03.20.17 CRM Releases

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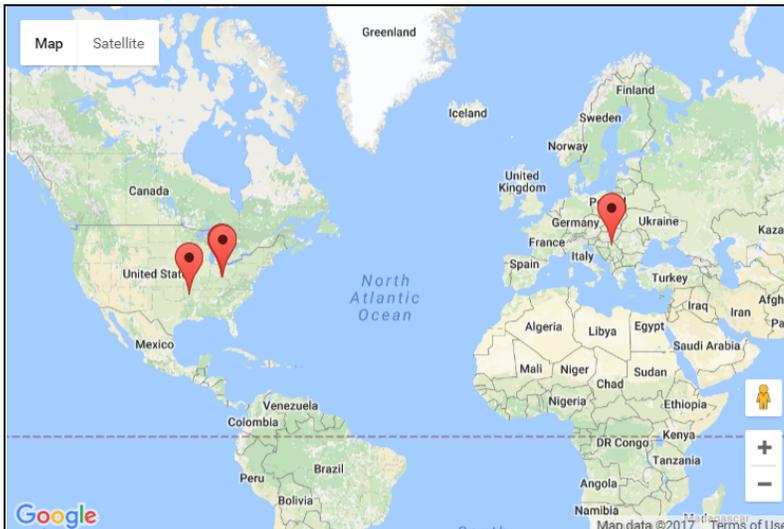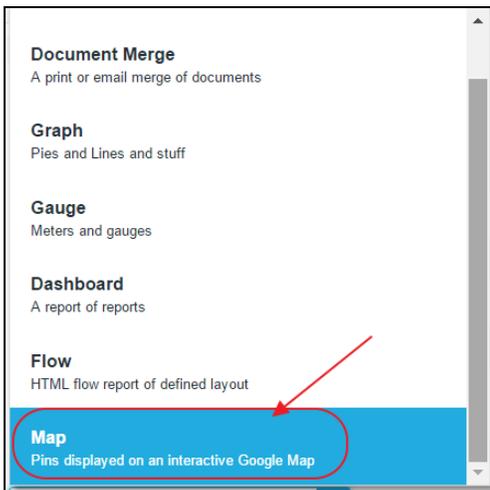
Enhancements

Reports

- **Added Map report type, allowing pins to be displayed on a Google Map of address data fed from the CRM. Report takes in a CRM query and can display additional data about the record in a Google Maps InfoWindow.**

  Use Case: Visually see the results of your Query now displayed on a map; for example, where your Prospects are located.

- **Added ability to use Query variable functions in Flow, Merge, and Graph report types.**

  Use Case: Now, save time by having results auto-filtered based on log-in criteria. For instance, if I am a Salesperson, and I always want to see results for my prospects, the system now responds to know that I am logged in, and will display only my results, yet provide me with an opportunity to alter the filter if I choose. As a Sales Manager, I could choose the Individuals or Areas I wish to see, and results will display based on selection. Previously, multiple queries would have been needed to satisfy these requests, however, with this enhancement, only one query is needed, and filters applied change data returned in reports.

Layout Builder

- **Added option to Layout Builder to specify if a Child relationship grid should display All or a Subset of records. By default only the first 5 will still be displayed unless a custom sort or filter is selected in the grid. Replaces former method of displaying only the top 5 records in all scenarios.**

  Use Case: For a Club who has multiple notes (child) under Prospect Notes (Parent), with a sort and/or filter applied, now view all notes for the prospect with sort applied (if any), rather than displaying only (5) records.

Bug Fixes

- Fixed an issue with the Campaign Recipient Detail where a dialog would error when attempting to display Query data.
- Fixed an issue with Query Variables that could reset their display in certain refresh scenarios.
- Fixed an issue where users had the ability to paste inline images in CRM HTML editors.
- This change ensures consistency with core Website HTML Editor.
- Fixed an issue when merging records. In some specific cases the record being chosen to keep could be linked to itself in a relationship.
- Fixed an issue where the campaign target can be saved multiple times.
- Fixed an issue with the CSS in the CRM Display Plugin which would cause no records to display.