

Release Notes

APC 25_22 Hotfix 1

December 18, 2025

Enhancements

Task List

Users can now easily clear selected activities by right-clicking on the grid.

The filter drawer now only has one action button at the bottom—"Apply"—so users can no longer unintentionally clear all filters on the list, which was resulting in an unexpected number of results being returned. Users can still close the filter drawer without applying any changes by means of the "X" in the top right corner.

APC 25_22

December 11, 2025

Enhancements

Opportunities and Contacts List - Users can now sort data directly on the column headers

Task List

Combined Date & Recurring into one column

Combined Activity Type & Private into one column

Moved Search and Filter controls to the right side of the Task List view

Multiselect functionality and Actions menu (selected activities can now be cleared and uncleared from the Actions menu)

UI – Slightly reduced the font size in the footer

AI History Summary – For Pro and Ultimate accounts, we have introduced a new feature. We are considering this a Beta and are encouraging our users to try it out.

It essentially asks an LLM to analyze your history with a Contact, and provide you with a summary, so users can quickly remind themselves of who a Contact is and what their

interactions have been like over the last 90 Days.

We have also provided an in-app means of sending user feedback directly to our Product Team so we can iterate and improve this AI feature over coming releases.

UI/UX updates to the new Mail Merge functions – updated the UI of the new Mail Merge tool to look and feel much more in line with all the new enhancements we've been making to the UI for Act!

Event Series for Advantage Pro/Ultimate - added the ability for users to define a series of Events, and provide a single signup workflow for their customers

Bug Fixes

Fixes for Email/Calendar Integration:

- Changing an Organizer, while connected to your email provider, will no longer cause duplicate meetings for any of the Invitees
- Accounts with multiple users connected to Google or Outlook email providers will no longer see errant duplication of their Activities
- Fixed several causes for errant duplication of Activities
- Fixed several causes for Emails to not attach correctly as History to Contacts and Users

Fixed several issues with the new Today button in custom Date picker fields

APC Mobile 1.16.0

December 5, 2025

Enhancements

Implemented Responsive screens – navigation and usage of MOST of the application now works well/better on Tablet sized screens. We have some upcoming enhancements to make better use of the screen size in coming releases.

Bug Fixes

Fixed an issue that was causing Company Field entries to drop a character
Fixed a few issues where navigation could become unresponsive
Fixed several issues where Editing an Activity could have unexpected UI results

APC Mobile 1.15.0

November 19, 2025

Enhancements

Private Activities – added the ability set created activities to Private

Task List Filtering – Added the ability to filter Activities on the Task List

Bug Fixes

Fixed several issues that were causing “Server 0” errors and disconnections

Fixed an issue where users could not see other users’ calendars

Fixed an issue where some Android devices were having phone navigation overlay with app navigation

Fixed an issue where entering or using International Phone Numbers could cause unwanted effects in Act! Cloud

APC 25_21

November 20, 2025

Enhancements

UI Cleanup - “Search” is no longer in the left nav by default. Users can add this function back if desired by enabling it in the “Navigation Pane Options.” Users can still access the search function by using the Search field at the top of the view.

Bug Fixes

Implemented a fix that we expect will address intermittent API errors when syncing data to APC or APFW.

Fixed an issue where creating a quote from an existing Opportunity was not working correctly.
Fixed an issue where AMA campaigns would not send if Birth date field type was changed from annual event.

Fixed an issue where selecting multiple Contacts and clicking "Email" only uses the first selected Contact.

Fixed multiple missing translations.

Fixed an issue where it wasn't possible to open a Contact in detail view from the list view if the Contact name was blank.

Fixed a couple of issues with Company names displaying incorrectly in the Opportunity List.

Fixed an issue where users were unable to apply a custom date range filter in the Opportunity List View.

Fixed an issue where doing a Quick Lookup for a whitespace would cause the user to be logged out.

Fixed an issue where the Edit / Replace menu did not work with currency or number fields.

APC 25_20

November 6, 2025

Enhancements

Users can now right-click to copy field values directly from the Contacts and Opportunities lists.

Users can now right-click on any form field on the Company, Contact, Group, or Opportunity detail pages to view a context menu with options such as Cut, Copy, Paste, and Lookup This Field Name.

Users with a large number of records in a list can now display up to 500 records per page.

The footer section on every page has been modified for better clarity and readability.

Added a "Today" option to the date picker for custom date fields on entity detail pages (e.g., Contacts, Groups, Opportunities).

Bug Fixes

MAJOR FIX - Implemented a fix that we expect will prevent contact details from being set to blank after the user takes certain actions.

