Release Notes

Product Name: TeamTexter® 2.0 Web Application

Release Number: v2.0 SP6

Date of Release: April 6, 2023

Overview: This service pack includes user interface updates and new features to the web application.

1. New Feature – User Creation and Update Import Process

- **Issue Summary:** Users were only able to be added manually, one at a time.
- **Resolution:** The user creation and update process is a new feature that allows users to import user data in bulk to simplify the process of creating and updating new users in the system. This feature has been developed to automate the process of creating and updating new users by allowing users to import user data from a CSV file or other data source. This feature will save time and effort, especially when creating numerous user accounts at once. To use this feature, simply navigate to Administration>User List>Import Users and follow the instructions to upload your CSV file. To update a user account, simply add the user details to the CSV with the updated properties and upon import, the existing user will be updated. Up to 1,000 users can be imported on a single CSV file.

- **Impacts:** No impacts.
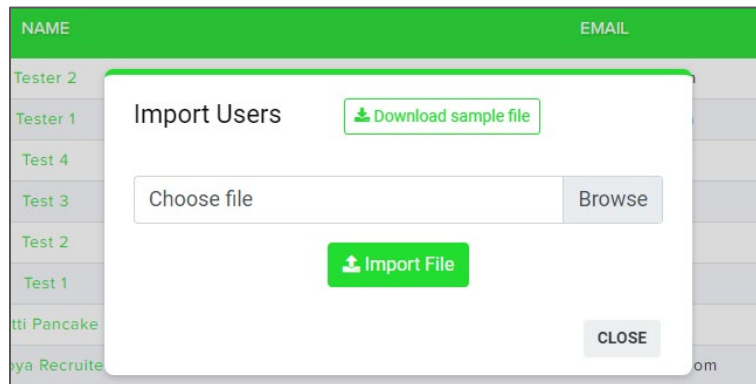
2. **Enhancement – Unique User ID**

- **Issue Summary**: Users were able to be added to TeamTexter with the same email address without restriction.
- **Resolution:** This feature is designed to provide each user in your system with a unique identifier that can be used to track their activity and data more acutely. With this enhanced feature, each user in your system will be assigned a unique ID that can be used to identify them across different applications and systems. This can be particularly useful if you need to integrate your system with other systems or if you need to track user activity for auditing or reporting purposes. Additionally, only one user with a particular email address will be able to be added to TeamTexter.
- **Impacts:** The unique user ID is generated automatically by the system and is assigned to each user at the time of creation. This ID is unique to each user and cannot be changed or duplicated in any way.

Administration > Users

USER LIST:

USER ID	NAME	EMAIL
DUNDER-1	Tester 2	tester2@mailinator.com
DUNDER-2	Tester 1	tester1@mailinator.com
DUNDER-3	Test 4	test4@mailinator.com
DUNDER-4	Test 3	test3@mailinator.com
DUNDER-5	Test 2	test2@mailinator.com

3. **New Feature – Add or Remove an Owner From People List Bulk Actions**

- **Issue Summary**: An owner could only be added or removed from a Person by clicking into the person and adding or removing the owner.
- **Resolution:** This feature was added to the platform to make it easier to add or remove owners to People from the People List in a bulk action. From the People List, select the person you want to add an owner to and click the Bulk Actions > Add Owner or Bulk Actions>Remove Owner. You can easily select an owner(s) to add or remove from the selected People in the People List.
- **Impacts:** None.

