CRM

Release Notes

Oct 2024

ISO ACCESS
BUILD YOUR BUSINESS

Introduction

We are excited to announce the October 2024 release of our CRM Platform, featuring a wide range of updates and enhancements aimed at improving your experience and productivity. This release includes important new features, such as multi-tenancy support, Merchant Tape functionality, and Quick Boarding development activities, along with the 250+ enhancement tasks and performance improvements.

Features

1. Write-Off Automation
2. Demo Instance creation
3. Green screen AWS implementation
4. Integration of MongoDB into CRM system
5. Beacon development
6. Elavon set up and development

Major Fixes and Enhancements

1. Multi-Tenancy Enhancements
2. Phase 1 Tasks
3. North MPA and boarding enhancements

These improvements will improve our services, resulting in uplifting businesses beyond standards. We appreciate your valuable feedback and continued support as we work to enhance your experience with our CRM.

Release versions

6 Releases - 09.02.24, 09.16.2024, 09.30.2024, 10.14.2024 & 10.28.2024

Tickets closed

Subject	Type	Version	Category
PORTAL CONTROLLER SETTINGS	Feature Request	v-09.02.24	Settings
Multi-Tenancy statistics report	Feature Request	v-09.02.24	Multi-Tenancy
power ACH export	Sub Task	v-09.02.24	Ach Reject
Fields dependency and Validation	Sub Task	v-09.02.24	Users
Merchant Mobile APPs	Task	v-09.02.24	Merchant portal
Closure dates are not reflecting	Task	v-09.02.24	General requirements
Tickets are there but Tickets are showing as deleted while clicking in the new CRM	Task	v-09.02.24	Ticket/Helpdesk

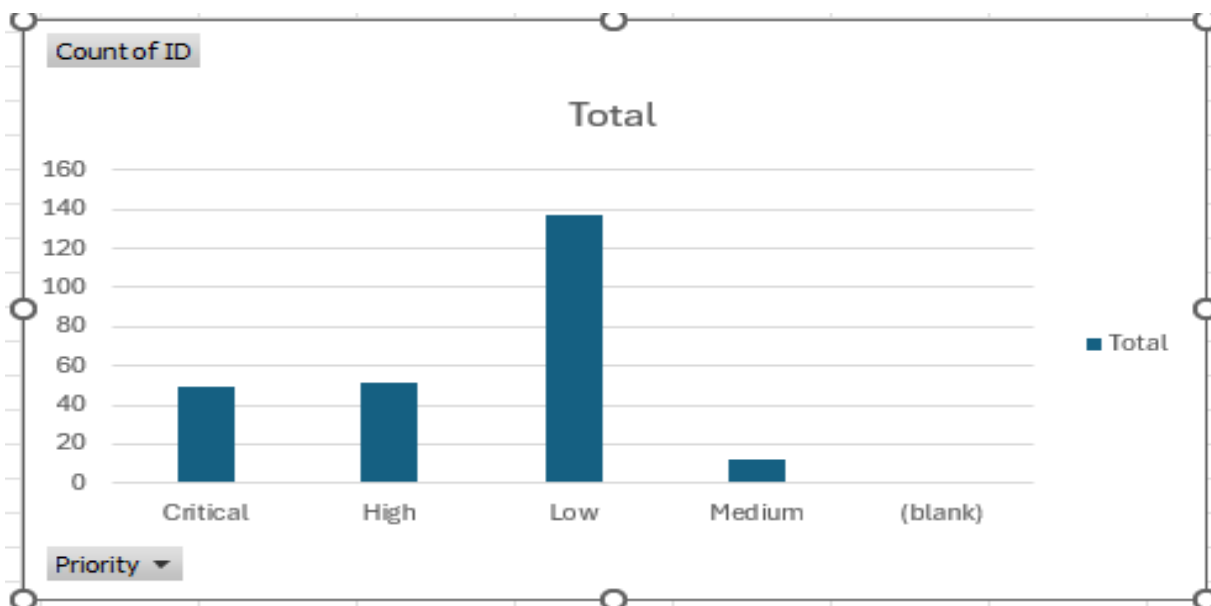| Disable Billback DocuSign MPA	Task	v-09.02.24	MPA
Close MID ticket - to-do list wants to arrange per closure workflow	Task	v-09.02.24	Ticket/Helpdesk
Assigned to name mismatch in ticket (5101657711083700)	Task	v-09.02.24	Ticket/Helpdesk
Current Mapping issues with North MPA	Task	v-09.02.24	MPA
2. Create Sales Rep / RM dependency	Task	v-09.02.24	Admin / Settings
CRM MPA North	Task	v-09.02.24	MPA
Unlink inventory from SO status	Task	v-09.02.24	Invoice
User Enhancement - Update 2	Task	v-09.02.24	Users
Multi-Tenancy - Global Variables Adding and updating	Task	v-09.02.24	Multi-Tenancy
Multi-Tenancy - User Module	Task	v-09.02.24	Multi-Tenancy
Fetching Batch Summary for Missed date	Task	v-09.02.24	General requirements
Linked Accounts Enhancements	Feature Request	v-09.16.24	Generic Requirements
Created invoice not showing in list view	Feature Request	v-09.16.24	Invoice
Once signed by the iso --> run Experian credUsers - it and save in personal docs	Sub Task	v-09.16.24	Users
Manage function - Changes	Sub Task	v-09.16.24	Users
DocuSign - Users	Sub Task	v-09.16.24	Users
Reports - Ability to pull records Merchant Portal Activated MIDs from frontend	Task	v-09.16.24	Reports
Payment Options	Task	v-09.16.24	Settings
Check pricing - 'Worked by: ' not displaying correct person	Task	v-09.16.24	Merchants
INVOICE NO: INV22878	Task	v-09.16.24	Invoice
Zip code auto-search for PR (Puerto Rico)	Task	v-09.16.24	Boarding
SAM 1 CORP (55630000265298)	Task	v-09.16.24	Boarding
ASSIGNED TO NAME MISMATCH IN TICKET DETAILS	Task	v-09.16.24	Ticket/Helpdesk
Fee item name was blank while checking the residual for the account 75240011942770	Task	v-09.16.24	Residual Module
Qual and non-qual is not showing Demo Mi old CRM	Task	v-09.16.24	Underwriting
FDR Transact Enhancements	Task	v-09.16.24	Transact Module
Status change issue in underwriter	Task	v-09.16.24	Underwriting
Monthly statement logo issue	Task	v-09.16.24	General requirements
Credit report error	Task	v-09.16.24	Boarding
Could not give Merchant Portal access to merchant	Task	v-09.16.24	Merchant portal
KATHERINA PERRY	Task	v-09.16.24	Boarding
IMPORT OPTION NEEDS TO BE REMOVED	Task	v-09.16.24	General requirements
UP CRM month missing in Filter	Task	v-09.16.24	General requirements
UP CRM -->Fix Search Functionality in Settings Page	Task	v-09.16.24	Boarding