[Outlook Sidebar] - Fixed an issue where Outlook Freezes when Clicking Quick attach in sidebar

Fixed an issue where user could not reschedule or clear multiple Tasks

Fixed an issue where AMA campaigns do not send if Birth date field type changed from annual event

Implemented a fix that we expect will prevent contact details from being set to blank after the user takes certain actions.

APC 25_19

October 22, 2025

Enhancements

Added a warning for potential long loading times when user filters the History List for All Dates.

Bug Fixes

Fixed an issue where clicking into a date field would show the wrong date format

Fixed an issue where other users Private activities would not show up unless you were looking at an All User calendar

Fixed an issue where yearly recurring Activity creation defaults to wrong month

Fixed inconsistent behavior for multiselect on new list views.

Fixed an issue where the sort arrows on the Task List were not displaying properly after navigating away from the list and back.

Fixed an issue where Task List sort order was not retained after clearing an Activity.

Fixed an issue where end date was displayed incorrectly on Task List.

APC Mobile 1.14.0

October 21, 2025

Enhancements

Zoom Gestures – Implemented Zoom gestures across the app to allow for enlarging the screen when needing to read smaller texts

Activity Priority – Added the priority field to activities

Calendar Navigation – Users can now click into the Date when viewing a calendar page, to quickly use a date picker tool to navigate to any week/day they choose

Customized Main Navigation – Users can now define which main pages they want shortcuts to in the bottom Navigation bar

APC 25_18

October 9, 2025

Enhancements

Looking at other users' calendars will now show you Activities based on the colors you set in your preferences by Activity Type

Updated UI and loading speed enhancements for the Task, Contact and Opportunity pages

APC 25_17

September 24, 2025

Enhancements

Date and Time, Notification, and Startup preferences are now accessible from the user account dropdown menu.

Bug Fixes

MAJOR FIX – Fixed a number of areas where Contact data could get blanked out after moving through the application

Fixed an issue where the Activity hover-over tooltip would block the right-click menu
Fixed an issue where setting an Activity to Private would not actually make the activity private to other users
Fixed an issue where setting a History to a duration of 0 minutes could freeze the application
Fixed an issue where Nylas initial sync could fail and block the sync going forward
Fixed an issue where syncing All Day Recurring events could break the Nylas sync going forward
Fixed an issue which was causing OK and Cancel buttons to be hidden in group criteria options
Fixed an issue where a user would get logged out when attempting to duplicate a contact

APC 25_16

September 10, 2025

Enhancements

Advantage – Projects

share links for contacts which allows Project users to share the details and progress of a project with the contact in real time

in addition to the existing security controls for the share links, namely the ability to view, clear, and make comments, users can now hide comments from the contacts

support for multi-currency feature was added per your request

prior updates included the ability to expand or collapse all tasks

Added support for individual options to allow/disallow contact access to each goal, obstacles, comments, or attachments page for Projects

APC In General

Nylas V3 – Many fixes and adjustments to ensure that Nylas has stable connections and clean syncs without duplication

History Duration Field – Modified the Duration field when creating/editing History, such that users can now type a duration directly in, if the drop down selections do not work for them

UI & Navigation

- [Act Advantage] Interactive Quotes is now accessible as a tab on the Opportunities view
- [Act Advantage] Online Appointment Scheduling is now accessible as a tab on the Calendar view
- Minor UI improvements to History List
 - Users can now manually refresh the history list to get the latest data

Bug Fixes

Fixed an issue where deleting an Activity in the Clear Activity screen would not fully delete the activity

Fixed an issue where users could not delete activities in a series

Fixed an issue where the mini calendar would remain open in the history list filter pane even after selecting a different date filter

Fixed an issue where the title and details fields of some history records would display as blank even though details were present

Removed redundant “E-mail system” from the E-mail Preferences modal

Bug Fixes

Fixed 15 defects

APC 25_15

August 27, 2025

Enhancements

History List - Users can now select multiple rows by means of the checkboxes in the grid, and perform bulk actions such as delete and create lookup.

History List - The privacy of a history record is now displayed as an icon in the Record Manager column.

Quick Lookup - Common fields are now sorted to the top of the dropdown menu for ease of access.

Updates to **Subject Line Picklist Manager** make it easier to keep your activity titles organized and relevant. You'll now have the flexibility to add, remove, and manage subject line options for meeting titles—helping reduce clutter and streamline scheduling.

Bug Fixes

Fixed 17 defects

APC 25_14

August 13, 2025

Enhancements

History List - Users can now access the Edit, Delete, Create Lookup, and Export actions in a dropdown menu at the top of the history grid.

