



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 and CrumpACE—Release Notes—February 9, 2023	1
CrumpCRM –Agent Form - Nickname changing to Alias.....	2
CrumpCRM –Agent Form Phone Number update	3
CrumpCRM – Updates to the Marketing List - Admin Tab	4
CrumpCRM – Updates to the Marketing List - Admin Tab	5
CrumpCRM – Precase Illustration Type - Automatic Update.....	6
CrumpCRM and CrumpACE – Updates to Forms with a Timeline View	7
CrumpCRM and CrumpACE – Global Agent Search updates	7

CrumpCRM and CrumpACE
Release Notes—February 9, 2023

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.

The screenshot shows the 'Agent' form for '36684dfdsf, Test Agent 3'. The 'General / Contact Information' tab is active. The form contains various fields for personal and contact information. The 'Alias' field, located below the 'Division - Market' field, is highlighted with a green border. The 'Pronouns' field is also visible below it.

Field	Value	Field	Value
First Name	Test Agent 3	Bus Ext	---
Middle Name	---	Mobile Phone	---
Last Name	36684dfdsf	Direct Phone	---
Suffix	---	Home Phone	---
Agent Type	Permanent	Other Phone	---
Primary Org	A.G.I.A., Inc. dba AGIA Insurance	Work Email	Ywmi566@test.com
Primary Manager	Child Agency-Assiatnt, Test	Personal E-Mail	---
Agency	Child Agency	Fax	---
Sales Manager	Abbey, Chad	Solution Center Email	---
Career Agt #	---	Corporate Agent	<input type="checkbox"/>
Division - Market	---	Alias	---
		Pronouns	---

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

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



CrumpCRM and CrumpACE

Release Notes—February 9, 2023

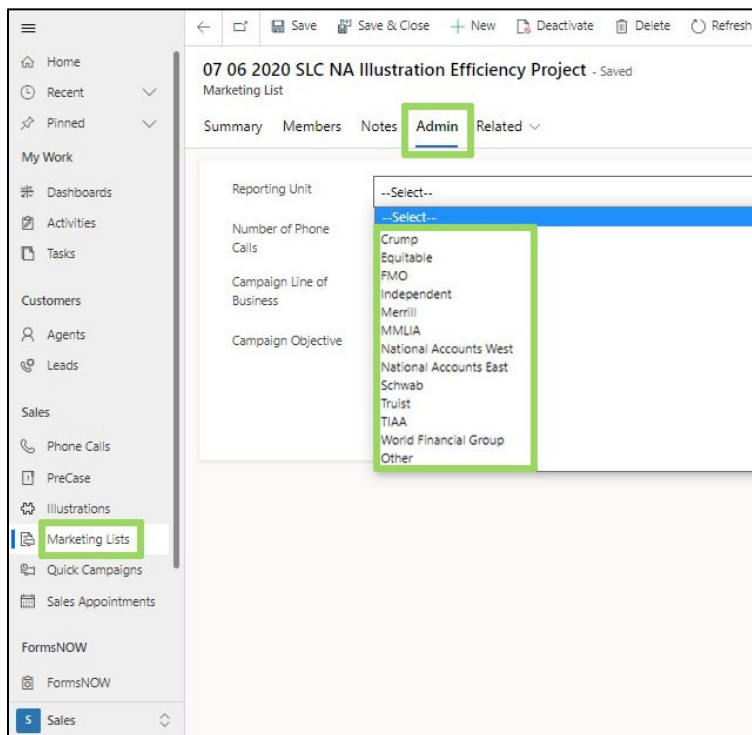
CrumpCRM – Updates to the Marketing List - Admin Tab

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

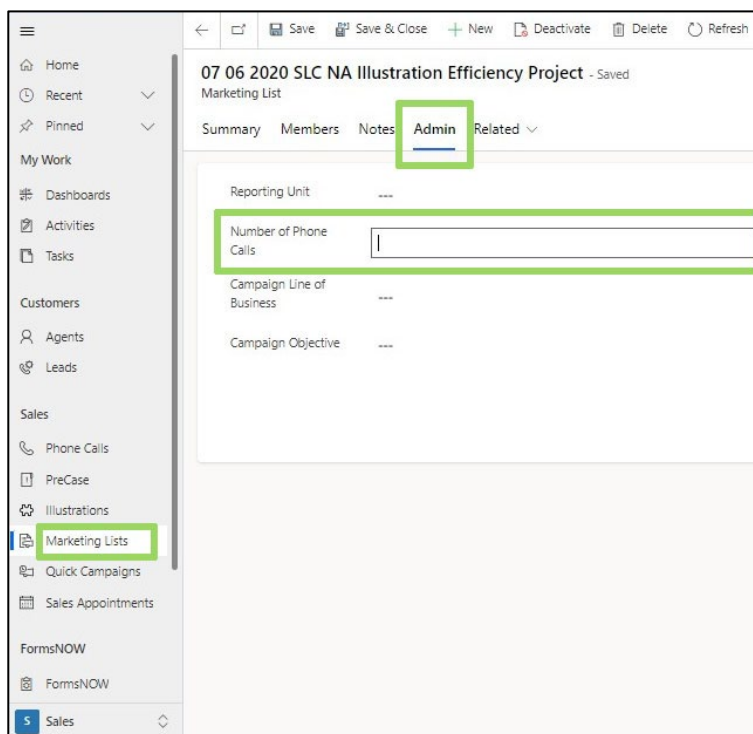


CrumpCRM – Updates to the Marketing List - Admin Tab

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**:


