



improveit 360

Summer 2018 Product Release Notes

Pro GA Release Date: 6/18/2018
Mobile Release Date: 6/18/2018

improveit 360 Professional Edition – version 25.4

Product Enhancements

Area of Focus: Appointment Scheduling

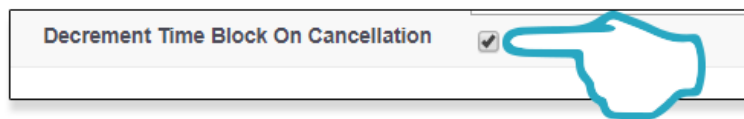
- Add Start and End Date to Time Blocks
 - When Repeating Time Block records were created, the Time Blocks were created indefinitely into the future. This caused considerable maintenance for those who run Appointments selectively throughout the year. With the implementation of start and end ranges, you can now define the date range in which Repeating Time Blocks are created. This will reduce the need to selectively delete Time Block records.

The screenshot shows the 'New Repeating Time Block' form. The title bar reads 'Repeating Time Block Edit' and 'New Repeating Time Block'. The form has a 'Save' and 'Cancel' button at the top right. The main section is titled 'Repeating Time Block Edit' and contains the following fields:

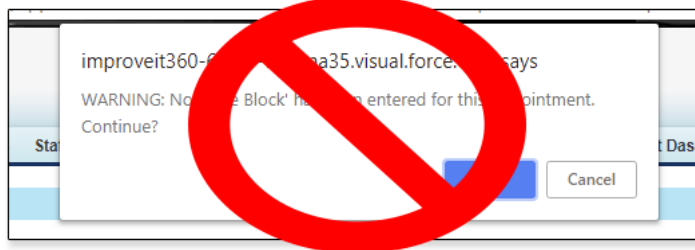
- Repeating Time Block Name:** Summer Weekday Windows
- Days of Week:** A list of days with 'Available' and 'Chosen' columns. Available: Sat, Sun. Chosen: Mon, Tue, Wed, Thu, Fri.
- Start Time:** 8:00 AM
- End Time:** 5:00 PM
- Start Range:** 6/1/2018 8:00 PM [6/8/2018 2:57 PM]
- End Range:** 8/31/2018 5:00 PM [6/8/2018 2:57 PM]
- Issue Rate (%):** 100
- Available Sales Reps:** 5
- Market Segments:** Available: (empty). Chosen: Cincinnati, Cleveland, Columbus.
- Product Categories:** Available: Direct Energy Diodes, Doors, Gutters. Chosen: Windows.

At the bottom right, there are 'Save' and 'Cancel' buttons.

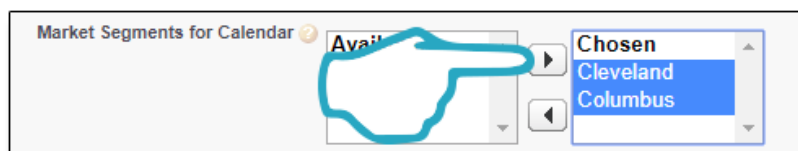
- Remove Appointment from Time Block if Appointment is resulted as Canceled
 - When an Appointment assigned to a Time Block was resulted as Canceled, the Appointment remained assigned to the Time Block and did not allow another Appointment to be booked. With the new custom setting activated, Canceled Appointment will be removed from their associated Time Block. This will open a slot in the Time Block for another Appointment to be assigned.



- Remove 'No Time Block has been selected' pop-up
 - For systems using Time Block Scheduling. If Users do not have access to Time Block records, the 'No Time Block has been selected' pop-up is suppressed. This is particularly helpful for One-Org clients and those using sharing rules to share records based on ownership.



- Advanced Calendar Market Segment Sharing
 - For systems using Market Segments. Though Users are assigned directly to Market Segments, Users could still view Market Segment values on the Staff Calendar they were not assigned to. With a new custom setting and picklist on the User you can ensure Users only see the Market Segments they are assigned on the Staff Calendar.





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- Display Staff Score in Find Available Time on Appointment and Project Activity
 - For systems displaying the Staff Score on the Staff and Scheduling Calendar, the Staff Score is now available when clicking on the 'Find Available Time' feature when scheduling an Appointment or Project Activity.

The screenshot shows the 'Find Available Time' window with filters for Duration (2 Hours), Date Range (6/11/2018 + 10 days), and Staff Capabilities (Sales). A modal window is open for Tuesday, July 28, 9:30a-11:30a, displaying a table of staff members and their availability for two representatives (Rep 1 and Rep 2).

Staff Name	Rep 1	Rep 2
Alyssa Biederman (100.0)	Available	Available
Anthony Adams (98.0)	Not Available	Not Available
Ashley Essig (95.0)	Not Available	Not Available
Bob Smith (91.0)	Not Available	Not Available
Chad Kelly (88.0)	Not Available	Not Available
Chris Evans (88.0)	Not Available	Not Available

- When saving a Repeating Time Block record, the system would redirect you to the Time Block Calendar. This inefficiency has been resolved and you will now be redirected the Repeating Time Block list view.
- When navigating the Time Block Calendar and adding a new ad-hoc Time Block, the system would direct you to the current month. This inefficiency has been resolved and you will now be directed to the last month that was viewed.