4. Bug – Individuals Not Showing in Campaign List

- **Issue Summary:** Not all individuals were displaying in the individual list when creating a campaign.
- **Resolution:** The issue was resolved by fixing a bug in the data synchronization process, ensuring that all individuals are accurately listed in the Campaign List. Now individuals will show up in the appropriate Campaign list.
- **Impacts:** None.
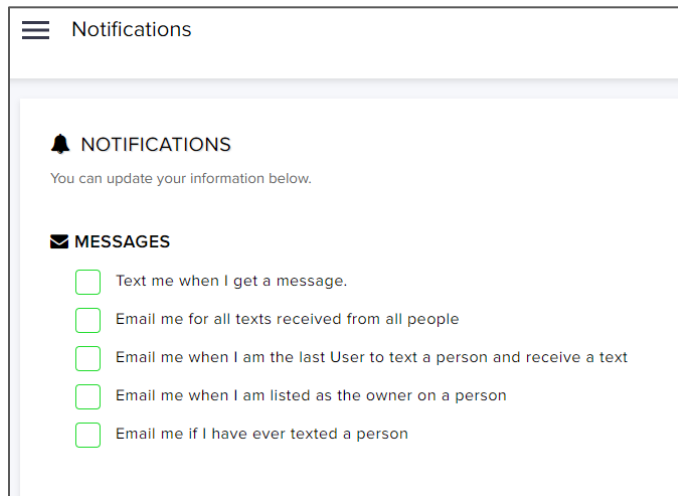
5. Bug – Fixed Date Format

- **Issue Summary:** The date format was that of non-US when hovering over some dates within the application.
- **Resolution:** Addressed issues with date calculation and formatting for US time zones. Improved date picker UI for better user experience, performance, and stability.
- **Impacts:** Dates will now display in US format.

6. Enhancement – Email Notifications

- **Issue Summary:** When the "Email me when I get a message" was checked off, the User received emails for all People and all Messages. There was no other option for selecting which messages the User received an email about.
- **Resolution:** New notification options offer Users a greater level of customization and control over their messaging experience, allowing them to

receive updates in the way that best suits their needs and preferences. The addition of multiple notification options enhances communication and reduces the risk of missed messages, ultimately improving user engagement with the platform. The four options now include:

- o   Email me when I am the last User to text a person and receive a text.
- o   Email me when I am listed as the owner of a person.
- o   Email me if I have ever texted a person.
- o   Email me for all texts received from all people.

- **Impacts:** Users that have the "Email me when I get a message" notification checked off should evaluate which of the new options might be better suited to their needs.

7. **Bug – Invitation Is Not Always Being Re-Sent**

- **Issue Summary:** When the airplane icon is clicked in the People List, the invitation is not always sent again.

- **Resolution:** The issue has been fixed and clicking the airplane icon will re-send the invitation to the Person.
- **Impacts:** People will no longer receive duplicate invitations.

8. New Feature – Add Owner Upon Email Import

- **Issue Summary:** There was previously no way to assign an owner to a Person who was created in TeamTexter through email parsing import.
- **Resolution:** We have added the "Owner" field to the inbound email source code, allowing Users to assign owner(s) to People imported from emails. This feature will streamline contact import and data management and enable greater collaboration and communication among team members. To add an owner through source code, simply list the email address of the User who you would like to be added. Multiple Owners can be added by using a comma to separate the email addresses within the code. Example:

  <div id="data" style="display: none;">EndMessage:;
  CountryCode:{Candidate.TT_COUNTRYCODE};
  MobilePhone:{Candidate.MobilePhone}; Name:{Candidate.FullName};
  Owner:test@mailinator.com;
  CompanyID:acme;Tags:test,taleo,tee;Source:TEE;Message:</div>
- **Impacts:** If using new Email Notifications or Owner Segmentation, please consider adding an Owner through email imports to ensure that Users receive the right notifications and can see the proper data within the application.

9. Bug – Global Search Not Including All Results

- **Issue Summary:** At times the Global Search feature is not working properly, and some individuals are not appearing in search results despite being present in the system.

- **Resolution:** This bug fix resolves an issue that was preventing certain individuals from appearing in global search results, even though they were present in the system. All relevant individuals should now appear in search results, ensuring that users can quickly and easily find the information they need. By resolving this bug, we are helping to streamline the search process and reduce the risk of frustration or errors caused by incomplete search results.

- **Impacts:** All search results will now be displayed in Global Search.

10. Bug – Invitation Not Sent Upon Person Import

- **Issue Summary:** When importing People, the invitation is not always sent to every individual.