AGNET CODE NOT SHOWS IN NEW GEN CRM	Task	v-09.16.24	Boarding
Reports show empty	Task	v-09.16.24	Reporting
Review merchant	Task	v-09.16.24	Boarding
Merchant Portal - Authorization shows duplicate entries	Task	v-09.16.24	General requirements
DemoCRM_ issues in Collection module	Task	v-09.16.24	Collection
User creation access	Task	v-09.16.24	Users
Multitenancy_ Can't be able to create invoice from merchant level In NPromotex	Task	v-09.16.24	Multi-Tenancy
Multi-Tenancy _ In all Instance The ticketing system does not allow the Solution Comment to exceed 99 characters	Task	v-09.16.24	Multi-Tenancy
Multi-Tenancy _ Build terminal Error "file_build_type"	Task	v-09.16.24	Multi-Tenancy
Multi-Tenancy _ Recent comment posting time incorrect	Task	v-09.16.24	General requirements
Multi-Tenancy _Comment Module Missing	Task	v-09.16.24	Multi-Tenancy
Multi-Tenancy _Slowness and PDF Document issue, Information Visualization	Task	v-09.16.24	Multi-Tenancy
Multi-Tenancy _Equipment creating SNo	Task	v-09.16.24	Multi-Tenancy
Beta url access for newgen	Task	v-09.16.24	Multi-Tenancy
Need to add new product in Npromotex	Task	v-09.16.24	Multi-Tenancy
Zapier - Vam Info	Task	v-09.16.24	Generic Requirements
Multi-Tenancy _ In Stock equipment not showing In NPromotex	Task	v-09.16.24	Multi-Tenancy
Multi-Tenancy _Document folder and file issue IN NPromotex and NRMF	Task	v-09.16.24	Multi-Tenancy
IMAP Report Visibility Issue Across Admin and Non-Admin Logins in New CRM	Task	v-09.16.24	Users
Mecca CBCAL	Task	v-09.16.24	Generic Requirements
Other Instance - Account Sync	Task	v-09.16.24	Generic Requirements
MCC Export Volume Profile	Task	v-09.16.24	Reporting
Multi-Tenancy fixes	Task	v-09.16.24	Multi-Tenancy
Multi-Tenancy - Role/ Profile	Task	v-09.16.24	Boarding
Multi-Tenancy _Lead Module issues	Task	v-09.16.24	Multi-Tenancy
Ticket Issues in multi tenancy	Task	v-09.16.24	Multi-Tenancy
Users - Bonus Section, Send DocuSign - Non-Admin Tasks	Task	v-09.16.24	Users
7524_Bank recon file update	Task	v-09.16.24	CBCAL
MRA REJECTS ISSUES	Task	v-09.16.24	MRA
Terminal data report	Task	v-09.16.24	General requirements
Remove Dollar from Risk Average Transaction	Task	v-09.16.24	General requirements

