

DOORCOUNTS UPGRADE 22-December-2020

Contact us for more information at support@doorcounts.com or 833-503-9934.

Performance Improvements

- Improved performance for the following pages:
 - Action Calendar
 - Upboard Page
 - Prospects / CRM
 - Sales Statistics (emp & loc)
 - Sales Charts

CRM Advanced Search Enhancements

- Search criteria can now find customers based on:
 - Prior name (such as prior visit by a family member)
 - Any prior sales order
 - Any prior notes & comments about the customer.

CRM Prospect History Enhancement

- Improved logic for combining history information if the customer has been in previously.
 - There were a very few cases where the Prospect History was incorrectly combined for two customers with similar names and addresses. This is now solved.

CRM Export Issue Solved

- Solved an issue that had started occurring with the CRM Export feature.
 - If a single store or single sales person had been selected with Advanced Search, all stores or all salespeople were being exported rather than just the filtered list.

Scheduled Action Enhancements

- If multiple salespeople have been involved with a particular customer, previously a follow-up action could only be assigned to the current salesperson. Now a scheduled action can be assigned to any of the salespeople who have been involved.
- If a sales person has moved from one store to another – and if a scheduled action is added by the sales person to a customer from the prior store, the action will be assigned to the new store. Previously, it had been assigning to the prior store.
- New company configuration option to require that a new Scheduled Action be entered for all Potential Sales. (Let us know if you would like this option to be turned on).

Podium Enhancement

- Now we have two company configuration options for how a Podium request can be sent.
 - Send Podium Request by clicking on the Podium icon on the photo. (current functionality)
 - Automatically send all Podium Requests without clicking.
 - (If you already have Podium integration turned on and would like to switch to automatic sending, let us know).

Custom Fields Enhancements

- Custom Fields with yes/no answer will now be included in the Sales Statistics reports showing a count of the “yeses”.
- Custom Fields were disappearing when editing a sale from the Sales Transactions Report. This is solved.

Emailing Enhancement

- Email responses from customers are now being displayed in the Email Popup.

Sales Transactions Report Enhancement

- Adjustments, Credits, and Returns will now be included in the Sales Transactions Report.