

document generated on:
2/20/2019



Release Verison

7 Minor Release

| Release Date | Customer Facing Description "What it is" | "Why we did it" | "How it Works" |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2/20/2019 | For NextCRM users a new DONE status bar that appears on the top right of the Agenda | <p>Gives visibility to what has been completed including:</p> <ul style="list-style-type: none"> * Calls (count of calls initiated through the call bridge) * Tasks (steps completed) * Appointments Created * Appointment Shows * Referrals Added (unique, new referral added) | <p>Agenda DONE Status Bar Tutorial: https://www.useloom.com/share/0e50de94a7e641d1a26712fccbd135d8</p> |
| 2/20/2019 | For NextCRM users, Organize Agenda Items by Type or a Club defined filter. Two options just above the Agenda To Do List: Type and [club defined] Filters | Allows Agenda items to be performed in order of importance | <p>Agenda To Do List Filter by Type Tutorial: https://www.useloom.com/share/c077df22319042ddb12e6e8dbf08f3ce</p> <p>Agenda To Do List Club Defined Filters Tutorial: https://www.useloom.com/share/0daf4b37616042bf85f5a27ea37f3ef3</p> |