Master Card Match Error CBCAL BIn	Task	v-09.16.24	General requirements
AO Comments not updated	Task	v-09.16.24	General requirements
User/ Agent needs secondary email address field to be added to send Notifications	Feature Request	v-09.30.24	Users
Monthly Statement Quick View	Feature Request	v-09.30.24	General
Add Florida office option for booking the Conference and Training rooms	Feature Request	v-09.30.24	Calendar
CRM || Record View & List View || Phone Enhancement	Sub Task	v-09.30.24	General requirements
CRM || Lead-Contacts Sync || Enhancements	Sub Task	v-09.30.24	Leads
Add a button - Merchant Statement	Sub Task	v-09.30.24	General requirements
Write code to push the content from old to S3 in Python	Sub Task	v-09.30.24	General requirements
Unable to build terminal automatically	Task	v-09.30.24	Equipment Creation / Boarding
V3Comm Survey Report	Task	v-09.30.24	PBXmanager
Approval Time in Merchant Level	Task	v-09.30.24	Merchants
Document page not landing for merchant	Task	v-09.30.24	General requirements
Green Screen VPN Setup from AWS	Task	v-09.30.24	General requirements
take a longtime to open - apply 5 second rule - chargeback summary report	Task	v-09.30.24	Transact
Parser For POSR_ADF	Task	v-09.30.24	Data File Parsing
Parser for PPM_KEY	Task	v-09.30.24	Data File Parsing
Map the MFC Grid 14233002	Task	v-09.30.24	Toytdins
Documents are not appearing in CRM after being uploaded to the demo CRM	Task	v-09.30.24	Documents
Issue with residual Raw data Exported file Showing Rounded Values Instead of Decimals/Accurate values	Task	v-09.30.24	Residual Module
Sort Menu Items alphabetically under "ALL" section in New CRM	Task	v-09.30.24	General requirements
Pricing Page mapping issue in demo CRM for FDR accounts	Task	v-09.30.24	Pricing
Download feature is not working in tab " Batch and Payment".	Task	v-09.30.24	Merchant portal
Cannot Update EPI While Editing Equipment	Task	v-09.30.24	General requirements
Annual review tickets → Running the script	Task	v-09.30.24	Ticket/Helpdesk
Merchant name not Displaying properly	Task	v-09.30.24	Users
Ticket module -Collection report issues	Task	v-09.30.24	Ticket/Helpdesk
Stale auth flag	Task	v-09.30.24	Risk

