Release Notes

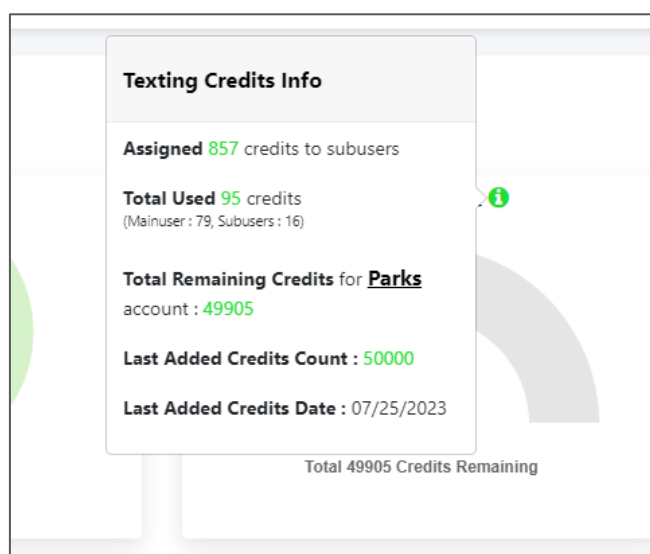**Product Name**: TeamTexter® 2.0 Web Application

Release Number: v2.0 SP9

Date of Release: January 6, 2024

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

1. **Bug: Texting Credit Report Statistics Error**

   - **Issue Summary**: The 'Texting credit info' report previously provided incomplete data, hindering financial transparency.

   - **Resolution**: We've implemented improvements to update the report to display accurate credit information, including:
     i. Assigned Sub-User Credits: Added information on assigned credits to sub-Users.
     ii. Total Used Credits: Updated to reflect the actual total credit usage across all accounts, including sub-Users.
     iii. Remaining Company Credit: Now accurately displays the remaining credit balance for the entire company.

   - **Impacts**: Account owners can now see accurate information about texting credits.

2. Enhancement: People List Format

- **Issue Summary**: The People List had issues with readability due to small column widths, grammatical errors in naming conventions. It also lacked a title.

- **Resolution**: Several User interface improvements were made including:
    i. Changing the page title to "People List"
    ii. Increasing the width of the Name column
    iii. Adjusting other columns to accommodate
    iv. Correcting grammar for "/people" URLs
    v. Updating "Messages" to align with style guide
    vi. We also added the capability to filter the listings for easier searchability.

- **Impacts:** The updates provide a cleaner more User-friendly experience for browsing people records.

3. Enhancements: Message Count Badge

- **Issue Summary**: The current design of the message count badge lacked clarity and functionality when dealing with high message volumes.

- **Resolution**: Several improvements were implemented to enhance the message count badge:

    i. Responsive Design: The badge now dynamically adjusts its size and text formatting based on the message count, ensuring clear readability even with high volumes.

    ii. Increased Padding: Additional padding within the badge improves visual separation and legibility of the message count.

- **Impacts**: None.

4. **Bug: Build Workflow Delete Issues**

- **Issue Summary**: Some of the fields within the build workflow functionality were not deleting correctly.

- **Resolution**: The issue has been addressed and a fix that allows all fields in the build workflow to be deleted as expected.

- **Impacts:** Users have full control over their workflows and can remove unnecessary or outdated fields.

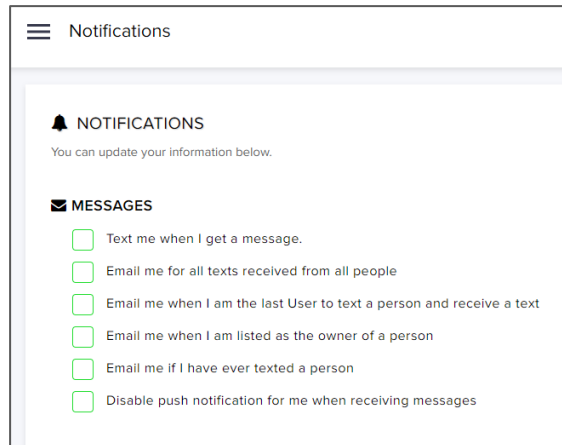5. **Bug: Calendly Message Action Button Displaying When Not In Use**

- **Issue Summary**: The Calendly message action button continued to display even after Calendly functionality was deactivated, causing confusion and unintended behavior for Users.

