



## Release Notes

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### Official Release – Version 3.1[f]

This release contains the following updates

#### **Included Features**

Below is a list of new features included in this release

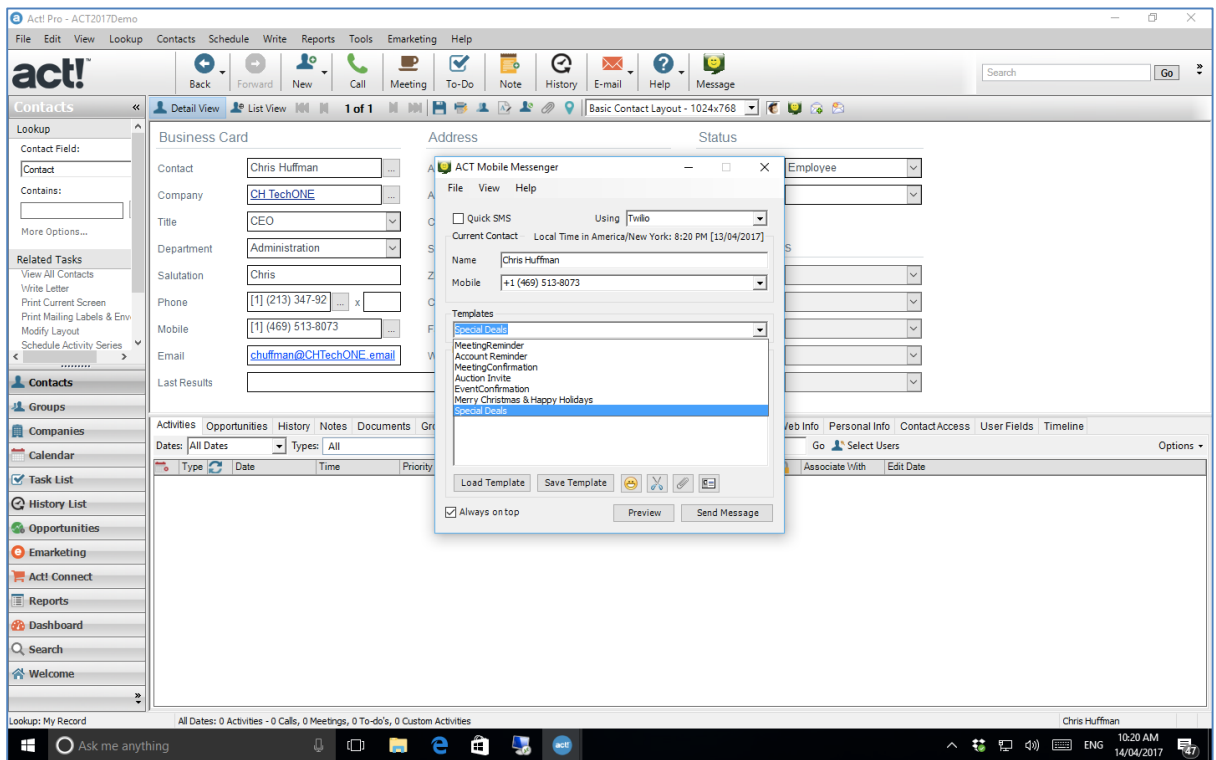
- 1) Message Templates Drop-Down Selector [AMMDEV-27]
- 2) Message Preview Button Feature [AMMDEV-34]
- 3) Message Reply - Duplicate Contact Handling [AMMDEV-32]
- 4) Phone Lookup Fix (Message Replies) [AMMDEV-38]
- 5) Local Time Improvements (Senders/Receivers) [AMMDEV-35]
- 6) Custom Text – Message Header [AMMDEV-40]
- 7) Message Recording – Private (Notes/History) [AMMDEV-41]
- 8) Group Messaging – Performance Improvements [AMMSUP-62]
- 9) Check for Updates & Auto-Update Features [AMMDEV-37]
- 10) Automatic Re-Registration [AMMDEV-36]

## 1) Message Templates (Drop-Down Selector) [AMMDEV-27]

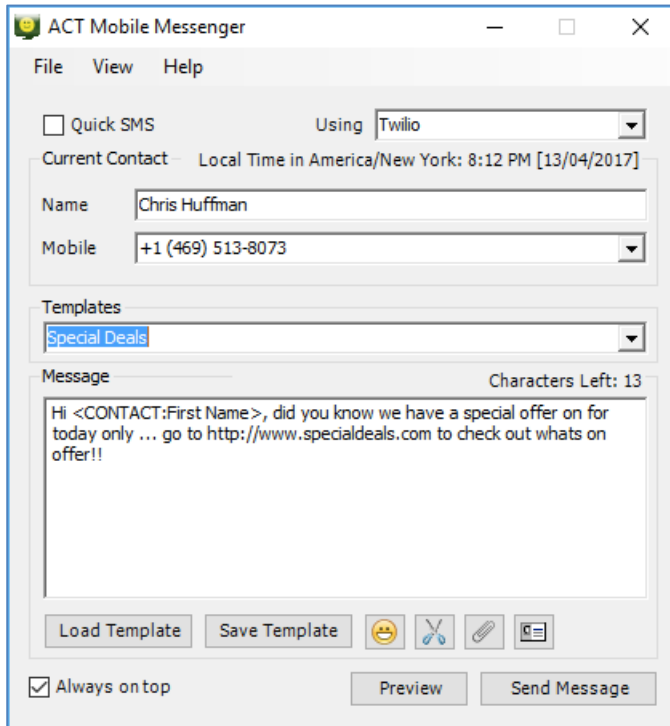
If you are a user of message templates then this new feature is a game changer. Previously, if you needed to use a message template you would have to browse for the file and then load it into your message screen. Further, if you decided to change the message template, you would have to go through the same process, only to be asked at the final step, 'Opening a template will replace current message. Are you sure?'. This can be quite tedious if you need to change templates quickly between individual messages.

