

# Core Release Bulletin

*IDI Platform  
26.2 Release*

February 2026

## Table of Contents

<b>1</b>	<b>Release Summary</b> .....	<b>4</b>
1.1	Change Orders/Enhancements .....	4
1.2	Resolved Known Issues .....	4
<b>2</b>	<b>Orders Enhancements</b> .....	<b>6</b>
2.1	Activity Center Enhancements .....	6
2.2	Constraints for Adding Services Whose Start Date is Earlier than Account Establish Date	7
<b>3</b>	<b>Field Service Management Enhancements</b> .....	<b>9</b>
<b>4</b>	<b>Workflow Enhancements</b> .....	<b>10</b>

## 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 3735 & 3736	<b>Enhancements to Activity Center clarify Workflow presentation</b> <ul style="list-style-type: none"> <li><b>Workflow instance name</b> replaces Workflow definition as the Workflow label. This follows the naming standard used in Workflow, providing consistency across applications.</li> <li><b>Root Workflow status</b> is now displayed in the Activity Center, providing additional context for the workflow's current state.</li> </ul>
Orders	AR 9517	<b>Constraints for adding a service whose start date is before the account establish date</b> This AR will provide Orders enhancements over several releases. This release lets you choose whether to have constraints for adding a service when its start date is earlier than the account establish date. You can choose to allow, prevent, or allow with a warning.
Field Service Management	FR 3670	<b>Miscellaneous enhancements</b> <ul style="list-style-type: none"> <li>Added a new permission to the Workflow Admin role for <i>Manage Appointments</i>.</li> <li>Added Region field to the Site display,</li> </ul> To be released in the next FSM deployment in February 2026.
Workflow	FR 3670	<b>JSON Editor for Extended Data key/value pairs</b> To be released in the next Workflow deployment in February 2026.
Workflow	N/A	<b>New Workflow Actions</b> <ul style="list-style-type: none"> <li>Save Extended Data</li> <li>Send Workflow Signal</li> </ul> To be released in the next Workflow deployment in February 2026.

## 1.2 Resolved Known Issues

The following known issues have been resolved in this release.

Functional Area	PR	Description
Customer Management – E911	85013	<b>Sent batches incorrectly shown as unsent</b> The Automated E911 File Generation script was updated to no longer mark <i>sent</i> records as <i>unsent</i> .

Functional Area	PR	Description
Customer Management	85080	<b>Modify prospect issue</b> The Customer Modified trigger no longer includes irrelevant fields that were causing errors when modifying a prospect.
Tickets	85042	<b>Attribute date displays when it's not selected and updated</b> The attribute date no longer auto-populates when users do not select it.
Billing	85052	<b>Missing PDF</b> This fixes an issue where the PDF Invoice Upload was marking <i>Upload Job Complete</i> to true for bill periods when there were invoices that are not uploaded properly.
Orders	85053	<b>Bill payment issue with Starting Blocks that lack a default register</b> Orders no longer displays a <i>No Tender Types</i> error when users manually select a properly configured register and use a Starting Block that allows Bill Payment.
Customer Portal	85058	<b>Attempt to impersonate an account fails</b> Customer Portal User Impersonation was updated to no longer require unnecessary permissions to successfully complete the impersonation.
Customer Portal	85062	<b>Users Page loading improvement</b> The Users page was updated to load more quickly.
Inventory	85074	<b>Edit Assigned Equipment dialog only shows first 100 results</b> This dialog was updated to allow more than 100 results.
AdvancePay	85007	<b>Auto Renewal using a different payment processor than Paymentus</b> AdvancePay in Customer Care was updated to always use the Paymentus payment processor even if POS Location configuration includes a different payment processor.
General Ledger	85064	<b>Issue when processing Paymentus tender type</b> General Ledger Daily Request processing was updated to no longer error when processing a posting that uses the Paymentus tender type.
Workflow	85076	<b>Unable to re-run complete Workflow tasks</b> Fixed an issue where completed Workflow tasks could not be re-run. Now users can re-run completed tasks where the Workflow has yet to complete.

## 2 Orders Enhancements

This release provides Activity Center enhancements for presenting Workflow information, and the ability to constrain adding a service whose start date is earlier than the account establish date.

### 2.1 Activity Center Enhancements

To provide greater clarity when monitoring a transaction's Workflow:

- Workflow instance name replaces Workflow definition name as the Workflow label. This follows the naming standard for Workflow, providing consistency across applications. The instance name is typically more familiar than the definition name for both Orders and Workflow users.

The Workflow Name in Orders now matches the Workflow Name in Workflow.



