rDesk CRM *Stage* Release Notes, version 9.2

Real Estate Digital is proud to announce the release of rDesk CRM v9.2. Releases will occur during the evening on the night before the date shown.

Stage release date: June 13, 2013

Production release date: June 26, 2013

We recognize that our release notes can be lengthy at times so to help you identify the items that should be read and previewed first in Stage, we added a ***Read Me First*** symbol to the title.

Contents

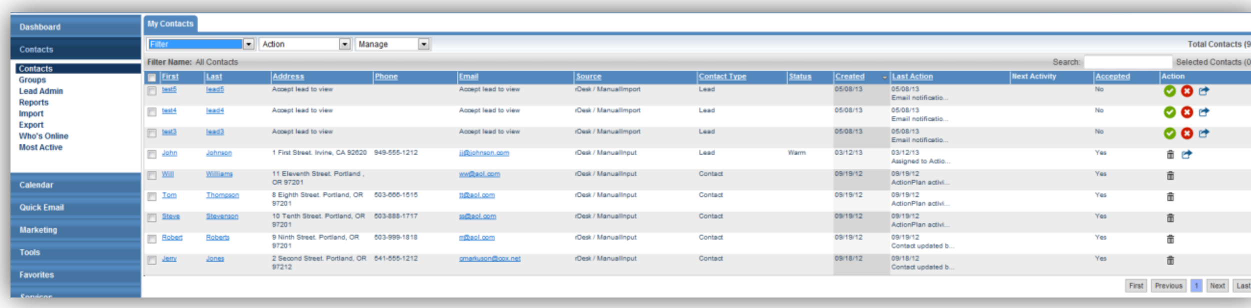
Read Me First

Usability

Single View of Contacts and Leads

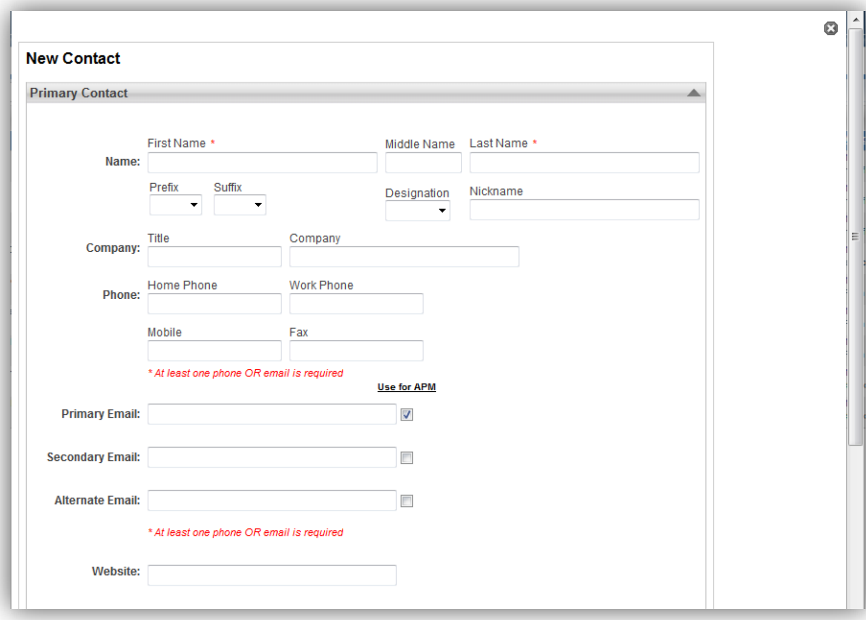
rDesk Elementool Ticket: [13620]

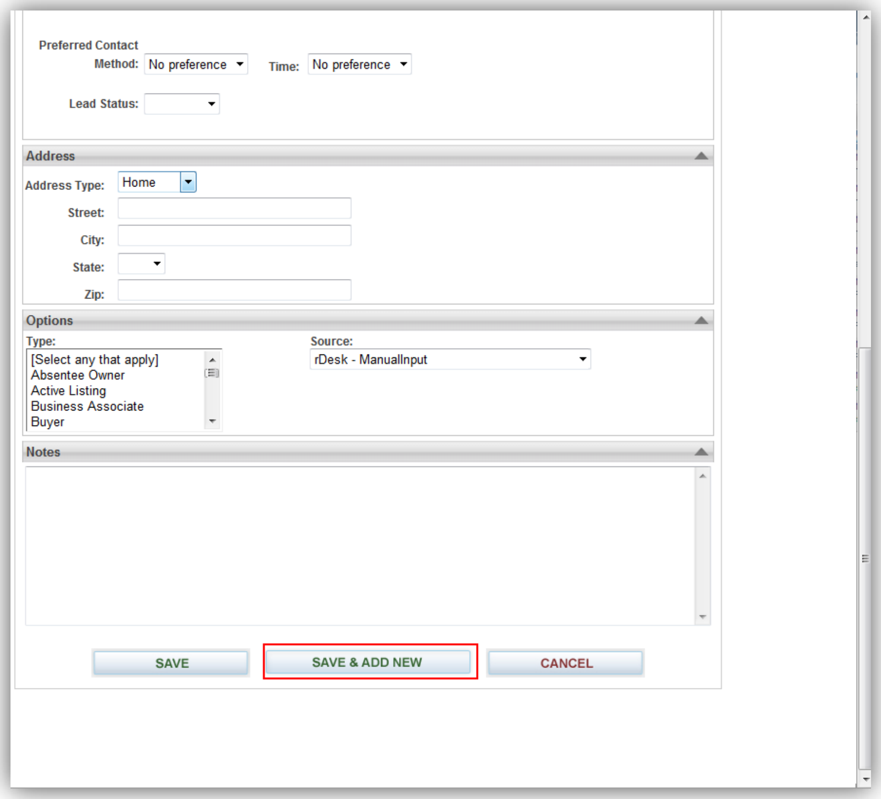
We know it has been confusing for your agents to have two different places to see all of their contacts and leads. As part of our unified platform project, we now have a single view where you can see all contacts and leads, as well as take actions (add, accept, assign, decline, delete, etc.), filter, and manage (add activity, send an email) from one location.



