CRM

Release Notes

Nov 2024

Introduction

We're thrilled to share the latest updates to our CRM platform, packed with new features, enhancements, and performance improvements designed to streamline your experience and help you get more done.

Here's a quick look at what's new:

New Features

1. **Write-Off Automation**
Simplify financial processes with automated bulk handling for write-offs, saving time and reducing manual errors.
2. **ACH Reject Automation**
Stay on top of payment rejections effortlessly with automated processes that handle them in real time.
3. **IMAP Integration Enhancements for CBCAL**
You can now easily view and download your CBCAL monthly reports directly from the CRM dashboard, making it simple to access the information you need.

Feature Enhancements You'll Love

1. **North MPA and Boarding Enhancements**
Improved workflows for boarding and MPA processes, delivering greater efficiency and ease of use.
2. **User Deletion Notifications**
Notifications are now sent directly to designated support email roles, keeping everyone informed and aligned.
3. **CBCAL Monthly Report**
Access and download detailed CBCAL monthly reports directly from the CRM front end, simplifying reporting.

Major Improvements for a Seamless Experience

- **Performance Enhancements**
Enjoy faster response times and optimized system performance for a smoother experience.
- **System Stability Upgrades (Version 1.1)**
Enhanced stability ensures uninterrupted operations, so you can focus on what matters most.

Why These Updates Matter

These updates reflect our ongoing commitment to delivering a CRM platform that works smarter for you. With these changes, you'll enjoy:

- **Improved Efficiency**: Automation and enhanced workflows free up your time for higher-value tasks.

- **Greater Transparency**: New notification and reporting features keep your team informed and in control.
- **Seamless Usability**: Faster, more reliable system performance makes daily operations hassle-free.

Release versions

- 11.11.2024

Tasks Completed

Subject	Type	Version	Category
TSYS Negation report	Task	v-11.11.24	Transact Module
RG department CRM Phase 2 wish list	Feature Request	v-11.11.24	Underwriting
Reports and settings module upgrades	Task	v-11.11.24	Reporting
SSN in Federal TXN ID Type	Task	v-11.11.24	Generic Requirements
Viewing Passer History in New Generation CRM	Task	v-11.11.24	Reporting
User residual report changes	Task	v-11.11.24	Reporting
bonus admin dashboard additional fields	Sub Task	v-11.11.24	Bonus Admin
lease bonus logic	Sub Task	v-11.11.24	Bonus Admin
MPA North - Personal Guaranty Signature for Docusign	Task	v-11.11.24	MPA
Automatic ticket creation on each new account boarded	Task	v-11.11.24	Ticket/HelpDesk
CRM || Application Time Out || Reload Page Request	Task	v-11.11.24	Generic Requirements
Remove the help desk button from all menu, as we already have separate for tickets.	Task	v-11.11.24	Generic Requirements
Accounts fixes	Task	v-11.11.24	Boarding
FDR-North pricing template mapping	Task	v-11.11.24	Boarding
AO Status Decline Not Syncing with CRM	Task	v-11.11.24	Generic Requirements
RMS File To Green Screen File Generation	Task	v-11.11.24	Generic Requirements
CBC ISO Q3 report	Task	v-11.11.24	Reporting
Add Calculators in the CRM - Topbar	Task	v-11.11.24	Generic Requirements
LABELS NUMBER AND TRACKING STATUS NOT ACCURATE	Sub Task	v-11.11.24	Shipping
MPA - General changes	Task	v-11.11.24	MPA
MPA North Discussions	Task	v-11.11.24	Boarding
FDR North Pricing	Task	v-11.11.24	MPA
User module-Exported excel repaired warning issue.(Demo CRM)	Task	v-11.11.24	Generic Requirements
FDR Merchant Clover Volume	Task	v-11.11.24	Generic Requirements
Todo list picklist settings for Closemid ticket	Task	v-11.11.24	Generic Requirements
Ticket module-Reason for call Ticket description issue.	Task	v-11.11.24	Ticket/HelpDesk