Return Invoice details need to add hyperlink of Regular Invoice	Task	v-09.30.24	Invoice
Merchant BAILEYS AUDIO pricing Information updated	Task	v-09.30.24	Pricing
Driver's License Number Format CRM Error During Boarding Process	Task	v-09.30.24	MPA
HubSpot -> CRM	Task	v-09.30.24	Hubspot
Users in "Backoffice Profile W/Residuals New" cannot view merchant email logs in both old and new CRM	Task	v-09.30.24	Users
Attrition Report	Task	v-09.30.24	Reporting
MCC Export Volume Profile - June - Report	Task	v-09.30.24	General requirements
Pass through interchange - All templates	Task	v-09.30.24	Schedule A
CRM || Leads || Merge Leads Enhancements	Task	v-09.30.24	Leads
CRM || Contacts || Phone Field Enhancements	Task	v-09.30.24	General requirements
Add UTM Details in Tableau	Task	v-09.30.24	General requirements
Lead status → UP CRM	Task	v-09.30.24	Leads
Python Scripts	Task	v-09.30.24	General requirements
UP CRM issues	Task	v-09.30.24	General requirements
Ticket information || Cancellation reason is not mandatory	Task	v-09.30.24	Ticket/Helpdesk
Dashboard not loading for non-admin users	Task	v-09.30.24	Users
Unable to onboard Lead	Task	v-09.30.24	FDR Boarding
Multitenancy support	Task	v-09.30.24	Multi-Tenancy
State reporting	Feature Request	v-10.14.24	FDR Boarding
Underwriting and boarding	Feature Request	v-10.14.24	Underwriting
Retention Admin Tool Suggestions	Sub Task	v-10.14.24	Collection
CRM || Leads || Add SO to Leads	Sub Task	v-10.14.24	General requirements
Changing the FedEx API structure	Sub Task	v-10.14.24	Invoice
Preview the document	Monthly Statement	Sub Task	v-10.14.24	Reporting
MS Dashboard - Redis Cache Implementation	Sub Task	v-10.14.24	General requirements
Vendor Name Mapping	Task	v-10.14.24	Equipment
List view fields	Task	v-10.14.24	Generic Requirements
Admin Dashboard - older lease bonus appears in lease bonus section	Task	v-10.14.24	Bonus module
Youssef needs his login to display the compliance report	Task	v-10.14.24	Reporting
Invoice missing in Payment Gateway	Task	v-10.14.24	Payment gateway

Issues with Close Recurring Payment RFC and List View in New Gen CRM	Task	v-10.14.24	Payment gateway
TSYS transact - Bank Recon - File Moving	Task	v-10.14.24	Transact Module
Transaction Data Enhancement	Task	v-10.14.24	Transact Module
PCI support	Task	v-10.14.24	PCI
Create a functioning demo instance	Task	v-10.14.24	General requirements
Create Runbook for New Instance launch in multi-tenancy	Task	v-10.14.24	General requirements
Vendor Mapping	Task	v-10.14.24	General requirements
RMF CRM Email Notifications Changes	Task	v-10.14.24	General requirements
LEASE DOCUMENTS (498459245888)	Task	v-10.14.24	Bonus module
Promotex -Invoice module	Task	v-10.14.24	Invoice
CRM || Luigino Tailor Shop one account does not have an MID	Task	v-10.14.24	Boarding
CRM || Documents || Accept more formats	Task	v-10.14.24	Documents
Bank recon file 7522	Task	v-10.14.24	CBCAL
Description disappearing during RFC change	Task	v-10.14.24	Ticket/Helpdesk
Collection Invalid Link issue	Task	v-10.14.24	Collection
FDGL Bonus section	Task	v-10.14.24	Bonus module
Multi-Tenancy _Lead	Task	v-10.14.24	Multi-Tenancy
North fixes	Task	v-10.14.24	FDR Boarding
CBCAL Merchant PCI Report	Task	v-10.14.24	CBCAL
New Agent Creation Notification Email	Task	v-10.14.24	Users
CRM New Field - Last 180 Days MID Approved Count	Task	v-10.14.24	General requirements
Boarding support issues - North and Omaga	Task	v-10.14.24	General requirements
CRM || SO || Address Field Issues	Task	v-10.14.24	Boarding
FD Boarding Issue	Task	v-10.14.24	FDR Boarding
Agent email logs	Feature Request	v-10.28.24	Users
CRM || FedEx Rates API || Changes	Sub Task	v-10.28.24	Invoice
CRM || Payment Gateway || Payment Status	Sub Task	v-10.28.24	Payment gateway
Report Admin / Non admin Access	Task	v-10.28.24	Generic Requirements
Generate Tsys MPA PDF Missing Field in CRM	Task	v-10.28.24	MPA
Authorisation Time Zone Conversion In Risk and CRM	Task	v-10.28.24	General requirements
Issues with Email Log Visibility and Missing Attachments in CRM	Task	v-10.28.24	General requirements
Green Screen→ Appearance of the report looks improper, it can be minimized.	Task	v-10.28.24	greenscreen

Slow Pages - System slowing down during high concurrent users	Task	v-10.28.24	Generic Requirements
Underwriting Action Tools	Task	v-10.28.24	Underwriting
Add Merchant tape report in Custom Report module	Task	v-10.28.24	Reporting
RMS File To Green Screen File Generation	Task	v-10.28.24	greenscreen
CRM || List View Page || Field Search	Task	v-10.28.24	Reporting
Print Statement Tsys Update	Task	v-10.28.24	TSYS Transact
Processing History Monthly Audit All Bin	Task	v-10.28.24	General requirements
CRM || Contacts || Delete Contact	Task	v-10.28.24	General requirements
CRM || Logo || Update New Logo	Task	v-10.28.24	General requirements

