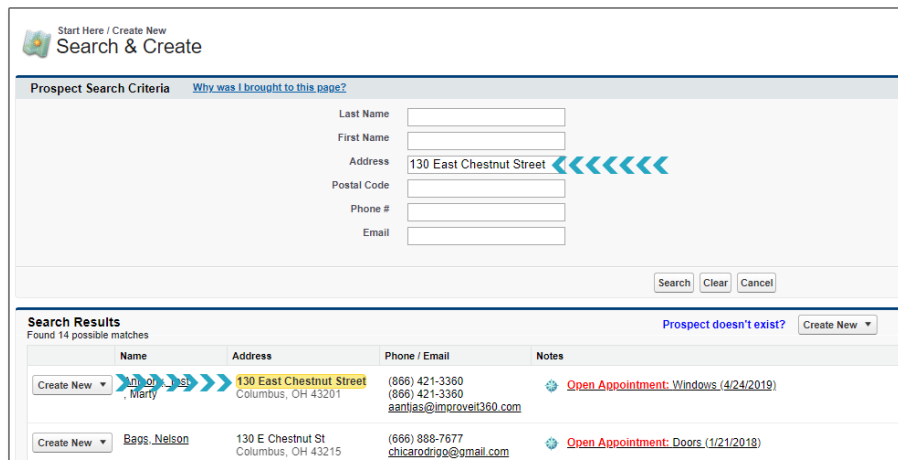Desktop GA Release Date: 5/22/2019

improveit 360 Pro – version 27.5
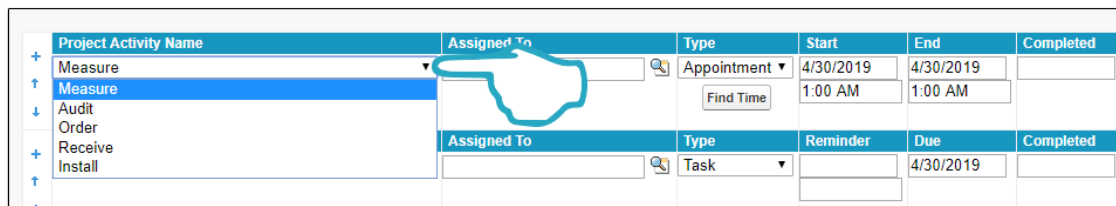**improveit 360 Ent** – version 24.3

Product Enhancements

- Full street address search when using Search and Create
  - When using Search and Create, the search will now perform a full text search on Street Address ensuring that all results are returned when a street number and street name are provided

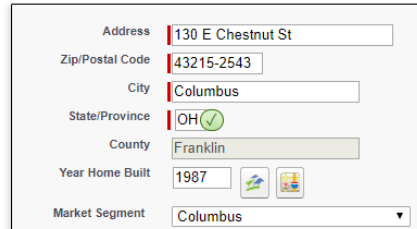- Picklist option for Project Activity Name
  - This new custom setting allows Admins to predefine their Project Activity Names via a global picklist allowing their Users to select the names via a dropdown when creating Project Activities or Project Templates. Once activated, no data will be lost historically, all new Project Activities will only be able to be named with the values defined in the global picklist
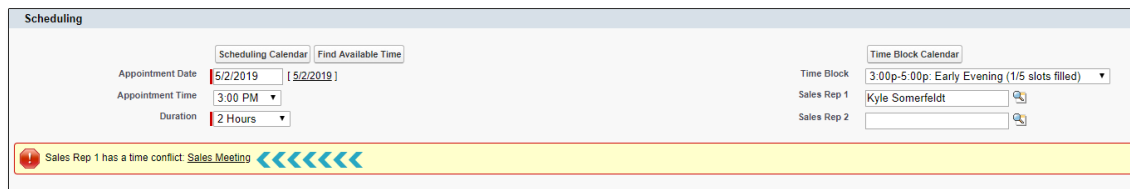
- Smarty Streets auto verify on page load
    - For Orgs with the Smarty Streets integration activated, addresses on the Prospect and Appointment pages will now verify automatically when the page is edited

