Product Release Notes

Package Date: 1/11/16
Pilot Date: 1/11/16
GA Release Date: 1/25/16

i360 Professional Edition – version 22.143

- Outbound/Inbound Text Messaging
  - Customers can now have automated outbound text messaging for a number of different scenarios. The main scenario being outbound appointment reminders and confirmation. Inbound scenarios include replies from customers to confirm appointments, texting attachments from sales reps or possibly even customers.
  - Inbound text records will be associated to the corresponding prospect or staff record or will be assigned to a new object called 'Inbound Text' that will house unmatched texts message records.

Pro Defect Fixes:

- Edit sold price defaulting to not check and changing sold price (Bay Home)
- Cloned quote templates overwriting 'cloned from' quote template
- Cannot save appointment when Sales Rep1 is an active user (Turf Installers, Perf. Log Finishers)
- Staff Calendar 'week by staff' view calendars blocks are off center (1-800 Busy Dog)
- Unit Cost field not formatted as currency on purchase order (Alluring Glass)
- Purchase order shipping discount fields not available
- Importing quote into sale does not bring over sales tax (Alluring Glass)
- Sales tax not populating on Purchase Order
- Print from prospect page format issue (Closet Specialists)
- Fields not Saving on Sale page when Sale Item has a quantity and no unit price
- Purchase Order 'Received' field not saving value (Comfort Windows)
- Error when selecting a Product from recent item list on a Purchase Order (Window Source of Ark)
- Rich Text in Custom Field Set/Section on Quote (Window Source of Ark)
- Vendor field not available on Sale Item
- Quote Templates stop populating after multiple selections (Alluring Glass)
- Quote Description Box overlapping other fields when expanded (Fun Outdoor Living)
- Purchase Order Model Number field no longer present (Jericho)
- Prospect Search is reformatting international phone numbers (3 Blind Mice)
- New Sale Error when creating new Sale from resulted Appointment (Dream Home Improvements)

i360 Go Mobile App – version 1.4.1

- Mobile Docs
  - ➢ We have added a tile to the mobile home page called Documents. This is a repository or storage location for sales reps to be able to easily access important documents such as marketing materials, catalog files, price books, training materials or checklists. This tile will appear in the mobile app if a customer creates a folder in their documents section of the desktop app called 'Mobile Docs'

- Design Enhancements
  - ➢ Addressed the non-wrapping of text and decreased the font size fields displayed user's list view of "My" appointments, Marketing Opps, Tasks and Project Activities.

- View All Calendars Permission
  - ➢ The ability to view everyone's calendar is now activated by selecting profiles from a list in the Mobile section of the Settings tab.

- Import Quote when resulting appointments as 'Sold'
  - ➢ Provided the option to 'import quote' when resulting appointments as 'Sold', mimicking desktop functionality

- Populating Appointment Sold Price with Quote Price
  - ➢ Added the functionality to populate the 'Sold Price' field with the 'Quote Price' field when resulting the appointment as 'Sold'

Mobile App Defect Fixes:

- o Cannot select Flag Prospect options when Resulting Appointments as 'Not Sold'
- o Comments not saving on Project Activities (Bath Planet of DFW)
- o Unit Price not available when selecting a Product in a Quote (Comfort Windows)
- o Marketing Opportunities displaying Zillow and Google Map button code in Prospect Address Field