Release Notes

Product Name: TeamTexter® 2.0 Web Application

Release Number: v2.0 SP8

Date of Release: September 30, 2023

Overview: This service pack includes new features, enhancements and bug fixes to the web application.

1. New Feature: Global Time Zone

- **Issue Summary:** The application did not have the ability for administrators to set a global default time zone for scheduling messages.

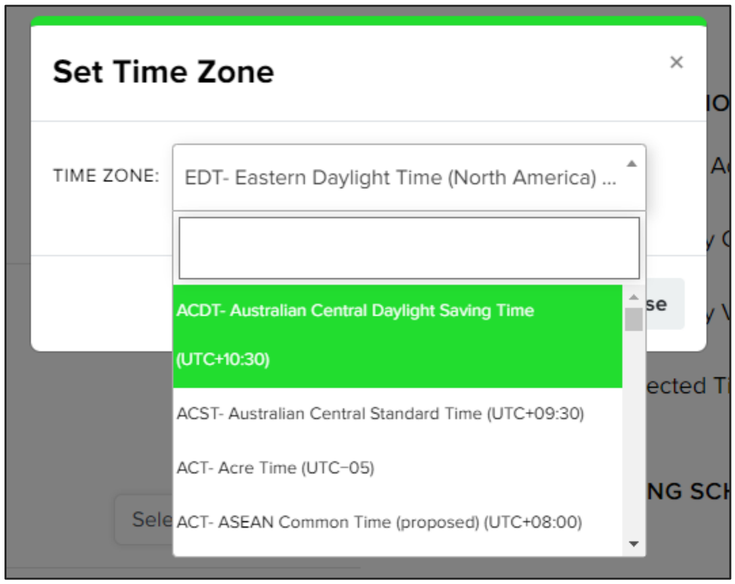
- **Resolution:** A new feature has been implemented that allows administrators to select a global default time zone under the Administration > Account settings. A drop-down menu of all time zones has been added, allowing the administrator to choose a single global time zone for the organization.

  However, if an individual user has a different time zone specified in their user profile, that user-specific setting will override the global time zone when scheduling messages for that user. This allows the majority of users to follow the global default time zone, while accommodating exceptions on an individual basis.

  The global time zone applies in the following ways:

- All scheduled messages will be sent based on the global time zone, unless overridden by a user's specified time zone.
- Meeting invitations and reminders will use the global time zone by default.

- **Impacts:** By setting a global default time zone, administrators can now coordinate scheduled messaging and events across multiple time zones in a standardized way.



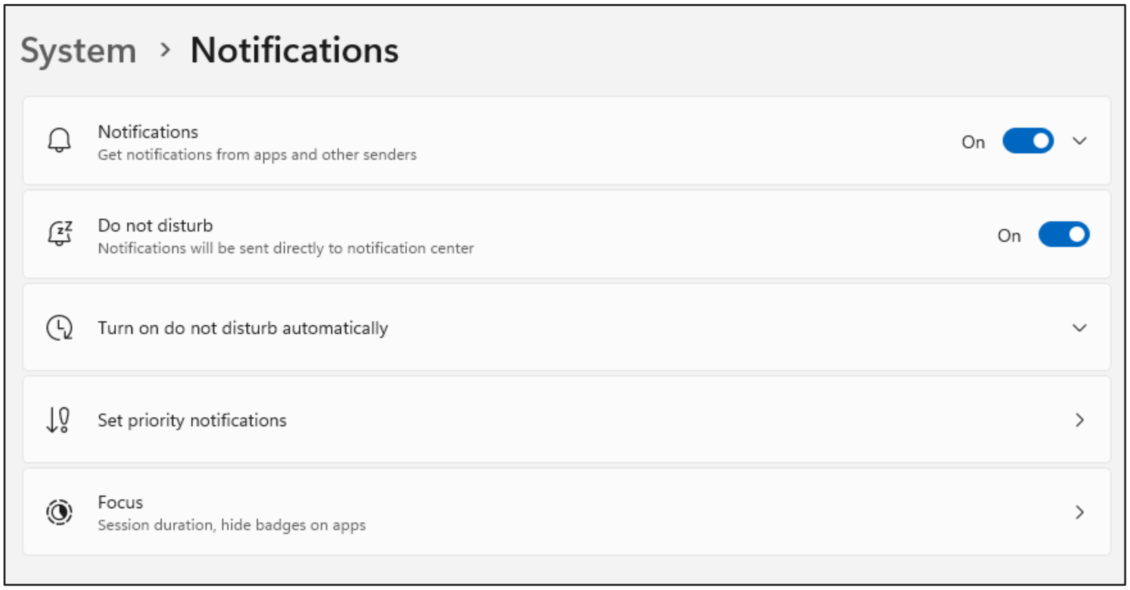
2. New Feature: Desktop Push Notifications