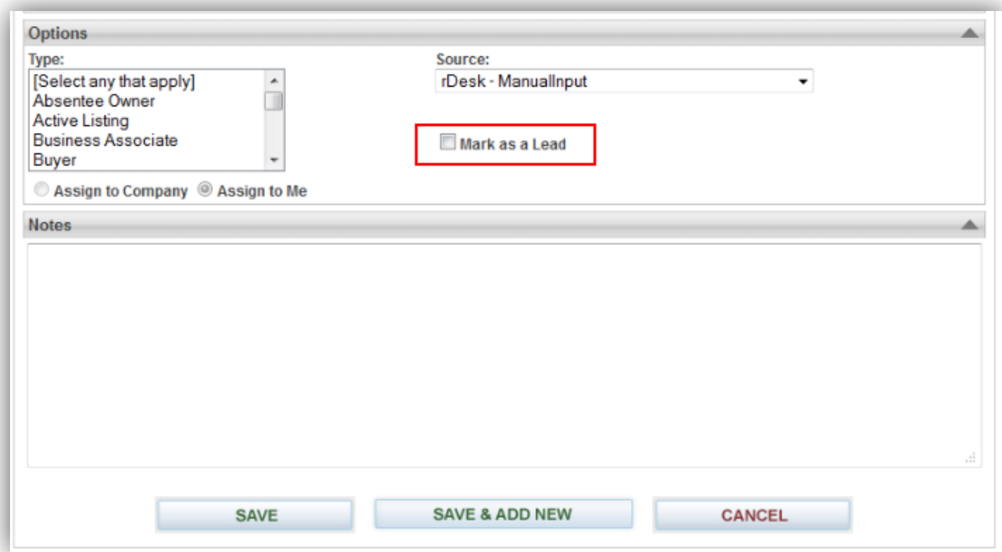
For the newer users among us struggling with the difference between what is a lead versus what is a contact, we now have one name for all … "contact". You will see subtle label changes to this point. A lead (routed from your website or third-party lead source) is simply a type of contact. The contact type (contact or lead) will be viewable in the grid and the actions available for the contact will depend on the type as well as the role of the user.

Agents can now manually add a contact and select a type (which allows the new contact to be added to a group) and source (which helps identify the source of the lead). We also added a "Save & Add New" button to the new contact overlay so you can quickly enter additional new contacts one after the other.

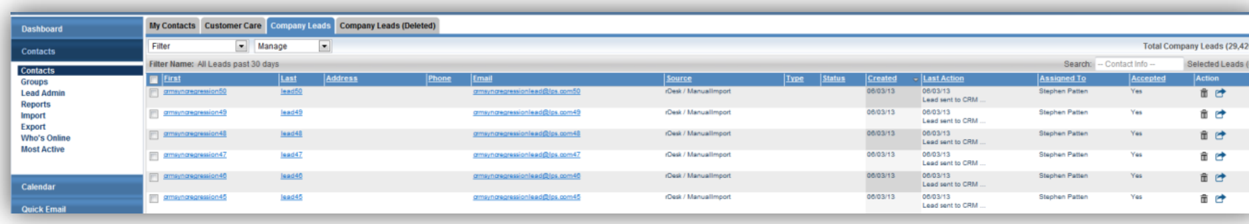

New Contact
Primary Contact
First Name *
Middle Name
Last Name *
Name:
Prefix
Suffix
Designation
Nickname
Company:
Title
Company
Phone:
Home Phone
Work Phone
Mobile
Fax
* At least one phone OR email is required
Use for APM
Primary Email:
Secondary Email:
Alternate Email:
* At least one phone OR email is required
Website:


Preferred Contact
Method: No preference
Time: No preference
Lead Status:
Address
Address Type: Home
Street:
City:
State:
Zip:
Options
Type:
[Select any that apply]
Absentee Owner
Active Listing
Business Associate
Buyer
Source:
rDesk - ManualInput
Notes
SAVE
SAVE & ADD NEW
CANCEL

As an Admin (CoBrand Admin, Lead Admin, Customer Care), you can distinguish when manually adding a contact if it is a lead or not by checking a new box … "Mark As Lead". (Agents can only manually add contacts.)



The Admin tabs (Customer Care, Company Leads, Company Leads Deleted, Office Leads, etc.) will remain the same and now be found under the Contacts left nav menu by default.



Note: Our rDesk Mobile platform will also show a combined contacts and leads view. The Leads button will no longer be available and all contacts and leads will be under Contacts.

[Screen shot to be added]

Benefits

- ✓ Eliminates confusion as to what is a lead versus a contact
- ✓ Improves agent productivity since all are located in one place
- ✓ Completes the first step needed for the rDesk Unified Platform Project where all contact information resides and is managed in rDesk CRM

Read Me First

Note: In our next release, we will be redesigning the Contacts user interface as well as introducing a new all expanded Contact record! We will also be creating a separate section for managing and assigning leads for Admins.

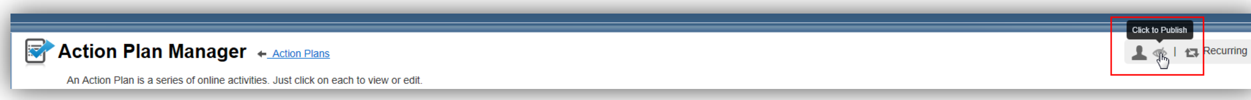
Action Plan Manager

We had such an overwhelming response to our new Action Plan Manager that we continued the work in this release. We have added many of your suggestions which including placement of the red asterisks for required fields, removing default date range for recurrence, replacing the edit with the copy icon, as well as the following;

Enable Publish/UnPublish Icon in Badge

rDesk Elementool Ticket: [13661]

We have enabled the publish/unpublish icons that display in the badge so an Admin user can publish the plan from within the plan instead of having to go back to the Action Plans view.



