Cycle 9 (08/12/2024 -09/01/2024) Change Log

BT Tech 🤖 Team Summary:

- 16 💡 Features Added
- 7 🪲 Bugs Squashed
- Some Highlights:
    - Made multiple improvements to affiliate profiles.
    - Overhauled event notifications.
    - Added a standard ROI form that's sendable on all cases.

Feature Improvements/Additions:

- Made multiple improvements to affiliate profiles. Improvements include: adding an expired documents tab for old licenses, adding "state" to licenses, adding more information about hourly availability to offices, and adding multi-select to multiple fields.
- Overhauled event notifications. A full list of changes can be viewed here: https://docs.google.com/spreadsheets/d/1u5RDVskno_akody39J_eFIBtpx6kTfAhL_nE7EPFAHQ/edit?gid=0#gid=0
- Added a record of daily utilization for all active organizations. Added an alert to account managers about upcoming utilization sensitive pricing changes.
- Updated the formatting on EOW draft emails to include clearer headings and EOW note writers.
- Added an alert to Megan B., Laura, Carey, and Kristin when a complaint is created.
- Added "Engagement" under "What" to organization notes. Also Relabeled "Utilization Reports" to "Program Engagement Reports".
- Added open proposals to Seth and Megan Peavey's dashboards. Updated forms for creating and editing leads to be consistent with one another.
- Added a standard ROI form that's sendable from Big Top on all cases.
- Added a CT first responder SAP form that's sendable from CT first responder SAP cases.
- Added tasks to vendor profiles and new fields including: virtual, open to travel, and on-site. Made all of these new fields search-able.
- Added a note as a record of calendar invites on events and meetings.
- Added the ability to filter completed reception tasks.
- Added the ability to set a note on a manager consult as the consult summary.
- Added information related to Health Plans Inc. to intakes.
- Added Job Title, Location (Town, State), Age and Email or Phone follow up to referral emails to worklife vendors.

- Added “Plan” as an accessible field on all intakes.

Bug Fixes:

- Fixed bug that was preventing contact edit modals from opening.
- Fixed bug that was preventing the modal to edit tasks from closing after submitting.
- Removed unnecessary formatting options from intakes.
- When a receivable is added on projects, users will now be redirected back to the project instead of the associated event.
- Restored text formatting options to benefit notes when editing.
- Fixed the accuracy of required field indicators on forms.
- Fixed bug that was preventing an organization’s utilization and profitability from being updated.