Bug Fixes

Fixed 10 defects

APC Mobile 1.13.0

August 15, 2025

Enhancements

Group Management - users can now create, edit and view Groups in the Mobile App

Bug Fixes

Fixed 15 defects

APC 25_13

July 30, 2025

Enhancements

New "**Marketing and Communication**" page makes various marketing and customer communication tools, plugins, and settings easy to find.

Upgraded the Email/Calendar integration to allow for us to enhance the User Experience, and control of what syncs and when in the coming weeks. Existing users will receive a prompt to reconnect their Google or Microsoft accounts to finish this background upgrade.

Bug Fixes

Fixed a bug that was causing Notes to not display correct formatting

Fixed several small defects with the new History List

Fixed an issue where associated Contacts/Companies were not carrying over when Copy-Pasting events on the Calendar

Fixed an issue where Opportunities were not adding correctly to Activity Series

APC Mobile 1.12.0

July 18, 2025

Enhancements

QR Code Scanner - users can now scan a business card QR code, map the lines of text to various Contact fields, and save new contacts in a jiffy

Calendar Start Day preference - users can now pick which day they want their calendars to start from

Bug Fixes

Fixed 25+ defects

APC 25_12

July 16, 2025

Enhancements

Improved History List - implemented a new front end technology to replace the History list and History tabs within Act! Replicated all existing functionality, and this new technology will load faster AND allow us to start implementing big enhancements to usability over the coming months

New Mail Merge for select Beta customers - implemented a new and improved function to

handle merging mail or documents with contact/company lists. This initial run will be released to a select few clients who have expressed frustration with the old way, and we will continue to develop this according to their feedback for global release soon

Bug Fixes

Fixed an issue where viewing other users' activities on calendars didn't keep the color code settings in place

Fixed an issue where adding attachments to Notes could create duplicates

Fixed an issue where creating Groups would fail if Duplicate Checking was enabled

Fixed some issue with the Actions Menu on Contact and Company list views

APC 25_11

July 3, 2025

Enhancements

Import Companies - users can now go into the Import function and select Company instead of Contact, and then bulk load Companies and Company metadata via a csv spreadsheet

Act! Advantage - Projects - added the new project management tool for Act! Advantage users in the Additional Features area of Act! Cloud

Calendar - made some updates to the UI to make the calendar more readable

Opportunity - Add Product - adjusted the UI when adding a Product to Opportunities; made the drop down selector larger and added type-ahead search to the product field

Lookup Enhancements

- Fields will now remember your last selections
- Added the Quick Lookup to the Left Navigation panel
- Current lookup information is now displayed on list views.
- Users can clear current lookup and return to All Contacts/Companies/Groups/Opportunities from list views.
- Users can modify or replace an active lookup by selecting the entity type in the "Search For" dropdown menu in the lookup drawer (entity types with active lookups are no longer disabled in this dropdown).

Bug Fixes

Fixed an issue where the Alarm window would not pop up

Fixed an issue where Standard Users could end up with permissions not granted them

Fixed an issue where Added invitees would move from Invite to Associated in Histories

Fixed an issue where users could edit Closed Activities from the Calendar

APC 25_10

June 18, 2025

Enhancements

- **Lookup UI Improvements:**
To create a lookup, users can click on the "Create lookup" button in the left nav bar. This will open the new Lookup drawer.
- The "Search for" field will default to match the page of Act! that the user is on, if applicable (e.g. if you are looking at the company list and open the drawer, the "Search for" field will default to Company)
- Users can easily see all current active lookups any time they open this drawer. They can also clear or modify their current lookups by clicking the icons next to the current lookups. When modifying an active lookup, users must select whether they want to replace, narrow, or add to the lookup.
- Users can see their 5 most recent lookups from this drawer. They can re-run recent lookups by clicking on them in this list.
- Users can access and run saved queries via this drawer.
- Users can access advanced query features by clicking on the "Open advanced query options" link below the lookup fields. This allows them to create a lookup with multiple queries, control how those queries should combine (and/or), preview the results of a lookup, and save a query. These advanced features can be closed by clicking the "Close advanced query options" link.
- The "My Record" option can be found in the profile menu on the right side of the top nav bar. This item no longer creates a new lookup of only the user's record. Instead, it navigates the user to their own contact record. If the user has an active lookup that does not include their own contact record, the current contact lookup is cleared and the user is navigated to their record. The cleared lookup can be easily run again by selecting it from the list of recent lookups in the drawer.