- Event conflicts when assigning Sales Reps to Appointment
    - When assigning a Sales Rep to an Appointment (Sales Rep 1 & 2), a conflict message will appear if the Sales Rep(s) has an event on the calendar at the same time as the Appointment being assigned

- Support 100 Quote Items, Sale Items and Purchase Order line Items
    - The system will now support Quotes, Sales and Purchase Orders with 100 items
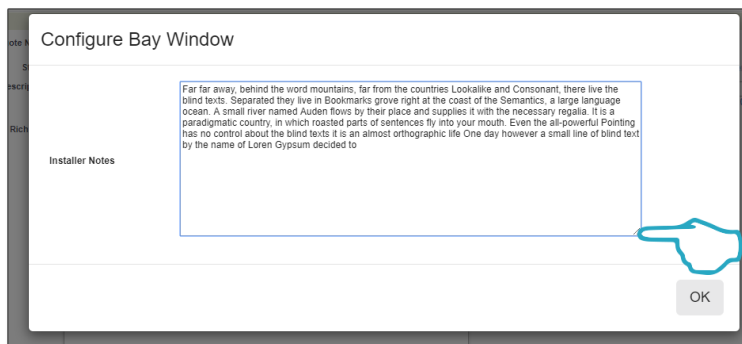
- Time Block Manager increased performance
    - To further increase the performance of page loading and navigation when using the Time Block Manager, the modal that appeared when clicking on a Time Block record via the Time Block Calendar has been removed and replaced by opening the Time Block record in a new tab. This change increased page load and page navigation drastically while preserving all necessary functionality

- Resize configuration text boxes
    - When configuring a Product on a Quote or Sale record, configurations of type text can now be expanded by dragging the bottom right hand corner

- Support Widget -> Close cases
  - o Admins now have the ability to close cases via the Support Widget
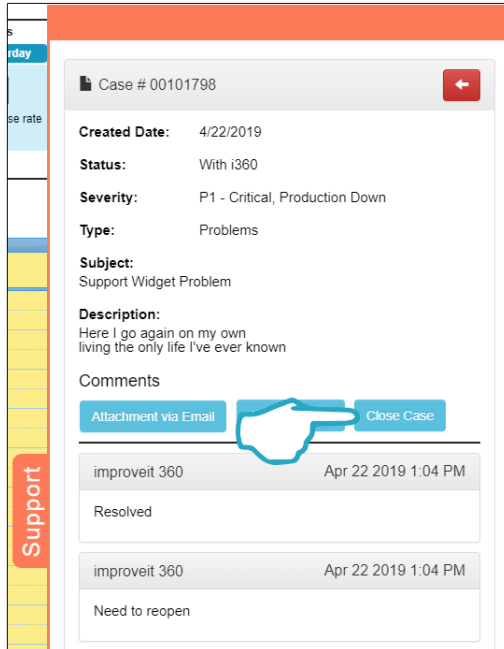
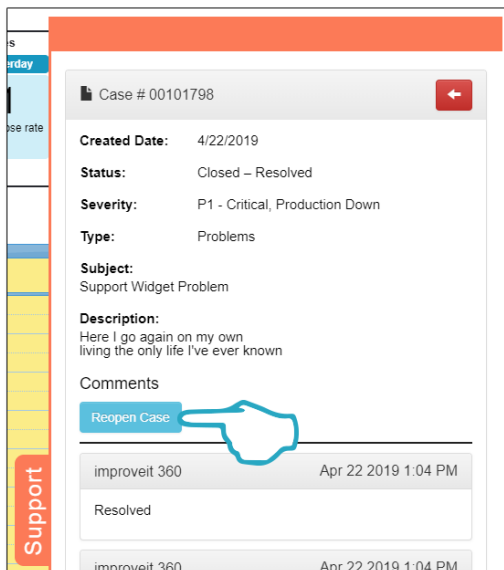- Support Widget -> Open closed cases
  - o Admins now have the ability to open cases previously closed via the Support Widget
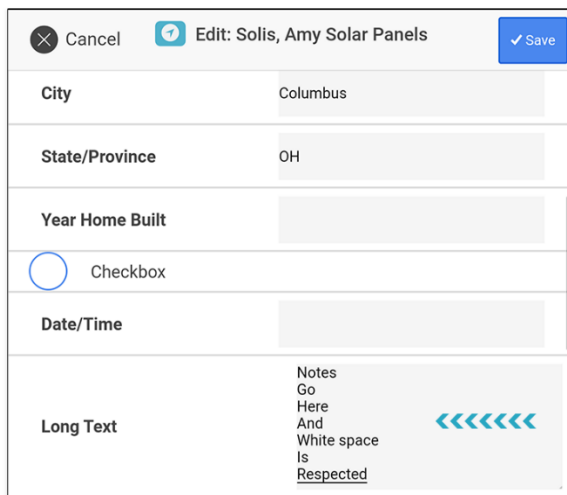
Production Defects Fixed

