

Pro GA Release Date: 12/03/2018
 Mobile Release Date: 12/03/2018

improveit 360 Professional Edition – version 26.0

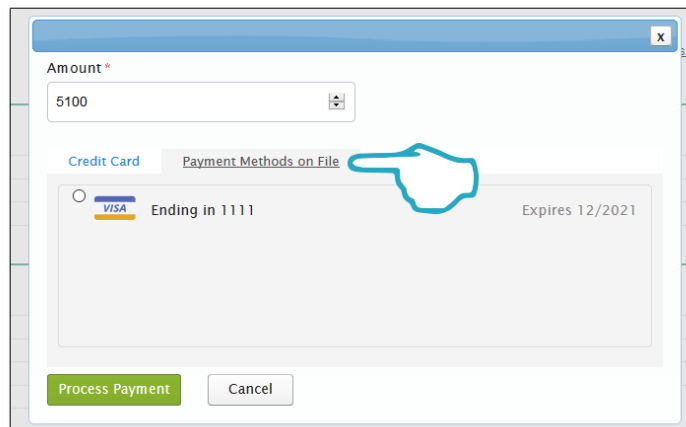
Product Enhancements

Area of Focus: System Stability

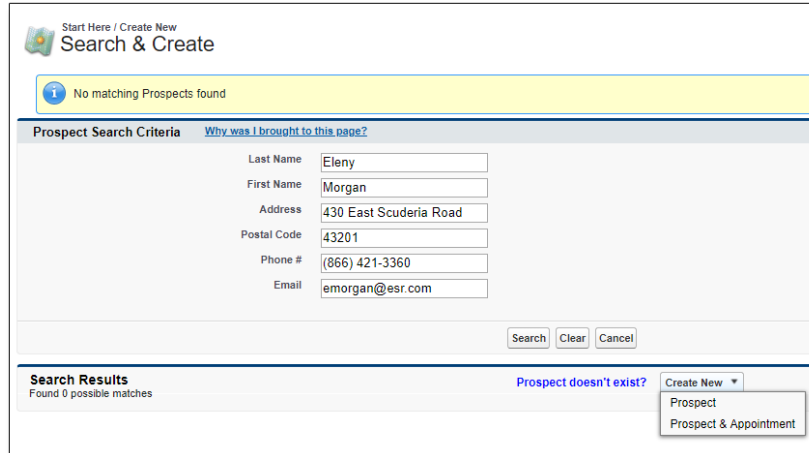
- Organize information in Staff Calendar Appointment blocks
 - Information on Staff Calendar blocks are now displayed on separate lines making meaningful information easier to access.

Mon Aug 20	Tue Aug 21	Wed Aug 22
<p>🔧 Install Teddy and Lucile Roosevelt (614) 221-5515(Primary Mobile) 8558 Haleigh Woods Dr Blacklick 43004-7140 Wall Support</p> <p>🌟 11:30a-3:30p Marissa Morgan (772) 772-8293 2272 Beck Rd Yellow Springs 96224 Sunrooms, Doors, Windows, Tile & Grout</p>	<p>🌟 10a-12p Don Biggles (866) 421-3360(Primary Mobile) 130 East Chestnut Street Columbus 43201 Lawn Service</p> <p>🌟 1p-3p Timothy Elderson (883) 764-74511(Home) (857) 635-43456(Mobile) (887) 615-25787(Work) 130 E Chestnut St Columbus 43215-2543 Roofing</p>	<p>🌟 9a-10:30a Melinda Harchuck (614) 924-0568 6605 Flowerdale Cleveland 44144 HVAC Service</p> <p>🌟 1p-3p Raymond Lasetta (829) 172-13152(Home) (857) 247-38284(Mobile) (866) 949-51676(Work) 130 E Chestnut St Columbus 43215-2543 Wall Support</p>

- PaySimple stored payment method (Card on File)
 - Store credit card information via the PaySimple integration within i360, making it easier to process future payments.



- Errors when creating Prospect & Sale
 - For systems with custom processes and triggers contributing to errors when creating a Prospect & Sale, a new custom setting is available to remove the Prospect & Sale option.



The screenshot shows a web interface for searching and creating prospects. At the top, it says "Start Here / Create New" and "Search & Create". A yellow banner indicates "No matching Prospects found". Below this is a "Prospect Search Criteria" section with a link "Why was I brought to this page?". The search criteria include: Last Name (Eleny), First Name (Morgan), Address (430 East Scuderia Road), Postal Code (43201), Phone # ((866) 421-3360), and Email (emorgan@esr.com). There are "Search", "Clear", and "Cancel" buttons. Below the search criteria is a "Search Results" section showing "Found 0 possible matches". A link "Prospect doesn't exist?" is present, along with a "Create New" dropdown menu. The dropdown menu is open, showing options: "Prospect" and "Prospect & Appointment".

