



# 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.

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● ***Read Me First***

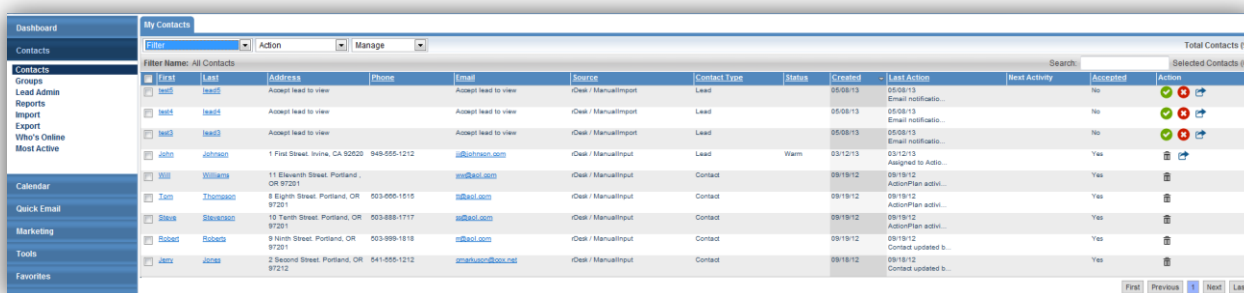
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## Usability

### ● 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.



First	Last	Address	Phone	Email	Source	Contact Type	Status	Created	Last Action	Next Activity	Accepted	Action
lead	lead	Accept lead to view		Accept lead to view	rDesk / ManualImport	Lead		05/08/13	05/08/13 Email notification		No	✓ ✕ ⚙
lead	lead	Accept lead to view		Accept lead to view	rDesk / ManualImport	Lead		05/08/13	05/08/13 Email notification		No	✓ ✕ ⚙
lead	lead	Accept lead to view		Accept lead to view	rDesk / ManualImport	Lead		05/08/13	05/08/13 Email notification		No	✓ ✕ ⚙
John	Johnson	1 First Street, Irvine, CA 92620	949-555-1212	john@red.com	rDesk / ManualImport	Lead	Warm	03/12/13	03/12/13 Assigned to John		Yes	✓ ✕ ⚙
Will	Williams	11 Eleventh Street, Portland, OR 97201		will@red.com	rDesk / ManualImport	Contact		09/19/12	09/19/12 ActionPlan activ...		Yes	✓ ✕ ⚙
Tom	Thompson	8 Eighth Street, Portland, OR 97201	503-555-1515	tom@red.com	rDesk / ManualImport	Contact		09/19/12	09/19/12 ActionPlan activ...		Yes	✓ ✕ ⚙
Steve	Stevenson	10 Ninth Street, Portland, OR 97201	503-555-1717	steve@red.com	rDesk / ManualImport	Contact		09/19/12	09/19/12 ActionPlan activ...		Yes	✓ ✕ ⚙
Robert	Roberts	9 Ninth Street, Portland, OR 97201	503-555-1818	robert@red.com	rDesk / ManualImport	Contact		09/19/12	09/19/12 Contact updated b...		Yes	✓ ✕ ⚙
John	Jones	2 Second Street, Portland, OR 97212	541-555-1212	john@red.com	rDesk / ManualImport	Contact		09/19/12	09/19/12 Contact updated b...		Yes	✓ ✕ ⚙

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.

### ● Read Me First

**New Contact**

Primary Contact

Name: First Name \* Middle Name Last 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:

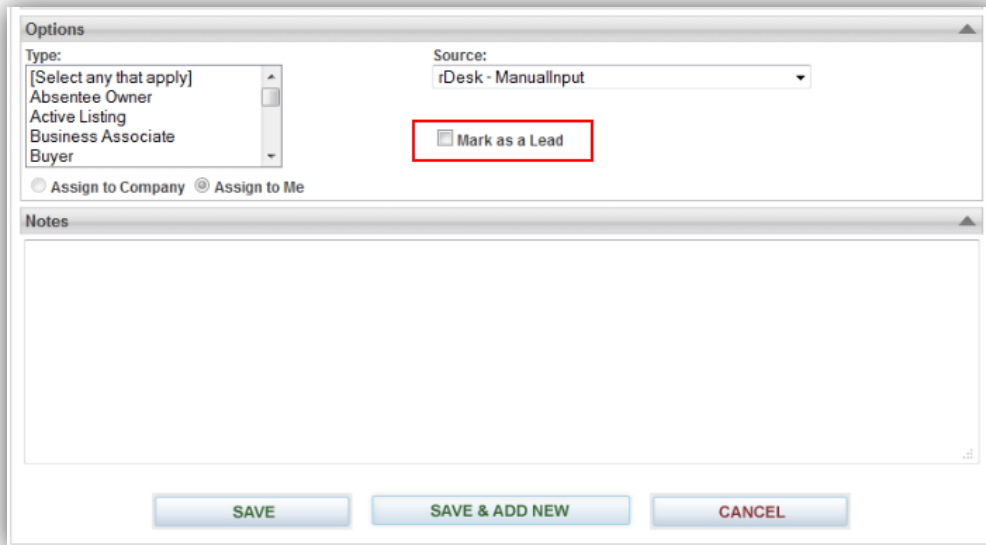
Options

Type: [Select any that apply] Absentee Owner Active Listing Business Associate Buyer

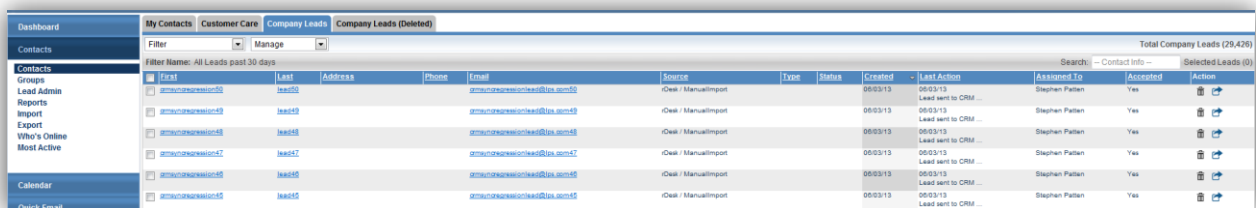
Source: rDesk - ManualInput

Notes

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.



