

HyperDrive CRM Updates to the System

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Birthday Assistant - Run a Workflow

The Birthday Assistant will now trigger a Workflow. This will allow you to do more with the Birthday Assistant, including changing the time of the email sending, have multiple emails go out, etc.

Birthday Assistant

Use the Birthday Reminder to set up automatic tasks to run on or before your clients' birthday.

Who should be included?

- Nobody. Disable birthday assistant
- Run birthday assistant for all contacts
- Run birthday assistant ONLY for contacts with this Tag:

Friends and Family

What should the Birthday Assistant do?

On the day of their birthday, do the following:

Add a "Birthday Reminder" To-Do

Send Email Template

Templates > Birthday Balloons

Apply Workflow (Only applies to primary contact)

Birthday Assistant

Save

New Email Template Sort Option

When you click to add an email template, the email templates are currently sorted alphabetically. You will not have the option to change the sort to a date sort. This will allow the newest templates you add to show first. If you want the sort to be this way by default, let me know and I can change it for your users, otherwise, it is optional per session.

New Look to the Rolodex

We've simplified the look of the Rolodex. It is just a little sleeker. Check it out...