# CrumpCRM and CrumpACE
# Release Notes—February 9, 2023

## CrumpCRM and CrumpACE—Release Notes—February 9, 2023

The following items will be updated in CrumpCRM and CrumpACE on the evening of February 9, 2023. The release will contain new features and modifications to the system's existing features.

**Please Note**:

As we continue building and enhancing our Microsoft Dynamics platform, there will be ongoing releases for **CrumpCRM** and **CrumpACE**.

Teammates may experience system slowness at **8:15 p.m. ET**. System slowness will last for approximately **15** minutes.

## Contents

## CrumpCRM—Agent Form—Nickname changing to Alias

**Nickname** has been changed to **Alias** on the **CrumpCRM Agent** form. All legacy data from the legacy Nickname field will be migrated to the new field.

**General / Contact Information tab** for Agents. The field **"Nickname"** has been replaced with **"Alias"**. On the screen shot below, you will see it directly below Division Market on the left-hand side. You will not lose any data that has been previously populated into the Nickname field - all legacy data will be migrated to the Alias field.

## CrumpCRM –Agent Form Phone Number update

**Agent Form - Phone Call** formatting will no longer include parenthesis and dashes (XXX) XXX-XXXX. This change aligns with data requirements for sending these fields over to Paragon.

| | |
|---|---|
| Business Phone | 7177777777 |
| Bus Ext | --- |
| Mobile Phone | 7176665555 |
| Direct Phone | 7176664444 |
| Home Phone | 7275556666 |
| Other Phone | 7175557777 |

2/7/2023

## CrumpCRM – Updates to the Marketing List - Admin Tab

**Reporting Units** and **Number of Phone Calls** have been added to the **Marketing List – Admin Tab**.

**Reporting Unit** (Drop-down menu)

This addition will help to improve reporting capabilities for the **Sales Development Team**. Reporting fields include:

| | |
|---|---|
| Crump | National Accounts West |
| Equitable | National Accounts East |
| FMO | Schwab |
| Independent | Truist |
| Merrill | TIAA |
| MMLIA | World Financial Group |
| | Other |
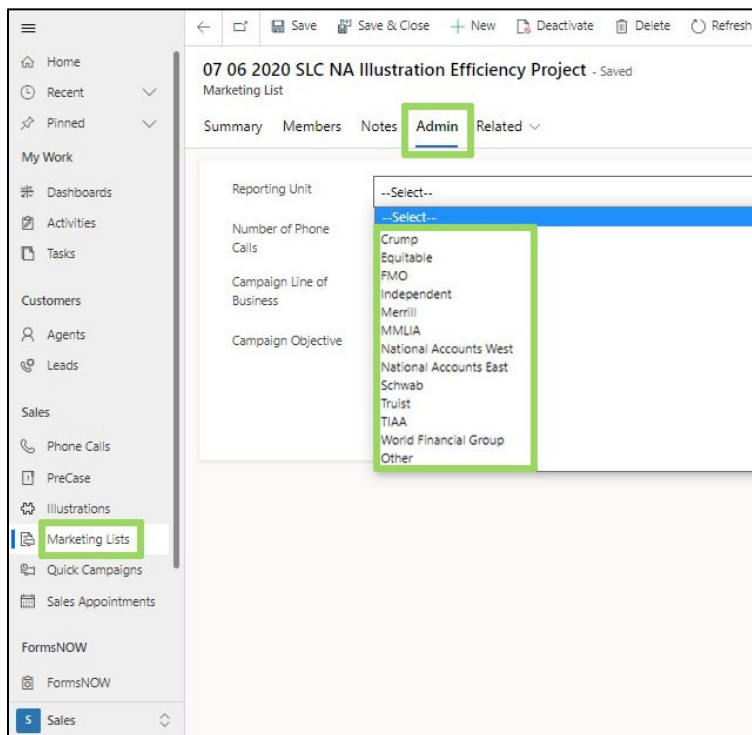
## CrumpCRM – Updates to the Marketing List - Admin Tab