- **Resolution**: The underlying issue has been corrected, ensuring that the Calendly message action button now properly removes itself when Calendly is disabled.

- **Impacts:** None.

6. **Enhancement: Additional Push Notification Control Features**

- **Issue Summary**: Only the account owner could manage push notifications for both themselves and sub-Users. This limited control and hindered the sub-User's ability to customize their notification preferences.

- **Resolution**: This release introduces two new features to address the issue:

    i. Push notification control for sub-Users: Sub-Users can now enable/disable push notifications for specific events within the platform, allowing them to personalize their notification experience and improve their workflow.

    ii. Improved notification granularity: All Users now have more control over the types of notifications they receive. This allows them to tailor their notification experience to their specific needs and stay informed about relevant events.
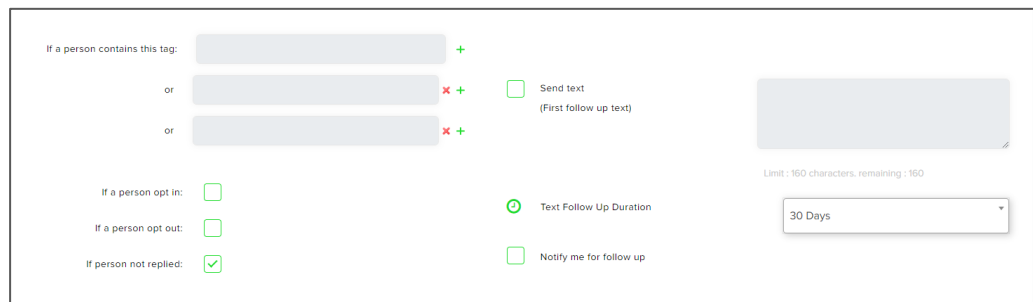
    The setting can be found in the Notifications section under Messages.

- **Impacts:** This update applies solely to push notifications. Email and SMS notification settings remain unchanged. The specific types of notifications available for control may vary depending on User roles and access levels.

7. **Enhancement: Automatic Workflow Reminders**

- **Issue Summary**: Workflows lacked the ability to automatically send follow-up messages when text messages sent within the platform went unanswered. This limited communication effectiveness and hindered User follow-up efforts.

- **Resolution**: This release introduces Automatic Workflow Reminders, a new feature addressing the issue by offering two functionalities:

    i. Send Follow-up Text SMS: Users can configure workflows to automatically send follow-up SMS messages to recipients who haven't responded to the initial message within a specified timeframe.

    ii. Notify Me: If the recipient still hasn't responded after 24 hours of the follow-up SMS, the User will receive an email notification prompting them to check the follow-up status, if the email address on the User profile has been completed.

- **Impacts:** This feature currently applies to text message follow-ups within opt-in workflows. Users can configure follow-up messages and timeframes within workflow settings. Automatic workflow cron jobs run three times daily (9am, 11am and 4pm EST) to check for pending reminders and send messages accordingly.

8. Enhancement: Automatic Message Refresh

- **Issue Summary**: When viewing the message page within the application, Users would have to go to another screen and come back, or refresh the page, to see new messages.

- **Resolution**: TeamTexter has been updated to automatically refresh the messages page so that Users can view new messages immediately without refreshing the page.

- **Impacts:** Users no longer have to refresh the messages page.

9. Enhancement: Message Classification

- **Issue Summary**: TeamTexter did not have the capability to differentiate between text messages and inbound emails sent from external systems like Taleo. This meant all messages were sent as the same type, regardless of the intended recipient and communication format.