- **Issue Summary:** The application did not have the ability to send push notifications to users when a new message was received.

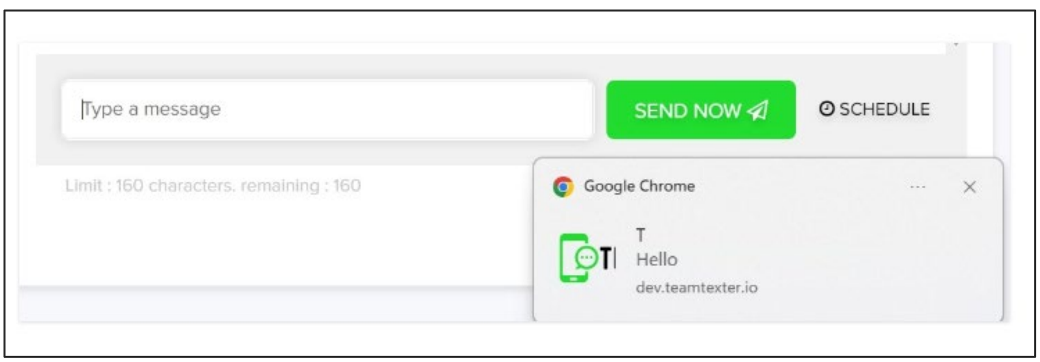
- **Resolution:**
  A new feature has been implemented to provide desktop push notifications when a user receives a new message. When a user receives a message while the web app is open, a notification will now pop up in the bottom right corner of the desktop displaying a preview of the message.

  This allows users to be alerted to new messages even when the application window is not in use and respond more quickly. Push notifications help ensure important messages are seen promptly.

Desktop push notifications are now available for Mac and Windows users of the web application. To enable desktop notifications, be sure that Notifications are turned on from the computer you are using.



- **Impacts:** If the user clicks on the notification, they will be taken directly to the full message in the web app.

