What's New (January 24, 2017)

Admins, you can now share your saved message templates with agents. Previously you could only share with other admins.

Easily scan transaction notes: Transaction notes are now shown collapsed. This will make it easier for you to scan them quickly. A green triangle at the right of a collapsed note will let you expand that note.

Search transaction notes: On the top right corner of the Notes area, there's now a "search notes" box allowing you to quickly locate notes that match a search phrase.

Easily set up standard doc names from tasks and tasks from standard doc names: Now when creating checklist tasks, the system will auto-suggest matching document names. Similarly, when creating standardized document names, you will see matching task names being automatically suggested.

Know if your attached files will be emailed as links or as attachments: Whenever you attach more than 5 megabytes worth of docs to your emails, the system always sends those as downloadable links rather than direct attachments. Now the system will warn you whenever your selected docs will be sent as links.

And several general improvements.

Read the blog post for more info →