Johnson, Cave - Saved
Illustration · Illustration_UI ▾

General Client Details Illustration Details Notes and Activities Admin



Client Info

Owner *  Sand, Derrick (Do not disturb)

Date Requested 12/21/2021  12:00 AM 

Due Date --- 

Mark Illustration Complete

Date Completed 2/7/2023  10:12 AM 

Johnson, Cave - Saved
Illustration · Illustration_UI ▾

General Client Details **Illustration Details** Notes and Activities

ILLUSTRATION INFO

Illustration Type * Indexed Universal Life

Topic ---

Payment Duration ---

Payment Duration Notes ---

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

Test Client - Unsaved
Pre Case

Client Agent **Precase Info** Notes and Activities Paragon Information Related ▾

Last updated: 2/7/2023 8:48 AM

Illustration Type Indexed Universal Life

Replacement No



CrumpCRM and CrumpACE

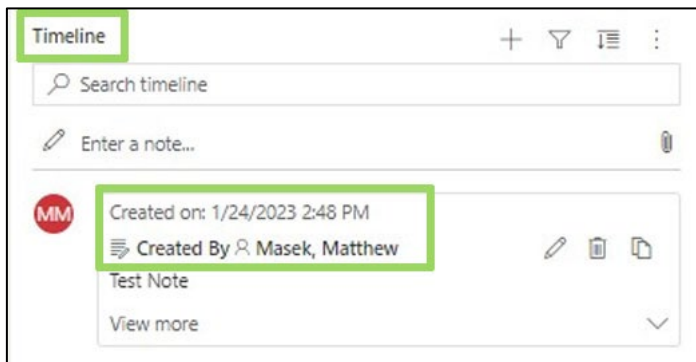
Release Notes—February 9, 2023

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~~

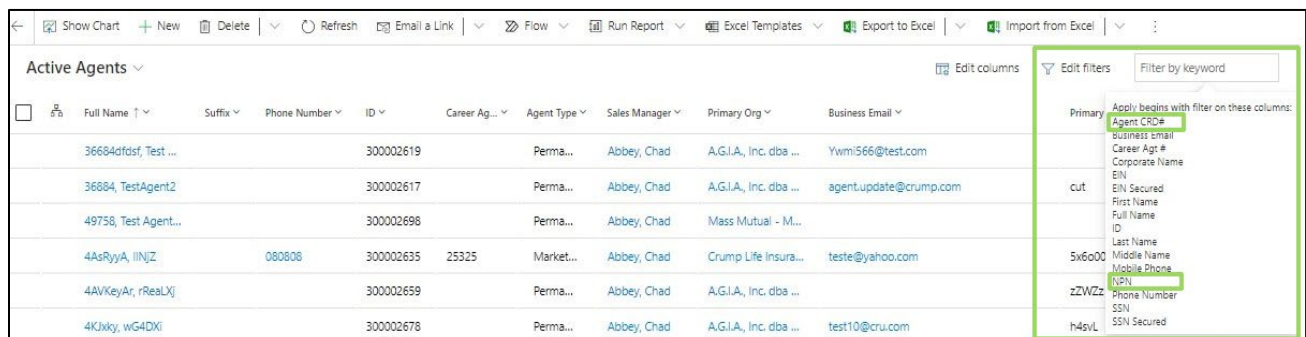
CrumpCRM Forms impacted – **Agent, Precase, and Illustration**

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#**.



The screenshot shows a table of 'Active Agents' with columns for Full Name, Suffix, Phone Number, ID, Career Ag..., Agent Type, Sales Manager, Primary Org, and Business Email. A filter dropdown menu is open on the right, showing a list of columns to filter by. The 'Agent CRD#' and 'NPN' options are highlighted with a green box.

Full Name	Suffix	Phone Number	ID	Career Ag...	Agent Type	Sales Manager	Primary Org	Business Email
36684dfdsf, Test ...			300002619		Perma...	Abbey, Chad	A.G.I.A., Inc. dba ...	Ywm1566@test.com
36884, TestAgent2			300002617		Perma...	Abbey, Chad	A.G.I.A., Inc. dba ...	agent.update@crump.com
49758, Test Agent...			300002696		Perma...	Abbey, Chad	Mass Mutual - M...	
4AsRyyA, IINjZ		080808	300002635	25325	Market...	Abbey, Chad	Crump Life Insura...	teste@yahoo.com
4AVKeyAr, rReaLXj			300002659		Perma...	Abbey, Chad	A.G.I.A., Inc. dba ...	
4KJxky, wG4DXl			300002678		Perma...	Abbey, Chad	A.G.I.A., Inc. dba ...	test10@cru.com