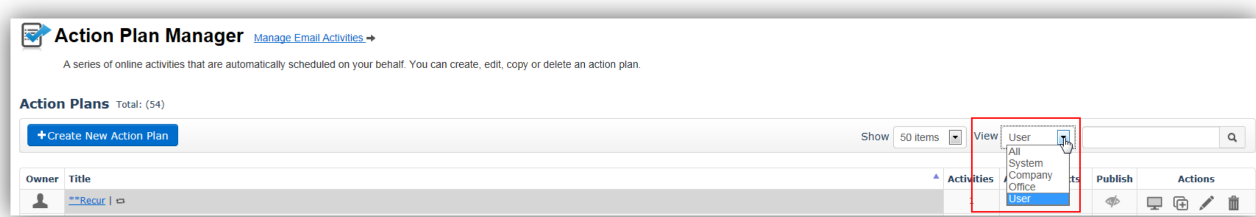
Benefits

- ✓ Saves time by eliminating the need to navigate elsewhere to publish or unpublish an Action Plan

Make the View filter Dynamic

rDesk Elementool Ticket: [13660]

We have made the View filter dropdown display the types of action plans (System, Company, Office, User) available to the logged in user.



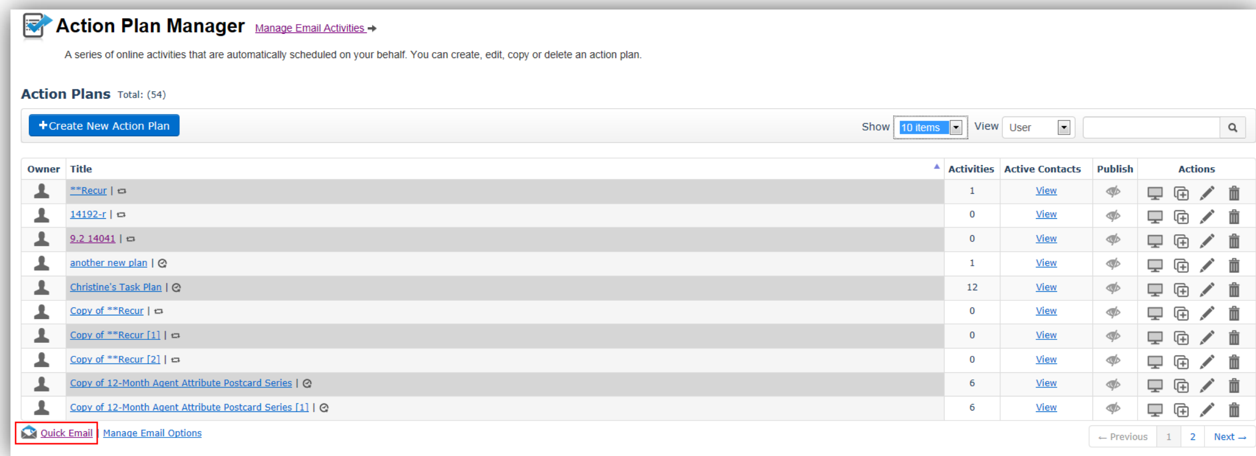
Benefits

✓ Improves usability by not displaying blank results if action plans for the chosen filter are not available to the user

Add a Link to Quick Email

rDesk Elementool Ticket: 13703

We added a link within Action Plan Manager so a user could easily launch Quick Email to select and send a single action plan activity to a contact.



Benefits

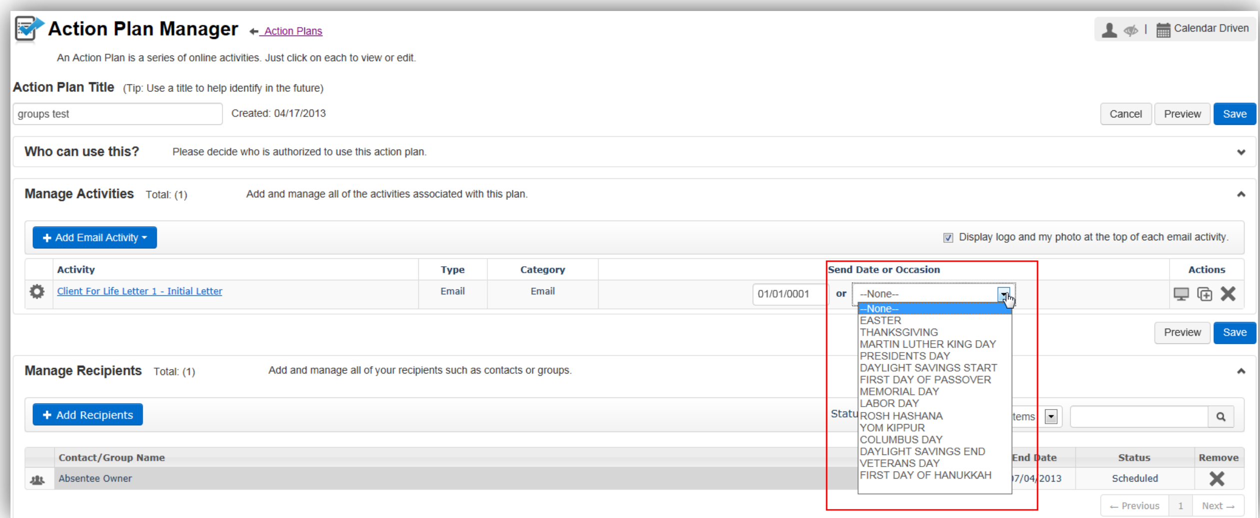
✓ Improve usability by allowing user to email action plan activities without having to navigate out to Quick Email

Revised Occasions

rDesk Elementool Ticket: 13876

We have updated and have made additional occasions available when creating calendar driven action plans to include the following;

Martin Luther King Day, Presidents' Day, Daylight Savings Start, First day of Passover, Easter, Memorial Day, Labor Day, Rosh Hashanah, Yom Kippur, Columbus Day, Daylight Savings End, Veterans Day, First Day of Hanukkah, Thanksgiving