Therefore, we now give you the option of the original implementation of browsing for message templates as well as this great 'NEW' option of using a message template drop-down selector.

### Message Template – Drop-Down Selector:

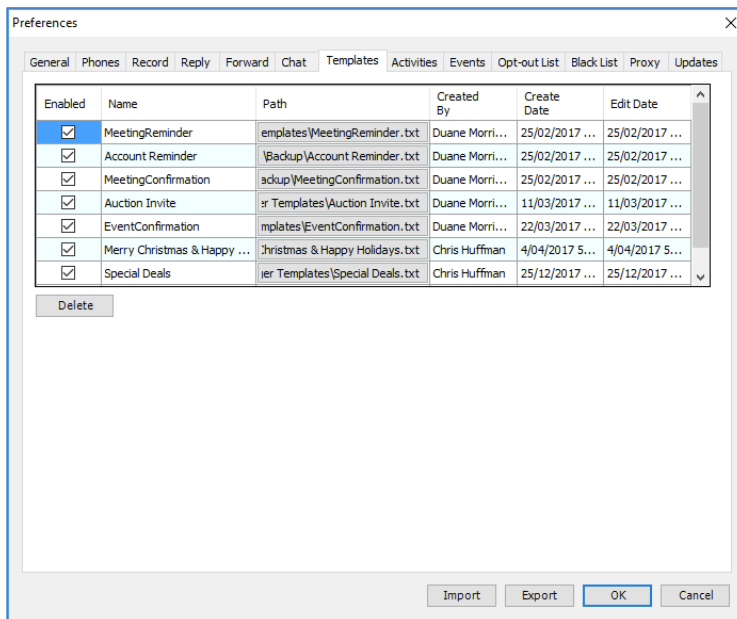


Message Template – Updates once selected without prompt:



Message Template Management (Preferences):

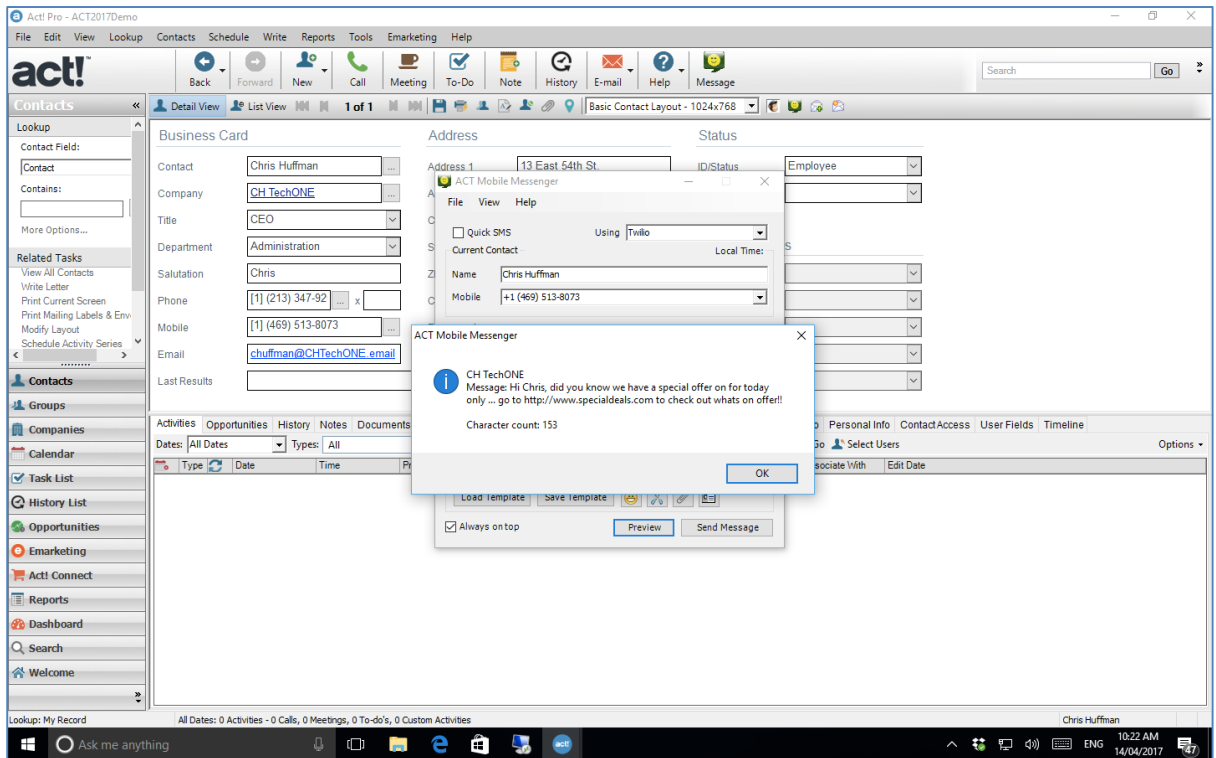
Message Templates now have their own Preferences tab so that all message templates can be managed in one place. Just enter a 'Name' and then browse for a message template.



