



rDesk CRM PROD Release Notes v 9.3.1

Real Estate Digital is proud to announce this off-cycle release of rDesk CRM. Releases will occur during the evening on the night before the date shown.

Stage preview period: Oct. 29 & 30, 2013

Production release date: Oct. 31, 2013

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Change in definition of Lead

rDesk Elementool Ticket: 14371

We have redefined “what is a lead” by separating the dependency on being added or removed from the lead contact group. New leads that come into rDesk CRM will still be automatically added to the lead contact group but the definition of leads are no longer based on if they belong to the lead contact group.

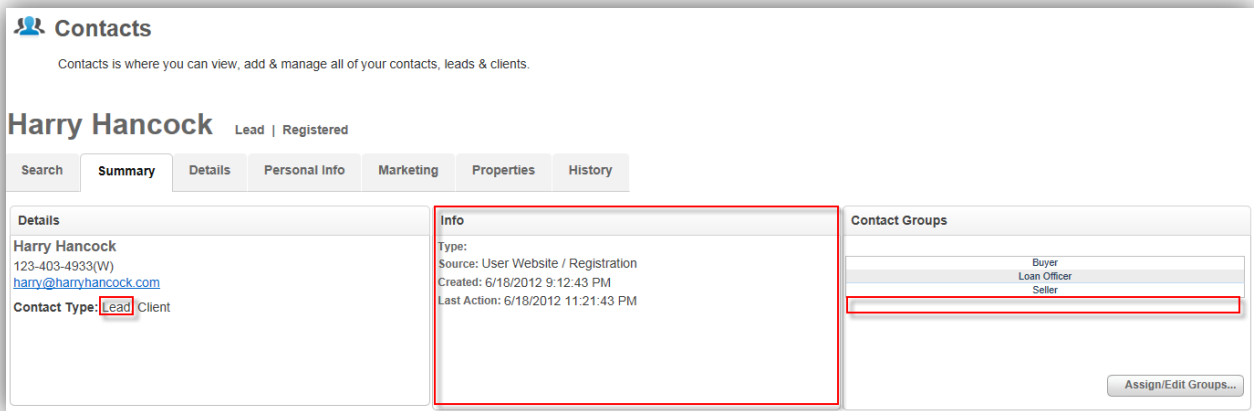
This change will also give Admins full visibility to leads at all times for managing, monitoring and reporting regardless if it was removed from the lead contact group.

The new definition and functionality are as follows;

1. Leads will be defined as not being a contact for,
 - a. Contacts manually entered
 - b. Contacts imported
 - c. Contact added through Exchange Sync

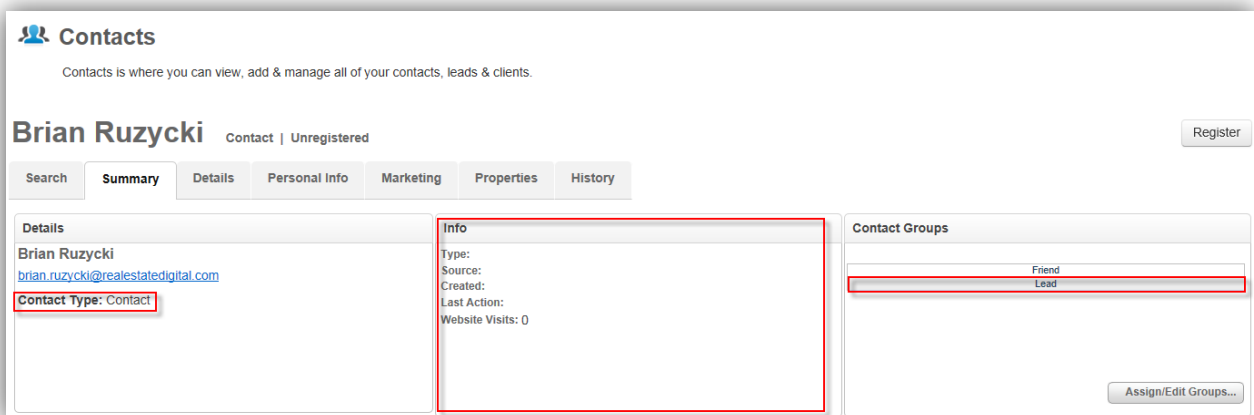
- d. Any contact in the system that wasn't created in one of these three ways will be considered a lead and visible to Admins. (This is consistent with the definitions established for the Unified Platform Project.)
- 2. If a lead is removed from the contact lead group, the contact type will not change from contact to lead and will still be considered a lead and visible to Admins.

In addition, the lead info will remain visible in the Info section on the Summary tab.



- 3. If a contact is added to the contact lead group, the lead info will not display Info on the Summary tab (this is current functionality) and will not will not be visible to Admins.

This includes when an agent imports contacts into the contact group of lead.



A migration task will be conducted the night of the release to apply this new logic. Admins may see additional assigned leads, previously removed from their view, as a result of a previous removal from the contact lead group.