**Number of Phone Calls** (Editable Text Field) has been added to the **Marketing List – Admin Tab**

**Number of Phone Calls** (fillable text field.)

> This field will help to improve with **identifying** and **reporting** on **Sales Development Campaigns** for our sales partners.
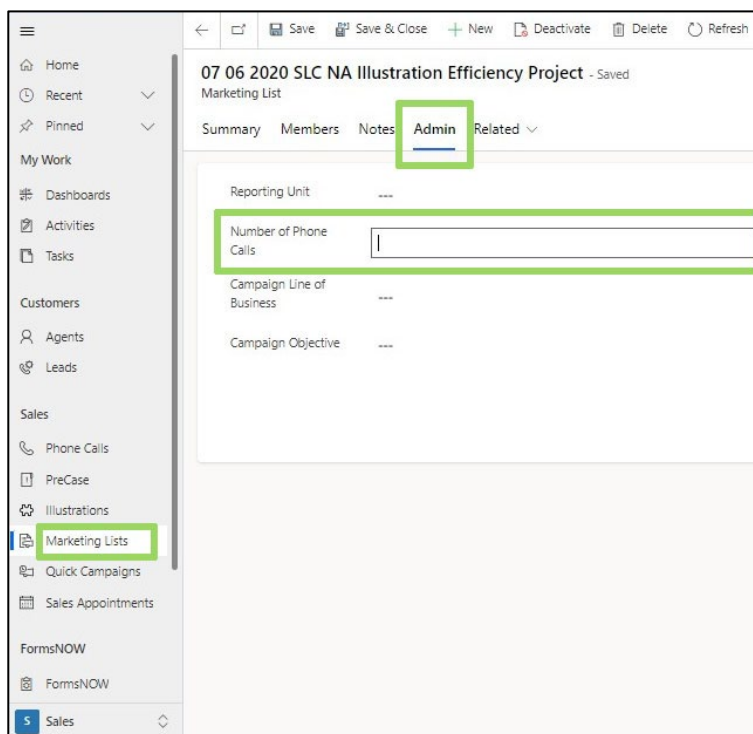
## CrumpCRM – Precase Illustration Type - Automatic Update

When an **Illustration** is **Marked Complete** in **CrumpCRM**:





The **PreCase Illustration Type** will be updated with the corresponding **Illustration's** - **Illustration Type**.

CrumpACE Support   CrumpCRM Support                    2/7/2023
For Internal use only.
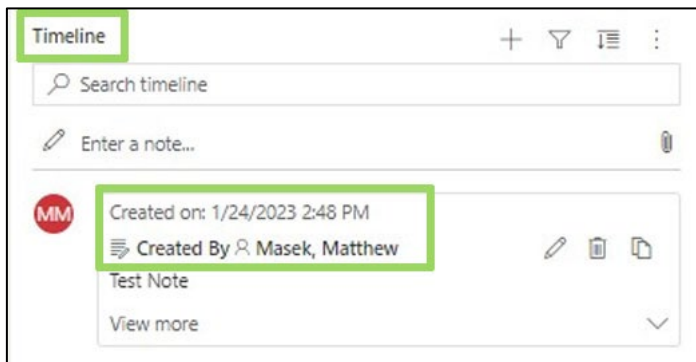
## CrumpCRM and CrumpACE – Updates to Forms with a Timeline View

Forms in both **CrumpCRM** and **CrumpACE** that include a **Timeline** have had the Notes Section updated as follows:

- ADDED – **Created on**
- ADDED – **Create by**
- Removed – ~~Modified on~~
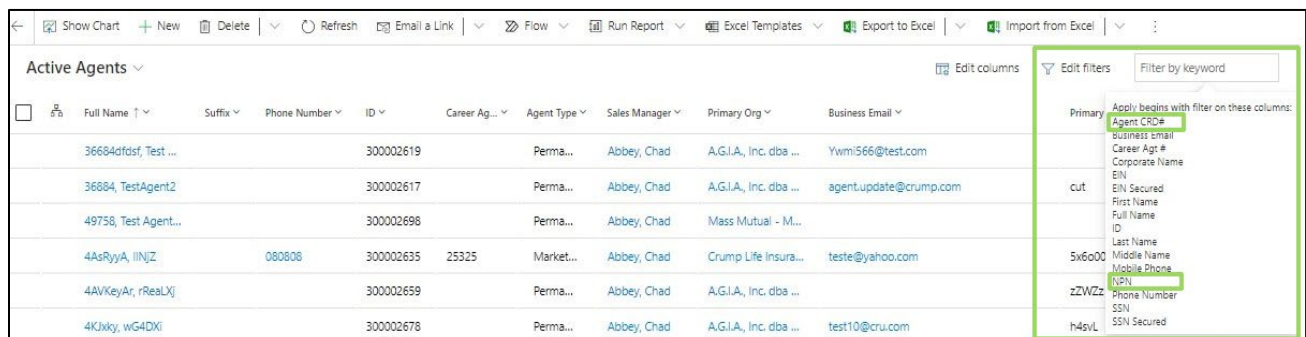- Removed – ~~Modified by~~

**CrumpCRM** Forms impacted **– Agent, Precase, and Illustration**

**CrumpACE** Forms impacted **– Agent and Account**

## CrumpCRM and CrumpACE – Global Agent Search updates

Global Search for **Agents** now includes the **NPN** producer number and **Agent CRD#**.