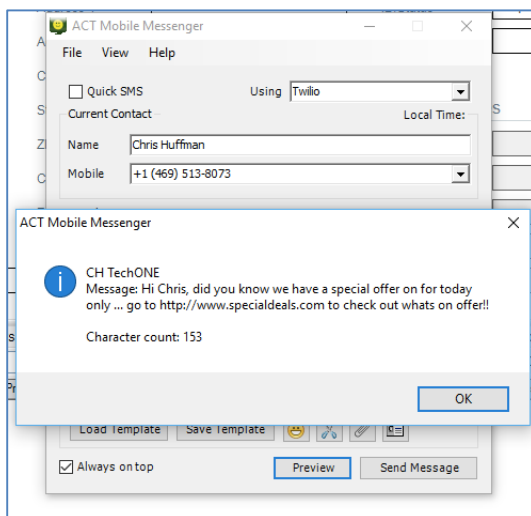
## 2) Message Preview Button [AMMDEV-34]

There is now the ability to 'Preview' and text message before you send it. This is great if you are using templates, including custom text, contact or company name in message headers, or using local time to send scheduled messages and would like to see the actual time the message will arrive.

### Preview Button & Preview Display (Contact Screen):



### Preview Button & Preview Display (Closer Look):



### 3) Message Reply - Duplicate Contact Handling [AMMDEV-32]

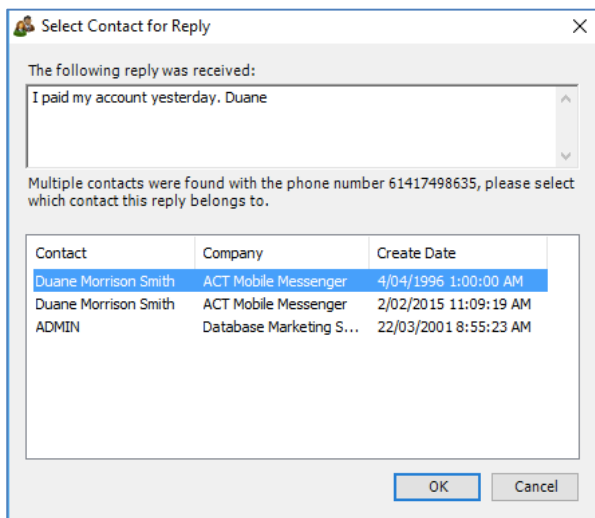
The Message Reply – Duplicate Contact Handling feature was developed for a customer who had a very specific requirement, based on the fact, that they had duplicate contacts in their act! database. These duplicates were created because each contact record was being treated as a case file rather than a contact record. That meant that a contact could have multiple contact records with distinct case file details, but common contacts details, hence duplicates. However, this could happen just as easily in any act! database where the cell/mobile number is entered twice or shared between two contacts so we decided to enable this functionality for all users.

#### Existing Duplicate Handling:

At present, when a message reply comes in and the phone number of the replier matches with duplicate phone numbers in multiple contact records, the message reply will be recorded against the first occurrence of the phone number. This may not always be the best result as the act! user may not be aware they have two or more contacts where the cell/mobile number happens to be entered in each of these contact records. The user then looks at the contact they are expecting the reply to be recorded against and finds no record of the reply which can be very disconcerting as they then think that the message reply functionality is not working. It is only later when they either scan for duplicates or do a free text search for the content of the message reply that they find the duplicate and then find the message reply was actually recorded, just on a different contact record.

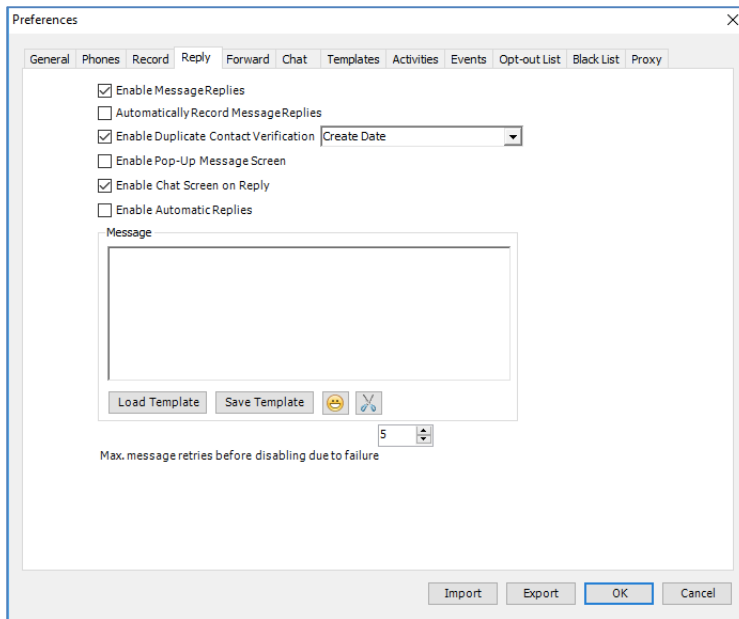
#### Message Reply - Duplicate Contact Handling Feature (NEW!!)

