



1.28.19 Release Notes

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Enhancements

CRM

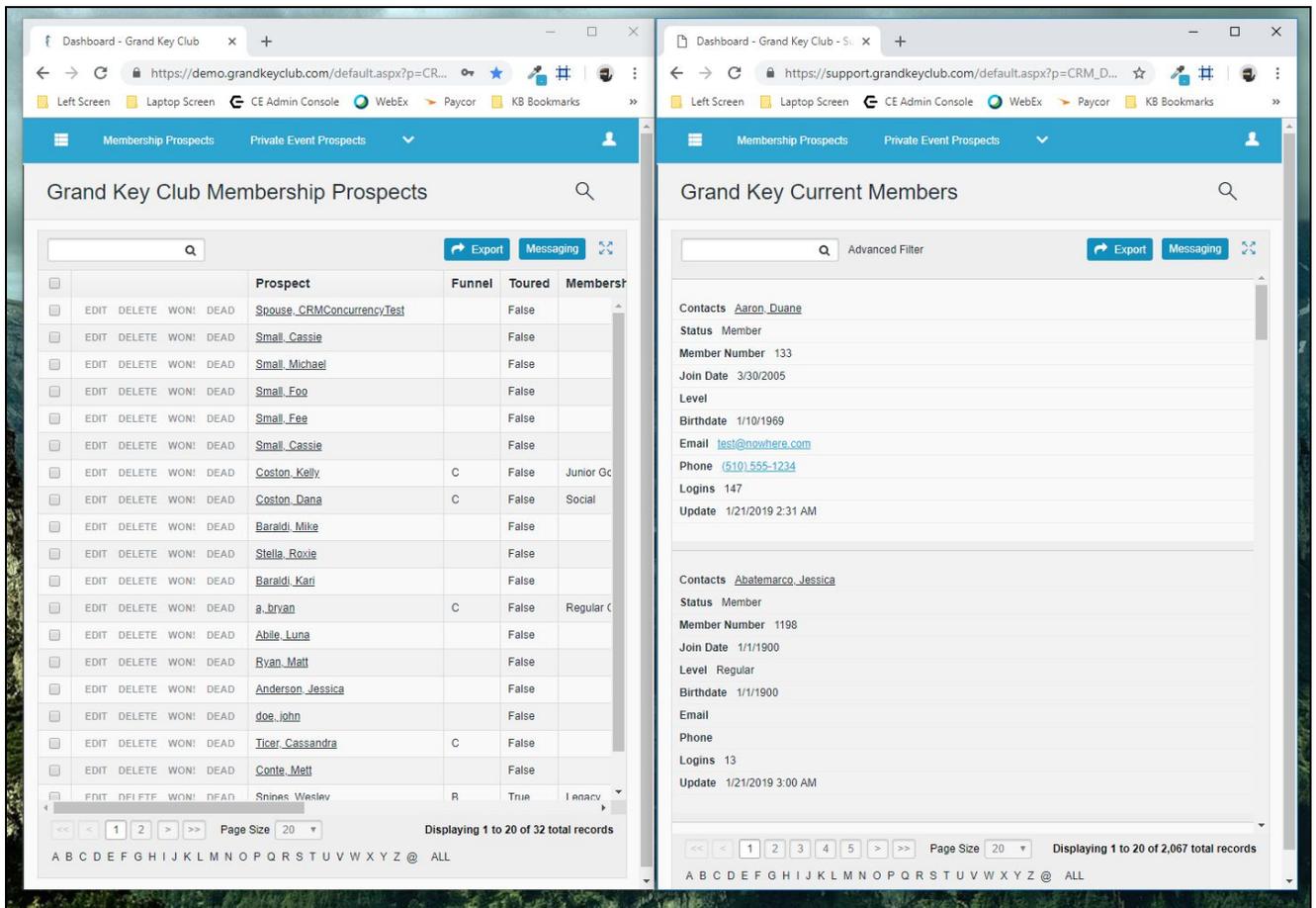
Mobile Functionality

- **Enhanced the look and feel of Mobile CRM.**

Use Case: Previously, many CRM items and navigation had been difficult to interact with on Mobile. Now, enhancements have been made regarding various sizes, positioning, padding of Menus and fonts to make touch navigation/use easier.

