Form approval by manager

It is possible to add form flow control in the new form module. An email with a link to approval is sent to the manager. Manager is set in the user's settings in More Service Agent Portal. When the manager has approved the form it is sent to the Inbox in More Service Agentportal.

Open the form editor and create a new form or edit an existing. Click cllik and save the Form.

Following will show

lit form - Order Printer Form Name Order Printer		
elect print		
elect		
Option 1		
SUBMIT		
	Y CONFIGURE TWO-LEVEL SELECT ITEM	

Choose settings to configure flow

Form Name			
Order Printer			
elect print			
elect			
Option 1			
option			
SUBMIT			

Operating unit	Access Information		
All			
Selected customers ⑦ Form flow Case type Service Request Use form approval flow Q Register the form to an agent or team 2. linje Register the form in the inbox Q Additional settings for the form Use a default when registering a case. Position	Operating unit	?	
Form flow Case type Service Request Use form approval flow Register the form to an agent or team 2. linge Register the form in the inbox Additional settings for the form Use as default when registering a case. Position	All	?	
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Additional settings for the form Use as default when registering a case. Position	2. linje		
Use as default when registering a case.	Register the form in the inbox	?	
Position	Additional settings for the form		
	Use as default when registering a case.	?	
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			SAVE
SAV			CATE

An email will be sent to the manager for approval before the form is sent to More Service Portal. (How to set up manager)

The manager must open the link in the email and approve the form:

Forespørsel om godkjenning av skjema

Du har mottatt en forespørsel om å godkjenne det vedlagte skjemaet.

Skjemaet er sendt inn av brukeren

Test Testesen (Telefon: 12345678, E-post: tms02@technet.no)

Link: https://demo.moreservice.com/Userweb/FormApproval.aspx?g=0ab1bde8-4f42-4ab8-af16-fa71adc5dc4f

The manager can approve or decline the form. The manager can add a comment or edit the form content.

Form Approval Add Comment Add Comment Approve Decline Autocomplete Order new laptop

The manager approves the form:



Autocomplete

An email is sent to the user.

Skjemaet er godkjent

Innsendt: 18.08.2020 12.10 Skjemanavn: Order new laptop Kommentar fra nærmeste leder: Skjema godkjennes.

The form is sent to More Service Portal Inbox or a team for further handling.

		Inbox	LATEST		
Received	Туре	Subject	User	Department	2020-08-18 13:15 - 13 - Test
2020-08-20 10:	Ŋ	Godkjent - Order new laptop	Test Testesen		2020-08-18 13:13 - 12 - Test
2020-08-20 09:24		More Service er nå oppgradert til 8.4.7 / MoreService is n			2020-08-18 12:02 - 11 - Godkjent - Order new lapto 2020-08-06 12:25 - 10 - Test
2020-08-18 13:15		Undelivered Mail Returned to Sender			2020-08-04 13:35 - 9 - Test
2020-08-18 12:10	M	Godkjent - Order new laptop	Test Testesen		2020-08-04 13:18 - 8 - Order new laptop 2020-07-02 12:15 - 7 - Skjematittel
2020-08-18 12:09	M	Godkjent - Order new laptop	Test Testesen		2020-07-02 12:14 - 6 - Skjematittel
2020-08-18 10:56	M	Order new laptop	Test Testesen		2020-06-30 11:47 - 5 - Skjematittel 2020-06-18 12:14 - 3 - Printer restarted by itself
2020-08-18 10:51	Ņ	Order new laptop	Test Testesen		2020-00-16 12.14 - 5 - Printer restarted by itsen
2020-08-18 10:49	M	Order new laptop	Test Testesen		
2020-08-06 12:58	M	Test	John Doe		
Username Name		est1 est Testesen			Kommentar fra: Leder Ledersen
Customer					
Email	fli	r@technet.no			
Email CC		r@technet.no 2345678			
Email CC Phone	1			ķ	
Customer Email CC Phone Type Attachments	1: B	2345678		ķ	

The case is registrered. The form is included in the case under $\ensuremath{\mathsf{FORM}}$

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Godkje	ent - Order new la	aptop							-<	? ቆ ≻
User	Test Testesen (Test1) - 12345678	- Food deliveries							×	≗ ≔ ≗ * (3)
Templates			 Affects 		`	 SL Type 				
Category			 Priority 			 Start within 		Solved within		
Object search			_			Consume	0%	Consume	0%	
DESCRIPT	ION ATTACHMENTS (0)	TASKS (0)	RELATED CASES (0)	MERGED CASES (0)	FORM (1)	EXTRA OUTLOOK				
						Registered	Description		Agent	Time Spent
Komment	ar fra: Leder Ledersen					2020-08-20 10:25	🔒 🗈 Received (From the More	Service Portal)	TMS	00:00
DESCRIPT		TASKS (0)		MERGED CASES (0)		EXTRA OUTLOOK Registered	Description		Agent	

User Form

.

×

Autocomplete
option-2

The manager declines the form:

The form has been declined

Autocomplete

I need a new laptop.

An email with comments is sent to the user:

Skjemaet er ikke godkjent

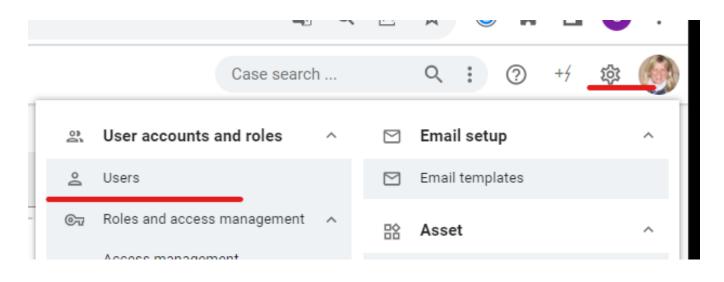
Innsendt: 18.08.2020 12.07 Skjemanavn: Order new laptop Kommentar fra nærmeste leder:

The form is not sent to More Service Portal.

Add manager:

If you use More Service Discovery and manager is defined there in Active Directory/Azure AD, this will be defined automatically. To manually set up manager, follow the steps below.

Manager is set in the user's setup in More Serivce Portal:



Seach the manager and fill it in.

dag	🙎 Ruben Syversen 🧪		×
99 @	Username	Password	
lede	ruben@cares.no		D
jill	Email ruben@cares.no	Language Norwegian	• in -
Siri	Phone, Work / Organization	Phone, Mobile / Private	in -
tore	94016045	94016045	in -
DAY	Customer Caro AS 🗧 🧪 🗸	← Search all departments	in -
GUN			
rube	Department	Location	_
dort	Manager	Employee No	
sisd Stib	\$ Invoice	VIP Very Important Person	
IT-sı	Agent	O	
test			
test	The users recent cases		~
pos	Other		~
Can	Asset		~
And		SAVE AND CLOS	