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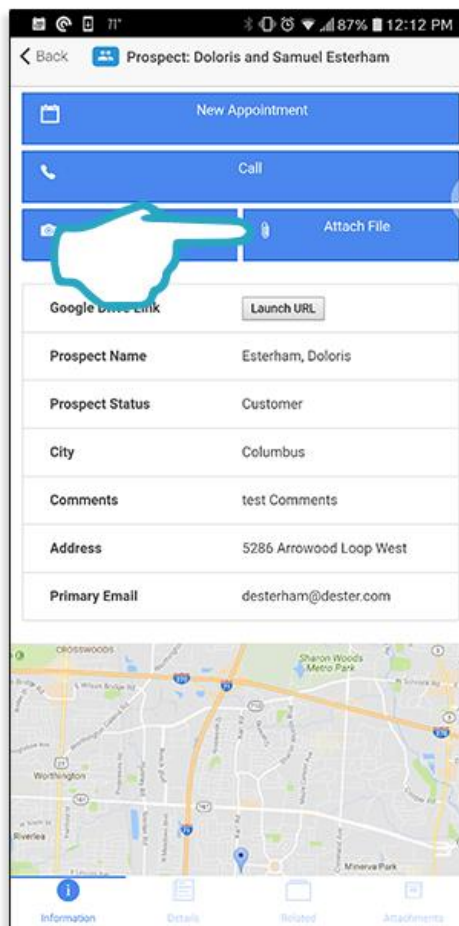
Production Defect Fixes

- Redirect to Department Dashboard after editing record
 - When editing a record via a list view within a Department Dashboard, Users are sent back to the Department Dashboard.
- When a Sale Item had 2 values to the right of the decimal, Users were unable to cancel the Sale
- When adding configuration options to a Product, config options with long names caused Custom Rules columns to overlap
- The "Help for improveit 360" custom link on the home page was not redirecting to help.improveit360.com
- The Sale 'Total' field was not rounding consistently when Sales Tax was calculated
- For clients utilizing Smarty Streets, the Appointment Latitude and Longitude values were being calculated from the Prospect Address
- When Users updated Sale records, the Sold Price reverted to \$0
- Appointments times displaying on Staff Calendar based on the time zone of the last User who modified the record
- When viewing a Time Block record via the Time Block Calendar, the 'Edit Series' button label reads 'Edit this day only'
- The "eLearning Videos" custom link on the home page takes 1 minute plus to load

improveit 360 Go Mobile App – version 2.6.0

Product Enhancements

- Upload Any File via iOS and Android
 - Files of any extension are now able to be uploaded on devices running iOS and Android. ****Only supports iOS 11 or greater****

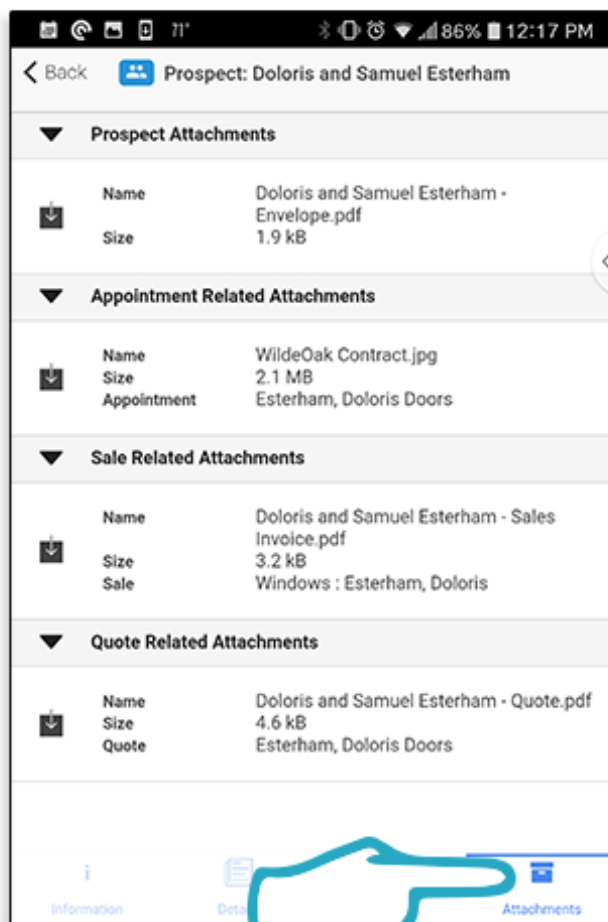




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- Display all attachments associated with a Prospect on a single page in Mobile
 - Users can access a list of all attachments, organized by object, from the Prospect record.





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Production Mobile Defect Fixes

- When the Sales Rep 1 field is updated on the mobile app, the system will now send the appropriate emails to the newly updated Sales Rep as well as the old Sales Rep
- For systems using Time Block scheduling, Sales Rep 1 and Appointment Time are no longer required when setting an Appointment from the mobile app
- For system with Rich Text fields in the Project Activity field set, double quotes (") displayed incorrectly in mobile app
- When viewing calendar Events within the mobile app calendar 'Day' view, calendar Events scheduled later in the day would not consistently appear
- For systems using Quote Template with Products including required configuration options, Users were able to save Quotes without filling out all required configuration options
- When saving a Quote with a 'Valid Until' Date, the date was not saving on Quote records in the mobile
- When saving a Quote Item with an associated Merge Template, the Merge Template was not saving values when created via the mobile app
- When resulting Appointments via the mobile app and creating a Marketing Opportunity, Users were not able to select a Marketing Opportunity Type Detail
- Prevent duplicate staff records from being created when Users login to the mobile app