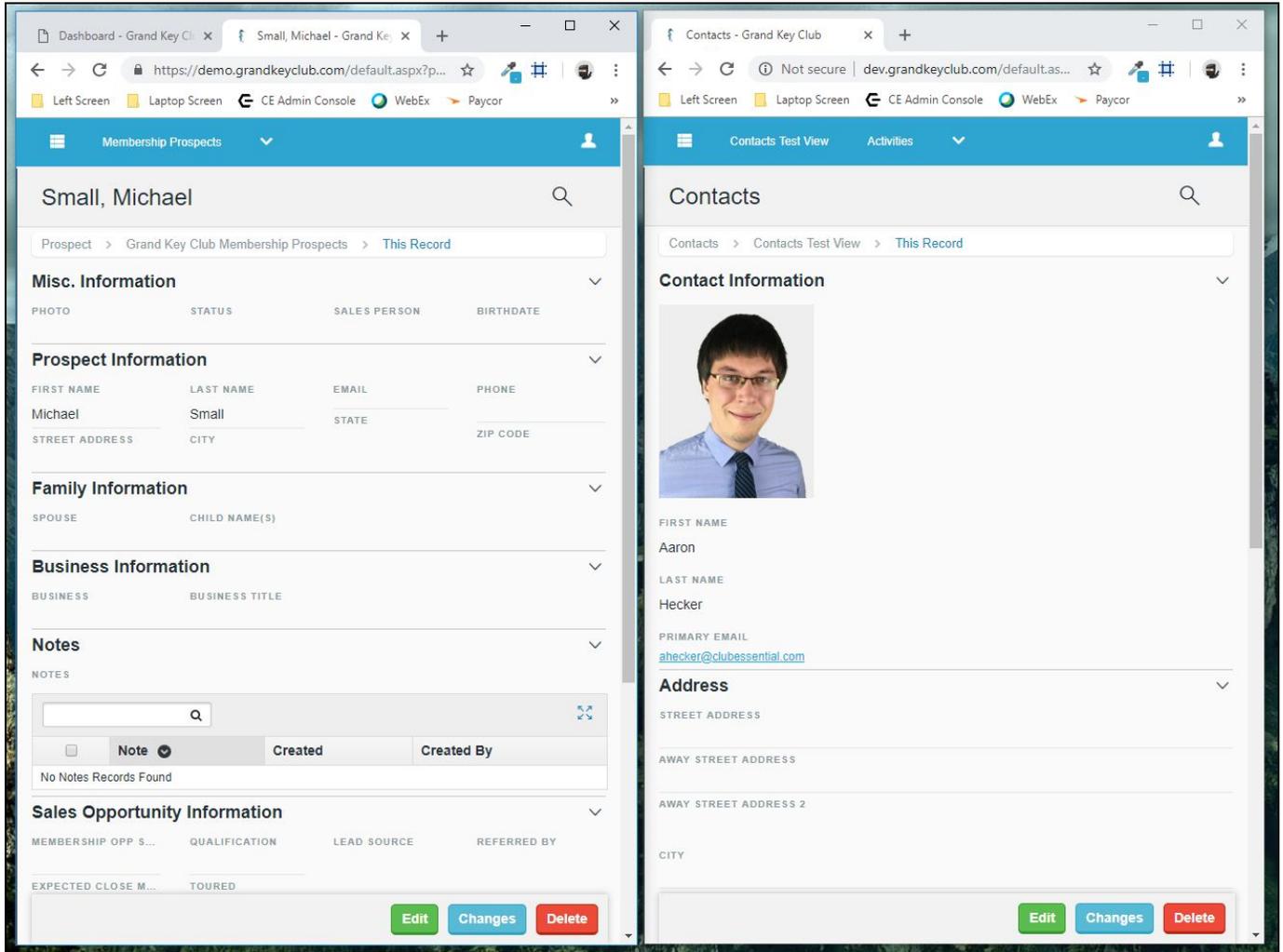
- **Streamlined Admin CRM Mobile views.**

Use Case: Previously, the CRM Admin view required horizontal scrolling to be able to view the whole screen on Mobile. Now, updates have been made to enable all data to be seen on one screen without horizontal scrolling, and create a better user experience when scanning through and selecting records. Previous mobile view (left) and current mobile view (right), shown below.



- **Streamlined Admin CRM Mobile layout.**

Use Case: Previously, Admin layouts were showing more than one column on Mobile, making it difficult to view and navigate. Now, Admin layouts fall into one column, creating a clearer User experience. Previous layout (left) and current layout (right), shown below.



View Fields Settings

- **Added functionality allows Admins to configure View Fields on Mobile.**

Use Case: Previously, Admins could not change View Fields on Mobile. Now, added functionality allows Admins to customize this feature, as seen below.

Edit View ✕

Fields

| | Column Name | Data Type | Display As | Hide On Mobile View | User Filterable | |
|---------------------------------------|------------------|-------------------------|------------|-------------------------------------|--------------------------|---|
| EDIT REMOVE | RecordName | Text | | <input type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | First_Name | Text | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | Last_Name | Text | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | Primary_Email | Email | | <input type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | Activity_History | ParentChildRelationship | | <input type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | Documents | ParentChildRelationship | | <input type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | Note_Section | ParentChildRelationship | | <input type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | Created | DateTime | | <input type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | Updated | DateTime | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | CreatedBy | CrmUser | | <input type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | UpdatedBy | CrmUser | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | ↕ |
| EDIT REMOVE | Facebook_Link | URI | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | ↑ |

Bug Fixes

- Fixed an issue when Users are working with more than one CRM record concurrently (in separate tabs), saving child records (like Notes) to one of the open records can cause all child records from one parent to move to the other record.
- Fixed an issue for Android Mobile App users where Notifications would show in their notification panel but then would not show in the app. Now, the notification will be present in the Notification section within the App and will only disappear if the User manually clears it via that notification interface.