

# 05.15.17 CRM Release

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# Enhancements

## Trigger - Button

- **Ability to perform multiple actions within a single click using triggers.**


Use Case: This functionality will provide CRM users the ability to click a button, and have a workflow complete. There are numerous possibilities for the use of this tool. One of the anticipated uses of this feature will be to insert a **Close button** on each row of an activity list, and instead of having to perform the steps of entering the activity list, editing the activity, changing the status in the drop-down to closed, clicking save, and exiting to the original list again to see the next activity, users may now stay on the summary read-only view, and click **Close** to launch the “closed” workflow for any activity selected.

**Triggers**

[+ Add New Trigger](#)

	Name	Description
<a href="#">EDIT</a>	Prompt to Create Another	DISABLED LOGIC = If isNewRecord Then Return True Else Return False End If

**My Follow Up Activities**

[Export](#) [Messaging](#) [Add New Activity](#) 

		Related Contact	Activity Status	Activity Type	Due Date	Assigned To
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">CLOSE</a>	<a href="#">Khaligov, Victoria</a>	Open	Call to check status	5/5/2017 11:00 AM	<a href="#">Zach Larabee</a>
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">CLOSE</a>	<a href="#">Luce, Norm</a>	Open	Comp round of golf	5/11/2017 8:00 AM	<a href="#">Rick Coffey</a>
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">CLOSE</a>	<a href="#">Ling, Susan</a>	Open	Touch base	5/18/2017 9:00 AM	<a href="#">Karen Kaplan</a>
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">CLOSE</a>	<a href="#">Nixon, Richard</a>	Open	Call	5/24/2017 11:00 AM	<a href="#">Rick Coffey</a>
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">CLOSE</a>	<a href="#">Williams, Leslie</a>	Open	See about signing	5/24/2017 1:00 PM	<a href="#">Karen Kaplan</a>

## Trigger - Link

- **Ability to include a link that will update the values of a CRM record by inserting a special link.**

Use Case: Similar to the above functionality, instead of embedding a Workflow into a button, the Workflow could also be embedded into a link and used in conjunction with the Campaign tool. For instance, if the Club had an upcoming Prospecting event with allotted spaces of 50 people, the Club could email Prospects, with a Link to indicate “I am planning to attend”. Once the link was clicked, the workflow would occur to update the CRM record.

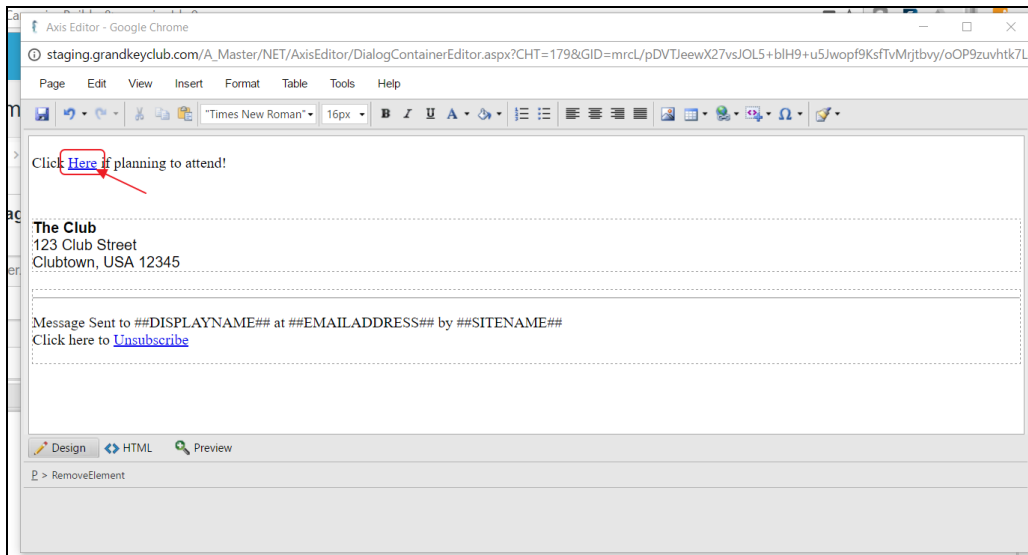
### Triggers

[+ Add New Trigger](#)

Name	Description
<a href="#">EDIT</a> test	

The screenshot shows the Axis Editor interface for creating a new email campaign. A dialog box titled "Insert Special Link" is open, listing several link options: "Print this HTML", "Send HTML to a Friend", "Send Link to this Page to a Friend", "Share this Page", "Top of Page", and "CRM Action Link". A red arrow points to the "CRM Action Link" option. The background shows the email content editor with a preview of an email from "The Club" (123 Club Street, Clubtown, USA 12345) containing a placeholder for a link and a "Unsubscribe" link.

The screenshot shows the Axis Editor interface with the "Insert CRM Action Link" dialog box open. The dialog has a "Select Action" section with a dropdown menu set to "Contact". Below this, there is an "Action" dropdown menu set to "test" and a "Create Link" button. A red arrow points to the "Contact" dropdown menu. The background shows the email content editor with the same preview as the previous screenshot.



## Bug Fix

- Record ID Unset when sending to a view based target with no snippets in the html content.