Lead	Address	Phone	Email	Source	Type	Status	Created	Last Action	Assigned To	Associated	Action
amc@realestatedigital.com	Lead01		amc@realestatedigital.com	iDesk / ManualInput		05/03/13	Lead sent to CRM ...	Stephen Patten	Yes		
amc@realestatedigital.com	Lead02		amc@realestatedigital.com	iDesk / ManualInput		05/03/13	Lead sent to CRM ...	Stephen Patten	Yes		
amc@realestatedigital.com	Lead03		amc@realestatedigital.com	iDesk / ManualInput		05/03/13	Lead sent to CRM ...	Stephen Patten	Yes		
amc@realestatedigital.com	Lead04		amc@realestatedigital.com	iDesk / ManualInput		05/03/13	Lead sent to CRM ...	Stephen Patten	Yes		
amc@realestatedigital.com	Lead05		amc@realestatedigital.com	iDesk / ManualInput		05/03/13	Lead sent to CRM ...	Stephen Patten	Yes		

*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.*

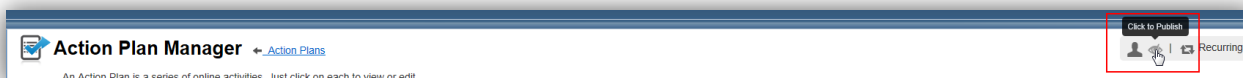
## Action Plan Manager

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.



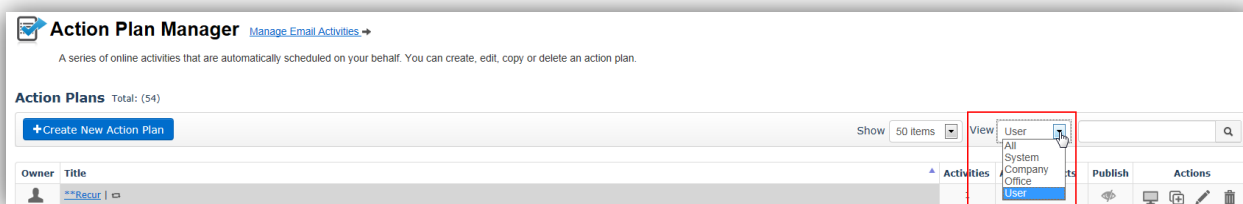
### Benefits

- ✓ 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

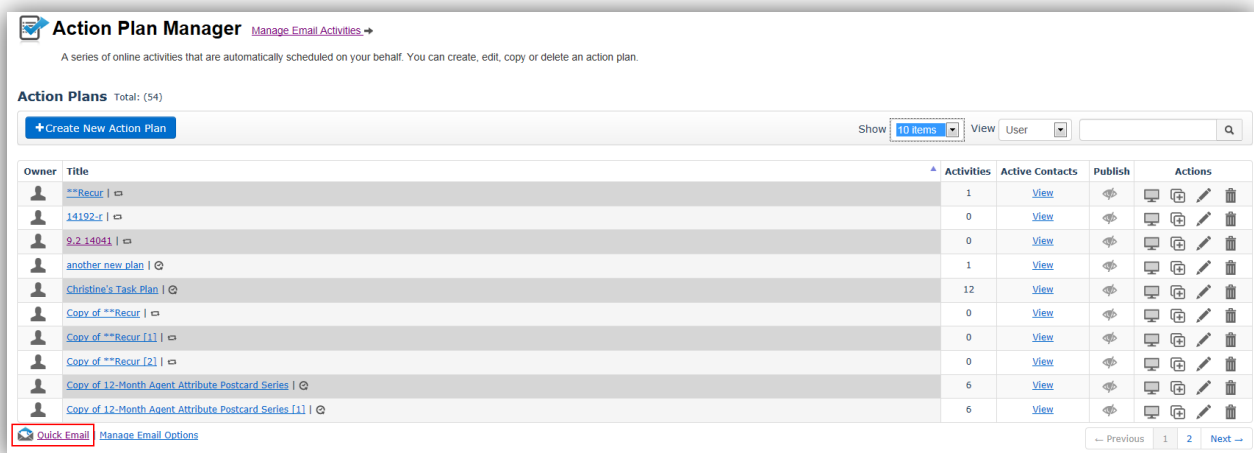
#### Read Me First

- ✓ 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.



**Action Plan Manager** [Manage Email Activities](#) →

A series of online activities that are automatically scheduled on your behalf. You can create, edit, copy or delete an action plan.