This new feature will check for any duplicate phone number for the incoming message reply and will present a selection screen for the user to choose which contact to record the message reply to/against. The user can also use control-click to select multiple or all duplicate contacts to record the reply to/against.



Preferences - Enable Duplicate Contact Verification:

To utilize this feature, you will need to enable it (tick the check-box) and then select which act! field you want to use as a reference (identifier or date) to uniquely distinguish between the duplicate records. By default, this is set to 'Create Date', but you can use any act! contact record field for this purpose and it will appear in the select screen for you to choose between contact records.



**4) Phone Lookup Fix (Message Replies) [AMMDEV-38]**

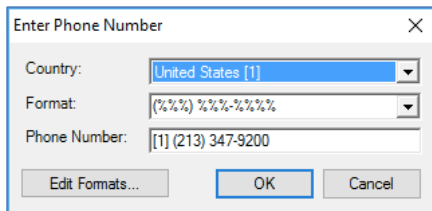
We recently had customers contact us, concerned that their message replies were not being recorded against the appropriate contact records, but were being recorded against the user's MyRecord. When we attempted to replicate the issue we were not able to produce the same results as the message reply feature was working as it should.

Generally, a message reply will only be recorded to a MyRecord if the phone number contained in the reply does not match a contact record within the act! database. Therefore, we went looking for the contact record matching with the phone number in the database and was not able to find the record even though the customer assured us that the record was there. We were able to find the record by searching via the Lookup->Surname function, but were unable to find the number when searching using Lookup->Phone or Lookup->Other Fields->Mobile Phone.

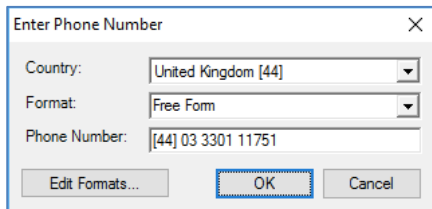
This was concerning as we use a phone lookup feature via the act! software development kit (SDK) that is the same feature that is used within act!. It was appearing as though the feature was broken in act! and therefore broken within the ACT Mobile Messenger. This prompted us to ponder why customers had not reported this problem before in great numbers?

In looking deeper, we then found we would get a different result depending on whether the mobile phone number was setup using a pre-defined format or whether it was entered 'Free Form'. Searching on a formatted phone worked fine, whereas if the free form had any spaces or other characters there was an issue finding the record.

### Formatted Phone:



### Free Form Phone:



It was concluded that this is an existing floor within act! and the act! software development kit (SDK) so it was decided we needed to find a work around solution.

### Phone Lookup Fix:

In order to ensure that message replies are received and connected to the appropriate contact records with integrity, the ACT Mobile Messenger now accesses the act! database via the SQL Server database. In bypassing the issues identified with act! and the act! software development kit we now have a robust solution to ensure replies are matched with records accurately.

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Hi Duane

Thanks for the fix on Friday, it seems to be working.

I've only tested it on two friends over the weekend, however, in both cases, messages were recorded on the way out in the client's record card and when they responded, it went directly to the record card again. Also the emails that come in have their details and not my own.

I'll keep you updated as more replies come in during the working week.

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Hi Duane

Thanks again for fixing the reply situation. It's looking good.

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## 5) Local Time Improvements (Senders/Receivers) [AMMDEV-35]