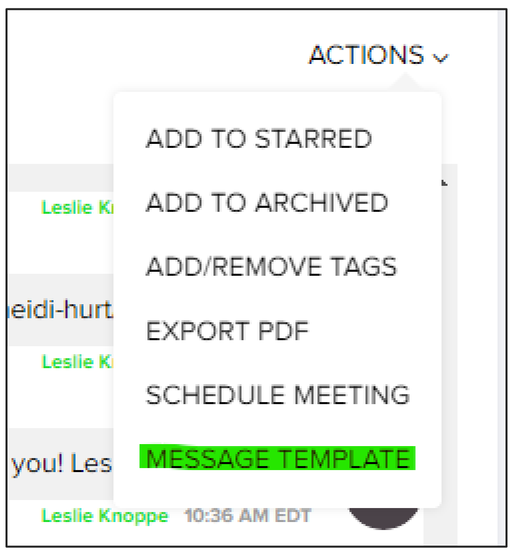


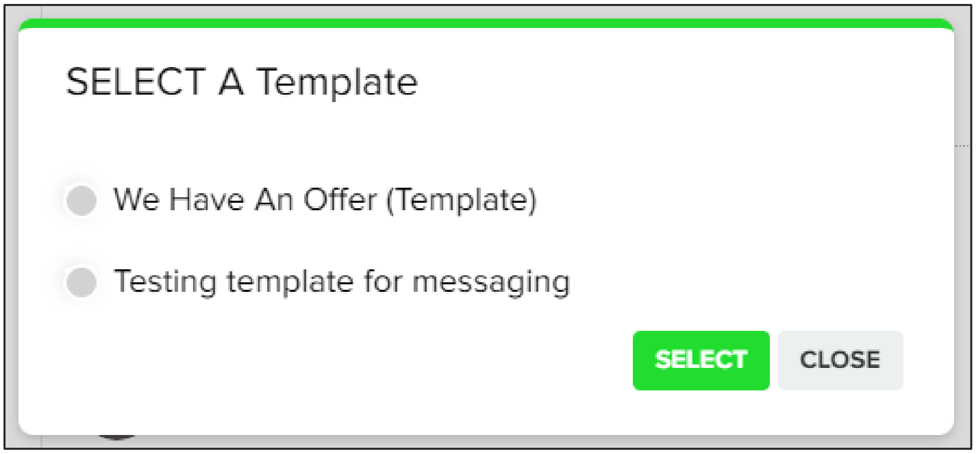
3. **New Feature: Select Texting Templates**

- **Issue Summary:** Users did not have the ability to select from predefined texting templates when sending messages within the application.

- **Resolution:** A new feature has been implemented that allows users to select from texting templates when composing a message to another user. From the message screen, users can now select from a list of predefined templates to populate the message box. This provides a faster messaging experience and reduces repetitive typing.

- **Impacts:** Administrators will be able to manage and create templates for common types of messages by going to Administration> Template List.



