

April 16, 2019 - HyperDrive Updates: Sort, Select & Edit To-Dos, Added Phone Numbers to Birthday Report, and More!

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Sort To-Do List

HyperDrive users now have the ability to “sort” their to-dos based on the different columns available. This will allow each user to view their set of to-dos sorted by the contact’s name, the to-do’s priority, the due date, and more.

<input type="checkbox"/>	Summary	Contact	Priority	Due	Completed	Mark Complete	Assigned To
<input type="checkbox"/>	✉ Batch to do list	👤 Halle Berry	Normal	4/12/2019		Mark Complete	DEMO - Hyper
<input type="checkbox"/>	✉ Batch to do list	👤 Jim Carrey	Normal	4/12/2019		Mark Complete	DEMO - Hyper
<input type="checkbox"/>	✉ Batch to do list	👤 Matt Damon	Normal	4/12/2019		Mark Complete	DEMO - Hyper
<input type="checkbox"/>	✉ Batch to do list	👤 Jessica Alba	Normal	4/19/2019		Mark Complete	DEMO - Hyper
<input type="checkbox"/>	✉ Batch to do list	👤 Robert De Niro	Normal	4/19/2019		Mark Complete	DEMO - Hyper
<input type="checkbox"/>	✉ Batch to do list	👤 Johnny Depp	Normal	4/19/2019		Mark Complete	DEMO - Hyper

To sort your to-dos by any of the given columns of information, simply select the column header to organize the list ascending, or select again to sort descending.

Select and Edit Multiple To-Dos

Users can also now select multiple to-dos at once by checking the box on the left. Each selected to-do will highlight in blue. All selected to-dos can then be mass edited at once. This includes marking all as complete, changing the due date, adjusting the priority, or adding the contact to Marketing.

To-Do List							Tools
View All							Make Calls
							Send Emails
							Create Letters
<input checked="" type="checkbox"/> Actions for 4 Checked Items Mark Complete Delete Due Date Priority Marketing							
<input type="checkbox"/>	Summary	Contact	Priority	Due	Completed	Mark Complete	Assigned To
<input checked="" type="checkbox"/>	✉ Batch to do list	👤 Halle Berry	Normal	4/12/2019		Mark Complete	👤 DEMO - Hyper
<input type="checkbox"/>	✉ Batch to do list	👤 Jim Carrey	Normal	4/12/2019		Mark Complete	👤 DEMO - Hyper
<input checked="" type="checkbox"/>	✉ Batch to do list	👤 Matt Damon	Normal	4/12/2019		Mark Complete	👤 DEMO - Hyper
<input checked="" type="checkbox"/>	✉ Batch to do list	👤 Jessica Alba	Normal	4/19/2019		Mark Complete	👤 DEMO - Hyper
<input checked="" type="checkbox"/>	✉ Batch to do list	👤 Robert De Niro	Normal	4/19/2019		Mark Complete	👤 DEMO - Hyper
<input type="checkbox"/>	✉ Batch to do list	👤 Johnny Depp	Normal	4/19/2019		Mark Complete	👤 DEMO - Hyper
<input type="checkbox"/>	✉ Batch to do list	👤 Leonardo DiCaprio	Normal	4/19/2019		Mark Complete	👤 DEMO - Hyper

CRM users can use the previously mentioned sorting function to organize their to-dos, select multiple similar or related tasks and edit them all at once.

Select and Edit Multiple Email Templates

Just like the to-dos, CRM users now have the ability to select multiple email templates at once. Instead of working with one template at a time, users can now organize email templates at once.

Email Templates						
Email Templates						
Header						
Footer						
Opt-In						
Settings						
<input checked="" type="checkbox"/> Actions for 2 Checked Items Move to Folder Delete Export						
<input type="checkbox"/>	Template Name		Email Subject Line	Last Changed	Share	
<input checked="" type="checkbox"/>	24 Hour Referral Letter / Sales	📁 Sale Follow-Up Email Campaigns	Would you recommend %%mm.Company%% 1	4/16/2019	🔗	🗑️
<input checked="" type="checkbox"/>	48 Hour GM Thank You Letter New Purchase	📁 Sale Follow-Up Email Campaigns	Thank you for shopping with %%mm.Company	4/16/2019	🔗	🗑️
<input type="checkbox"/>	48 Hour GM Thank You Letter Used Purchase	📁 Sale Follow-Up Email Campaigns	Thank you for shopping with %%mm.Company	4/16/2019	🔗	🗑️
<input type="checkbox"/>	Announcement	📁 Templates	Announcement	4/16/2019	🔗	🗑️

Keep all your templates organized with ease by moving, deleting, or even exporting multiple email templates at once.

Edit Team Calendars

A user permission has been added to HyperDrive CRM Pro to allow users to edit team calendars. If you would like this permission enabled for your dealership's users, please contact More Than Rewards customer support at 414-326-4100 to help get it setup.

Trigger Actions Following Autoresponder Completion

CRM users can now setup automated actions to be triggered when an Autoresponder is completed, such as assign an action set, to-do plan, deal stage or flag to the contact. It can also be configured to add a note or send a notification.

The screenshot shows the 'Autoresponder' configuration interface. At the top, it displays 'Step 1' with a 'Schedule 5 Days' option and an 'Announcement' template. Below this are buttons for 'Add a Step', 'Close', and 'Stop Campaign'. The main section is titled 'Completion Assistant' and asks 'What do you want to happen when this Autoresponder has completed?'. It includes several configuration options: 'Assign this Autoresponder', 'Assign this Action Set', 'Assign this To-Do Plan', 'Assign this Deal Stage', 'Add this Note' (with a text area), 'Send notification' (with three email address fields), and 'Assign these Flags' (with a list of flags like 'IMPORT - ACTIVE', 'IMPORT - BACK BURNER', etc.). 'Save' and 'Cancel' buttons are at the bottom.

You can setup these types of triggers by going to your HyperDrive CRM Pro “Settings,” click “Autoresponders” in the “Automatic Systems” section, and either select the existing Campaign or click to add a new one. Click on “Completion Assistant” at the bottom to setup what you would like to happen when the Autoresponder is completed.

Phone Numbers Added to Birthday Report

Contact phone numbers have been added to appear on the Birthday report. This will allow CRM user to have all the information they need right from the report to call contacts for their birthday.

Birthday & Anniversary Report Print						
Month:	April	Filter by Deal Stage:	(All Deal Stages)	Create Labels	Create Note	
Occasion : Description	Date	Name for Address Label	Address	City State Postal Code	Phone 1	
Birthday : Primary Contact	4/8/1970	Matt Damon	4831 Brighton Circle Road	Mcgrath MN 56350	(320) 592-2121	
Birthday : Primary Contact	4/25/1940	Al Pacino	4544 Stratford Park	Indiana IN 47802	(812) 870-0182	

You can view this report by clicking on the "Reports" icon in the top menu and under "More Reports" select "Birthdays & Anniversaries."