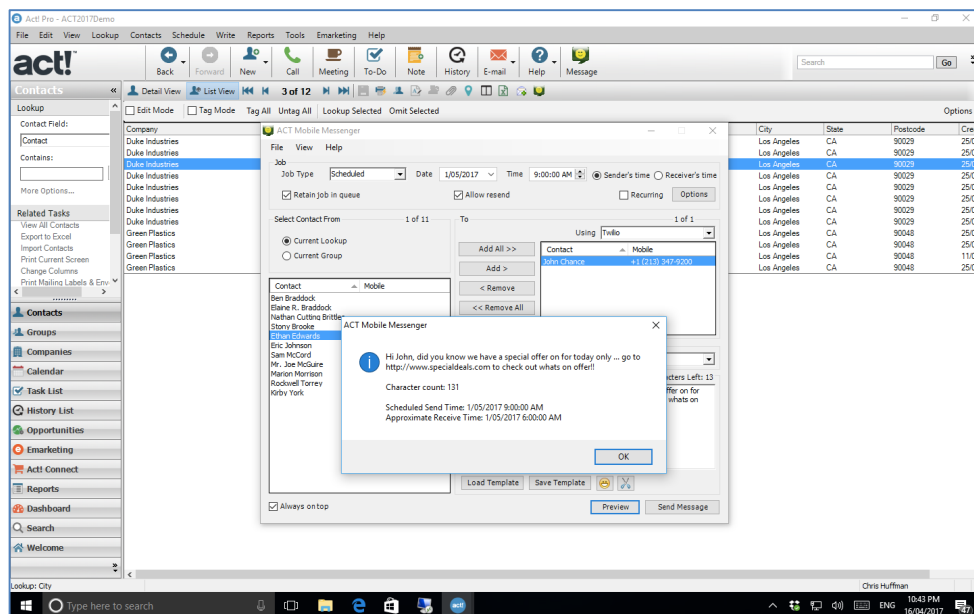
In an earlier release, we introduced the ability to specify 'Local Time' when scheduling text message jobs. This was to ensure that if a message job was sent to a different country, region or state, that time differences would be considered. By selecting this option each individual scheduled message job would be scheduled based on the location (country, state & city) of the contact's address. This would mean that a text message scheduled for Monday 1<sup>st</sup> of May 2017 for someone in New York would arrive the same time for someone in Los Angeles, London, Tokyo or Sydney. After all no one wants to receive a text message in the middle of the night. ☹

We have now added additional functionality to this feature to allow the user to specify whether the time being scheduled is the 'Sender's time' or the 'Receiver's time' providing additional control as previously the time would always be the receiver's local time. However, there may be instances where the scheduling of the message is based on the sender's time and the receiver would receive this at the equivalent time in the local region.

To further enhance this we have also added the 'Preview' option introduced in this release to allow the user to see the results of the time conversion whether the sender's or receiver's time is selected. ☺

### Sender's time (Sender in New York/Receiver in Los Angeles):

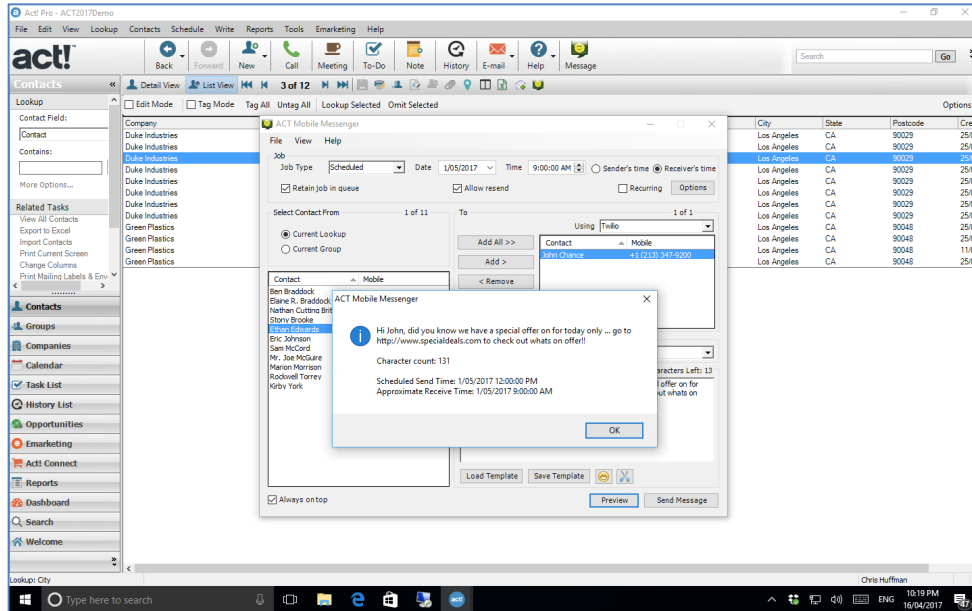
In this case the sender's time is 1<sup>st</sup> of May at 9:00AM (Scheduled Send Time) and the receiver's time is the 1<sup>st</sup> of May at 6:00AM (Approximate Receive Time)





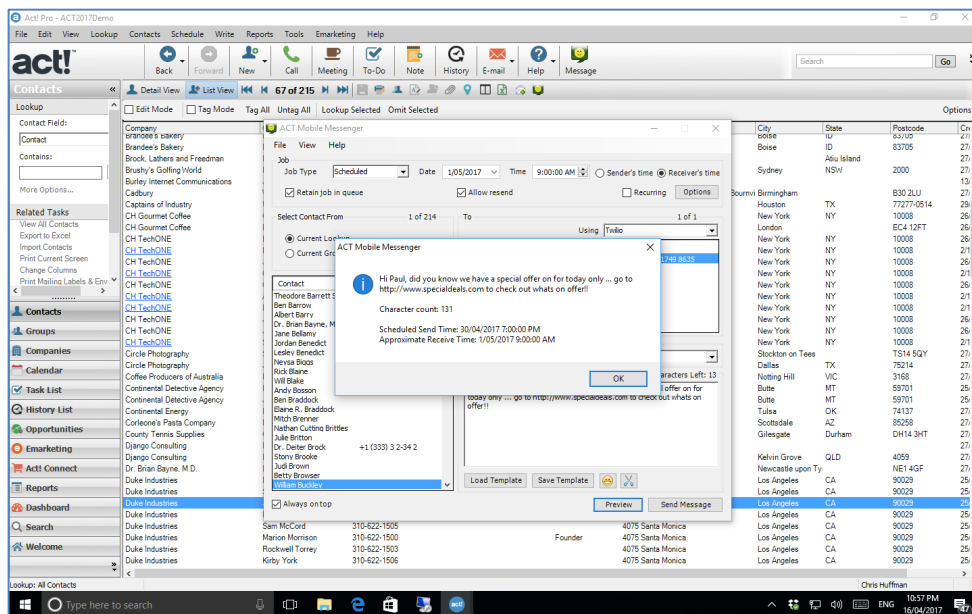
Receiver's time (Sender in New York/Receiver in Los Angeles):