Benefits

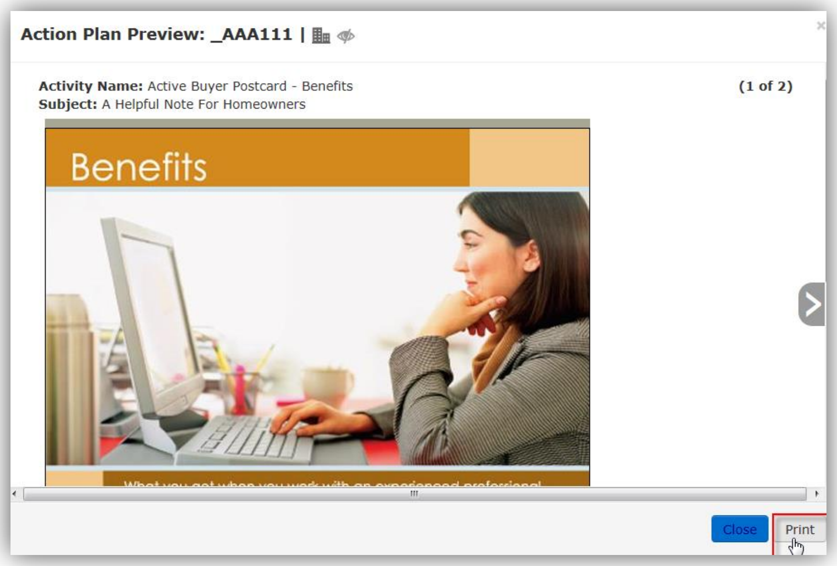
- ✓ Improves usability by giving additional options when creating action plans based on annual varied date occasions

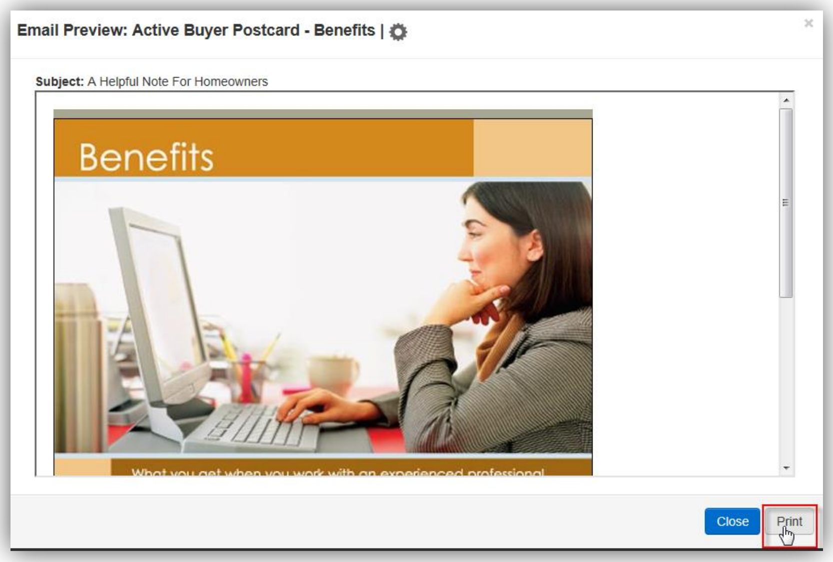
Note: We removed Independence Day/4th of July and Christmas since they occur on the same day each year.

Ability to Print

rDesk Elementool Ticket: 14033

We had added a Print button that will allow users to print a single activity or all activities within an Action Plan. You can find this available in three locations when you click Preview either from the summary view, a plan, or a single activity. From the plan, you will receive a printed version for each activity. This does not apply to task plans or tasks mingled with activities within a plan.





Benefits

- ✓ Improve usability by offering the option to print out action plan activities

User selection for View will "stick"

rDesk Elementool Ticket: [13945]()

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Patched on 4/26/13

When a user selects a View from the dropdown list, it will remain at that view as the user navigates to other pages within CRM.

Benefits

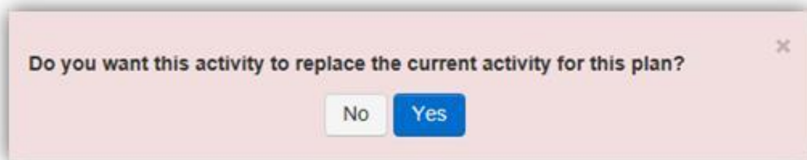
- ✓ Improves usability by maintaining the user selected preference

Message for Second Activity on Recurring plan

rDesk Elementool Ticket: 14017

Patched on 4/26/13

If a user tries to add a second activity to a recurring plan (which is designed for one activity), a message will display indicating that the original activity will be replaced.