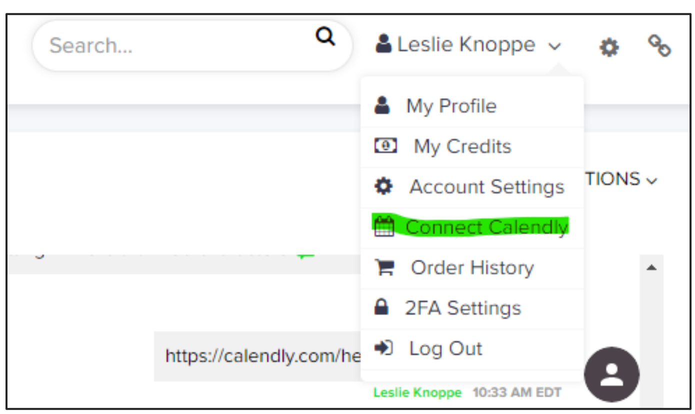


4. New Feature: Integrate with Calendly for Scheduling

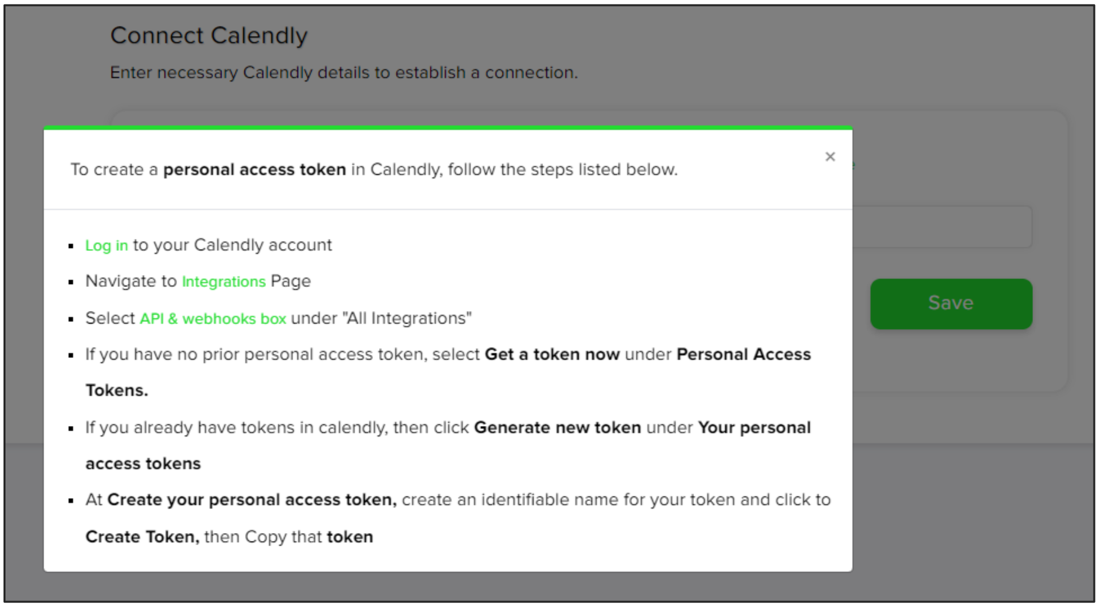
- **Issue Summary:** The application did not have an integrated scheduling system to facilitate meetings and appointments between users.

- **Resolution:** The application has been integrated with the Calendly scheduling API. Users can now schedule meetings and appointments directly from within the application by sending text requests. The Calendly API handles finding available times, sending notifications, and confirming bookings. Integration with Calendly allows for a streamlined and automated scheduling experience within the application.

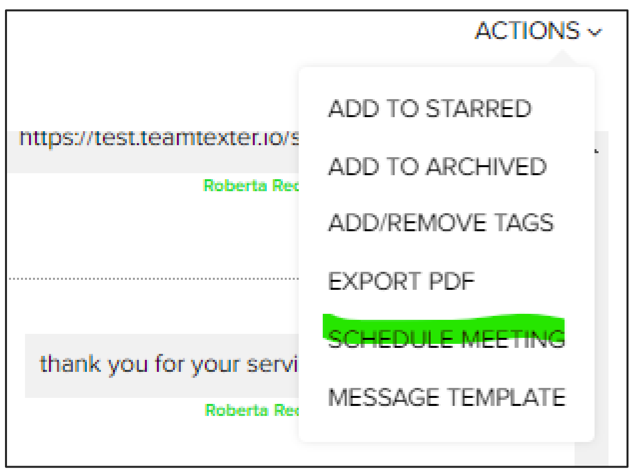
  To use the feature, click Connect Calendly under your profile avatar.



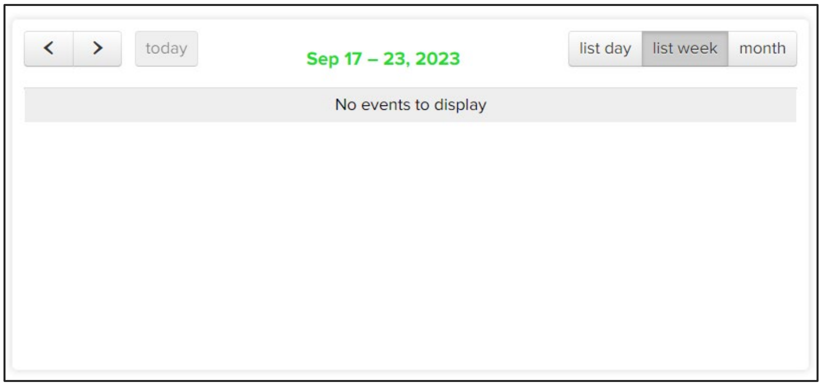
Follow the on-screen instruction to connect your Calendly account.



To schedule a meeting, click Actions when comping or responding to a Message. Choose Schedule Meeting. Follow the on-screen prompts.



Additionally, we've added a new dashboard widget that will dynamically display when Calendly is enabled, showing the scheduled meetings.



