

MiTek[®]

SALES SIMPLICITY

Sales Simplicity X Release Notes – Version 20.1

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All new features included in this release are referring to Sales Simplicity X. If you are still accessing Sales Simplicity via the Legacy application, please note that Legacy no longer receives any updates and support for the Legacy system is being phased out. Some of these new features only apply to our Subscription users, which are all listed under the separate “Subscription Environments Only” category. Please contact the Professional Services Training Department at account@salessimplicity.com for additional information or training on the functionality of these new features, or for information about switching to Subscription. If you are unable to see any newly added tab, make sure they are turned on in your User Settings and that you and your users have access to it. Bug fixes that were resolved in this release will be marked in the Support tickets that have been submitted and may not be included in this release notes document.

Updates to Sales Simplicity – Sorted by Section

Builder

Builder > Field Labels > Dropdowns – Loan Type displays existing loan types and allows users with the appropriate permissions to make changes to the display name. New loan types cannot be added.

Builder > Attributes – The Active and Inactive toggle has been updated to work as expected.

Division

Division > Master Options – Toggling Show Inactive properly displays all options instead of presenting a blank table.

Division > Mortgage – Data is displaying on the table to show what mortgages are available for Customer selection.

Customer

Customer > General – Pop-up windows for Price Incentive are now properly displayed and Price Incentive field is now working properly.

Customer > Buyer – Selecting Do Not Email and saving your changes does not cause an error code.

Customer > Lots – The layout for the Scattered Lot popup has been updated to remove additional white space at the top of the screen

Customer > Lots – The Clear Approval alert no longer is triggered when a lot reservation is made or updated.

Customer > Options – The cost of Standard Options that were added after the customer has been approved does not replace the plan cost.

Customer > Options and Spec Homes – Option searches have been updated to limit search results to the exact phrase/string used in the Search box.

Customer > Mortgages – Adding a mortgage note does not remove additional selections of the mortgage/lender.

Customer > Contracts – Printing process for contracts has been updated for multiple Crystal Reports to be printed at the same time.

Customer > Contracts – When taking a Spec Home to Contract, options are no longer deleted.

Follow Up

Follow Up > To Do Suite (relating to Follow Up Plans) – Tasks assigned to a department representative in a new Follow Up campaign will be properly assigned to the correct department representative.

Follow Up > To Do Suite (relating to Follow Up Plans) – Updates were made to the processes generating follow up tasks to properly match clients with the appropriate Marketing Plan's anchor criteria (Start node in Builder > Follow Up Admin).

Follow Up > To Do Suite – Under Individual Follow Up, the Recent Interactions dropdown populates, and Actions hyperlinks display properly.

Follow Up > To Do Suite – Error messages have been updated if attempting to complete an email task for a customer that has no email address on their profile.

Follow Up > Customer Marketing – Hyperlinks within email blasts no longer redirect to a salessimplicity.net address and instead direct to the desired web link.

Follow Up > Customer Marketing – Errors have been removed when uploading a valid image into the Image Library.

Follow Up > Customer Marketing – Customers with more than one scenario will not receive more than one email when added to an eblast.

Follow Up > Customer Marketing – Exclude filters are updated to properly remove data from a query.

Reports

Automated Reports are sending when they are scheduled.

Stages

Error messages are properly displayed when saving incorrect changes to data in the Stages section.

External Sites – eLead Admin, Excel, Customer Portal, and Email Creation Utility

Excel Imports - Excel Imports site now works in-app as a custom tab with parameters attached.

eLead Admin - Email notifications that send when an eLead has been processed are now properly being sent.

Various System Updates

Updates have been made to **Attachments** functionality throughout the system to ensure proper item attachment without error.

Miscellaneous

A variety of minor fixes are included in this release. If you have opened a ticket reporting an issue that has been fixed in this update, you will be notified in the ticket. If you have any questions regarding the changes, or any other questions about using or setting up Sales Simplicity, please contact account@salessimplicity.com