- **Resolution:** The bug was fixed by improving the functionality of the system to ensure that invitations are consistently sent to all individuals upon import.

- **Impacts:** Imported People and Invitation is sent to Yes, all People will receive an invitation.

11. Bug – Add to Group Not Working Upon Import

- **Issue Summary:** When using the sample file and indicating the Group field, the People imported are not always added to the Group.

- **Resolution:** This bug fix resolves the issue of People not being added to a Group upon import, ensuring that all People are properly categorized. The fix improves functionality, increases accuracy, and streamlines the workflow of

importing People and adding them to Groups, reducing the need for manual workarounds or extra steps.

- **Impacts:** Imported People now display properly in Groups.

12. **Enhancement – Owner Count**

- **Issue Summary:** When viewing the People List, there is no quick way to see if there are Owner assigned to the Person.

- **Resolution:** When viewing the People List now, we have added a new column displaying the count of how many Owners are assigned to the Person. When clicking on the Owner count link, the Person screen is opened in Edit mode.

- **Impacts:** None.

	NAME	OPT IN	GROUP	MOBILE #	STATUS	OWNER	GROUP MESSAGES
☐	Olivia Barker	Yes	0	+12816501405	ACTIVE	1	0
☐	Jenny Jones	No	1	+12819070388	ACTIVE	0	0

FILTER: Search People 🔍 Unblocked ⌄ ACTION: Bulk Actions ⌄

13. **Enhancement – Add Owner Upon Person Import**

- **Issue Summary:** When importing People, there was no way to assign owners to a Person through the import.

- **Resolution:** When importing People now, there is a column included in the sample CSV for Owner. When populated and imported, the Owner will be assigned to the People being imported.
- **Impacts:** If using the new Email Notifications or Segmentation, please review to determine if populating an Owner upon import is needed for proper system access.

A	B	C	D	E	F
name	phone_prefix	phone	tags	groups	owners
Jared	1	6062225274	jobs,fresher,experience	React developers	Owner1,Owner2
Maryam	1	6068734566	2023,NewYear	Python Dev,Angular Developer	Owner3
Joe	1	6068734565	Tech,HR,Management	Python Dev,Angular Developer,Analyst	Owner4

14. Bug – People Automatically Marked As Active Once Messaged

- **Issue Summary:** When messaging an inactive Person, the system did not automatically mark an Inactive person as Active.
- **Resolution:** This bug fixed the issue. Now when an Inactive Person is messaged, they will automatically be marked as Active in the People List.
- **Impacts:** Inactive People will automatically now display as Active.

15. New Feature – Owner Segmentation

- **Issue Summary:** TeamTexter did not provide a way to segment People and Messages by Users. All Users were able to see all People and Messages.
- **Resolution:** Owner Segmentation allows for system Users to define which People and Messages can be seen by an individual User. New User

Permissions have been introduced to help set boundaries for those who may need to have access to a sub-set of People or Messages. User Permissions can be set up for the four available User Role in TeamTexter. Then, the User Role can be assigned to the User to restrict or allow access to People and Messages. The new User Permissions are:

- o Restrict view to only People owned by user
- o Restrict view to only Messages of People owned by user
- o Restrict view to only Groups owned by user

- **Impacts:** This feature has great impacts. To use the User Permission, ensure that all of the People in your account have the proper Owner applied to them first, else your Users won't be able to see any People or Messages as expected.

Restrict view to only People owned by user
Restrict view to only Messages of People owned by user
Restrict view to only Groups owned by user

16. **Bug – Right Side Conversation Fix**

- **Issue Summary:** TeamTexter was displaying inbound parsed emails in the Message section as being sent FROM the Person, instead of being sent TO the Person.
- **Resolution:** Inbound Messages parsed from email now appear to be sent from the Company from the User on the People Message.
- **Impacts:** When using the Email Notification feature, the User no longer gets an email when inbound messages are sent through the email parser.