of the IDI Work Order that you're adding extended data to.
- **Extended Data:** This contains a JSON string of the extended data property and value you want to populate the property. For example, the JSON syntax: `{"OrderID": "@[CartID]"}` will update the OrderID extended data value with the submitted order.

Note: Ensure the property names in the JSON string match the *Field Label* of the Extended Data configured on the Work Order Type.

Set Work Order Extended Data
DETAILS
DATA LINKS

Action*
Set Work Order Extended Data
Parameters: ^

Work Order ID*
@[WorkOrderID]

Extended Data
{"OrderID": "@[CartID]", "Customer Type": "#[CustomerSummary(@[CustomerID]).AccountType]", "Service Type": "@[Service Type]", "Service Number": "@

Task Name*
Set Work Order Extended Data

Rank*
3

Description
Set Work Order Extended Data

Installation - Fiber Drop and Install

Details **Extended Data**

Extended Data

[Add New Field](#) [Cancel](#) [Save](#)

Configure the user-defined extended data for this Work Order Type

Field Label *	Type *	Default Value	Required
Customer Type	Text		<input type="checkbox"/>
OrderID	Text		<input type="checkbox"/>
Order Type	Text	Smart Data Value #{Order(@System.LinkedOrderID)).OrderType}	<input type="checkbox"/>
Service Type	Text		<input type="checkbox"/>
Service Number	Text		<input type="checkbox"/>

3.5 Managing Extended Data on an Existing Work Order

To view and manage extended data on the work order, go to the work order and click on the **Extended Data** tab.

- The extended data will be displayed in alphabetical order.
- The page will display the last time the extended data was sent to Zinier.
- Click the **Export** button to export the extended data to a downloadable CSV file.

You can edit and resend extended data for any open work order by clicking the *edit* (pencil) icon. Once saved, you can click the **Sync Now** button to send the data to Zinier. Alternatively, you can set the work order to *Auto-Sync* by updating the slider. Doing so will automatically send the updated data to Zinier.

Work Order 9659 [Open](#)

LINK [Ticket 217](#) TYPE Break Fix CREATED ON 10/09/2025

Work Order Details **Extended Data** Task Data

Synced With Provider On 10/09/2025 03:21 PM ☐ Auto-sync with Provider on Edit [Sync Now](#)

Label	Value
Plan	Fiber
Replace Equipment	Yes
Router Firmware	2.36.57
Ticket Priority	High
Ticket Type	Work Request
TicketID	217
Title	Internet is Slow

[Export](#) Showing 1 - 7 of 7

Edit Extended Data Value

Replace Equipment

☒ Yes ☐ No

COMPUTED VALUE

Yes

[Save](#)

If the extended data property is a data lookup, editing the property will provide options for editing or replacing the data lookup.

Work Order 9659 Open ▼

LINK Ticket 217 ▼ TYPE Break Fix CREATED ON 10/09/2025

Work Order Details **Extended Data** Task Data

Synced With Provider On 10/09/2025 03:21 PM Auto-sync with Provider on Edit Sync Now

Label	Value
Plan	Fiber
Replace Equipment	Yes
Router Firmware	2.36.57
Ticket Priority	High
Ticket Type	Work Request
TicketID	217
Title	Internet is Slow

Export Showing 1 - 7 of 7

Edit Extended Data Value

Ticket Priority

Smart Data Value
#{Ticket[System.LinkedTicketID].TicketPriority}

COMPUTED VALUE
High

Save

Insert Smart Data

Copy Smart Data

Replace Smart Data

Edit Raw Smart Data

Clear Value

Note: Once the work order is closed, the extended data is no longer editable.

3.6 Retrieving and Displaying Technician Data

The Field Service application automatically retrieves and displays the data collected by the field service technician once the task is completed in Zinier. You can view the data by clicking the **View Task Extended Data** button or **Task Data** tab.

Work Order 9575 Closed

LINK Order 152 ▼ TYPE Installation - Fiber Drop and Install CREATED ON 10/07/2025

Work Order Details **Extended Data** **Task Data**

Referenced Work Order Details

REFERENCED WORK ORDER	REFERENCED WORK ORDER STATUS	PRIORITY	COMPLETE DATE
WKORD000374	Completed	Low	10/07/2025 3:27 PM

Customer
[George Jetson](#)

Site Address
123 Bruce Dr
Cary, NC 27511
USA
[Open in map](#)

CONTACT NAME
Jim Hart

CONTACT EMAIL
jhart@idibilling.com

CONTACT PHONE
9195395912

Tasks

Drop
Task ID: TSK001407

Appointment
October 07
Appointment Start N/A
Appointment End N/A

Task Details

STATUS	SCHEDULED START	ACTUAL START	ESTIMATED DURATION	TECHNICIAN	COMPLETED DATE	ACTUAL DURATION
Completed	10/07/2025 3:30 PM	10/07/2025 3:12 PM	1.00 hrs	Jim Hart (+19195395912) jhart@idibilling.com	10/07/2025 3:16 PM	0.05 hrs

Schedule Appointment View Task Extended Data (6) Cancel Task

Clicking **View Task Extended Data** will display the data the technician collected for that individual task.

