G 1.28.19 Release Notes

Enhancements

<u>CRM</u>

Mobile Functionality

View Fields Settings

Bug Fixes

Enhancements

CRM

Mobile Functionality

• Enhanced the look and feel of Mobile CRM.

<u>Use Case</u>: 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.

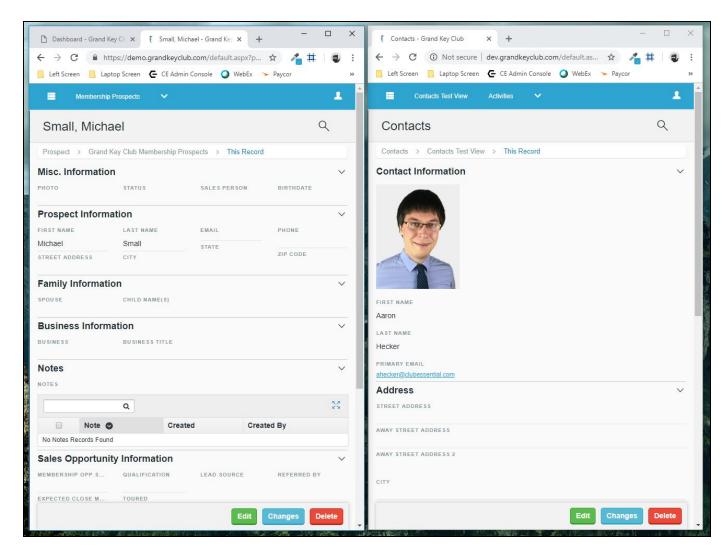
• Streamlined Admin CRM Mobile views.

<u>Use Case</u>: 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.

Lef	t Screen 📙 Laptop Screen 🧲	• CE Admin Console 🥥 WebEx 🤝	Paycor	KB Bookm	narks »	📑 Left Screen 📑 Laptop Screen 🧲 CE Admin Console 🥥 WebEx 🥆 Paycor 📑 KB Bookmarks
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Эr	and Key Club Mer	mbership Prospects			Q	Grand Key Current Members
	٩		A Expor	t Messa	iging 🔀	Q Advanced Filter
		Prospect	Funnel	Toured	Membersh	
	EDIT DELETE WON! DEAD	Spouse, CRMConcurrencyTest		False		Contacts Aaron, Duane
	EDIT DELETE WON! DEAD	Small, Cassie		False		Status Member
	EDIT DELETE WON! DEAD	Small, Michael		False		Member Number 133
	EDIT DELETE WON! DEAD	Small, Foo		False		Join Date 3/30/2005
	EDIT DELETE WON! DEAD	Small, Fee		False		Birthdate 1/10/1969
	EDIT DELETE WON! DEAD	Small, Cassie		False		Email test@nowhere.com
	EDIT DELETE WON! DEAD	Coston, Kelly	С	False	Junior Gc	Phone (510) 555-1234
	EDIT DELETE WON! DEAD	Coston Dana	С	False	Social	Logins 147
	EDIT DELETE WON! DEAD	Baraldi, Mike		False		Update 1/21/2019 2:31 AM
	EDIT DELETE WON! DEAD	Stella. Roxie		False		
	EDIT DELETE WON! DEAD	Baraldi, Kari		False		Contacts Abatemarco, Jessica
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	EDIT DELETE WON! DEAD	Abile, Luna		False		Member Number 1198
	EDIT DELETE WON! DEAD	Ryan, Matt		False		Join Date 1/1/1900
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• Streamlined Admin CRM Mobile layout.

<u>Use Case</u>: 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.

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

ields						
	Column Name	Data Type	Display As	Hide On Mobile View	User Filterable	
EDIT REMOVE	RecordName	Text				\$
EDIT REMOVE	First_Name	Text		(\$
EDIT REMOVE	Last_Name	Text		\$		\$
EDIT REMOVE	Primary_Email	Email				\$
EDIT REMOVE	Activity_History	ParentChildRelationship				\$
EDIT REMOVE	Documents	ParentChildRelationship				\$
EDIT REMOVE	Note_Section	ParentChildRelationship				\$
EDIT REMOVE	Created	DateTime				\$
EDIT REMOVE	Updated	DateTime		×.		\$
EDIT REMOVE	CreatedBy	CrmUser				\$
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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.