- **Resolution**: Users can now specify whether a message from an external system should be sent as an email or text message. This is achieved by setting specific flags within the source code, enabling greater control over communication delivery.
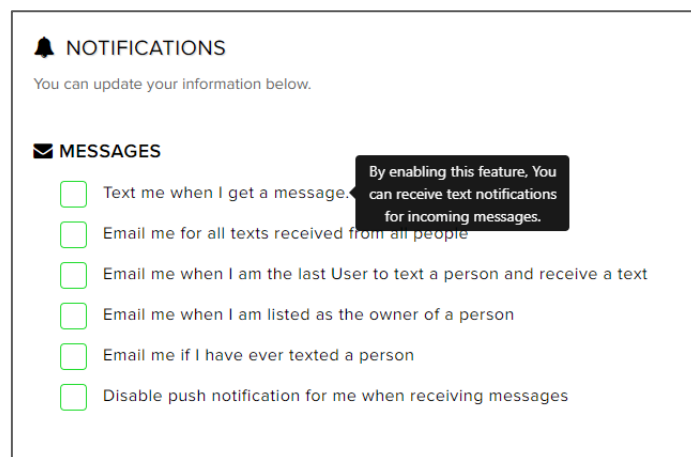
- **Impacts:** No impact.

10. Enhancement: Reports Update

- **Issue Summary**: Users lacked insights into basic report data, such as total number of messages, people, and Users. Filtering by date was also unavailable.

- **Resolution**: A new section has been added to the Report, providing essential data points and date filtering functionality. Users can now access the information they need to effectively manage their activities.

- **Impacts:** None.
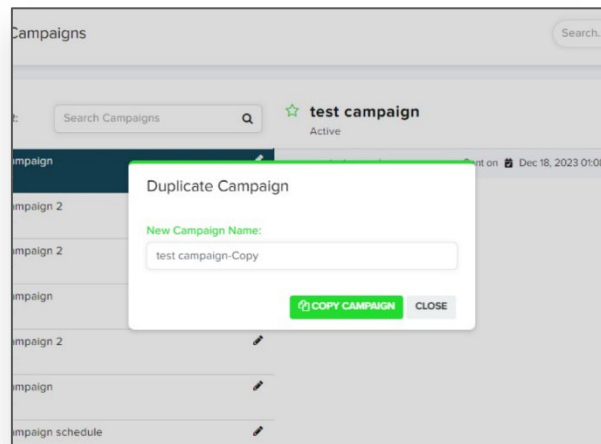
11. Bug: Notifications Tooltips

- **Issue Summary**: Some Users reported that they did not see any tooltips on the notification page, which made it difficult to understand the functionality of the text me notification option.

- **Resolution**: Tooltips under the text me notification option have been fixed and explain what it does and how to use it. The tooltips are visible when the User hovers over the option or clicks on the question mark icon next to it.

- **Impacts:** None.

12. New Feature: Duplicate Campaign

- **Issue Summary**: Users had to manually create a new campaign if they wanted to use the same settings as an existing one, which was time-consuming and error-prone.

- **Resolution**: A duplicate option was added in the Action drop down menu on the Campaign Listing page, which allows Users to easily copy an existing campaign and edit it as needed. The duplicate option is available for both active and inactive campaigns.

- **Impacts:** This change simplifies the campaign creation process and saves Users time and effort.

13. Bug: Assign Owner Through Workflow

- **Issue Summary**: Some Users reported that when they created a workflow and chose Assign Owner as the action, the account owner did not show in the list of Users to select from.

- **Resolution**: The account owner is always included in the list of Users for the Assign Owner action. Users can now assign the account owner as the owner of any workflow they create.

- **Impacts:** Users can now assign the account owner as the owner of any workflow they create.

14. Bug: Tag Count Not Increasing

- **Issue Summary**: Adding tags to people on the message level was not reflecting the increased tag count on the person's profile or vice versa. Tags associated with a person on the People List were not displayed when viewing their messages, and vice versa.

- **Resolution**: Adding or removing tags for a person is now reflected correctly in both the message level and the person's profile. Tag counts are updated accurately on both views.

- **Impacts:** None.

15. Bug: Tag Count Decreasing After Refresh

- **Issue Summary**: Some Users reported that the tag count for messages decreased after refreshing the page, even though they had not removed any tags. This issue was caused by a bug in the tag removal function that resulted in the database not being updated correctly.

- **Resolution**:   The system now ensures that the removal function only deletes the tags explicitly selected by the User and properly updates the database accordingly. Additionally, a confirmation message displays the number of removed tags for increased transparency.

- **Impacts:** None.