- Appointment Cancelation Emails not sent to Prospects when disregard in statistics is set to true
- Appointment 'Source Type' not updating when Lead Source 'Source Type' updated
- Appointment notification banner displayed when sales reps opt out of email notifications
- PaySimple 'Amount' displays as invalid when 'Amount' is changed from default value
- Staff Latitude and Longitude not updating when Staff Address changes
- Staff with 'End Dates' able to be scheduled via Scheduling Calendar
- Multi Day Events set to 'All Day Event' do not appear on the last day on the Scheduling Calendar
- Images attached to Quote records do not appear in Image Carousel on related objects
- Project Activities require a start and end date validation error. When a Project Activity is saved via a Project record with an end date and no start date, errors are thrown when the Project is subsequently edited. The system will now automatically set the start/end date if it is blank and the corresponding date is filled in with the same date
- Sales Reps receiving Appointment emails when 'no formal Sales Appointment' is check when creating a 'Prospect & Sale'
- Receipt and Adjustment Validation Rule Error handling. Validation Rules active on the Receipt and Adjustment object now display errors as expected
- When a Sale is canceled, hovering your mouse over the 'Status Date' fields resulted in a thinking cursor
- Images attached to Project Activity records do not appear in Image Carousel on related objects
- Canadian Geocoding Support
- Selecting a Sales Rep via Scheduling Calendar from the Call Queue does not insert Staff into Sales Rep 1 or Sales Rep 2
- Rich Text field causes error in Call Queue when setting Appointment. This has been confirmed as a Salesforce limitation. Rich Text fields should not be placed in any Appointment field set if Users set Appointments via the Call Queue
- Prospect information not wrapping causing data to be hidden when long URLs are in Lead Source Interest Descriptions when accessing via the Call Queue
- Sales Rep 2 not editable on Sale Edit page
- Sales Rep(s) unavailable in Time Block Manager when assigned a Canceled Appointment
- Time Block Calendar displaying Time Blocks assign to Market Segments of similar name when filtering by Market Segment

Mobile Release Date: 5/22/2019

improveit 360 Go Mobile App – version 2.8.0

Product Enhancements

- Allow text boxes to be resized
  - White Space is now respected in all text fields. When Users add a carriage return, text boxes will automatically resize and display more rows as needed

Production Defects Fixed

- Project Activities disappearing when refreshing calendar
- Custom Date fields updated when custom Rich Text field is updated
- Multi Day Events not spanning all days in mobile calendar
- Updating Project Activity records with cross-object formula in the field set results in error
- iOS devices crash when selecting to use camera when uploading a photo
- Creating Quote via mobile requires refresh before Quote is available in related list
- Merge Templates do not update when Quote Items are updated via mobile
- Uploading Images and files does not preserve the file extension in the file name