Bug Fixes

Fixed an issue where the browser Back button could cause issues when browsing the Advantage modules

Fixed an issue where Users could create activities with invalid start and end times

Fixed an issue where attached files would not display when Editing an Activity

Fixed an issue where Time Style preferences would be incorrectly displayed

Fixed 50 Medium Severity Defects

APC Mobile 1.11.0

June 27, 2025

Enhancements

Business Card Scanner - users can now scan a business card, map the lines of text to various Contact fields, and save new contacts in a jiffy

Added the ability to view other Users' Calendars, and schedule with or for those other users from their Calendar

Added the ability to tap directly into Calendar time slots to create new Activities

Bug Fixes

Fixed 7 defects

APC 25_9

May 29, 2025

Enhancements

Performance Improvements to Running Exports from History Lists

Small improvements to the UI when looking at other Users' Availability while creating an Activity

Admin users can now see their current subscription information in their profile dropdown menu

Added Advanced Sort to the Actions dropdown on Contacts and Opportunity Lists

Bug Fixes

Fixed an issue where deleting a secondary contact would delete the main Contact

Fixed an issue where manually associating a contact to an activity would not associate that contact

Fixed an issue where setting a yearly recurrence on an activity would create the activity with a wrong date

Fixed an issue where Opportunity List would not sort appropriately

Fixed an issue where users would be logged out if "Use Favorites as Default Lookup" was selected

Fixed an issue where users would be logged out if they selected multiple contacts from the list view

Fixed an issue where selected contacts would not remain selected when editing Notes

Fixed several issues with the Layout Designer

Fixed an issue where Report filtering would not respect the selected date filters

Fixed an issue where deleting many Contacts would cause an error

Fixed an issue where View History pop-up would not appear in DE and FR locales

APC Mobile 1.10.0

May 30, 2025

Enhancements

Added type ahead searching for the ID/Status field on Contacts

Bug Fixes

Fixed 16 defects

APC 25_8

May 13, 2025

Enhancements

Users can now see Sub-Groups and Parent-Groups in the selector for Activity/History
Adjusted the Add Product screen to have type ahead, also made the drop-down selector larger to make it easier to find Products

Bug Fixes

Fixed an issue where 2-day activities didn't size correctly on the Calendar
Fixed an issue where Selected Groups and Companies did not display correctly in Activity/History screen
Fixed an issue where the new Write Menu didn't include the MS Word Integration download
Fixed an issue where clearing an Active Lookup would not display chosen contacts correctly
Fixed an issue where Reports were not respecting the selected date range
Fixed an issue where Outlook Side Bar was incorrectly showing dates
Fixed an issue where Outlook settings could freeze the app
Fixed an issue where Users and Contact screens could render blank
Fixed an issue where Notes dates were not respecting localization formatting

APC Mobile 1.9.0

May 10, 2025

Enhancements

Added the ability to access and view Attachments for Activities and Histories
Added a Layout Editor for Companies
UI/UX pass on List views to make them look and feel consistent

Bug Fixes

Fixed 28 defects (layout issues, server 0 error issues)

APC 25_7

Apr 30, 2025

Enhancements

Users can now Drag and Drop Calendar Activities to change their date/time
Users can now right click Activities and Calendar spaces to Copy/Paste Activities to new date/times
Users can now check other Users' calendar availability while creating an activity in order to easily schedule meetings with their Team members

Added a new Left Nav item titled "Tools" - this area will serve as a replacement for the top navigation menu items, although we will leave both in effect for a time to ease with the transition

Bug Fixes

Fixed an issue where the Save and Cancel buttons would not present on Opportunities
Fixed an issue where sorting or deleting large lists of Products wasn't saving
Fixed an issue where navigating away from Companies wasn't saving changes
Fixed an issue where Clearing an activity wouldn't save changes to the activity fields
Fixed an issue where menu items would be unresponsive when navigating through the new Additional Features section

APC 25_6

Apr 16, 2025

Enhancements

Added a new Action drop-down on all Entity and List pages. This action menu duplicates the functionality found in the Top Navigation menu items - it doesn't currently replace the Top Navigation, but it now allows us to start removing elements and moving elements found in the Top Nav.

