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

Last Modified on 11/02/2020 4:48 pm CST

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.

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.

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.

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.

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.

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