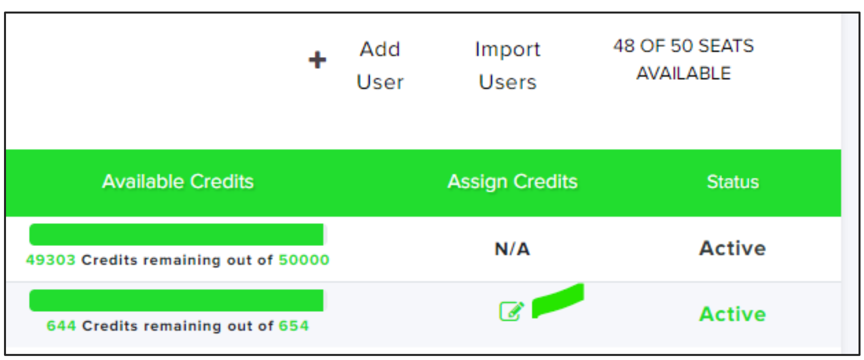
- **Impacts:** Users gain a convenient way to schedule and manage meetings within the application.

5. New Feature: Texting Quota Limits Assigned to Individual Sub-Users

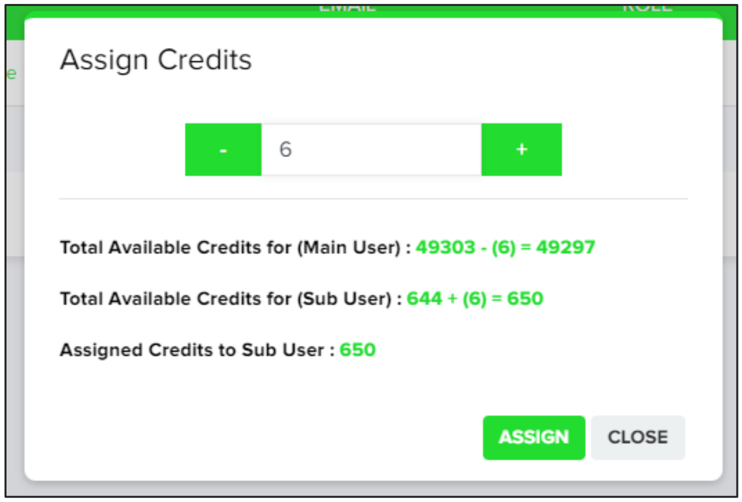
- **Issue Summary:** The system lacked the ability to set individual texting quota limits for sub-users within a company account, potentially resulting in overages by individual heavy users.

- **Resolution:** The web app has been updated to allow companies to assign unique texting quota limits to each sub-user within their account. This ensures that overages are contained to the individual sub-user level, rather than impacting the entire company account.

  To use Quota Limits, simply go to Administration>User List and click on the Edit icon under the column Assign Credits.



  Then adjust the credits up and down for that individual user. You will see how it impacts your overall available credits.



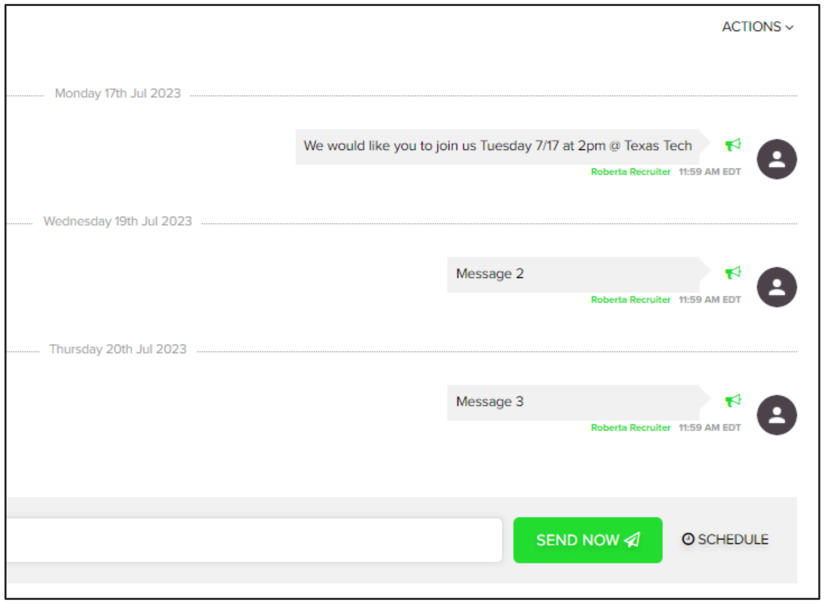
- **Impacts:** Once a sub-user reaches their individual quota, they will be unable to send additional text messages until the next billing cycle.