**Action Plans** Total: (54)

[+ Create New Action Plan](#) Show **10 Items** View User

Owner	Title	Activities	Active Contacts	Publish	Actions
**Recur   ☐		1	<a href="#">View</a>		
14192-r   ☐		0	<a href="#">View</a>		
9.2.14041   ☐		0	<a href="#">View</a>		
another new plan   ☐		1	<a href="#">View</a>		
Christine's Task Plan   ☐		12	<a href="#">View</a>		
Copy of **Recur   ☐		0	<a href="#">View</a>		
Copy of **Recur [1]   ☐		0	<a href="#">View</a>		
Copy of **Recur [2]   ☐		0	<a href="#">View</a>		
Copy of 12-Month Agent Attribute Postcard Series   ☐		6	<a href="#">View</a>		
Copy of 12-Month Agent Attribute Postcard Series [1]   ☐		6	<a href="#">View</a>		

[Quick Email](#) [Manage Email Options](#) [Previous](#) 1 2 [Next](#)

## Benefits

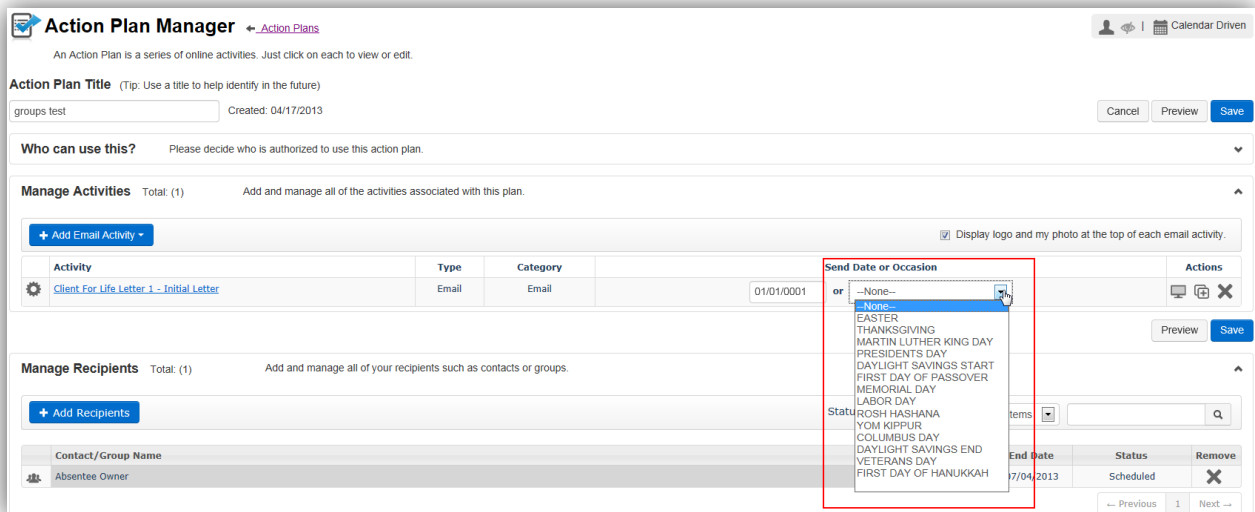
- ✓ Improve usability by allowing user to email action plan activities without having to navigate out to Quick Email

## 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



The screenshot shows the 'Action Plan Manager' interface. At the top, there's a header with the title 'Action Plan Manager' and a link to 'Action Plans'. Below this, a description states: 'An Action Plan is a series of online activities. Just click on each to view or edit.' The main form area includes a section for 'Action Plan Title' with a tip: '(Tip: Use a title to help identify in the future)'. Below this is a text input field containing 'groups test' and a 'Created' date of '04/17/2013'. There are 'Cancel', 'Preview', and 'Save' buttons. A section titled 'Who can use this?' prompts the user to 'Please decide who is authorized to use this action plan.' Below this is a 'Manage Activities' section with a 'Total: (1)' and a description: 'Add and manage all of the activities associated with this plan.' It includes a '+ Add Email Activity' button and a checkbox for 'Display logo and my photo at the top of each email activity.' A table lists activities with columns for 'Activity', 'Type', 'Category', and 'End Date'. One activity is listed: 'Client For Life Letter 1 - Initial Letter' with Type 'Email' and Category 'Email', and an 'End Date' of '01/01/0001'. To the right of the table is a 'Send Date or Occasion' dropdown menu, which is open, showing a list of occasions including 'EASTER', 'THANKSGIVING', 'MARTIN LUTHER KING DAY', 'PRESIDENT'S DAY', 'DAYLIGHT SAVINGS START', 'FIRST DAY OF PASSOVER', 'MEMORIAL DAY', 'LABOR DAY', 'YOM KIPPUR', 'COLUMBUS DAY', 'DAYLIGHT SAVINGS END', 'VETERANS DAY', and 'FIRST DAY OF HANUKKAH'. Below the table is a 'Manage Recipients' section with a 'Total: (1)' and a description: 'Add and manage all of your recipients such as contacts or groups.' It includes a '+ Add Recipients' button and a table with columns for 'Contact/Group Name', 'End Date', 'Status', and 'Remove'. One recipient is listed: 'Absentee Owner' with an 'End Date' of '7/04/2013' and a 'Status' of 'Scheduled'. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons.