16. Bug: Blocked Message Count Changing After Page Refresh

- **Issue Summary**: Blocking a person and then refreshing the message page could lead to an inaccurate block message count. In some cases, the count would decrease unexpectedly, while in others, it would increase.

- **Resolution**:   The block message count now accurately reflects the actual number of blocked Users and remains consistent even when the page is refreshed.

- **Impacts:** None.
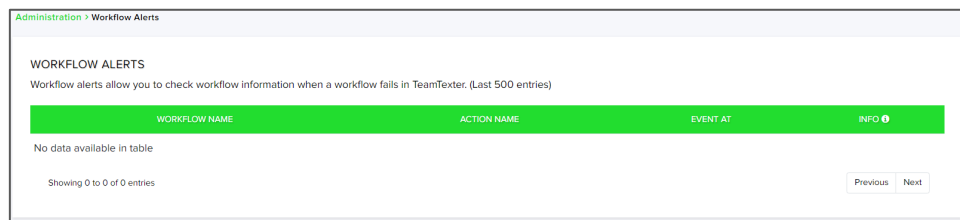
17. Bug: Date Format

- **Issue Summary**: Dates displayed in the system were not always formatted according to the US standard of MM-DD-YYYY.

- **Resolution**:   All dates throughout the system are consistently presented in the US format of MM-DD-YYYY.

- **Impacts:** None.

18. Enhancement: Email Threads

- **Issue Summary**: When using the notification setting "Email Me….", the User would receive an email with the text content/body with no reminder of the conversation, unrelated to other emails.

- **Resolution**: All email notifications for texting activity will include a conversation thread within, so that the User can be reminded of the bigger conversation. This feature will only work in Gmail and Outlook Online.

- **Impacts:** In order to use this feature, you must login to Classic Outlook Online and go to Settings > Mail > Layout > Message Organization and then select Show email grouped by conversation. Gmail does this automatically.

19. New Feature: Workflow Alerts

- **Issue Summary**: When a workflow fails, there was no way for a user to know the reason why.

- **Resolution**: A new feature, Workflow Alerts, has been added to Administration> Workflows. This Alert listing will describe the Workflow Name, Action Name, Event and Information, allowing the User to know why the Workflow failed. The last 500 entries will be displayed.

- **Impacts:** None.

20. New Feature: Cache OTP In Browser

- **Issue Summary**: When 2FA is enabled and a User logs into TeamTexter, each time a login occurs, the User would be prompted for a OTP for authentication.

- **Resolution**: A new feature now allows Users to decide if they want to have their browser remember their OTP for 14 days by presenting a checkbox to enable. If enabled, the User will not be asked for their OTP for 14 calendar

days, so long as they continue to use the same browser the feature was enabled on.

- **Impacts:** If enabled, the User doesn't have to enter the OTP at each login.

21. Enhancement: Sorting & Filtering The User List

- **Issue Summary**: The Admin Users page lacked functionality to sort or filter users, making finding users more difficult.

- **Resolution:** The sorting of admin user listings by status and other attributes has now been enabled. New filters were also added to allow status-based filtration such as only viewing active users.

- **Impacts:** None.

22. Enhancement: Allow Different Text Content While Emailing From 3rd Party System

- **Issue Summary**: When using email source code to send emails from a 3rd party system to TeamTexter for parsing and sending of a text message, you could only send the email to TeamTexter and the recipient with the same content.

- **Resolution:** New email source code has been introduced for configuration in the 3rd party source system to allow different content to be sent by TeamTexter as text versus what the email content is to the recipient.

- **Impacts:** If a separate text message versus email is to be sent, the source code in the email of the 3rd party system needs to be updated to the format below (replacing with the actual tokens/content) for what you want. The content between [text_msg] and [/text_msg] will be sent as a text and the rest of the content will be sent as an email to the person in the TO/CC/BCC field in the email.

<div style="display: none;"> [text_msg] Candidate please give Recruiter Name a call at Recruiter Phone to schedule an interview. [/text_msg]
<div id="data" style="display: none;">EndMessage:; CountryCode:{Candidate.TT_COUNTRYCODE}; MobilePhone:{Candidate.MobilePhone}; Name:{Candidate.FullName}; CompanyID:dunder;Tags:test,taleo,tee;Source:TEE;Message:</div>