

Fresh Service Automation Overview: Pushing Existing Past Due Dates to Future

Who:

- Created by **Nicholas** and currently applies exclusively to tickets assigned to Nicholas. The automation only executes when Nicholas assigns a ticket to himself, serving as a safeguard to ensure that it doesn't affect tickets across the entire company.

What:

- **Automation Name:** *Pushing Existing Past Due Dates to Future*
- This automation extends the due dates of tickets that have past-due dates by adding **30 days** from the current execution date. It specifically targets overdue tickets that Nicholas is responsible for and helps prevent the buildup of overdue tickets.

When:

- The automation runs **constantly** as long as it is active and applies whenever Nicholas assigns a ticket from any other agent to himself. This ensures it only affects tickets Nicholas is directly handling and prevents mass ticket updates.

Where:

- Implemented within the **Fresh Service platform** using the **Workflow Automator** tool, the automation is confined to Nicholas's ticket queue, ensuring focused action without impacting other teams or departments.

Why:

- The need arose due to the accumulation of past-due tickets, primarily on the State Reporting side, which relies heavily on county billing and state processing timelines. Updating these manually was time-consuming and inefficient.
- **Purpose:** Provide a more accurate, future-facing due date for tickets that were stuck in the past due to reliance on external factors such as billing and state submittal delays. The automation ensures the team's workflow aligns with realistic completion times.

How:

- Built using the **Fresh Service Workflow Automator**, the automation checks for tickets with overdue due dates and extends their deadline by 30 days from the execution date. It simultaneously logs a note in each updated ticket, describing the change.
- Execution is triggered when Nicholas reassigns a ticket from any agent to himself, ensuring control and focus.

Key Results & Value Delivered

Efficiency Gains:

- Manually updating **123 tickets** would have required **1-2 full days** (8-16 hours) of dedicated work, during which all other tasks would have been halted. The automation completed the task in **under 5 minutes** (0.0833 hours), resulting in a **time savings of 98.96% to 99.48%**.
- This saved between **8 to 16 hours** of manual work, freeing up critical time for other tasks without causing any disruption to ongoing operations.

Reduced Ticket Backlog:

- The automation instantly addressed the backlog of overdue tickets, aligning their timelines with realistic future completion dates. This proactive measure prevents any further accumulation and ensures smoother management of ticket flow.

Operational Improvement:

- The automation synchronizes due dates with workflow realities by extending past-due dates by 30 days. This aligns the ticket management process with actual work requirements, particularly for State Reporting tickets, which depend on external billing and state submittal schedules.