6. New Feature: Add Time Stamp to Messages

- **Issue Summary:** Messages in the application did not have timestamps, making it difficult to track the order and timing of conversations between all users.

- **Resolution:** A new feature has been implemented to add timestamps to all messages throughout the application. Messages now show the exact date and time they were sent, making it easier for all users to track the progression of conversations and identify when responses are overdue.

- **Impacts:** Users can readily see when messages were exchanged to better manage conversations.

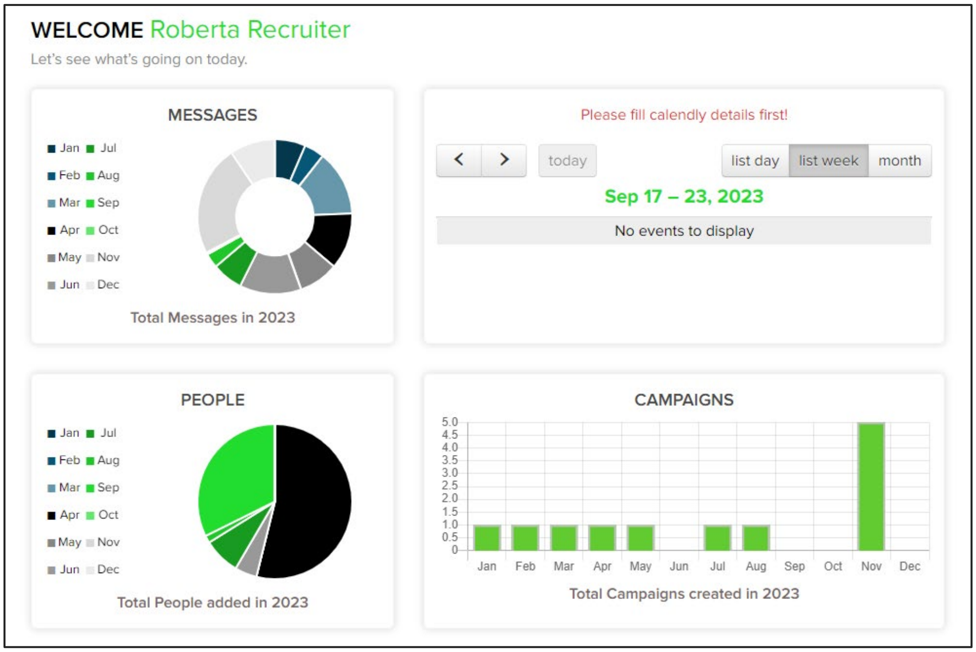


7. Bug: Dashboard texting volume data mismatch issue fixed

- **Issue Summary:** The Texting volume reports on the Dashboard were showing incorrect data for several metrics:
  - Texting volume only showed data for one day when texts had been sent on multiple days.
  - The number of texts sent did not match the actual number.
  - Texting credit used did not match the number of texts sent.
  - The response widget percentages were unclear as the formulas were unknown.

- **Resolution:** The issue with incorrect data reporting in the reports dashboard has been resolved. The texting volume, texts by user, texting credits used and response count now accurately matches the actual texting activity. This ensures reports are providing the correct texting statistics and volume information.