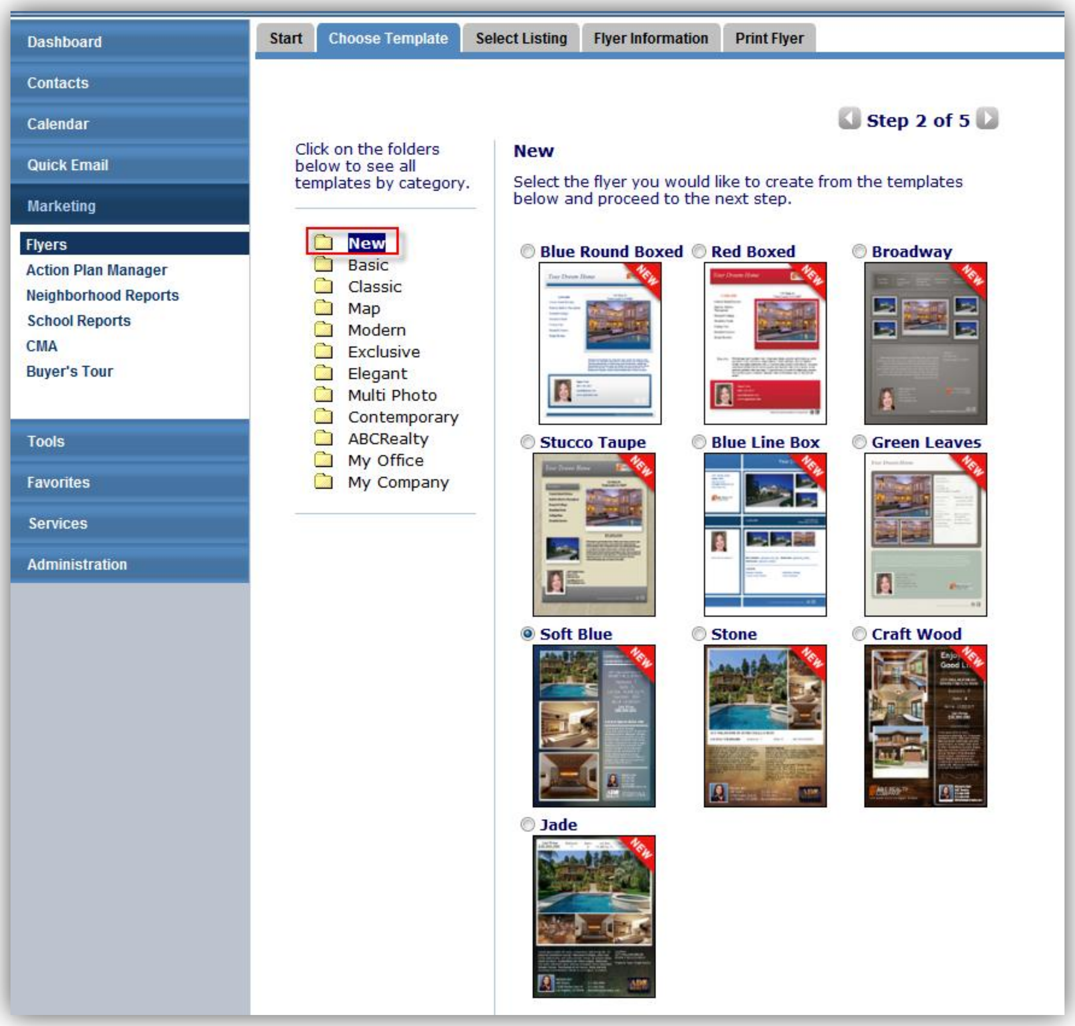
Benefits

- ✓ Improves usability by confirming with user that they want to replace the activity

New Flyer Templates

rDesk Elementool Ticket: 12723

We have added brand new flyer templates and you can find them in a new folder called “New”. Built by our own UX team in HTML, we will be adding more as we continue to plan for our new Flyer redesign in a future release.



Note: Our new flyer templates are "emailable" but only as a PDF attachment, as are the current templates available.

If you have customized the available flyers, you will not see the 'New' folder and the new templates. Let your Account Manager know if you want us to insert these new templates for you.

Benefits

- ✓ New templates will improve agent adoption and usage of marketing materials
- ✓ Built in HTML, the new templates will offer more flexibility for revisions and customizations in future releases

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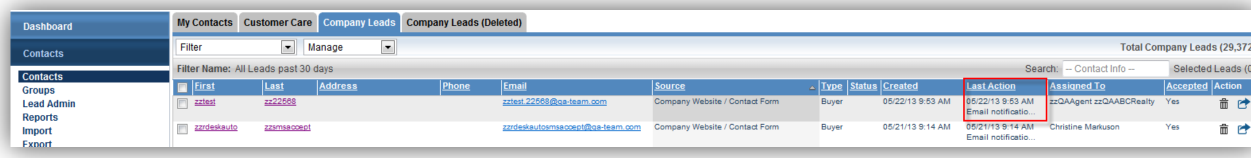
Add Timestamp for Last Action

rDesk Elementool Ticket: 14080

We have added the timestamp for the Last Action to the grid view for all contacts and leads.



The Last Action is the last event performed by the contact, which is different than the Last Activity which is a user or system activity and is captured in the Contact history.

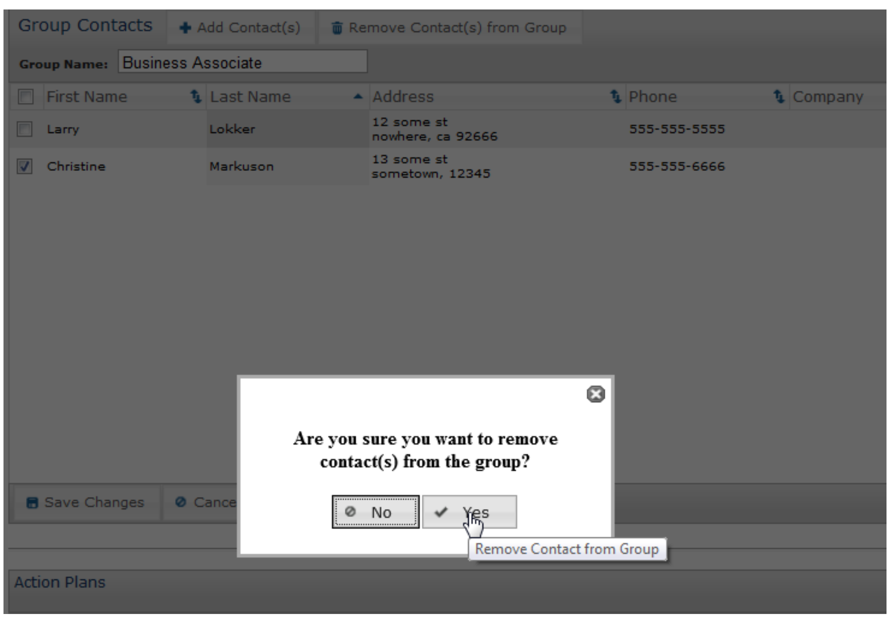
Benefits

- ✓ Exposing the timestamp in the grid view will improve lead capture and conversion

Warning Message when removing Contact from Group

rDesk Elementool Ticket: 13305

We have added a new message that displays when a user removes a contact from a group so they have the opportunity to cancel beforehand.