In this case the receiver's time is 1<sup>st</sup> of May at 9:00AM (Approximate Receive Time) and the sender's time is 1<sup>st</sup> of May at 12:00PM (Scheduled Send Time).



Receiver's time (Sender in New York/Receiver in Sydney, Australia):

In the case of the receiver being in a different country the time differences can be quite significant. Below the receiver's time in Sydney, Australia is 1<sup>st</sup> of May at 9:00AM, but the sender's time would be 30<sup>th</sup> of April at 7:00PM. It is like the text message is travelling ahead in time. ☺



## 6) Custom Text – Message Header [AMMDEV-40]

We are frequently asked by customers the following questions:

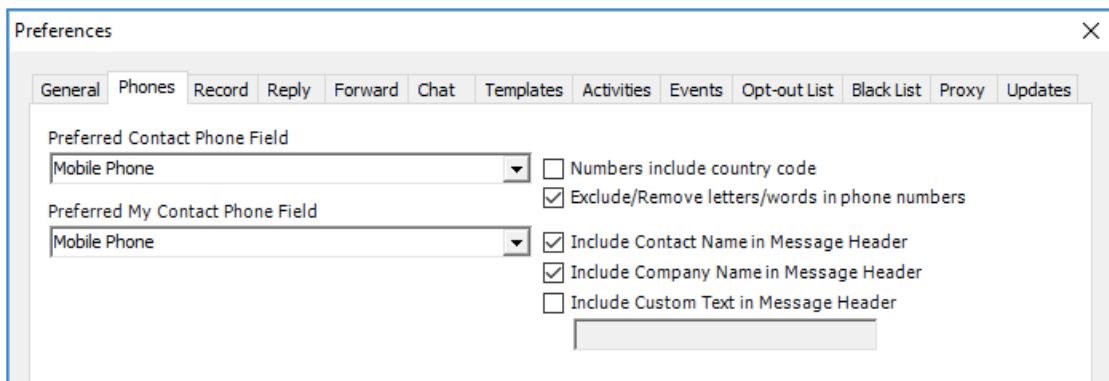
- 1) Can I include my phone number as the sending number?
- 2) Can I include my name so that the receiver knows who I am?
- 3) Can I include my company name so that the receiver's knows which company is sending the message?

The first question is generally one for your selected message provider as depending on what features they offer you may or may not be able to use your number or the company's landline number as the originating phone number (or sender id). There is often additional costs associated with these services and some providers do not allow it as there are chances the text messages could be blocked.

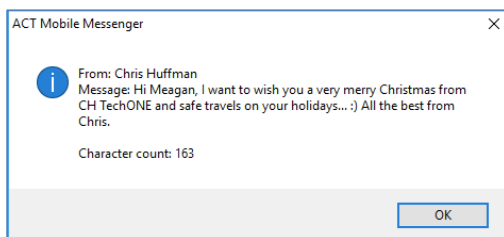
Please also keep in mind, that if you are allowed to use your own cell/mobile number as the sending number, that the replies would not be recorded in act! as they would go directly to your phone. ☹

### ACT Mobile Messenger – Identifier Options:

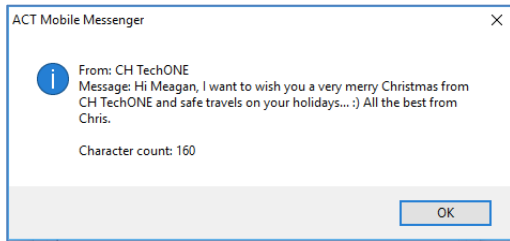
To overcome some of the above issues we provided the user the ability to include either their 'Contact Name' or 'Company Name' or both from their MyRecord in the header of the text message before the actual message text included as From:.



