

Feature Release 2025 May CRM

New features released up to May 2025

Customer Relationship Module (CRM)

1	Bulk email templates for Debtors and creditors
2	Time log flags for public holiday
3	Enhanced print out report
4	Enhanced auto letters out
5	New categories for letters out for WOF and Service due
6	Units logged on Asset

Bulk email templates for Debtors and creditors

CRM



Configuration

Check List Template Setup

Check List Groups

Check List Questions

Interaction Types

Website Support Groups

Website Support Forms

Support Log Ticket Setup

Contract Maintenance

Time Tracker Config

Expense Setup

Sales Lead Setup

Email Templates

Activity

Time Logging

Active Stock Take - B

Email Template Letter

Search

Add

Code:

Description:

Type:

Customers

Active:

☒

Page 1

#	Code
1	Shift tab bug
2	WhereIsType
3	ErrorWithTagNa
4	Save bug
5	WhereIsImage!
6	fixerror001
7	testsavedimage
8	TESTOrderUpd
9	TESTServiceFee
10	TESTSpecialPro
11	SupplierCode

Edit Email Letter

Code:

TESTOrderUpdate1

Active:

☒

Description:

Customer Order Update

Type:

Customers

B

i

A:

Dear [Contact Full Name], or [First Name of Contact] if you prefer

I hope this email finds you at [Name of Customer]. We are reaching out to inform you about your order y [Company Name].

Order Details:

Order Number:

CL201112

Order Date:

20/1/2025

Product Information:

Product Name:

CMS Branded Toothbrush

Quantity:

2

Price:

\$99.12

We wanted to let you know that your order has been shipped. You can track your order using the followin <https://example.com/tracking/91241112>.

We also wanted you to let us know if you can see the image below, it is embedded in this email:



Time log flags for public holiday

Edit Time Log

Attachment

Memo

Create Reminder

Add Disbursements

Email Self

Print

Info

Close

Time Log - T716

Detail

Detail 2

Travel Expense

Invoice Lines

Custom Fields

Asset:

L: ☒

In Warranty:

☐

View Asset Item

Support Task:

Support Sub Task:

Log No:

Remove Support Log

Support Link:

Time Field 1:

Time Field 2:

Time Field 3:

Order Number:

Geolocate:

Map

Location Date Time:

Add Time Logs On Job As:

Add To Job:

☐

☐ CTC

☒ SC

Job Number:

Job Line Link:

Job Line Link Display:

--

New Job Line:

☐

Added To Job:

☐

Remove T/L To Job

Added Log:

Sales Lead:

Remove Sales Lead

Sales Lead Link:

Leave:

☐

Sick:

☐

Public Holiday:

☐

Save & New

Save & Close

Save

Close

To Outlook

Add to Job

Enhanced print out report

Time Log Search

Search Add Edit Cancel Clone Email Self Imports Process Print/Export

Detailed Custom Fields Calendar Expand

Time Log No.: Reference: Debtor From: Contract: Date From: 2025-01-01

Time Log Group: Other Employee: Malcolm Granville Debtor To: Task:

Total Hours: 94h20

Page 1 of 1

#	Selected	Att	Memo	Status
1	☐			
2	☐			
3	☐			
4	☐			
5	☐			
6	☐			
7	☐			
8	☐			

T720 2025-W20

4 933.34

Remove P

Job No.

User Time Log Report

Summary Detail

Hours Compare: 40

Continue Close

Enhanced auto letters out

Asset Tracker

Configuration

- Debtor Setup
- Supplier Setup
- Inventory Setup
- Unit Of Measure Setup
- Policy Control
- Incident Setup
- Group Code Setup
- Brand Make Model Setup
- Asset Group Setup
- Asset Action
- Asset Condition
- Asset Location
- Issue To Users
- Email Letter Templates

Email Template Letters

Search Add Edit Delete Print

Code: Description: Active: ☒

Email Type: All

Page 1 of 1 Remove Paging: ☐

#	Code	Description	Active	Type	Return Date Set	Days
1	HEA	Health	Yes	Return Date Letter	Before	28
2	TestReturnDate7DaysBefore	Test Return Date 7 Days Before	Yes	Return Date Letter	Before	7
3	TestReturnDate7DaysAfter	Test Return Date 7 Days After	Yes	Return Date Letter	After	7
4	TestReturnDateOnDay	Test Return Date On Day	Yes	Return Date Letter	On Day	
5	TestCode400	Save with new code test	Yes	Action Letter		
6	TestImageWithoutUpload	New description once again	Yes	Action Letter		
7	TestImageSaveHere	8 bit pictures to save	Yes	Action Letter		
8	ChrisTempImages		Yes	Action Letter		
9	The Flooring Room	Thanks for Visiting Our Showroom – Let's ...	Yes	Action Letter		
10	SubTest01	Test substituted values	Yes	Action Letter		
11	SubTest02	Test subs 2	Yes	Action Letter		
12	ImageRestrictionTest	Image Restrictions Test	Yes	Action Letter		

Units logged on Asset

Edit Asset Item

Asset Item Detail

AttachmentsMemoCreate ReminderPrint DetailView AttachmentsAction:Close

AssetFixed AssetVehicle RegisterCRM

MainGeneralInfoLinked ItemsDoc LinksAsset Action LogMaintenanceUnits Logged

SearchAddEditDeleteRecalculate

Page 0 of 0No data to display

#	Units Logged	Last Logged	Difference	Date	Date Logged	Time Logged	By Who
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Save & NewSave & CloseSaveCloseCheck Out

Revision #2
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