Benefits

- ✓ Improves usability as it prevents users from accidentally removing a contact from a group

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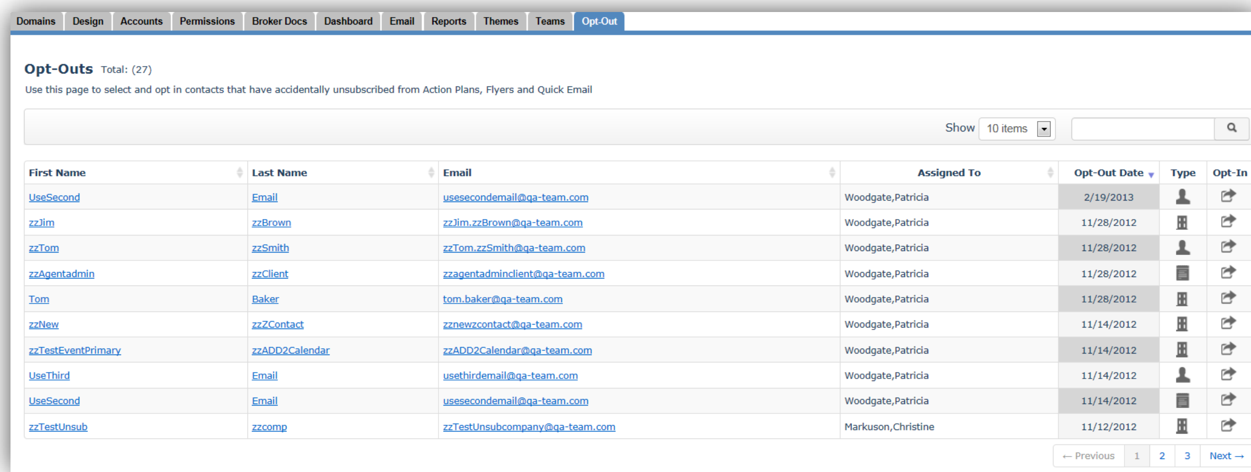
Configurability

Ability to Opt Contacts Back In

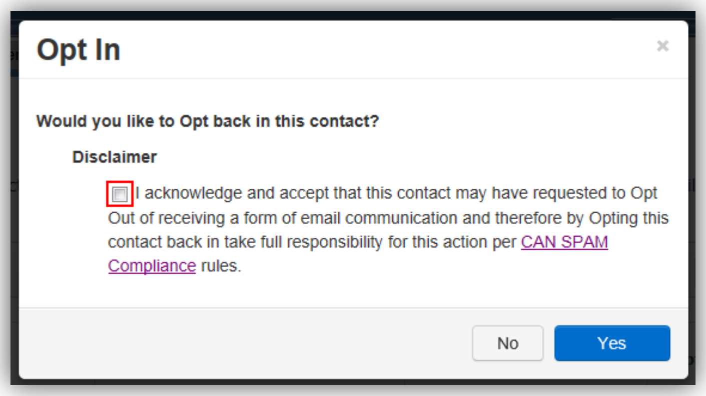
rDesk Elementool Ticket: [13391]

We have added the ability for CoBrand Admins, Franchisor Admins and Franchisee Broker Admins to opt contacts back in that have accidentally opted out of APM, Flyers and Quick Email. For companies that use Quick Email to do internal emails blasts, this will reduce the common request for our development team to add their users back in.

Under Administration, CoBrand Admin, you will find a new tab called “Opt Out” where you will see a list of all of your unsubscribed contacts from the beginning of time. You can search by name or email address and once found, you can click the Opt In icon which will resubscribe the contact to receiving all marketing emails for your company.



Since we need to be sensitive to CAN SPAM Compliance requirements, we will display a responsibility message that will need to be checked to resubscribe the contact, along with a link to the policy.



For Calendar-Driven and Recurring Action Plans, the contact will be reinstated to receive the next activity in the plan. For Day Interval Action Plans, the contact will be reinstated to receive the next activity in the plan according to the schedule that was originally established when the contact was added to the plan.

If the contact is listed more than once in the list, as they may have unsubscribed from multiple users or varied emails, opting them in on one, will opt them back in for all.

We have two CoBrand attributes to control this feature; one to hide the tab (and functionality altogether) and another to be able to simply search and view the list of unsubscribed contacts but not have the ability to opt contacts back in.

Please let your Account Manager know if you wish for us to apply one of these attributes for your company as by default all will have access to this feature.

Benefits

- ✓ Reduces need for development to do this task for internal contacts
- ✓ Offers top level admins the convenience and control to opt contacts back in

Change Timestamp for APM

rDesk Elementool Ticket: 13441

We have changed the timestamp (or time of day) for when action plan manager emails are sent from 12 midnight central standard time to 9 am based on the time zone of the user (this will help those of you that cover multiple time zones)

The exception to this will be for Day Interval plans where the activity is set for “0” which will be sent immediately. The following activities will be sent at 9 am based on the time zone of the user.

For action plan activities exceeding 10,000 emails per company, they will be sent in 10,000 increments every ½ hour until completed.

Plan Type	Added as	Timestamp
Calendar Driven	Contact	9:00 AM based on time zone of user*
	Group	
	Routing Rule	
	Groups - from Group UI	
Day Interval	Contact	Immediately for Day set at "0", 9:00 AM based on time zone of user for following activities
	Group	
	Routing Rule	
	Groups - from Group UI	
Recurring	Contact	9:00 AM based on time zone of user*
	Group	
	Routing Rule	
	Groups - from Group UI	