- **Impacts:** Texting reports now accurately reflect text messaging activity and statistics.

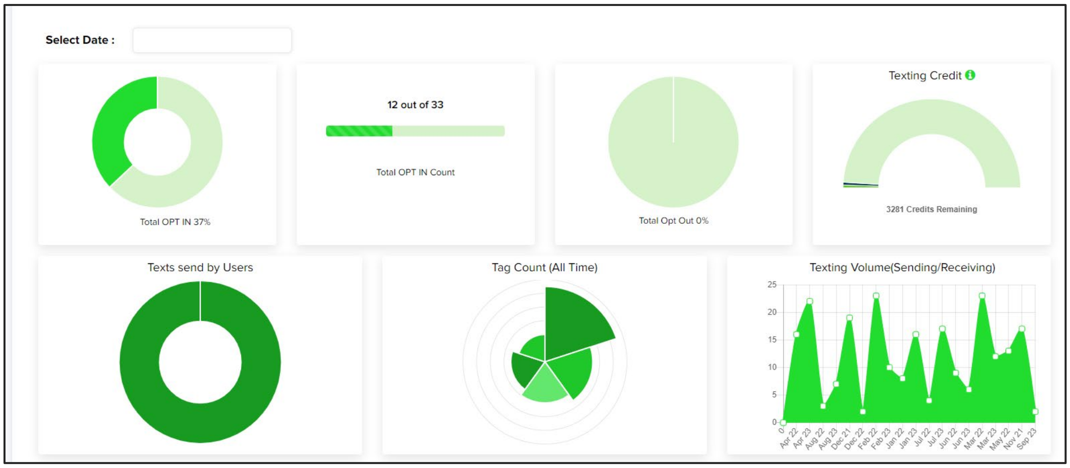


8. Bug: Inaccurate total response count

- **Issue Summary:** The total response count (number of people who responded to texts) displayed in the dashboard and reports section was incorrect.

- **Resolution:**
  The issue with inaccurate total response count shown in the dashboard and reports has been resolved. The total number of responses to texts is now calculated correctly and shown accurately in both the dashboard and reports section.

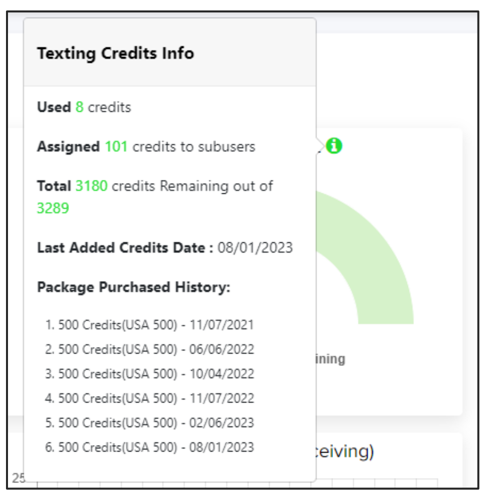
- **Impacts:** This change ensures administrators and managers will now have an accurate count of total responses to text messages when viewing dashboards and reports.



9. Bug: Reports show incorrect remaining texting credits

- **Issue Summary:** The reports section was not displaying the remaining texting credits available for the user.

- **Resolution:**
  The issue with reports not showing the remaining texting credits has been resolved. The reports section now accurately displays how many texting credits are left for the user. This will help users keep track of their texting credits and manage costs. You can view the details by hovering over the Information icon on the Texting Credit widget in the Reports section.



- **Impacts:** With the successful resolution of the issue, users can now see the accurate representation of their remaining texting credits in the reports section.

10. Bug: Insufficient Seats Notice, when there are seats available

- **Issue Summary:** The application was incorrectly showing an "Insufficient Seats" notice when attempting to add a new user, even though seats were available.

- **Resolution:** The issue has been resolved by fixing a bug in the seat count calculation. The application now correctly checks the number of available seats before showing the "Insufficient Seats" notice and allows users to be added when seats are available.