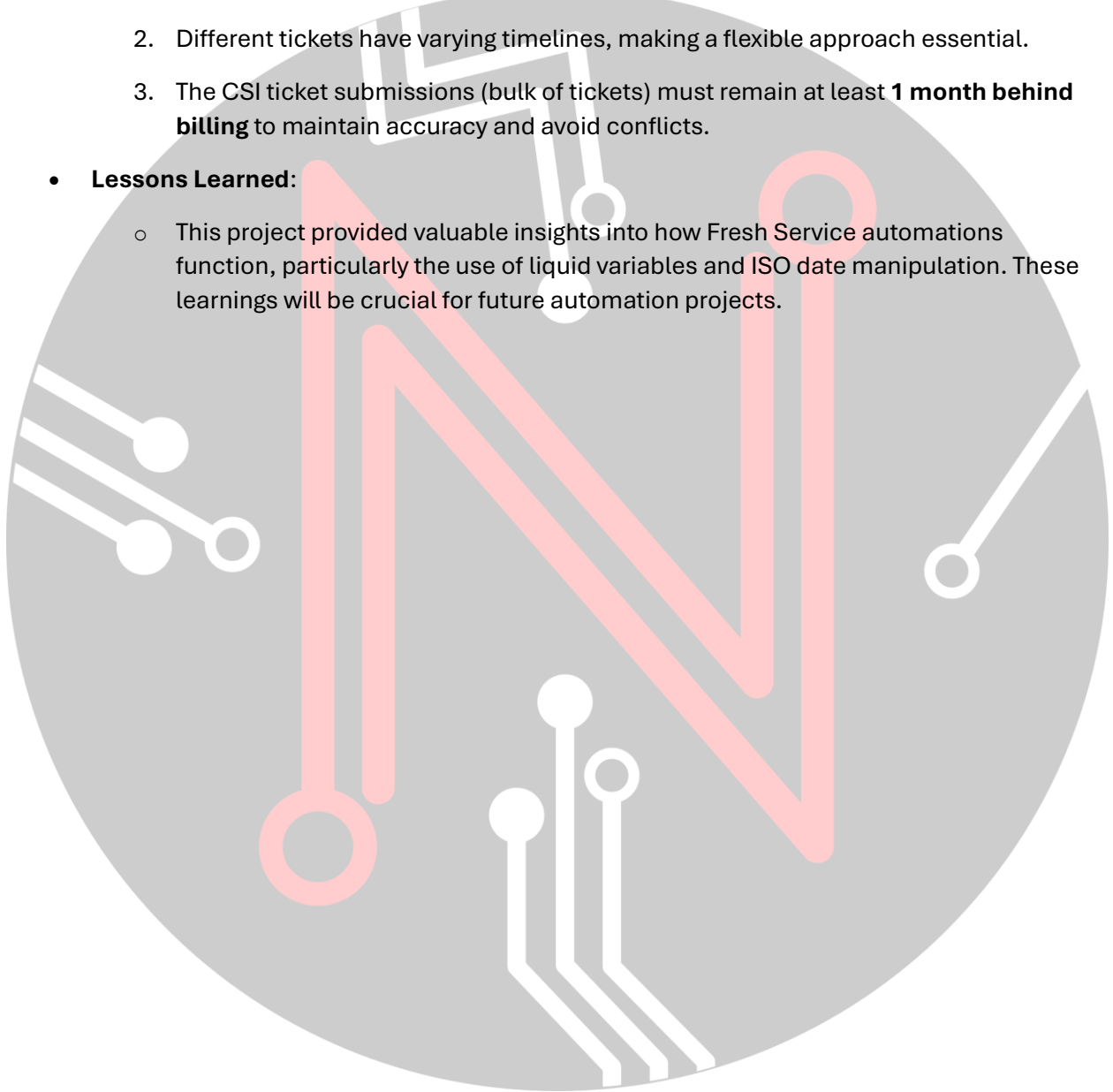
Considerations & Learnings

- **Key Considerations:**

1. Unknown how far in the future each ticket's completion may fall due to external dependencies (e.g., billing, state timelines).
2. Different tickets have varying timelines, making a flexible approach essential.
3. The CSI ticket submissions (bulk of tickets) must remain at least **1 month behind billing** to maintain accuracy and avoid conflicts.

- **Lessons Learned:**

- This project provided valuable insights into how Fresh Service automations function, particularly the use of liquid variables and ISO date manipulation. These learnings will be crucial for future automation projects.



Future Optimizations & Expansion

- **Future Projects:**
 - There are countless possibilities for expanding automation capabilities within Fresh Service. Many future projects could benefit from automating other repetitive tasks, particularly in areas with complex dependencies.
- **Optimizations:**
 - Nicholas and Sergio have brainstormed ideas to further enhance and optimize the execution of the current automation, such as better scaling across multiple users or introducing more controlled variables for refinement.

This detailed report highlights the **massive efficiency gains** and **operational improvements** brought by the automation, underscoring its potential value to the company as a tool for eliminating manual, repetitive tasks. The successful implementation not only justifies keeping the **Fresh Service platform** but also opens the door for further innovative use of automation to streamline work processes.