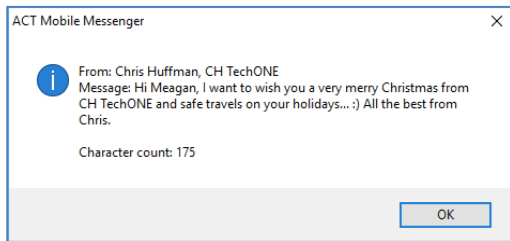
### Include Contact Name in Message Header



Include Company Name in Message Header

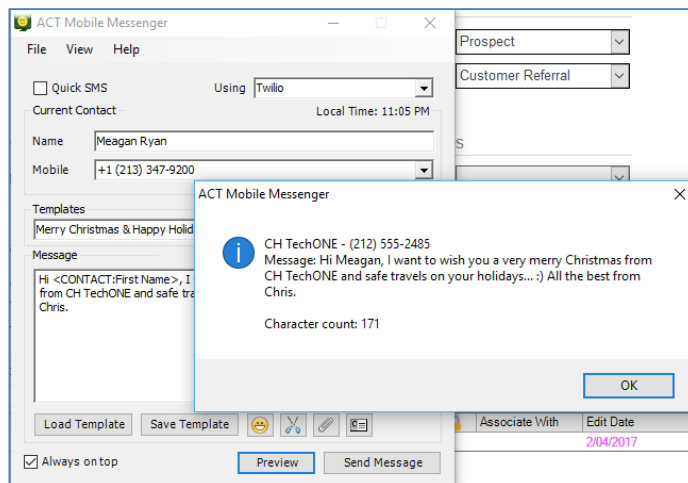
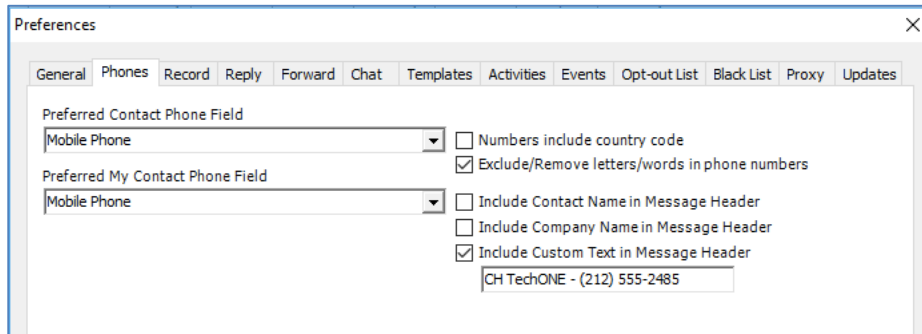


Include Contact Name & Company Name in Message Header



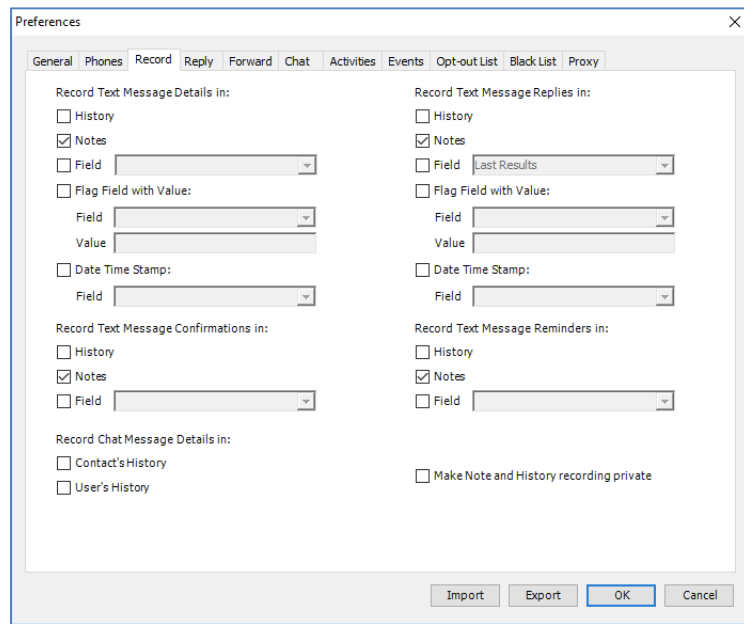
Include Custom Text in Message Header:

We have included the option to include your own 'Custom Text' before the message to label the message any way you want. We had to do this for one customer, who is actually using their Company field for something else, but we have also had requests for quite some time to have the option of a phone number or free entry text.



## 7) Message Recording – Private (Notes/History) [AMMDEV-41]

We recently had a request, to have the ability to make text message recording in Notes and History private. This option has now been included in the Preferences->Record tab along with the many options we have for recording text messages in act!. There are also plans to have this capability when sending and receiving messages.



## 8) Group Messaging – Performance Improvements [AMMDEV-62]

There has been an on-going performance issue with Group Messaging (Advanced View) when adding and removing contacts in bulk (en-masse). This immediately results in windows wheels spinning or hour glasses and can ultimately result in system freezes or act! crashes depending on the number of contacts involved.

We are committed to make the ACT Mobile Messenger the most robust software of it's kind for doing CRM based group messaging and will always monitor and improve upon our performance.

Therefore, we have implemented a new data grid component that replaces the select 'From' and 'To' list windows and drastically improves the speed of the 'Add-All' and 'Remove All' functions. If you use Group Messaging at all you would have been familiar with the 'Flickering' and 'Scrolling' as the software tried to add all your contacts. You will see right away with this release what a difference this new data grid control makes. Previously, you had to wait and wait, whereas now your contacts will be added and removed at the blink of an eye.