Task Data ×
Showing all data for the task Drop

Label	Value
Drop type	Underground
Fiber length	50 Ft
Light level at MST	Blue
Light level at Slackbox	Green
Work complete?	Yes
Notes	Had to go through backyard

Showing 1 - 6 of 6 < >

Cancel

Clicking the **Task Data** tab displays a list of all data gathered on all the tasks assigned to the Work Order. The data is grouped and sorted by task. Click the **Export** button to export the data to a CSV file

Work Order 9575 Closed

LINK [Order 152](#) ✓ TYPE Installation - Fiber Drop and Install CREATED ON 10/07/2025

Work Order Details Extended Data **Task Data**

Task	Task Name	Label	Value
TSK001406	Install		-
TSK001406	Install	Upload Speed	925 MB
TSK001406	Install	Check	true
TSK001406	Install	Download Speed	950 MB
TSK001406	Install	Label	GigaSpire Router
TSK001406	Install	Location of ONT	Basement
TSK001406	Install	Notes	Customer happy with speed
TSK001406	Install	Ont Model	GPX100
TSK001406	Install	ONT Serial Number	9781491973790
TSK001406	Install	Ping	14 ms

Export

Items Per Page:

10

Showing 1 - 10 of 19

< >

3.7 Automatically Retrieving and Storing Zinier Close-out Package

The new *Retrieve Zinier Closeout Package* workflow action lets you automatically retrieve, store, and attach the Zinier Close-out Package to the work order. The Close-Out package is generated by Zinier when the Work Order is closed. It contains all the relevant information about the work order.

The action is available under the *Field Service* category. It can be combined with the *Work Order Modified* trigger to automatically attach the package to the Work Order once it is completed. Alternatively, you can add the action to your Workflow definition.

The action requires the following parameters to be populated.

- **Work Order ID** – This is the ID of the work order you want the action to act upon. If combined with the *Work Order Modified* trigger, the work order ID will be a system-defined data lookup value.
- **Document Storage Category Name:** The categories assigned to documents help you organize them into groups for easier searching and filtering.

Configure Trigger

Name* FSM - Retrieve Close Out Package

Description

Enabled ☒

Notification Policy Never

Work Order Modified

+ GROUP + CONDITION

Filters

All of the following:

Status = Closed

Retrieve Zinier Closeout Package

Parameters

Work Order ID * @WorkOrderID

Document Storage Category Name * Zinier Closeout Package

3.8 Update Ticket Status when Work Order is Completed

You can now update a Ticket's status when the associated Work Order is completed. The following parameters have been added to the *Work Order Modified* workflow action.

- **Primary Link Reference Type:** This defines the type of object a work order is associated with.
- **Primary Link Reference ID:** This defines the ID of the object linked to the work order.

These two new fields let you set up a trigger to update the ticket when the work order is completed.

Configure Trigger

Name* Close Ticket when Work Order is Completed

Description

Enabled ☒

Notification Policy Never

Work Order Modified

+ GROUP + CONDITION

Filters

All of the following:

PrimaryLinkReferenceType = Ticket

Status = Closed

Modify Ticket

Parameters

Assigned To

Priority

Status Closed

Ticket ID * @PrimaryLinkReferenceID

3.9 New Work Order Extended Data Lookup

Both the extended data sent to the FSM provider and the data collected from the technician are stored in the IDI database. Workflow admins can access this data using the new WorkOrderExtendedData Smart Data Lookup. The available values are:

- **extendedInformationID** = The database ID of the Extended Information item configured on the work order.
- **workOrderId** = The unique ID of the work order that contains the extended data.
- **extendedInformationItemID** = The unique ID of the extended information item.
- **key** = the “Field Label” name of the configured extended information item.
- **value** = the data entered in the extended information item.
- **computeValue** = The value computed by the system to populate the extended information item. This value is populated if Smart Data Lookups were used to determine the extended data value.
- **lastComputedDate** = The date and time when the extended data value was last calculated.
- **isProvider** = Indicates whether the IDI application determined the extended data value or if it came from the external field service management application. The value will be zero if provided by the IDI application and will be 1 if supplied by the external field service management application.

Name*

Data Source*

Filters

[Add Group](#) [Add Condition](#)

All ▼ of the following:

☰

extendedInformationID

workOrderId

extendedInformationItemID

key

value

computedValue

lastComputedDate

isProvider

☰

3.10 Linking a Work Order to an Object

The View Work Order page has been updated to let you change the object a work order is linked to. This is helpful if you opened a work order from a customer but now want it connected to an open ticket, or if your data lookups were set up to use ticket data instead of customer data. To do this:

- Select the down arrow on the Link field on the work order.
- Choose the object type you want the work order linked to.
- Update the ID of the object you want the work order linked to.
- Selecting save will now link the work order to that object.