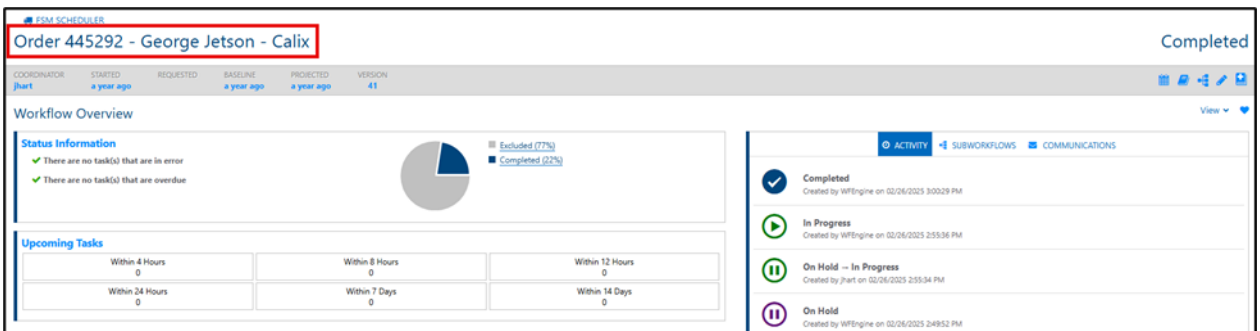
**Order #382979** Completed  
George Jetson (222423)

CREATED BY: jhart | CREATED ON: February 26, 2025 | ESTIMATED MRC: 109.95 | ESTIMATED ONE-TIME: 100.00 | ORDER TYPE: New Install

**Info**  
Order Type\*: New Install  
New Account Status  
Est. Complete Date  
Source Code  
Sales Associate  
Note

**Workflow**  
Order 445292 - George Jetson - Calix  
Completed  
100.00 % Complete  
✓ There are no tasks in error.  
✓ There are no tasks overdue.  
Completed: 22.58 %  
Excluded: 77.42 %

Coordinator Started: jhart (a year ago)  
Requested Baseline: (a year ago)  
Projected: (a year ago)



**FSM SCHEDULER**  
Order 445292 - George Jetson - Calix Completed

COORDINATOR: jhart | STARTED: a year ago | REQUESTED: a year ago | BASELINE: a year ago | PROJECTED: a year ago | VERSION: 41


**Workflow Overview**  
Status Information  
✓ There are no task(s) that are in error  
✓ There are no task(s) that are overdue

**Upcoming Tasks**

Within 4 Hours	0	Within 8 Hours	0	Within 12 Hours	0
Within 24 Hours	0	Within 7 Days	0	Within 14 Days	0

**Activity Center**  
Completed: Created by WfEngine on 02/06/2025 3:00:29 PM  
In Progress: Created by WfEngine on 02/06/2025 2:59:36 PM  
On Hold - In Progress: Created by jhart on 02/06/2025 2:59:34 PM  
On Hold: Created by WfEngine on 02/06/2025 2:49:52 PM

- The Activity Center now displays the root Workflow status, providing additional insight into the state of the Workflow.



**Order #382853** Failed  
IDI - Test Account (222413)

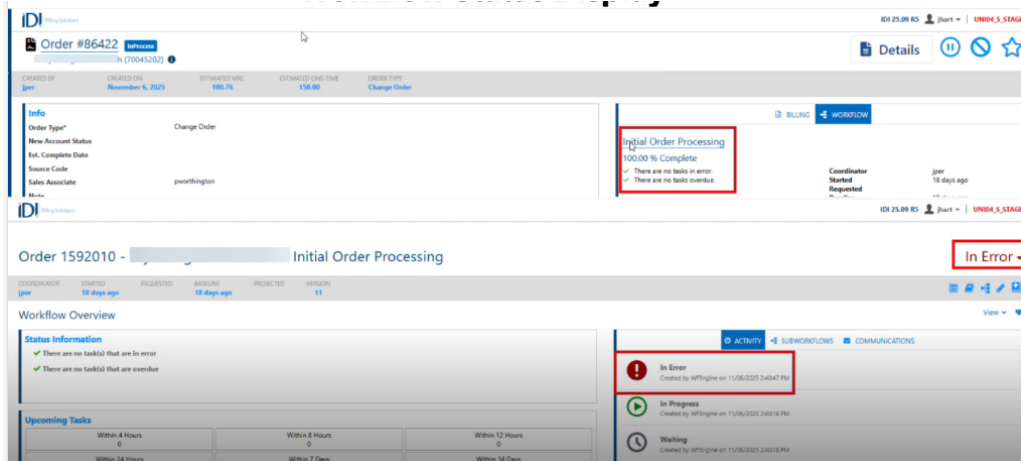
CREATED BY: jhart | CREATED ON: February 1, 2024 | ESTIMATED MRC: 73.95 | ESTIMATED ONE-TIME: 0.00 | ORDER TYPE: New Install