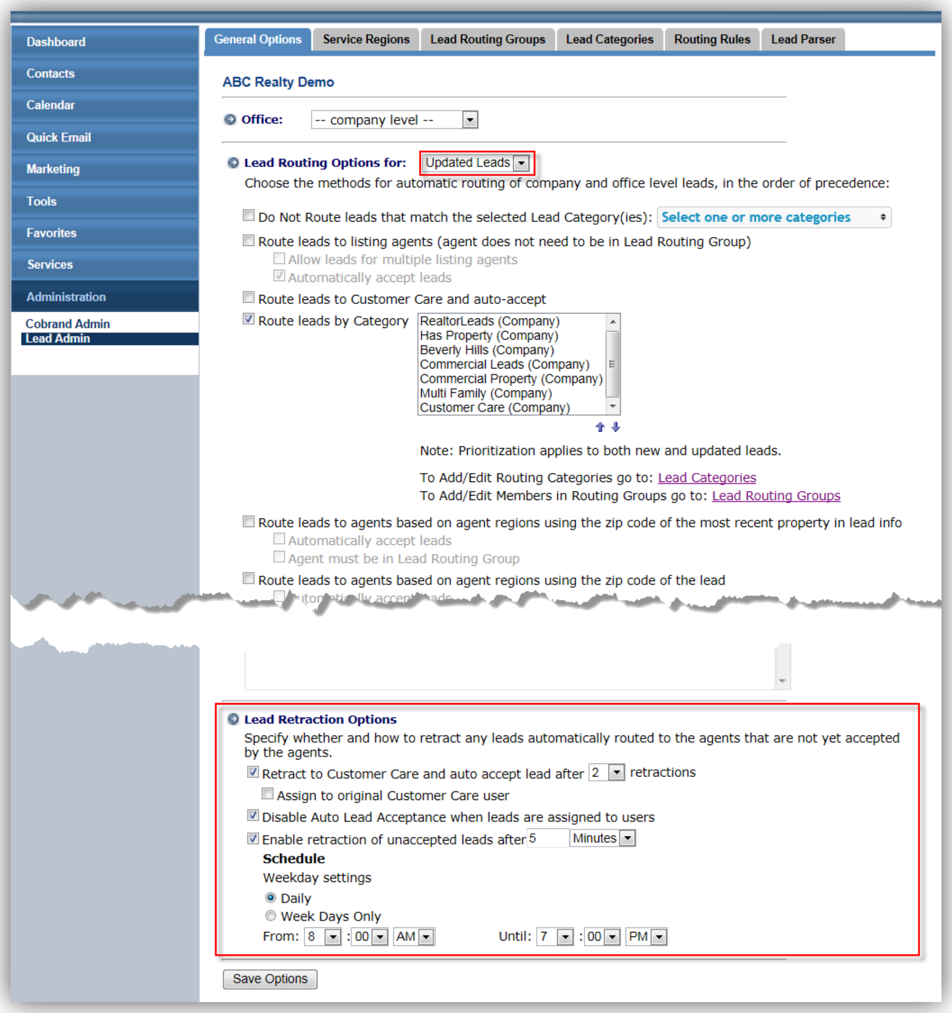
*For email activities totaling more than 10,000 contacts per company, the remainder will be sent in increments of 10,000 every 30 minutes until complete

Benefits
Improves lead capture and conversion by sending marketing emails during the business day

Apply Updated Routing Rules to Retracted Leads

rDesk Elementool Ticket: 14071

We have added the option to apply the updated routing rules to retracted leads when it is an updated lead.



This feature is controlled by a CoBrand attribute so for those of you that have a different set of routing rules for updated leads, versus new leads, you will have to specify if you wish this option.

Please let your Account Manager know if you wish for us to enable this attribute as it will be off by default for most companies.

Benefits

- ✓ Improves lead capture and conversion for those that have different routing options for new versus updated leads

Notify Company or Office (Broker) when Lead is returned

rDesk Elementool Ticket: 13592

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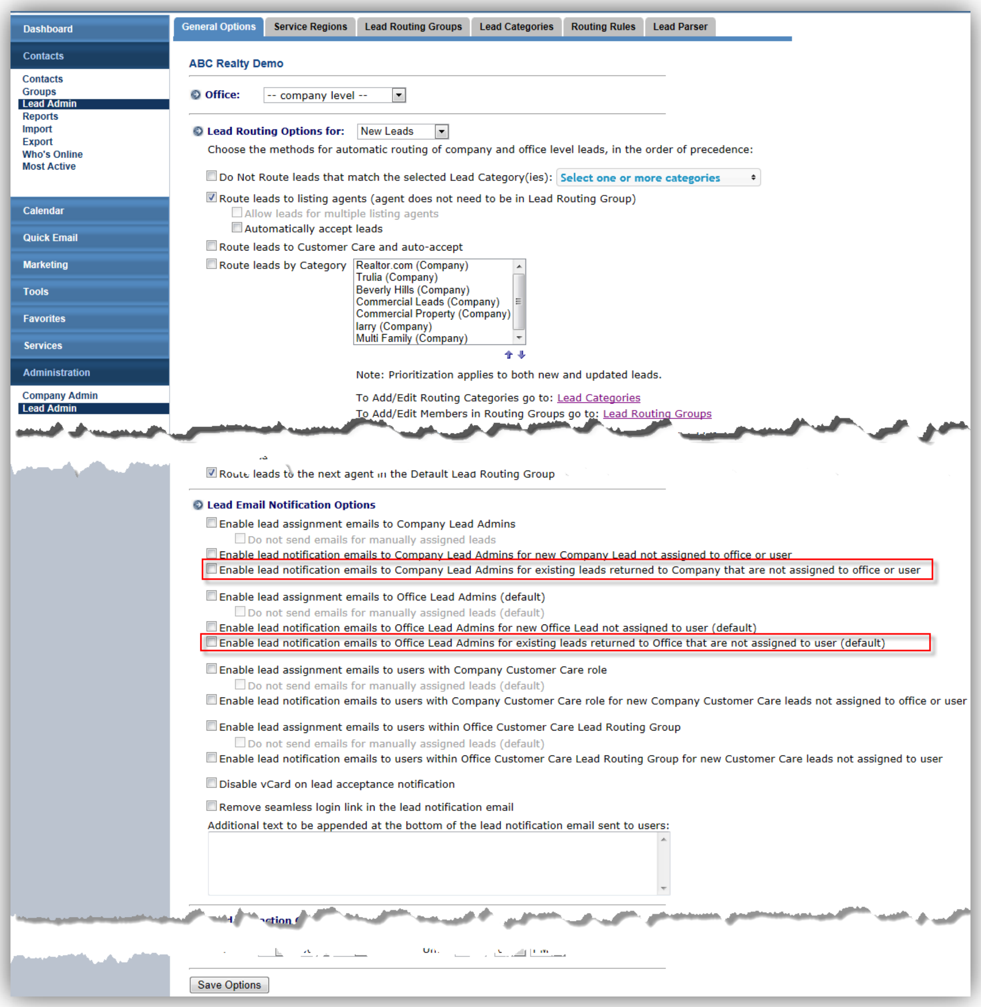
When a lead has been retracted or declined and has been routed to all possible groups, and the lead is returned, you now have the option to send an email notification to your Company or Office (Broker) Lead Admin.