### Benefits

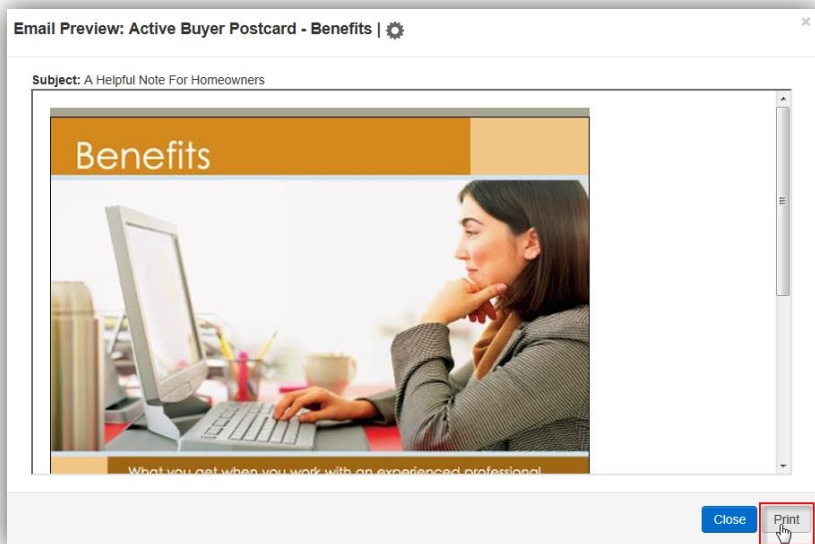
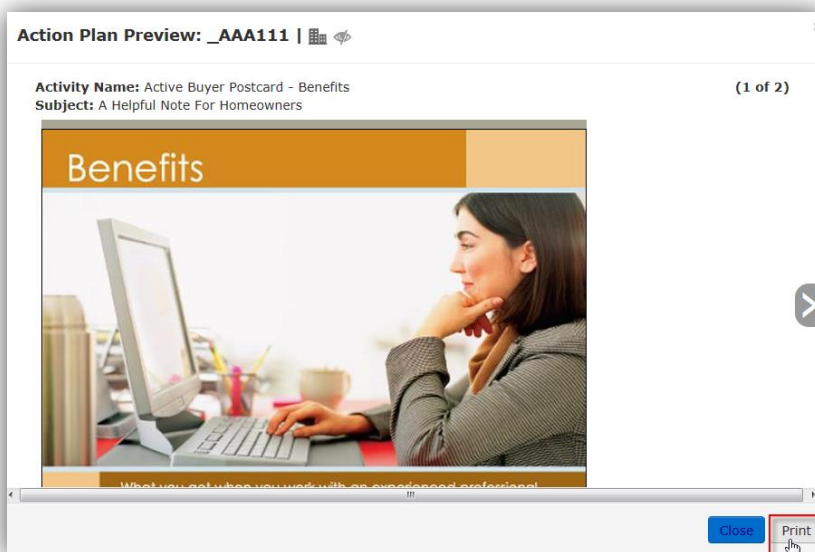
- ✓ Improves usability by giving additional options when creating action plans based on annual varied date occasions

*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](#)

### **Read Me First**

*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**

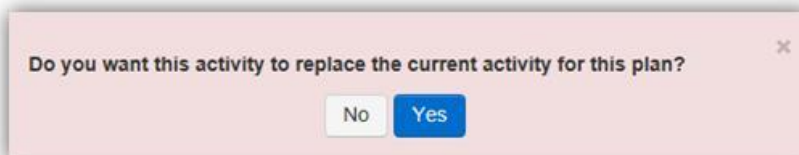
- ✓ Improves usability by maintaining the user selected preference