Work Order 9575 Closed

LINK	TYPE	CREATED ON
Order 152	Installation - Fiber Drop and Install	10/07/2025

Update Work Order Link

Order 152 Save

Suggestions

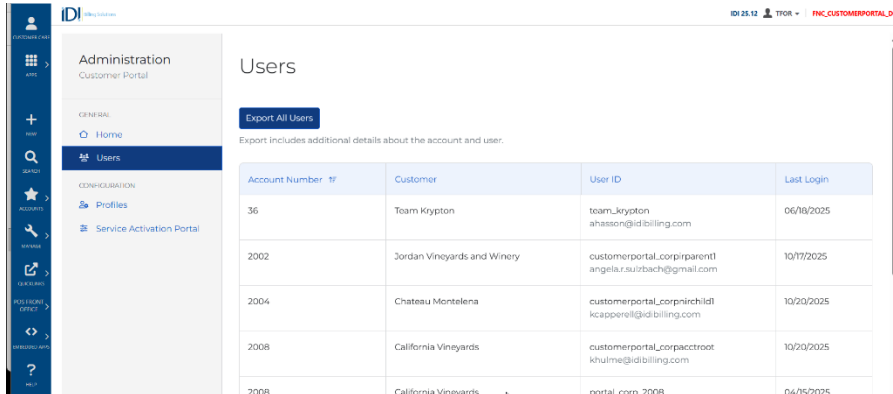
- Customer
- Order
- Ticket
- Service

Work Order	Completed	Low	COMPLETE DATE
REFERENCED WKORDO			10/07/2025 3:27 PM

Customer Tasks

4 Viewing and Exporting Customer Portal Users

Customer Portal Administration in Customer Care has a new page that lets you quickly view and export all Customer Portal users.



Account Number	Customer	User ID	Last Login
36	Team Krypton	team_krypton ahasson@idibilling.com	06/18/2025
2002	Jordan Vineyards and Winery	customerportal_corpparent1 angela.r.suizbach@gmail.com	10/17/2025
2004	Chateau Montelena	customerportal_corpnichid1 kcupperell@idibilling.com	10/20/2025
2008	California Vineyards	customerportal_corpacctroot khulme@idibilling.com	10/20/2025
2008	California Vineyards	portal_corp 2008	04/19/2025

Clicking the **Export** button generates a downloadable file containing the full list of users, sorted in ascending order by account number. The following columns are included:

- Account Number
- Customer Name
- Account Status
- Market
- Username
- Full Name
- Email Address
- Bill Notification (Y/N)
- Activation Date
- Last Login Date
- Locked Out (Y/N)
- Last Lockout Date
- Expiration Date
- User Status (Active/Disabled/Locked/Expired)
- Domain
- SecUserID
- CustID

Example Export:

AutoSave OFF PortalUsers_10_21_2025 (2) - Saved to this PC

File Home Insert Page Layout Formulas Data Review View Automate Help Acrobat

Clipboard Font Alignment Number Styles Cells Editing Sensitivity Add-ins Analyze Copilot Create a PDF Adobe Acrobat

Account Number

Account N	Customer	Account	SI	Market	User Nam	Full Name	Email	Bill	Notific	Activation	Last Login	Locked	Out	Last	Locko	Disabled	Expiration	User	Statu	Domain	SecUserid	CustId
2002	Jordan Vir	Active			WorldWid	customerj	Caroline Bangela.r.s	N	#####	#####	N	#####	N					Active	FNC_OLB	39429	24467	
2004	Chateau h	Active			WorldWid	customerj	Alison Wekcapperell	N	#####	#####	N		N					Active	FNC_OLB	39430	24468	
2008	California	Active			WorldWid	customerj	Corp Root khulme@i	N	#####	#####	N		N					Active	FNC_OLB	43510	24460	
2008	California	Active			WorldWid	portal_	Kathleen (khulme@i	N	2/4/2025	#####	N		N					Active	FNC_OLB	43588	24460	
2027	Silvia Mari	Active			WorldWid	mh01	Mike Holle mholleran	N	#####	#####	N		N					Active	FNC_OLB	41622	24474	
2028	Allen Cooy	Active			WorldWid	customerj	Maybac S kapperell	N	9/1/2022	#####	N	#####	N					Active	FNC_OLB	38066	24469	
2028	Allen Cooy	Active			WorldWid	customerj	Allen Cooy kapperell	N	#####	#####	Y	#####	N					Locked	FNC_OLB	40235	24469	
		Active			WorldWid	customerj		N	9/1/2022	8/1/2025	N	#####	N					Active				24469