Benefits

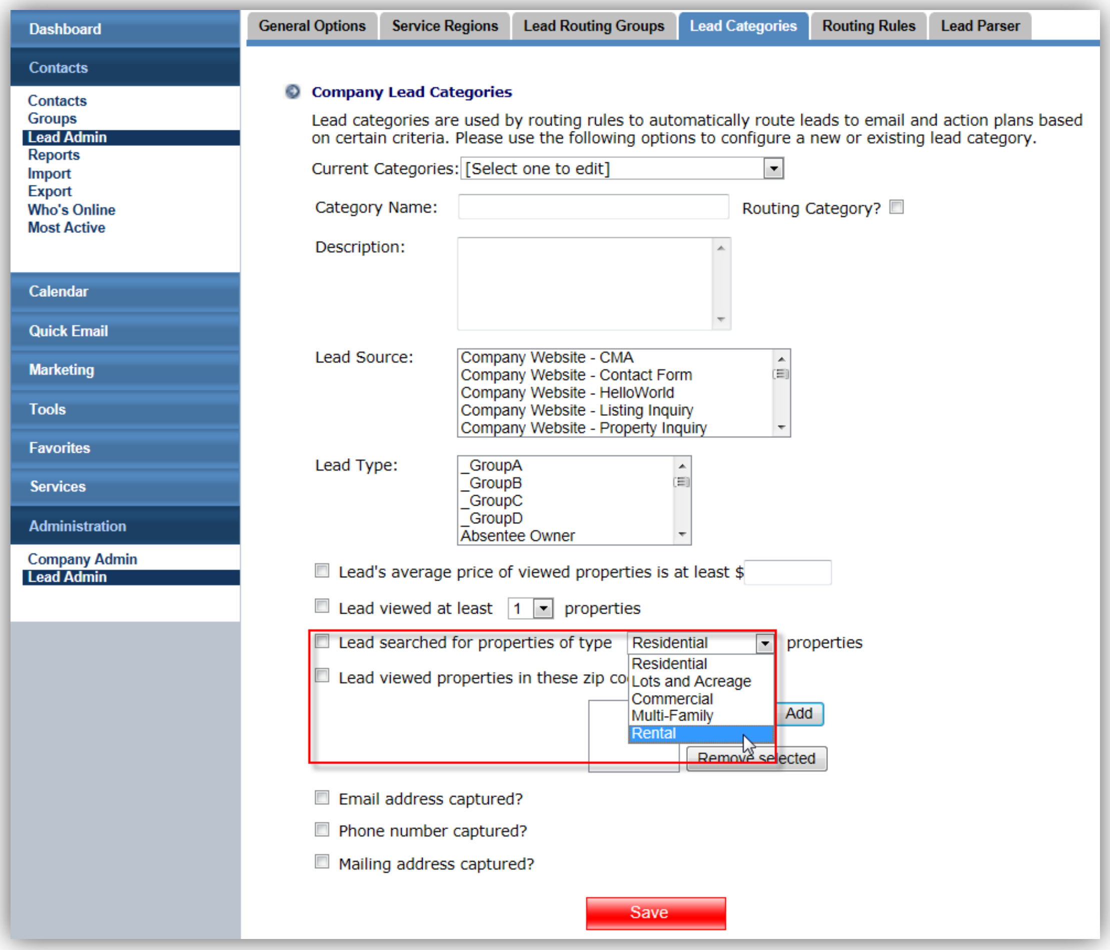
- ✓ Improves lead capture and conversion by keeping company and office admins aware of returning unassigned leads

Add Rental to Lead Categories

rDesk Elementool Ticket: 13156

This will be ready to test beginning on Tuesday, June 18th

We have added Rental to the property type dropdown list under Lead Categories, along with Residential, Lots and Acreage, Commercial, and Multi-Family.



Benefits

- ✓ Expands lead routing options for assigning Rental opportunities

Sustainability

Exchange Sync

rDesk Elementool Ticket: [14229]

Patched on 5/30/13

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Our team spent a considerable amount of time this release performing extensive analysis and testing leading to the following substantial improvements to our Exchange Sync functionality. These included:

- ✓ Updated MSMQ configuration settings
- ✓ Code refactoring
- ✓ Sync Host service converted from IIS to Windows service
- ✓ Additional RAM on production servers
- ✓ Improved logging with verbosity levels, auto-archiving and writing from concurrent multiple threads

Benefits

- ✓ Ensure our Exchange Sync services and technology are up to date and can scale to meet increased demand

rDesk Unified Platform Project (UPP)

We have made the necessary architecture changes needed to support the user interface revisions you will see in the next releases. In addition, to the items noted above (#13620 and #14082) a large amount of our development effort in this release was spent completing the following tasks for the rDesk Unified Platform Project. They are;

- ✓ Implementation of Service Oriented Architecture (SOA) framework
- ✓ Add support to obtain contact data from rW (contact profile)
- ✓ Add support for ability for Association/Disassociation of Contact with Agent
- ✓ Support for contact centric rW features (Saved Search, Saved Property, Recommended Properties, Sell My Home)
- ✓ Implement tracking functions for contact scoring data elements

Documentation

As always, we want to make sure that you, your admins, and agents, have easy access to the current user guides (via the Help link to redassists.com) and that they include the most recent enhancements and improvements.

For this release, the following user guides have been created or updated and can be found under these headers,

- Agent Tools
    - Action Plan Manager User Guide

- Contacts/Leads User Guide (*combined Contacts and Leads User Guides*)
- Groups User Guide
- Getting Started with CRM
- Flyers User Guide
- Mobile User Guide

- Company Tools
  - CoBrand Admin Opt Out (*New!)*
  - CoBrand Admin Broker Docs and Dashboard
  - CoBrand Admin Domains and Designs
  - CoBrand Admin Accounts and Permissions
  - CoBrand Admin Reports and Teams
  - Flyer Token List (*New!)*
  - Lead Routing User Guide
  - Managing and Assigning Leads (*New!)*

Change Control

Date	Change Type	Category	Section
6/10/13	Add	Usability Configurability	Add detail to #14080 Timestamp for Last Action vs. Last Activity Add grid to #13441 Timestamp for APM
6/11/13	Remove Add	Usability Configurability	Removed #14082 Registered/Associated Agent in Contact history Add screenshot for #13156 Add Rental to Lead Category, ready to test note
6/13/13	Revise Add	Header Usability	Prod release date Add detail to #12723 New Flyer Templates

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