**Info**  
Order Type\*: New Install  
New Account Status  
Est. Complete Date  
Source Code  
Sales Associate  
Note

**Workflow**  
Order 445237 - IDI - Test Account - Calix  
Cancelled  
100.00 % Complete  
✓ There are no tasks in error.  
✓ There are no tasks overdue.  
Completed: 6.45 %  
Excluded: 93.55 %  
Cancelled: 9.60 %

Coordinator Started: jhart (2 years ago)  
Requested Baseline: (2 years ago)  
Projected: (2 years ago)

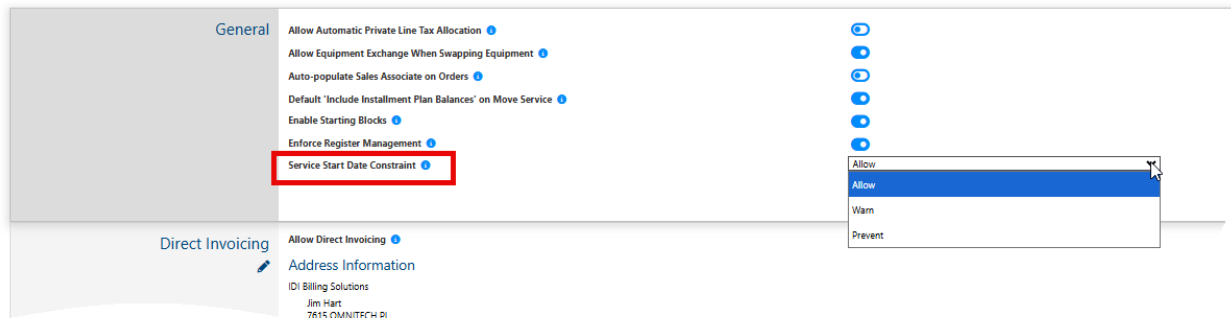
- Also, to avoid confusion, the Percent Complete indicator is hidden when the root Workflow status is *In Error*, due to a subworkflow being in an errored state. Previously it would indicate the Workflow was 100% complete even though it was in error.



## 2.2 Constraints for Adding Services Whose Start Date is Earlier than Account Establish Date

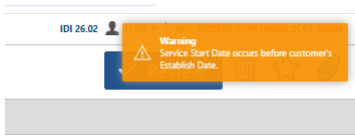
This release lets you choose whether to have constraints for adding a service when its start date is earlier than the account establish date. This is controlled by a new *Service Start Date Constraint* setting in Orders **MANAGE** > **Settings**.

### Settings

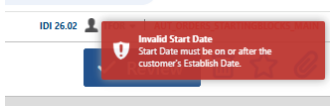


The setting provides three options:

- Allow** (default) – This lets you add services whose start date is earlier than the account establish date without a warning.
- Warn** – This displays a warning when you add a service whose start date is earlier than the account establish date, but allows the service to be added.



- **Prevent** – This displays an *Invalid Start Date* error and does not let you add the service until the start date is on or after the account establish date.



Add To Cart Cancel

**Staged Items (1)**

XXXXXX  
Centrex View Details

Service Number*	XXXXXXXXXX
Ring to Number*	XXXXXXXXXX
Name	
Start Date*	01/15/2026
End Date	
Quantity*	1
Group	
State	
Zone	
Region	
Send Usage Notifications To	Service Only
Set as Primary Service	<input type="checkbox"/>

**Note:** The account *Establish Date* is now shown when you click to show account information (blue and white **i** icon).

Cart #75 Assembling

by (10001604) i

**Japan Society**

Account Number	10001604
Account Status	Active
Account Type	Business
Bill Cycle	Normal Bill Cycle
Billing Address	333 E 47th St New York NY (New York) 100170000 (USA)
Customer Type	Customer
Establish Date	July 1, 2027
Market	NYS - PAPER Statement

### 3 Field Service Management Enhancements

This release adds

- A new permission to the Workflow Admin role for *Manage Appointments*.