### **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.



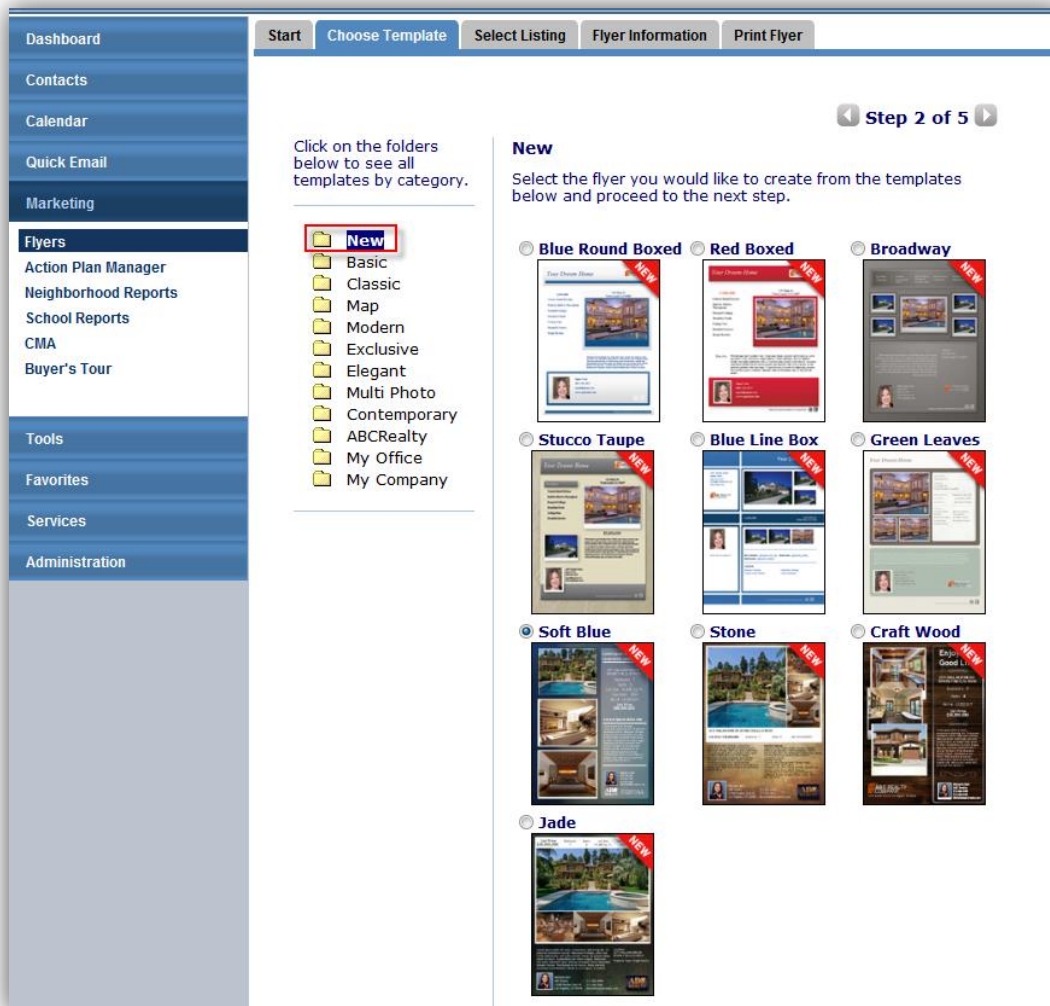
### **Benefits**

- ✓ 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**

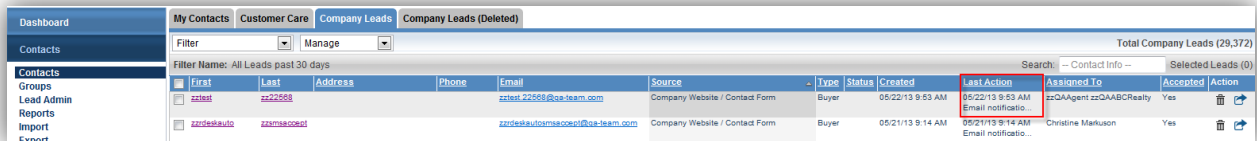
- ✓ New templates will improve agent adoption and usage of marketing materials
- ✓ Built in HTML, the new templates will offer more flexibility for revisions and customizations in future releases

### **Read Me First**

## 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.



First	Last	Address	Phone	Email	Source	Type	Status	Created	Last Action	Assigned To	Accepted	Action
zztest	zz22558			zztest.22558@qa-team.com	Company Website / Contact Form	Buyer		05/22/13 9:53 AM	05/22/13 9:53 AM Email notificatio...	zzQAAgent zzQAABCR Realty	Yes	
zztestauto	zzmaasopst			zztestauto.maasopst@qa-team.com	Company Website / Contact Form	Buyer		05/21/13 9:14 AM	05/21/13 9:14 AM Email notificatio...	Christine Markuson	Yes	

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.

