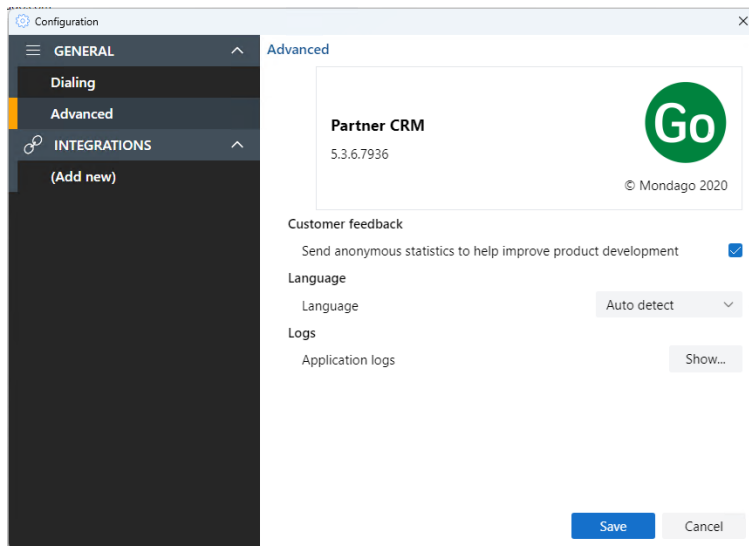


Product Update: PartnerCRM v5.3.6

PartnerCRM v5.3.6 contains both new and improved features, various bug fixes and an updated CRM Integration library with over 30 new CRM Integrations.

New Features



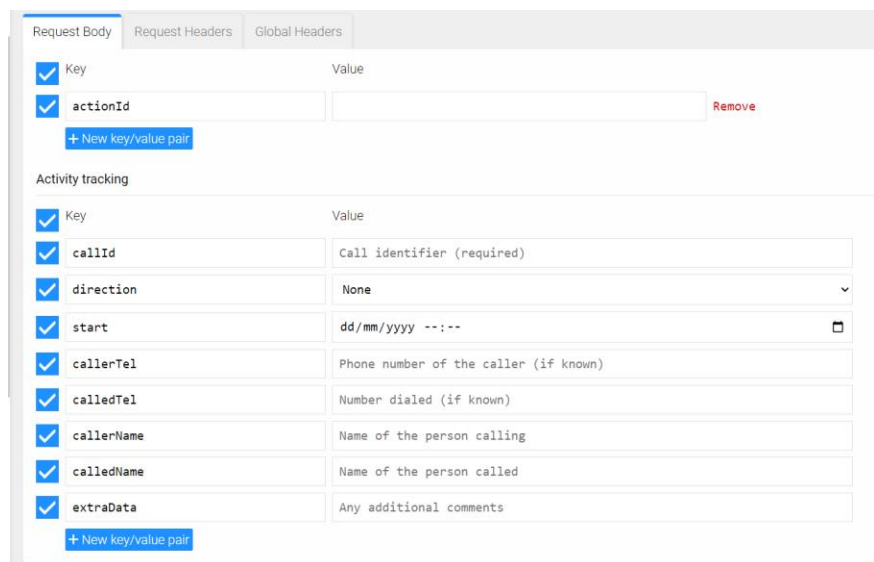
Anonymous Customer Feedback enabled

Anonymous statistics are collected and will contribute to ongoing enhancements in product development and provide valuable market data to Partner CRM partners. Data collected includes statistics on the most popular CRM Integrations, and the most used features.

The system is a lightweight event system that gathers the data to the cloud for analysis and does not consume resources.

Extension to API method for add Activity Record – ExtraData will be written to Comment/Notes

This allows an API user to include **extra data**, such as Recording URL, Account details or anything useful from the call.



New CRM integration

The following integrations, categorised by their vertical, have been added. Unless otherwise specified, these integrations are available for the Windows and macOS client:

<p>General</p> <ul style="list-style-type: none"> • 2Solar • ActiveCampaign • Cargas Energy* • Cobra • GoldMine* • Gorilla • Gripp • HighLevel* • InteractiveBlue* • KaseyaBMS* • Kommo • Kustomer* • LDAP • Method:CRM* • Monday.com • OptifiNow* • Power Automate* • SimPRO* • SuiteCRM* • Tyresoft • weclapp 	<p>Property</p> <ul style="list-style-type: none"> • agentOS • Apex27 • Propertyware* 	<p>Recruitment</p> <ul style="list-style-type: none"> • MatchMaker Kairos • NxtMatch • Otys* • Recruit CRM
<p>Logistics / ERP</p> <ul style="list-style-type: none"> • Acumatica ERP • Baka Glass • Deltek • Vantagepoint 	<p>Healthcare</p> <ul style="list-style-type: none"> • Cliniko • ModMed* • Opticabase 	<p>Financial</p> <ul style="list-style-type: none"> • Canopy* • Itris*
	<p>Automotive</p> <ul style="list-style-type: none"> • Future Taxi* • MOTIONDATA 	<p>Dental</p> <ul style="list-style-type: none"> • Aeronadental*
	<p>Construction</p> <ul style="list-style-type: none"> • ServiceTitan • Survey Booker 	<p>Law</p> <ul style="list-style-type: none"> • Prevail*
	<p>Retail</p> <ul style="list-style-type: none"> • Tekmetric 	<p>Medical</p> <ul style="list-style-type: none"> • Red Spot Interactive*

* Only available on Windows client.

Improvements

Caching Enhancements to CRM Integration

- During re-cache, existing cached records are still searchable - this allows the user to continue to search and work while re-caching is in progress.
- Cache system now uses SQLite as the storage mechanism - This offers faster searching and support for larger numbers of cache records, this was previously capped to prevent resource issues.
- Address book advanced search options - Advanced searching options of 'What' and 'Where' are now available in cached mode
- Improved behaviour of handling caching on Client start
 - Restarting the client will not force a new re-cache.
 - Restarting the client will reset the timer to the cache frequency period. Previous behaviour was to initiate immediately on Client start - hence causing server overloading when every client restarts.
 - Caching now uses the last modified date of the cache file as the last completed cached date/time. Using this value for calculating whether re-caching is required.
 - Changes in configuration will not cause a new cache update. Previous behaviour of Cached CRMs was on configuration save to cause an immediate re-cache.
 - If machine is off for several days, then only re-cache if last cache date/time is older than 1 day and the cache frequency value set - e.g. if the cache frequency period is set to 2 days, this will be used, instead of default 1 day.

Improvements to Outlook Integration with large Public Folders (Windows only)

Integration with Outlook now supports Public folders

Outlook and Outlook Web Access (OWA) searching enhancements

Integration with OWA now supports nonstandard telephony fields like Primary phone and Call back

Support for Outlook shared Folders (Windows only)

Integration with Outlook now supports shared folders

Support for umlaut (diacritic) characters within Microsoft Dynamics CRM

Integration with Microsoft Dynamics CRM 365 now supports the use of umlaut within contact names