We are very keen to hear from customers with large databases how this works for them and what a difference it makes in using Group Messaging (Advanced View).

## 9) Check for Updates & Auto-Update Features

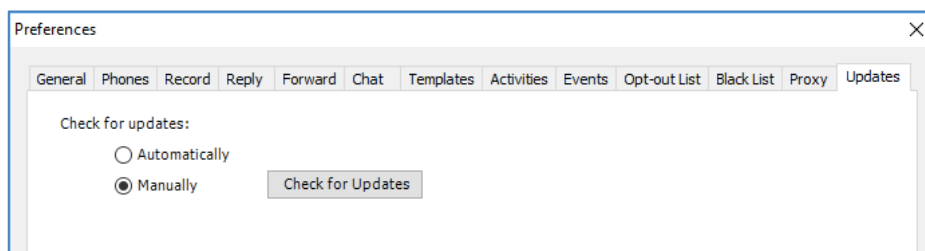
One of the support challenges we have is ensuring that all users are using the latest software. Many of our support issues are generally issues that have been resolved, but customers are still running outdated software.

What's worse is that customers stop using the software thinking the problem will not be solved. Our policy is and has always been, that customers who have either purchased the software, or are on an active software subscription, are entitled to receive free updates of the software.

When we first developed the software, it was always intended that we would do quarterly official releases with updated builds in between for any new features or bug fixes. However, it has been almost monthly that we are implementing changes and customers are still running software over two years old in some cases.

Therefore, we hope this new feature will be a far more seamless way of keeping customers up-to-date and also provide the customer a much easier way for them to check whether they have the latest and greatest software. 😊

### Preferences – Update Tab:



### Single Users

In the case of Single Users we generally recommend choosing the check for updates 'Automatically' as this is relatively simply and there is only a single user to consider.

### Multi Users

In the case of Multi Users we would strongly recommend choosing the check for updates 'Manually' as there are a lot more users to consider and IT may want to do some testing prior to rolling out the changes or update. It is also a safe guard in case any issue picked up post release is not rolled out to a significant number of users who may all be impacted if an issue occurs.



## 10) Automatic Re-Registration

Many customers have been frustrated by how many times they have had to 'Register' and 'Activate' the ACT Mobile Messenger software. When we originally released the software you could register it once on a single computer and not have to worry about it again. Even if you installed an update the original registration would still be effective.

However, as a result of changes to computing where you can effectively have thousands of users on one single machine (server) or even multiple virtual machines (VMs) running on a single machine (server) we had to change our registration procedures and base them on not only the computer, but also the windows user profile.

The downside of this additional control meant we lost the ability to maintain the previous registration when updating the software. This meant the user would install the software and then the software would be reset to 'Trial' mode meaning the software would operate for 10 days until the software 'Expired' unless re-registered. This as you can imagine caused a lot of pain for our customers and also a 'HUGE' workload for us in processing all of the re-registrations. This was manageable when we had hundreds of customers, but much more challenging with thousands of customers.

Therefore, we have (as part of this release), implemented an automatic re-registration so that after you register this software this time on a single machine you should not have to re-register when performing software updates via the new 'Check for Updates' feature.

You will simply install the software update and the software will be registered.

This is the first step towards the future, where all registrations will be done online and you will be able to activate your software straight away without having to wait for a response within 24 hours from us. 😊

## **Included Bug Fixes**

Below is a list of bug fixes included in this release:

- 1) ACT Mobile Messenger - Registration - Computer ID not Unique [AMMSUP-46]
- 2) ACT Mobile Messenger not working after ReImage installation [AMMSUP-47]
- 3) Invalid Recurrence Pattern - Retrieval of Named Days [AMMSUP-48]
- 4) Template Location Validation [AMMSUP-49]
- 5) Text Message History Recording only recording in MyRecord [AMMSUP-50]
- 6) Zipwhip Connector - Check Replies Issue - Out of Memory Exception [AMMSUP-51]
- 7) Object reference not set on instance of an object [AMMSUP-52]
- 8) Message Recording says Message Sent however message is not sent [AMMSUP-53]
- 9) Template Merge Issue - Last E-mail Date [AMMSUP-54]
- 10) Twilio Connector - Sending but not Receiving messages [AMMSUP-55]
- 11) Out of Memory Exception [AMMSUP-57]
- 12) Just-In-Time Debugger [AMMSUP-58]
- 13) SQL Server Connectivity Error [AMMSUP-59]
- 14) Contact Messaging - Contact Record Scrolling Slow [AMMSUP-60]
- 15) Multiple instances of application open [AMMSUP-61]
- 16) Group Messaging - Add All & Remove All (Screen Freezes) [AMMSUP-62]
- 17) Message Replies - Reply not received on time [AMMSUP-63]
- 18) Message Recording - Messages recorded against MyRecord [AMMSUP-64]
- 19) Group Messaging - Add all & Remove All corrupts Contact List View [AMMSUP-65]

## **Latest Release – About Screen**





**Footnotes:**

- i) An updated User Guide including all the latest features will be available soon.