Changes in the Update of SkyDesk CRM

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SkyDesk Service Center

Fuji Xerox Co., Ltd.

Summary

Thank you for using SkyDesk CRM. We greatly appreciate your business.

We provide several new features and enhancements for SkyDesk CRM.

This document explains the important changes in order to make your transition easier.

1. Profile permission page changes
2. Other Changes

Note: The features described in this document may be changed before the release.

1. Profile permission page changes

- **Make sure users don’t exceed their permissions** – Earlier, the related permissions were not changed automatically based on the basic permission, you had to make the changes individually. For example, a user without create permission can import leads if that permission was not disabled. Now, these related permissions rely on their corresponding basic permissions, which means that the access given to a particular profile user does not exceed his limitations. If a module is disabled it won't be available for the remaining permissions.
- **Enable permissions based on the module** – Earlier, there was no option to enable permissions like change owner, send email, delete email, print view and sheet view for specific modules alone. Now, while extending the permissions you can also specify for which modules these should be enabled.
- **Enable / Disable permissions in a single click** – Before, you had to unselect all modules to disable a single permission or vise versa. You had to go through each of the permissions and make the required changes. Now, you can disable permissions with just a single click. Incase you want to enable the permission only for certain module, you can select only those that are needed from the drop-down list.
- **Tab Group permissions are available only under the customization page**

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2. Other Changes

- In Approval Process, "Assign Task" option is listed under "Who should Approve" section. This task is assigned to the Approver when a record is submitted for approval while the "Assign Task" under ”Action on Approval" will be assigned to the record owner after the approval of the record.
- In Criteria editor, the condition field “Current User” is moved into the user part as a value field. The supported conditions are “is” & “isn't.”
- Google Calendar private events should not get synced with CRM. Previously, they were synced, and this issue is fixed.