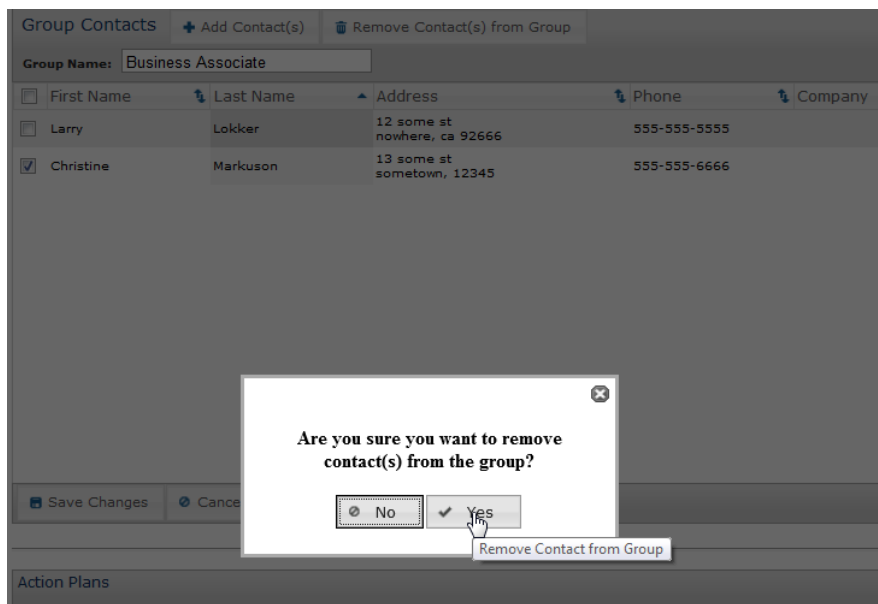
### Benefits

- ✓ 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

### Read Me First

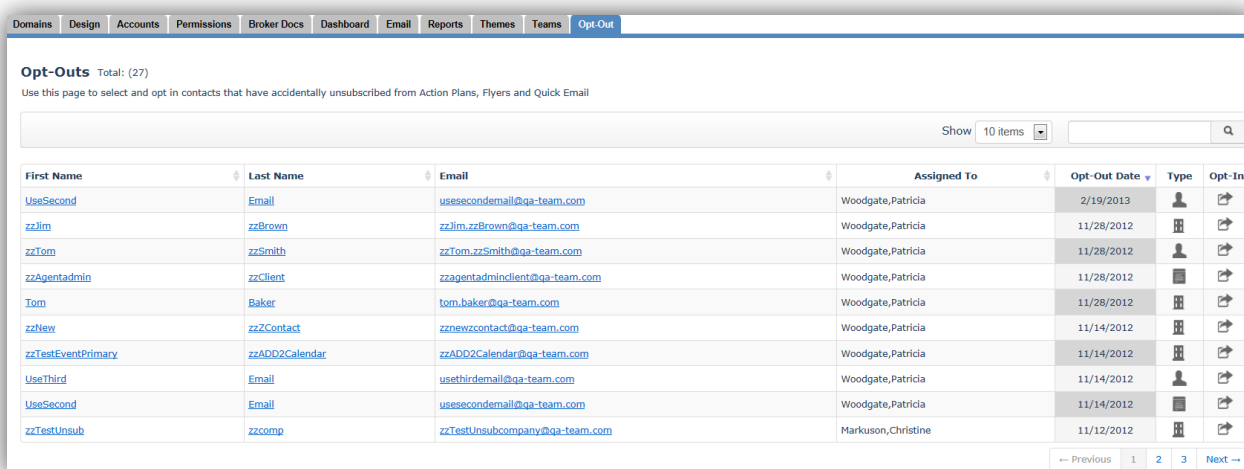
## Configurability

### ● 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.

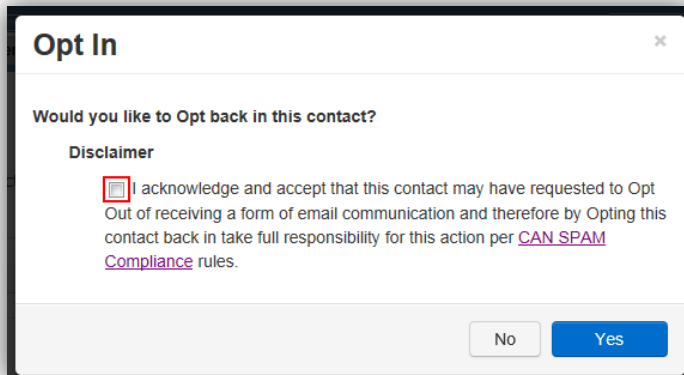
Under Administration, CoBrand Admin, you will find a new tab called “Opt Out” where you will see a list of all of your unsubscribed contacts from the beginning of time. You can search by name or email address and once found, you can click the Opt In icon which will resubscribe the contact to receiving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



First Name	Last Name	Email	Assigned To	Opt-Out Date	Type	Opt-In
UseSecond	Email	usesecondemail@qa-team.com	Woodgate, Patricia	2/19/2013		
zzJim	zzBrown	zzjim.zzbrown@qa-team.com	Woodgate, Patricia	11/28/2012		
zzTom	zzSmith	zzTom.zzsmith@qa-team.com	Woodgate, Patricia	11/28/2012		
zzAgentadmin	zzClient	zzagentadminclient@qa-team.com	Woodgate, Patricia	11/28/2012		
Tom	Baker	tom.baker@qa-team.com	Woodgate, Patricia	11/28/2012		
zzNew	zzContact	zznewcontact@qa-team.com	Woodgate, Patricia	11/14/2012		
zzTestEventPrimary	zzADD2Calendar	zzADD2Calendar@qa-team.com	Woodgate, Patricia	11/14/2012		
UseThird	Email	usethirdemail@qa-team.com	Woodgate, Patricia	11/14/2012		
UseSecond	Email	usesecondemail@qa-team.com	Woodgate, Patricia	11/14/2012		
zzTestUnsub	zzcomp	zzTestUnsubcompany@qa-team.com	Markuson, Christine	11/12/2012		

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.

### ● Read Me First



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.

### **Read Me First**

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		

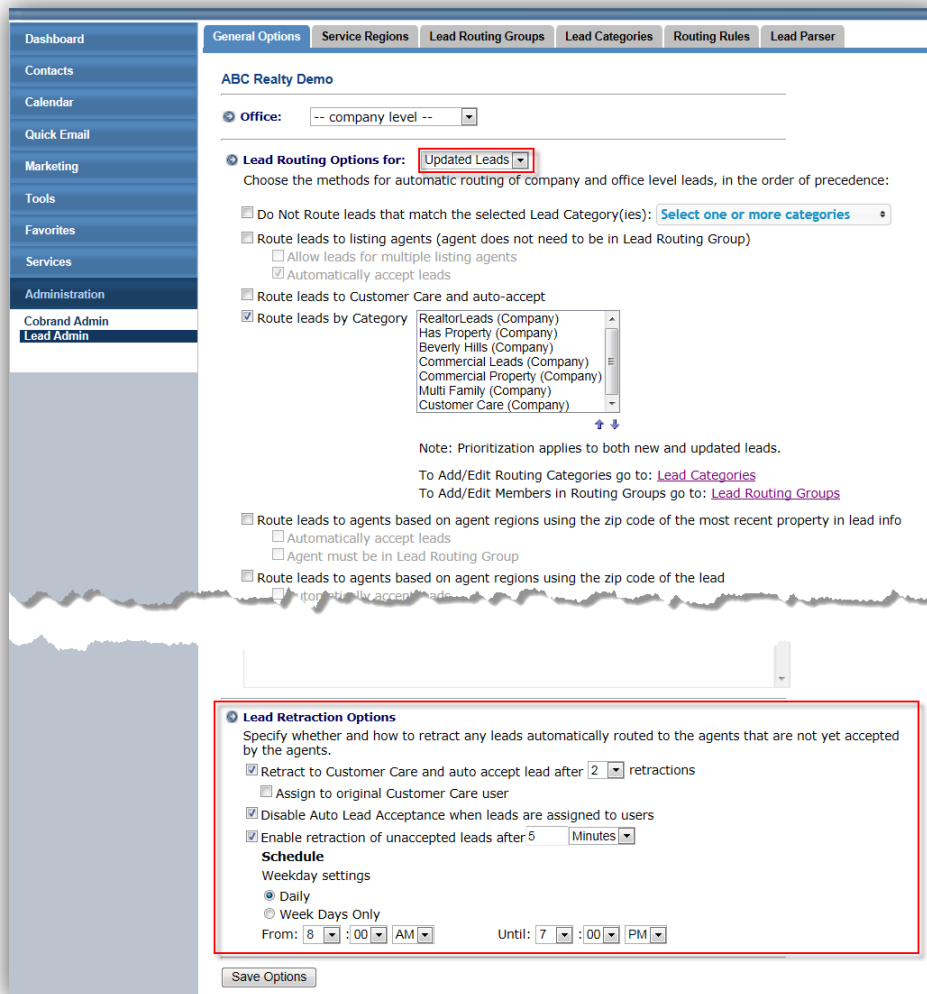
### Benefits

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.