Benefits

- ✓ This will address the issue where admins would lose visibility to company leads when an agent would remove the assigned and accepted lead from the lead contact group.
- ✓ This will allow agents to continue to fully use contact groups for grouping contacts and leads without impact to the visibility of company-generated leads to admins or exposing their own personal contacts

Add Property Views

rDesk Elementool Ticket: 14991

We have added a new section under the new Property tab called Property Views to display listing views made by the contact. Although this information is currently visible to unregistered contacts under the Property tab, it was not for registered contacts in the new Property tab that displays the Saved Search, Saved Property, etc. sections once available only in Website Admin.

Contacts

Contacts is where you can view, add & manage all of your contacts, leads & clients.

Christine Markuson

Client | Registered

Search Summary Details Personal Info Marketing **Properties** History

Saved Searches

No saved searches Refresh

[+ Add New](#) View: All Show: 5 Items Search


Search Name	Status Date	Saved By
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← Prev Next →

Saved Properties

2 properties saved Refresh

[+ Add New](#) Rating: None View: All Show: 5 Items Search




5995 Bowen Se Place, Outside Area (Outside Ca), OR 97317 , (Active) | 4 Beds, 3.0 Baths, sqft | MLS#SR12129376 ★★★★☆

\$469,900
Property Type: **Residential**
Listing Provided by

Agent: Phone: Agent: Phone:
Email: Email:
First Viewed: Jan/01/0001
Last Viewed: Jan/01/0001
Times Viewed:

[Print](#) [Share](#)



5995 Bowen SE Place, OUT OF STATE, OR 97317 , (Active) | 4 Beds, 3.0 Baths, sqft | MLS#SR12129376 ★★★★☆

\$469,900
Property Type: **Residential**
Listing Provided by Mills Realty of California

Agent: Simon Mills Phone: 818-332-7987 Agent: Ann Call Phone:
Email: Email: EDDAFFRON@TARBELL.COM
First Viewed: Jan/01/0001
Last Viewed: Jan/01/0001
Times Viewed:

[Print](#) [Share](#)

← Prev 1 Next →

Property Inquiries

No property inquiries Refresh


Show: 5 Items Search

← Prev Next →

Property Views

3 property views Refresh

Show: 5 Items Search



5995 Bowen SE Place, OUT OF STATE, OR 97317 , (Active) | 4 Beds, 3.0 Baths, sqft | MLS#SR12129376

\$469,900
Property Type: **Residential**
Listing Provided by Mills Realty of California

Agent: Simon Mills Phone: 818-332-7987 Agent: Ann Call Phone:
Email: Email: EDDAFFRON@TARBELL.COM
First Viewed: May/20/2013
Last Viewed: May/20/2013
Times Viewed: 2

Remember that viewed data is counted each and every time the contact clicks property details, requests information on a property asks a question on the property details, saves the property, and changes the milestones for the property (saved property update) which could occur all in one session!

It is possible that a contact can view a property, inquire about the same property and also save that property so you may see the same property multiple times. Also know that since we pull views versus inquiries and saves from different sources, the data may differ as well.