CRM || Code Base & DB || Copy from Production to UAT	Task	v-11.11.24	Generic Requirements
Risk CBCAL Read-only Access User Creation	Task	v-11.11.24	Risk
North Pricing label change	Sub Task	v-11.11.24	MPA
Sunset old CRM plan - Beta Tag removal step	Task	v-11.11.24	Generic Requirements
Pci update type of industry, language	Sub Task	v-11.11.24	Generic Requirements
MPA - Enhancement	Feature Request	v-11.11.24	MPA
CRM ||Shipping || Enhancement	Enhancement	v-11.11.24	Shipping
CRM || Leads & ISO Details Page || Remove Section	Task	v-11.11.24	Lead
CRM || Updates Section || Remove Data	Task	v-11.11.24	Generic Requirements
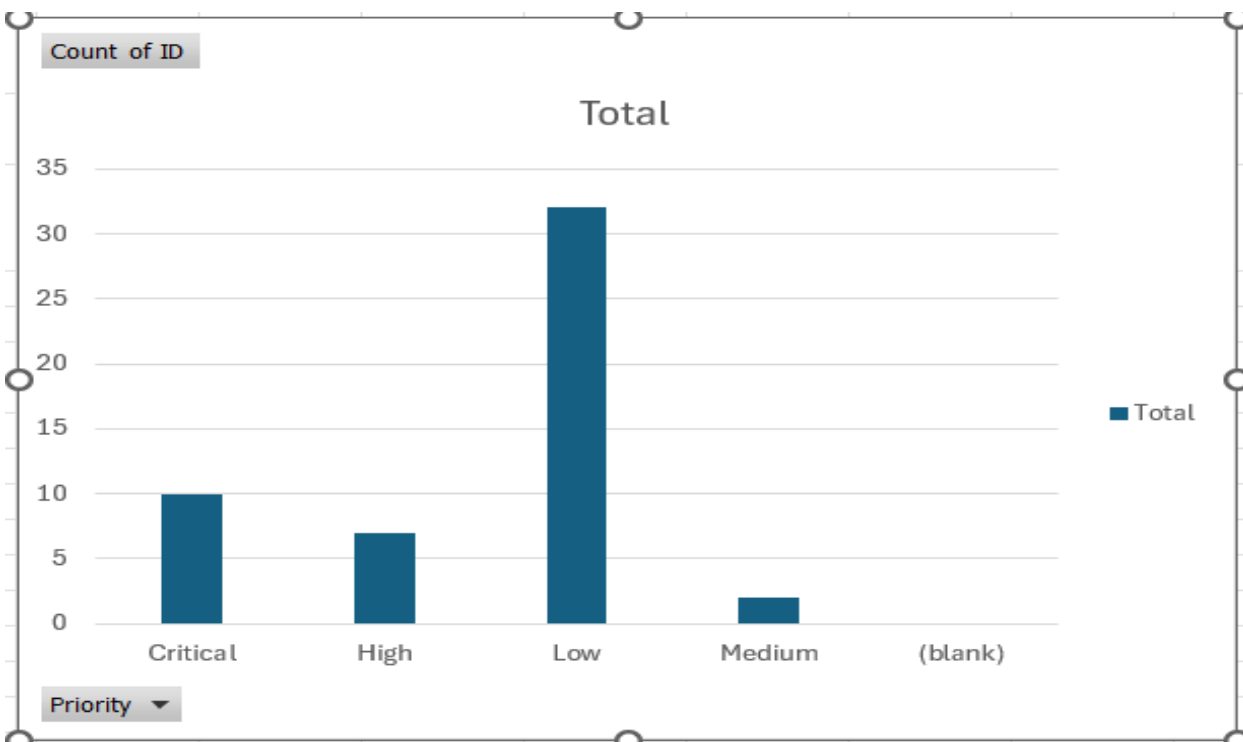
BUGS	Feature Request	Task	Sub Task	Enhancements	Grand Total
10	2	32	6	1	51

Major tasks/issues delivered

- Write off Automation
- Performance tuning, stability enhancements
- Beacon development
- Elavon development
- Quick Boarding enhancements
- Version 1.1 tasks enhancements
- North MPA and boarding Enhancements
- CBCAL monthly report enhancement
- User Deletion process enhancement

Tasks closed based on category and priority mentioned below:
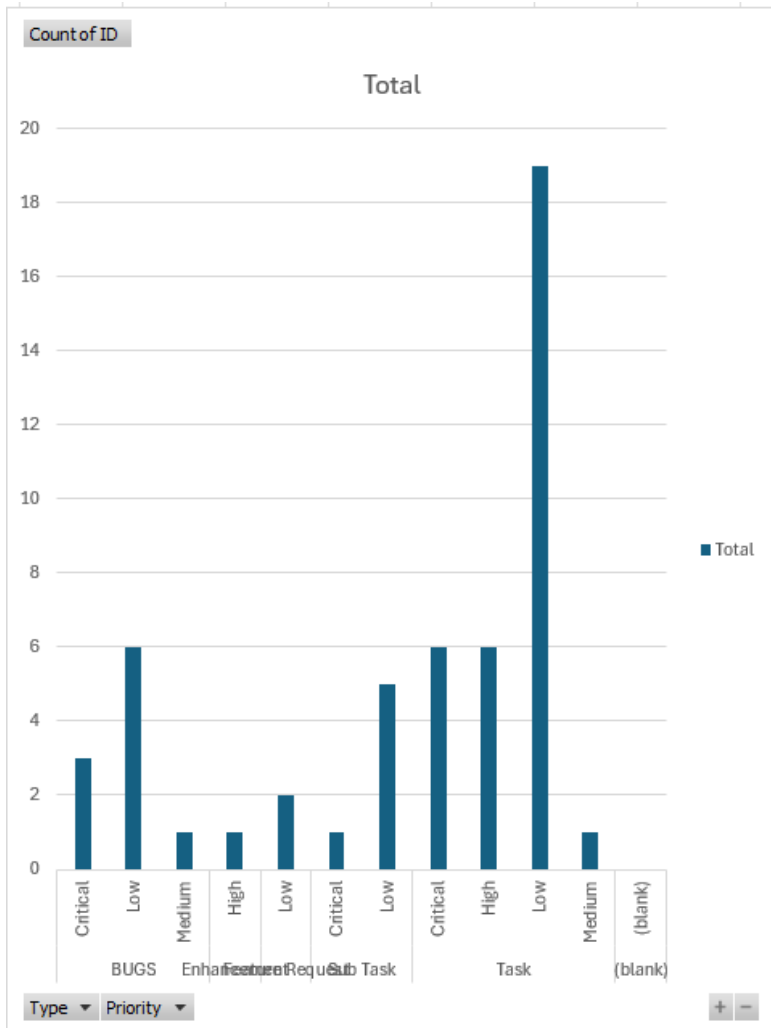
What's Next?

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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