Dashboard  
Contacts  
Calendar  
Quick Email  
Marketing  
Tools  
Favorites  
Services  
Administration  
CoBrand Admin  
Lead Admin

General Options Service Regions Lead Routing Groups Lead Categories Routing Rules Lead Parser

ABC Realty Demo

Office: -- company level --

Lead Routing Options for: Updated Leads

Choose the methods for automatic routing of company and office level leads, in the order of precedence:

☐ Do Not Route leads that match the selected Lead Category(ies): [Select one or more categories](#)

☐ Route leads to listing agents (agent does not need to be in Lead Routing Group)

☐ Allow leads for multiple listing agents

☒ Automatically accept leads

☐ Route leads to Customer Care and auto-accept

☒ Route leads by Category

RealtorLeads (Company)  
Has Property (Company)  
Beverly Hills (Company)  
Commercial Leads (Company)  
Commercial Property (Company)  
Multi Family (Company)  
Customer Care (Company)

Note: Prioritization applies to both new and updated leads.

To Add/Edit Routing Categories go to: [Lead Categories](#)

To Add/Edit Members in Routing Groups go to: [Lead Routing Groups](#)

☐ Route leads to agents based on agent regions using the zip code of the most recent property in lead info

☐ Automatically accept leads

☐ Agent must be in Lead Routing Group

☐ Route leads to agents based on agent regions using the zip code of the lead

☐ Automatically accept leads

Lead Retraction Options

Specify whether and how to retract any leads automatically routed to the agents that are not yet accepted by the agents.

☒ Retract to Customer Care and auto accept lead after 2 retractions

☐ Assign to original Customer Care user

☒ Disable Auto Lead Acceptance when leads are assigned to users

☒ Enable retraction of unaccepted leads after 5 Minutes

Schedule

Weekday settings

☒ Daily

☐ Week Days Only

From: 8 :00 AM Until: 7 :00 PM

Save Options

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

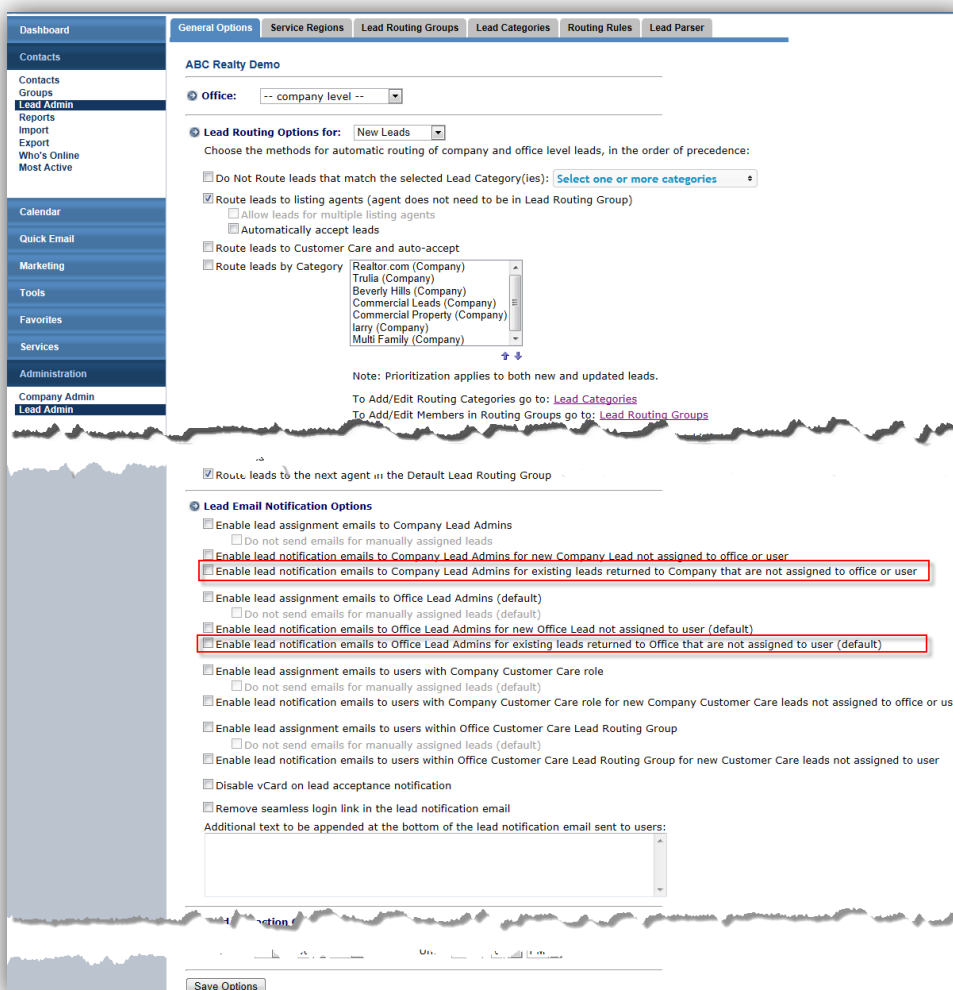
- ✓ Improves lead capture and conversion for those that have different routing options for new versus updated leads

### Notify Company or Office (Broker) when Lead is returned

rDesk Elementool Ticket: [13592](#)

 Read Me First

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.