**Role Information**

**Role Name**

**Company**

**Description**

[View Assigned Users](#)

[View History](#)

**Permissions**

- Workflow (16)
  - Allow Log On
  - Manage Design
  - Manage Workflow Instance
  - Manage Tasks (Advanced)
  - Send Email
  - Allow Search
  - Manage Quicklinks
  - View Field Service
  - Edit Field Service
  - Field Service Settings
  - Manage Work Order Types
  - Create Work Orders
  - Add Documents
  - Manage Documents
  - Download History Logs
  - Manage Appointments

- A *Region* field to the Site display,

**Work Order 9575** Attach Documents (1) Remove Bookmark

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

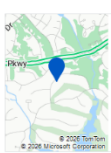
**Work Order Details** | Extended Data | Task Data

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

**Customer**

[George Jetson](#)

**Site**



123 Bruce Dr  
Cary, NC 27511  
USA

[Open in maps](#)

NAME: George Jetson - 123 Bruce Dr | CONTACT NAME: Jim Hart

CONTACT EMAIL: jhart@idibilling.com | CONTACT PHONE: 9195395912

**REGION**

Raleigh

**Tasks** Newest to Oldest

**Drop** Task ID: TSK001407

**Appointment** October 07

<b>Task Details</b>	<b>Task Details</b>	<b>Task Details</b>
STATUS: <span style="border: 1px solid #ccc; padding: 2px;">Completed</span>	ESTIMATED DURATION: 1.00 hrs	TECHNICIAN: Jim Hart (+19195395912) <a href="mailto:jhart@idibilling.com">jhart@idibilling.com</a>
SCHEDULED START: 10/07/2025 3:30 PM	ACTUAL START: 10/07/2025 3:12 PM	COMPLETED DATE: 10/07/2025 3:16 PM
	ACTUAL DURATION: 0.05 hrs	

Schedule Appointment View Task Extended Data (6) Cancel Task

**Install** Task ID: TSK001406

**Appointment** October 07

<b>Task Details</b>	<b>Task Details</b>	<b>Task Details</b>
STATUS: <span style="border: 1px solid #ccc; padding: 2px;">Completed</span>	ESTIMATED DURATION: 1.50 hrs	TECHNICIAN: Jim Hart (+19195395912) <a href="mailto:jhart@idibilling.com">jhart@idibilling.com</a>
SCHEDULED START: 10/07/2025 3:30 PM	ACTUAL START: 10/07/2025 3:12 PM	COMPLETED DATE: 10/07/2025 3:16 PM
	ACTUAL DURATION: 0.05 hrs	

## 4 Workflow Enhancements

This release provides:  
A JSON editor for Extended Data key/value pairs

**Step Details** Return to Designer

Name\*  Description

**Tasks** + ADD

Rank	Task Name
1	Update and Check Extended Data
2	Create Work Order
3	Set Work Order Extended Data

**Set Work Order Extended Data** DETAILS DATA LINKS

Action\*  Parameters

Work Order ID\*

Extended Data

Task Name\*

Rank\*

Description

Duration\*  Minutes

Effort  Same as Duration

Assignment Set

Default Group

Automated (Unknown)

Inherit From Definition

SAVE CANCEL

**Step Details** Return to Designer

Name\*  Description

**Tasks** + ADD

Rank	Task Name
1	Update and Check Extended Data
2	Create Work Order
3	Set Work Order Extended Data

**Edit Value** ✕

Modify a list of key/value pairs

Key	Value
OrderID	<input type="text" value="@[CartID]"/>
Customer Type	<input type="text" value="#[CustomerSummary]@[CustomerID]"/>
Service Type	<input type="text" value="@[Service Type]"/>
Service Number	<input type="text" value="@[Service Number]"/>

Add Key/Value Pair Cancel Save

### New Workflow Actions

- **Save Extended Data** - This can be used to create different conditional steps that run different Update Workflow Extended Data actions and save specific values which are different for each condition. This helps avoid duplicate steps/tasks that have the same action but with different hard coded action parameters.

**⚡ Save Extended Data**

CHANGE

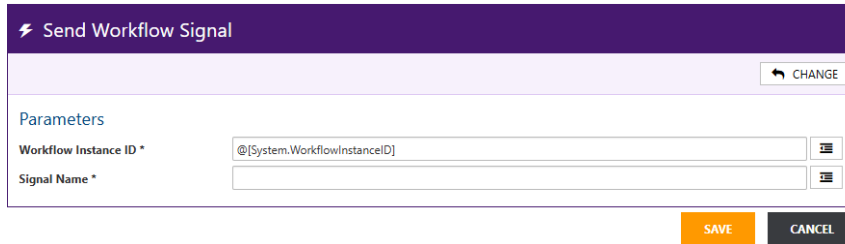
**Parameters**

Workflow Instance ID \*

Extended Data \*

SAVE CANCEL

- Send Workflow Signal - This fires a signal to make it easier for Workflow to use signals instead of using the Make Http Request action.



The screenshot shows a configuration window titled "Send Workflow Signal" with a lightning bolt icon. The window has a purple header bar. Below the header is a light purple bar with a "CHANGE" button. The main area is titled "Parameters" and contains two input fields: "Workflow Instance ID \*" with the value "@[System.WorkflowInstanceID]" and "Signal Name \*". Both fields have a menu icon to their right. At the bottom right of the form are "SAVE" and "CANCEL" buttons.