- **Impacts**: Users will no longer see misleading insufficient seats notices when adding members if seating capacity has not actually been reached.

11. Bug: Dead Links - Add User Seat

- **Issue Summary:** The "Buy Subscription" and "Add User Seat" links were broken and non-functional for new users, preventing them from purchasing a seat license.

- **Resolution:**
  The issue has been resolved by fixing the dead links for purchasing a subscription and adding user seats. The appropriate form fields and checkout flows have been re-enabled, allowing new users to successfully purchase a seat license when they sign up.

  Users are now correctly prompted to purchase a seat either during or immediately after sign up. The "Buy Subscription" and "Add User Seat" links and buttons now function properly, taking the user through the payment and account activation steps to complete the sign up process.

- **Impacts:** New users can purchase a license to access the application's paid features, improve conversion rates, and provide a positive initial experience.

12. Enhancements: Help Button

- **Issue Summary:** The Help Button was initially located at the bottom of the application, requiring users to scroll down to see it.

- **Resolution:** The Help Button has been moved up the screen, so that it is now visible without any scrolling required. The full application, including the Help Button, is now displayed on the initial screen. This improves the usability and accessibility of the Help functionality.

- **Impacts:** None.

13. Bug: Administrators Details Update

- **Issue Summary:** Previously, administrators were not able to update their own user details from the Administration>User List>User section of the application.

- **Resolution:** The application has now been updated to allow administrators to edit their own user details from the Administration > User List> User page. Administrators can now self-serve and quickly update any changes to their contact information. This improves the efficiency and autonomy of administrative users.

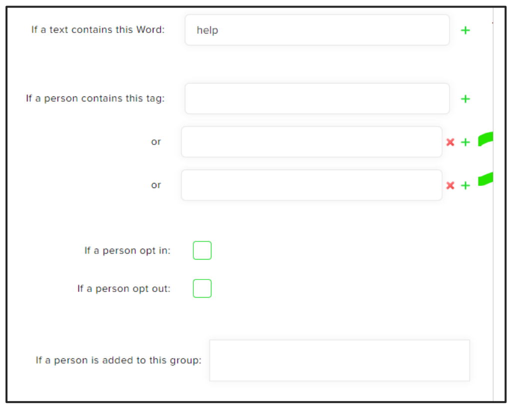
- **Impacts:** Administrators gained the ability to independently manage their own user profiles.

14. Enhancements: Build Workflow - Delete fields option added

- **Issue Summary:** In the "If a text contain this word" & "If a person contains this tag" sections of Build workflow, there was no option to delete fields that were added. Users could only add fields but not delete them.

- **Resolution:** The ability to delete fields in the two mentioned sections has been added. Users can now delete fields that are no longer needed, keeping the workflow template clean and organized.

- **Impacts:** Once a field is deleted, it cannot be restored, ensuring workflows are cleaned up of obsolete fields.



15. Bug: Removed references to "Recruiter"

- **Issue Summary:** The application was referring to users as "Recruiters" in various places such as the admin portal, and other locations.

- **Resolution:** All references to "Recruiter" have been removed from the application. Page titles, configurations, and any other locations now correctly refer to users as "Users" rather than "recruiters".

- **Impacts:** The application now accurately and clearly addresses users by their correct designation.

16. Bug: Reports show inaccurate total opt out count

- **Issue Summary:** Reports displayed incorrect total opt-out counts.
- **Resolution:**
  The issue with incorrect total opt out count in the reports section has been resolved. Reports now accurately show the total number of people who have opted out of receiving text messages.
- **Impacts:** Users can now rely on accurate reporting within the reports section regarding the total count of opt-outs–individuals who have chosen not to receive text messages.

17. Bug: Correct logo

- **Issue Summary:** The logo was appearing unusually large in size in emails sent from the TeamTexter app and received in the Outlook email client.
- **Resolution:** Logo size in emails has been corrected.
- **Impacts:** None.