ChildCareCRM v.08.05.01
Release Notes

This release is one of our biggest ever! For all the fun documentation on "The Big Three" features, visit childcarecrm.com/latest-release!

Home Tab

• We received some feedback that our Tasks Tab could use some tidying up. So, we did some serious spring cleaning! The tab is now organized into My Tasks, All Tasks (and Team Tasks/Available Team Tasks if Enrollment Teams are enabled) and if you click away from the home screen fear not the Task Tab will now remember which tab you had open, so you don't have to!

• Our Manage Lead screen has been enhanced to add the Activities tab and the Communications Tab. What was previously your History Tab has now been renamed Audit and shifted to the end of the list, since you probably aren't using it as often as the others. Within your Activities Tab, you'll find a list of tasks and events that included direct interaction by your team members. By default, you won't see communications that include emails and text, but you can easily toggle your views to include emails, texts or both. The Communications Tab will now house your Email and Text communications, including Pending Emails & Texts.

• When a duplicate lead would come into the database without an assigned location, users could merge the leads, but this occasionally resulted in a lead with an N/A location which could not be deleted. We resolved this by requiring that leads be assigned to a location.

• Previously, there was no way to know it your new lead had saved. We added a spinning wheel to indicate when the system is saving, so that you can be confident that the information will be saved.

We cleaned up several of our widget headers by removing the nonfunctional icons within them. This will give users a cleaner interface and reduce confusion.

Settings

• To improve our Location Settings and make Location Staff Settings more intuitive, we added a Staff Notifications section so Corporate Level Users can decide who gets notifications for what. This will help centers that have multiple people working on potential enrollments keep all team members in the loop (and stop bothering people who do not need the notifications).

• We have gotten a few requests from particularly dedicated users to allow tasks to be set on weekends when the task is added manually. Locations also have to ability to enable or disable this feature. To the people who requested this - we respect your hustle. Keep up the good work.

• We updated our system privileges to be more accurate. Users who do not have modification access will no longer be able to add/edit/delete a lead.

Reports

• A few customers reported to us that their Staff Usage Report and Lead Report were not completely matching up, we took this issue directly to our engineering team and they found the problem - a bug in

the system! This bug had found its way into the code and was preventing the system from pulling the actual lead ending date, instead substituting the current date. The bug was exterminated and the reports should now be functioning properly.

Marketing Tab

• We have updated our merge variables within emails to include all staff levels and settings including Director, Admin, Enrollment Rep, Family Rep and Manager. Now everyone can join in on the fun!

Opportunities/Child

• If you were one of the few centers that were experiencing the bug that effected the Wait List Pop Up's ability to save information, please accept our apologies, we found the field integration issue and have resolved the problem. Thank you to the centers that brought this to our attention!

• You may have noticed that whenever an invalid date was entered into our system, the date would auto correct to 12/31/1969… this was not ideal because any child born on that date would be almost 49 years old, and most likely not enrolling in childcare. If an invalid date is entered, the system will now autocorrect to today's (current) date.

Within Manage Lead we have added a new tab to house past activities, this tab is called Activities.