Dashboard | General Options | Service Regions | Lead Routing Groups | Lead Categories | Routing Rules | Lead Parser

ABC Realty Demo

Office: -- company level --

Lead Routing Options for: New Leads

Choose the methods for automatic routing of company and office level leads, in the order of precedence:

- ☐ Do Not Route leads that match the selected Lead Category(ies): [Select one or more categories](#)
- ☒ Route leads to listing agents (agent does not need to be in Lead Routing Group)
  - ☐ Allow leads for multiple listing agents
  - ☐ Automatically accept leads
- ☐ Route leads to Customer Care and auto-accept
- ☐ Route leads by Category
  - Realtor.com (Company)
  - Trulia (Company)
  - Beverly Hills (Company)
  - Commercial Leads (Company)
  - Commercial Property (Company)
  - Larry (Company)
  - Multi Family (Company)

Note: Prioritization applies to both new and updated leads.  
To Add/Edit Routing Categories go to: [Lead Categories](#)  
To Add/Edit Members in Routing Groups go to: [Lead Routing Groups](#)

☒ Route leads to the next agent in the Default Lead Routing Group

Lead Email Notification Options

- ☐ Enable lead assignment emails to Company Lead Admins
  - ☐ Do not send emails for manually assigned leads
- ☒ Enable lead notification emails to Company Lead Admins for new Company Lead not assigned to office or user
- ☒ Enable lead notification emails to Company Lead Admins for existing leads returned to Company that are not assigned to office or user
- ☐ Enable lead assignment emails to Office Lead Admins (default)
  - ☐ Do not send emails for manually assigned leads (default)
- ☒ Enable lead notification emails to Office Lead Admins for new Office Lead not assigned to user (default)
- ☒ Enable lead notification emails to Office Lead Admins for existing leads returned to Office that are not assigned to user (default)
- ☐ Enable lead assignment emails to users with Company Customer Care role
  - ☐ Do not send emails for manually assigned leads (default)
- ☐ Enable lead notification emails to users with Company Customer Care role for new Company Customer Care leads not assigned to office or user
- ☐ Enable lead assignment emails to users within Office Customer Care Lead Routing Group
  - ☐ Do not send emails for manually assigned leads (default)
- ☐ Enable lead notification emails to users within Office Customer Care Lead Routing Group for new Customer Care leads not assigned to user
- ☐ Disable vCard on lead acceptance notification
- ☐ Remove seamless login link in the lead notification email

Additional text to be appended at the bottom of the lead notification email sent to users:

Save Options

## Benefits

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

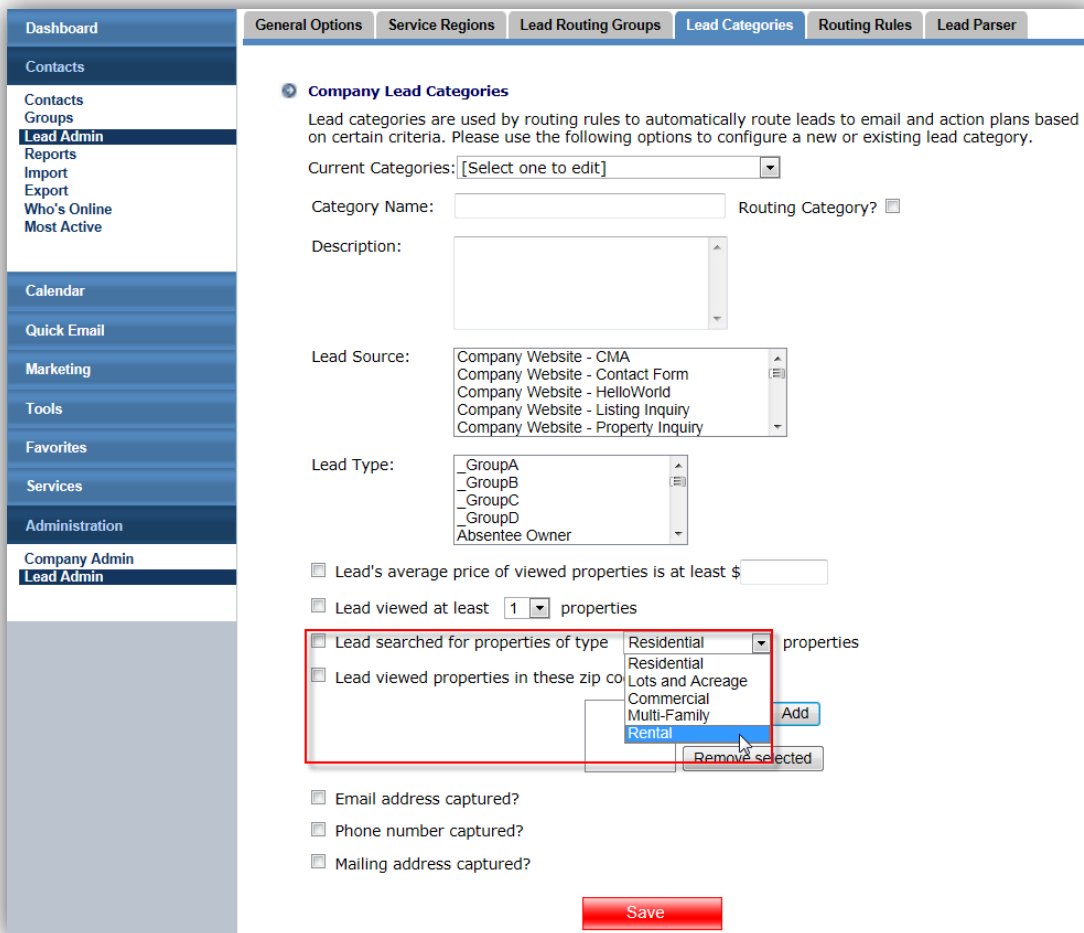
## Add Rental to Lead Categories

rDesk Elementool Ticket: [13156](#)

## Read Me First

*This will be ready to test beginning on Tuesday, June 18<sup>th</sup>*

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

● Read Me First

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](http://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

### **Read Me First**

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



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