Pictures with key information

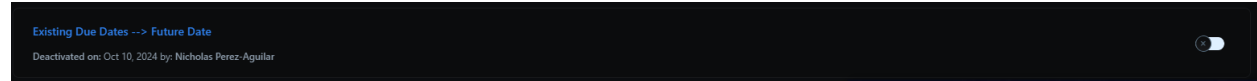


Figure 1: Outer Level Automation with Active Toggle

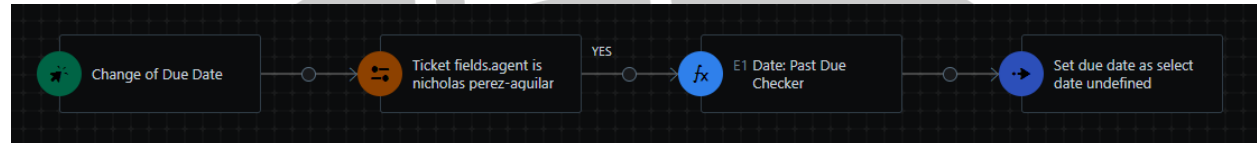


Figure 2: Workflow of Automation: High Level

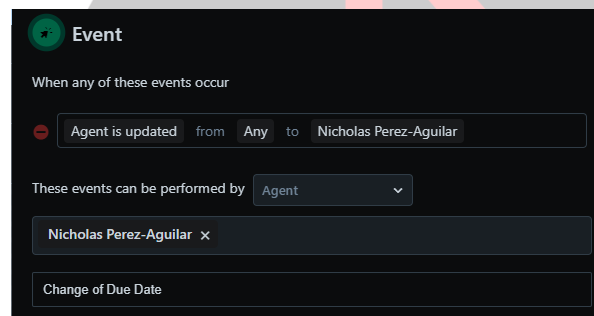


Figure 3: Workflow Details (Example 1) - Low Level

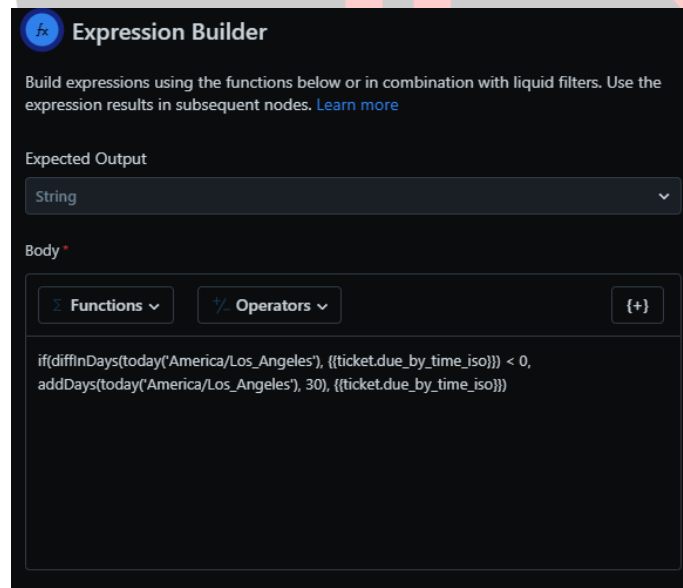


Figure 4: Logic Details (Example 2) - Low Level

KVPS > Workflow Automator > Execution Logs

Search logs

Refresh

Time	Source	Source Type	Workflow ID	Workflow Title	Status	Node details	Node Label	Job ID
Oct 10, 2024 7:51	REQ-43875	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	026127
Oct 09, 2024 11:17	REQ-40948	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	2993c4
Oct 09, 2024 11:17	REQ-40947	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	6fd45f
Oct 09, 2024 11:17	REQ-40946	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	d612ef
Oct 09, 2024 11:17	REQ-40945	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	658fe25
Oct 09, 2024 11:17	REQ-40944	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	422d43
Oct 09, 2024 11:17	REQ-40943	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	c7fa677
Oct 09, 2024 11:17	REQ-40942	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	53d21b
Oct 09, 2024 11:17	REQ-40934	Ticket	19000666386	Existing Due Dates --> Future Date	SUCCESS	if(diffInDays(today...	Date: Past Due Checker	b199ad

Figure 5: A log file of all tickets affected by automation

Request for: Self

Details Related tickets Tasks Assets Associations Approvals Activities Resolution

Description
Monthly CSI Report.

Requested items
- There are no requested items - [Add item](#)

Conversations

- System**
Added a private note a day ago (Wed, Oct 9 11:17).
Updated Due Date to reflect a more accurate timeframe for ticket completion.

Open
Priority: Low
First response due by Mon, Jun 17 2024, 12:16 - 3mon 3w
Resolution due by Fri, Nov 8 2024, 00:00 + 4w 6h
Approval: Not requested

Requester information
Compliance Officer
[View more](#)

Collaborate
[Teams](#)

Figure 6: An example ticket that was updated. Due Date advanced; Short Private Note Added.