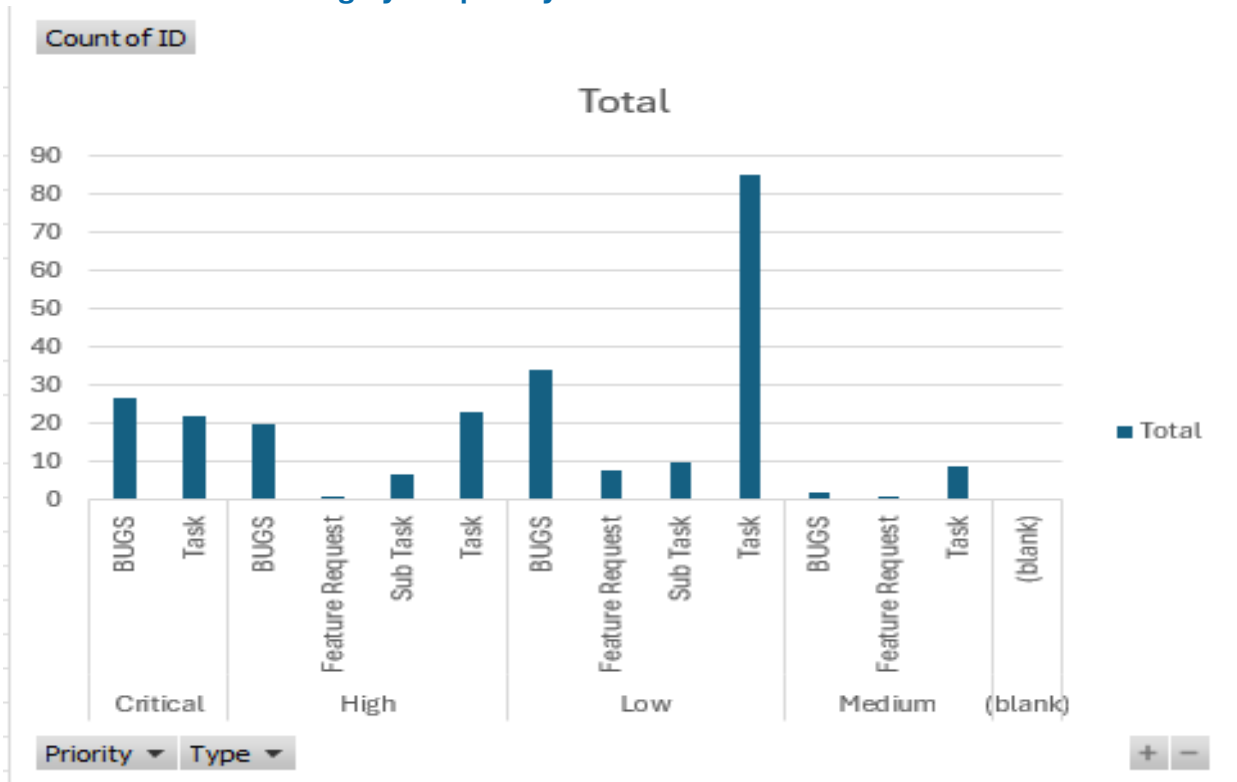Below is the tabular representation of the above chart:

Issues	Feature Request	Task	Sub Task	Others	Grand Total
83	10	139	17	0	249

Major tasks/issues delivered.

Write off automation
Demo instance creation
Green screen AWS implementation
Integration of MongoDB into CRM system
Beacon development

Elavon set up and development
Multi-Tenancy Enhancements
Phase 1 Tasks
North MPA and boarding Enhancements

Tasks closed based on category and priority mentioned below:

CRM products in October 2024 Release scope

Applications
Demo CRM (New Gen)
MECCA CRM
UPCRM
Promotex CRM
RMF CRM
Risk shield
Merchant Portal
MPA

What's Next?

We're not stopping here! Look forward to more enhancements and features in the coming months as we continue to refine and expand our CRM capabilities to better support your needs

If you have any questions or need assistance, please don't hesitate to contact our team at info@merchantindustry.com or +1.866.811.1005. For additional resources, be sure to visit www.merchantindustry.com. We appreciate your trust in us and look forward to serving your payment processing needs.

THANK YOU

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