Production Defects Fixed

- Create New Prospect refreshes page instead of navigating to quick action
 - When adding a new Prospect and clicking 'Create New' and selecting 'Prospect', the page would often refresh and not redirect you to the new Prospect page.
- 'Time Block Validation Error: Value is not valid': error when saving Appointment
 - When assigning a Time Block to an Appointment or updating an existing Appointment with a Time Block, an error would display when clicking 'Save'. The Time Block would no longer be associated with the Appointment requiring the Time Block to be selected again.
- Duplicate Time Blocks being created
 - When a Time Block was selected on an Appointment record, depending on the state of the Time Block record in the database, the Time Block record would be duplicated.
- Updating Repeating Time Block Time does not update Time Blocks
 - When a Repeating Time Block's Start and End Time are updated, the future Time Block records were not updated.
- PaySimple ACH Payment returning 'failed' transaction when successful
 - Processing an ACH payment through the PaySimple integration would return a Receipt and Adjustment record for \$0 with a status of failed transaction though the payment was successful.
- Search & Create fields push out of bounds in Firefox
 - When viewing the home page using Firefox, the fields within the Search & Create box pushed off to the left of the screen.
- Only display Support Cases to system champion in Support Widget
 - Users other than the Admin Users were able to view Support Cases through the Support Widget.
- Adding Product Categories in Settings tab not updating Staff Capabilities
 - When new Product Categories were added from the Settings tab, the values were not automatically added to the Staff Capabilities fields on the Staff Object.



Fall 2018 Product Release Notes

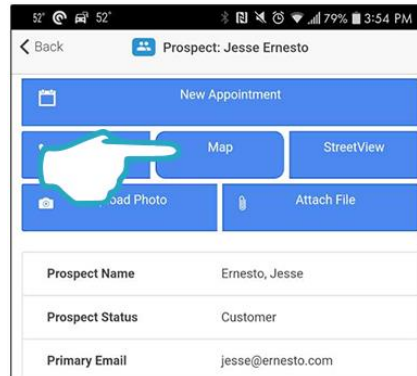
v1 11/6/2018

- Unlocking Campaign Members via list view did not unlock Campaign Member
 - When using the Campaign Member 'All Locked Records' view, selecting records and clicking the 'Unlock' button was not unlocking the Campaign Members.
- Sales Rep Appointment notification banner displaying when Appointment is updated
 - When an Appointment was updated and saved, the notification banner confirming an email was sent to the assigned Sales Rep was displaying when no emails were being sent.
- Encode champion names in for Support Widget so invalid JavaScript isn't generated
 - For Admin Users with special characters in their First Name or Last Name the Support Widget was not loading.

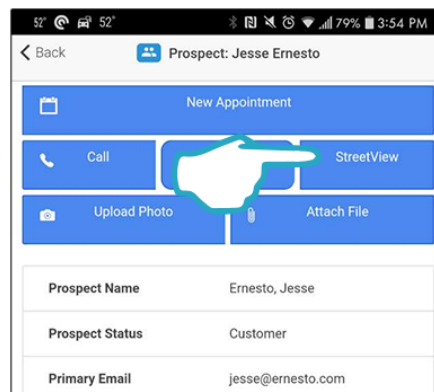
improveit 360 Go Mobile App – version 2.7.0

Product Enhancements

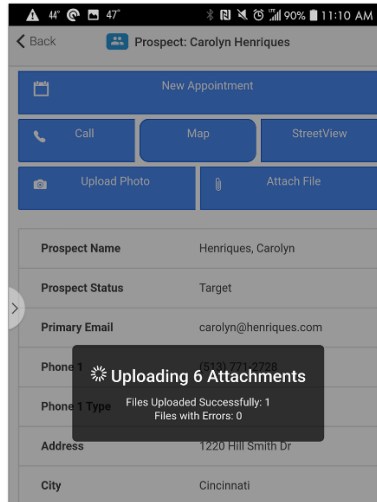
- New Maps Button
 - The static map has been replaced with the new Maps button to provide more comprehensive functionality by launching the record's address in Goggle Maps or Apple Maps.



- New Google Street View Button
 - The static Google StreetView image has been replaced with the new StreetView button. When clicked, the record's address information is opened in Google StreetView allowing Users to fully utilize StreetView functionality.



- New Image Upload Alert
 - Uploading images from the mobile app now displays progress information as images are being uploaded. The pop-up will remain open until all images are uploaded.



Production Defects Fixed

- 'Show only mine' filter not respected in mobile search nearby
 - When performing a nearby search with the 'Show only mine' checkbox set to true, records were displayed that were not assigned to the logged in User.
- Cannot add ad hoc Quote Item in Mobile
 - When Users manually entered a Quote Item instead of looking up an existing Product, the Quote Item would not save.
- Mobile: Required fields not flagged when appointment result is not equal to sold
 - Required fields such as Marketing Opportunity Due Date were not marked as required when Users resulting an Appointment as not sold.
- Custom Date/Time fields error on Project Activity when saved via mobile
 - When updating a Project Activity with a custom date/time field, an error would appear when saving even if the date/time field was not updated.