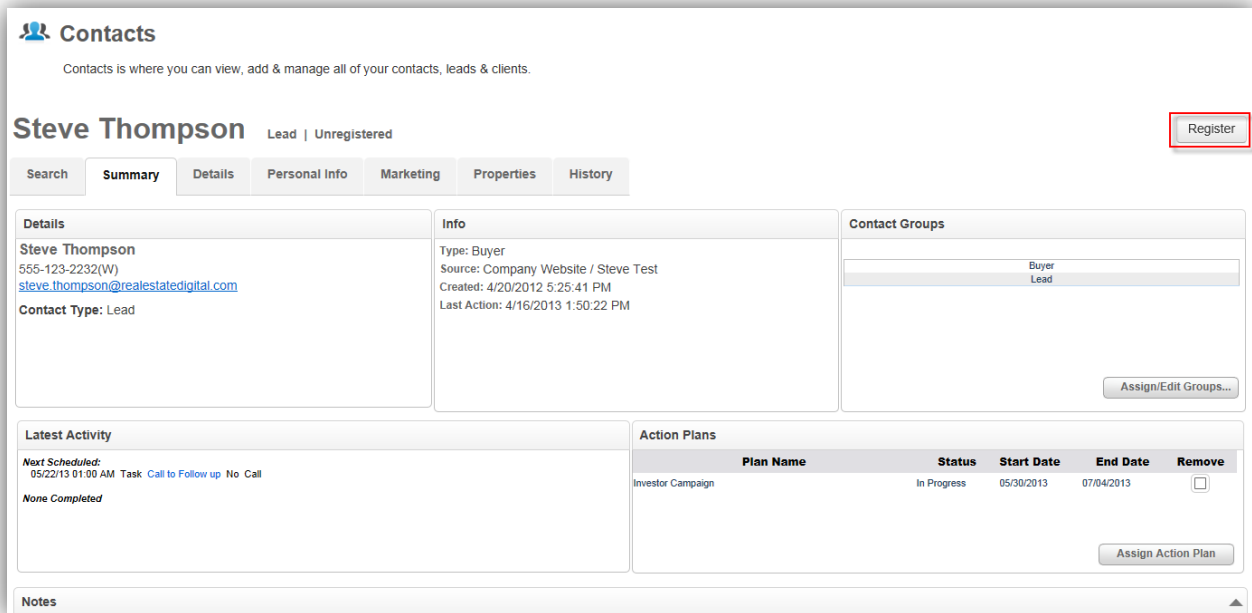
Benefits

- ✓ Allows users to see listing view information for registered contacts

Auto “Associate” existing contact when registering

rDesk Elementool Ticket: 14925

Currently when a new contact is added and the agent selects the “Register this Contact” checkbox, the contact is registered and associated to the agent all at once. We now have extended this capability for when an agent registers an existing contact or lead using the current “Register” button.



The screenshot shows the 'Contacts' page for 'Steve Thompson', a Lead who is Unregistered. A red box highlights the 'Register' button in the top right corner. The interface includes tabs for Search, Summary, Details, Personal Info, Marketing, Properties, and History. The 'Details' tab is active, showing contact information, source, and creation details. Below the details are sections for 'Latest Activity' and 'Action Plans'.

Plan Name	Status	Start Date	End Date	Remove
Investor Campaign	In Progress	05/30/2013	07/04/2013	<input type="checkbox"/>

Although the ‘Associate’ button will no longer display for agents, it will for Admins as they will still need to choose the agent as part of that step.

Benefits

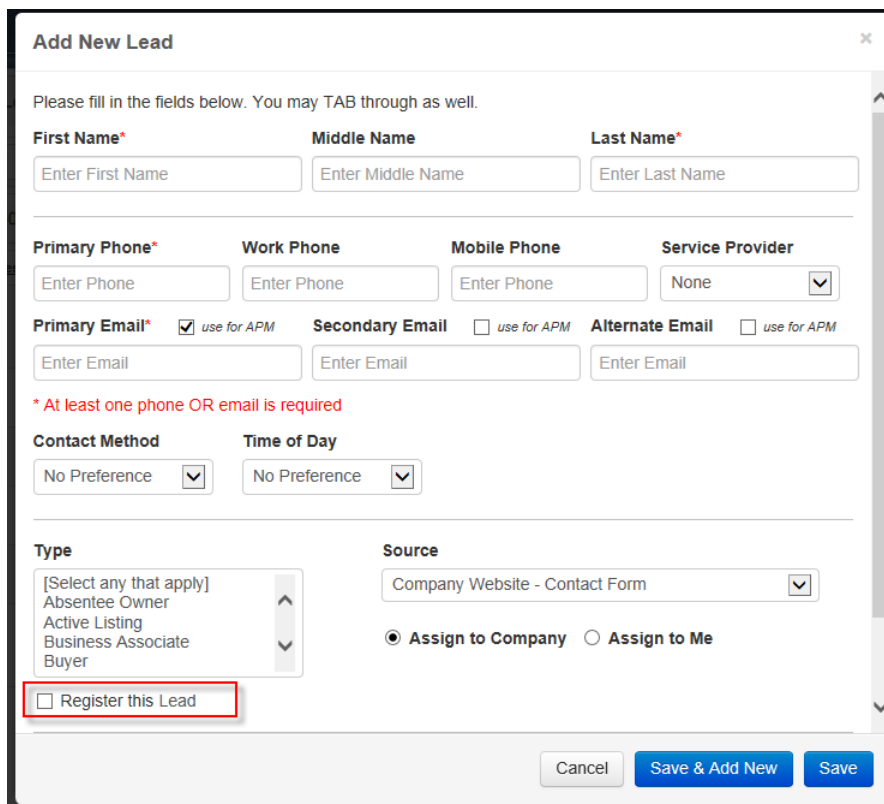
- ✓ Eliminates need for agents to perform a two-step process to establish a one-to-one relationship with a contact
- ✓ Reduces confusion as to what “associate” means

Add “Register this Lead” to the Add New Lead overlay

rDesk Elementool Ticket: 14894

We added a new "Register this Lead" checkbox to the lead overlay that displays when Lead Admin manually add a lead under Manage Leads, Manage dropdown.

This additional feature will allow admins that manually add leads to easily register them within this step.



You will also notice that we applied our style guide to this overlay so it is easier to use and is consistent with our Add New Contact overlay.

Benefits

- ✓ Eliminates additional steps required for admins who need to register manually added leads
- ✓ Improved usability with new look-and-feel



Documentation

For this release, the following user guides have been updated and can be found under these headers via the Help link to redassists.com by the date of the release.

- Agent Tools
 - Contact Leads User Guide
- Company Tools
 - Managing and Assigning Leads User Guide

Contact your Account Manager if you need these sooner in a Word or PDF formatted version.

Change Control

Date	Change Type	Category	Section
10/25/2013	Initial		



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