CRM (1.30.17) Releases

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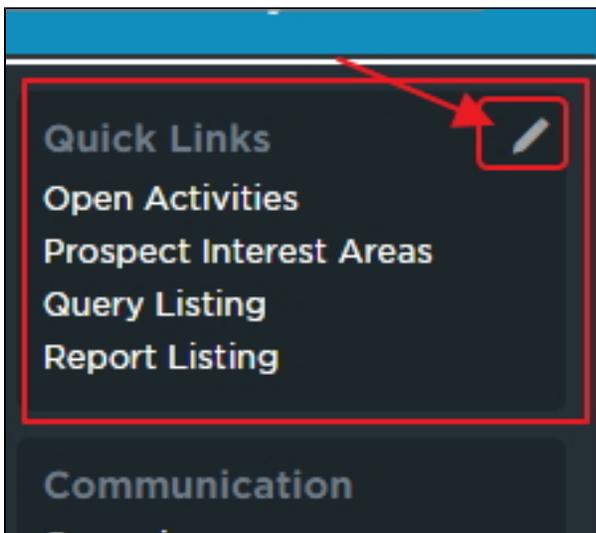- Downloadable Guide

Enhancements

Quicklinks

- **Added groupings to the Quick Links page.**

    System Admins can create new groupings and manipulate the items within the groupings from here. On the User detail screen, groupings may be assigned to an individual user. Up to that point, functionality mimics the Application Links section. There's a divergence on the User page, where a System Admin can now click a link directly below the quick link grouping selector to edit an existing user's quick links without having to impersonate that user. Additionally when the users themselves view their own quick links, and has a grouping assigned to them, they can choose to copy the grouping locally and then manipulate it further. This will break the reference back to the shared quick links, however.

    Use Case: A CRM (non-Admin) user wants to set their own Quick Links to be different than the default. User can now define what links appear in their link groupings.
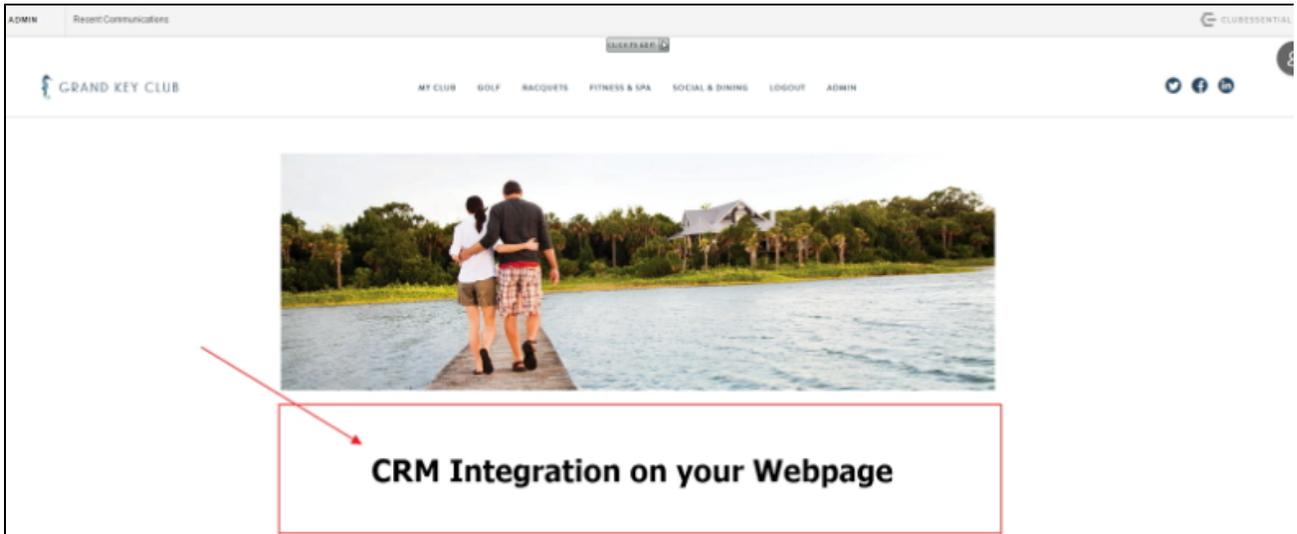
Dynamic Page Plug-In

- **Added a new Dynamic Page plugin that will allow a page to show CRM Objects, Views, Queries and Reports.**

  Use Case: Previously inserting data from the CRM in the form of a view, query, report, or other CRM object within a webpage was not possible. With this new plugin, it is now possible for Clubs to highlight data within their CRM on a webpage. For instance, a Yacht Club looking to showcase their available slips (from CRM data) on a webpage to their Members, can now do so! With Formbase, it is even possible to allow Members to request available slips. This is just one of the many use cases envisioned for this enhancement.

Bug Fixes

- Fixed an issue where large views with a Reference field type would load very slowly. Optimized the way these views are loaded to greatly improve performance.

- Fixed an issue with iPad modal dialog boxes working improperly when scrolling horizontally.

- Fixed an issue where the Rich Text field type was not supported in API sync.

- Fixed performance issues with email delivery resulting in significantly faster outbound email queue processing.

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