Renamed "Act! Marketing Automation" in the Left Nav to "Marketing"

Added some logs to Activities and Histories - users can now see who originally created an Activity and when

Bug Fixes

Fixed an issue where Admin users could not log into a locked DB

Fixed an issue where Custom Tables with spaces in the title could break navigation

Fixed an issue where logouts could occur upon using Configure Items

Fixed an issue where Date/Time fields would display an incorrect date

Fixed an issue where added attachments to Histories would not display correctly

APC Mobile 1.8.0

Apr 17, 2025

Enhancements

Added the ability to manage, edit and create Companies

Added Swiping Actions to list views - swipe a contact to the left to reveal hidden Delete/Edit buttons in-line

Bug Fixes

Fixed numerous defects (layout issues, server 0 error issues)

APC 25_5

Apr 2, 2025

Enhancements

Added the ability to extend a Trial by 7 days in-app

Navigation menu improvements:

- Combined related pages in the left navigation menu - individual pages within these groups are accessible via tabs above the page content
 - Contacts, Companies, Groups
 - Calendar and Task List

- Dashboards and Reports - this includes the "Act! Insights" page
- Top menu bar color matches the left menu

Outlook sidebar for APC:

- Layout customization (hide/add/reorder fields)
- Refreshed design
- View associated opportunities
- View/create/edit notes
- View/create histories

APC 25_4

Mar 20, 2025

Bug Fixes

Fixed an issue where Calendar would not load, and hang on a blank screen

Fixed an issue where the History page would display an error after sorting columns

Fixed an issue where Universal Search was not displaying all objects it should after searching

Fixed an issue where certain fields would not allow a user to delete them

Fixed an issue where Companies and Groups associated with an Opportunity would not display on the Opportunity List page

Fixed an issue where editing fields on a Contact Detail page would not save the changes if user navigates away

Fixed an issue where Notes, Histories and Activities would not adhere to time zones when filtering

Fixed an issue where Admins were unable to change a user's Access Level

Fixed seven page load defects

APC Mobile 1.7.0

Mar 8, 2025

Enhancements

Added the Contact and/or Company values to your Calendar Activities

Added the ability to download Attachments from Contact Notes

APC 25_3

Mar 6, 2025

Enhancements

- Added ability to batch Clear activities from Task List - ctrl+click multiple tasks, click into one of the selected tasks “clear” button
- Enhanced the mini calendar at the top right to Bold dates that have uncleared Activities
- Enhanced Calendar - right click an Activity that has an associated Opportunity, you will now see a “Go To Opportunity” shortcut.

Bug Fixes

Fixed an issue where the Duration field was un-interactive in some regions

Fixed an issue where Delete or Clear Activity buttons were un-interactive on the Task List

Fixed an issue where the Cancel and Save buttons were un-interactive on the Clear Activity screen

Fixed an issue where time zones were not respected in filters

Fixed an issue where deleting a Lookup could sometimes delete Contacts

Fixed an issue where Customize Columns button was not working on the Task List page

Fixed an issue where editing the field changes would not retain selection if user navigates away from the Detail view

Fixed a number of pages that would refresh the whole screen/app on loading

APC 25_2

Feb 11, 2025

Enhancements

- Overhauled the Import Contacts workflow - much better and intuitive UI for new and existing users to load a spreadsheet of their Contacts
- Added the ability to associate Contacts with Groups by adding a Group column to our CSV Template

- Added the ability to batch Delete tasks from your task list - ctrl+click multiple tasks, click into any of their Delete icon, and follow the prompts to batch remove tasks from your list
- Adjusted the UI and field names of the Create/Edit History view - removed the Invite field and changed “Scheduling” to “History Details”

Bug Fixes

Fixed an issue where History List columns could become unaligned

Fixed an issue where French Canadian accounts could not customise Task List columns

Fixed an issue where removing fields from Notes tab columns could cause issues with other columns

Fixed an issue where Users could be logged out when deleting activities

Fixed an issue where Cleared Activities were editable

Fixed an issue where editing an Activity could hide the Activity Results from the selector

Fixed an issue where the Calendar could be mistakenly resized in the window

Fixed an issue where Mail merge would freeze on the first contact merged

Fixed an issue where Creating a Lookup for Opportunities without associated Contacts would navigate the user to the Contacts page

Fixed a number of cosmetic issues caused by 25_1 release

APC Mobile 1.6.0

Feb 13, 2025

Enhancements

Added Layout Editor for Contacts - Admins can navigate to the Account Preferences in the Mobile app, and use the Layout Editor to add/remove fields from the Contact screen, including custom fields from Act Premium Cloud.

Updated the Time Selector in Activities to use 5 minute increments, scrolling and selecting times is much easier

Updated the ID/Status picker to be a whole screen with multi select capability

Bug Fixes

Fixed 20 found defects

APC Mobile 1.5.0

Dec 13, 2024

Enhancements

Added support for Rich Text to Details/Description fields on Activities

APC 24_28

Dec 17, 2024

Bug Fixes

- Fixed an issue where Calendar wouldn't display appropriately if "1st day of the week" was set to something other than Sunday
- Fixed an issue where Days in Stage would not reset to zero when users changed the stage of an opportunity
- Fixed an issue where switching between custom phone formats would sometimes lose the entered phone number
- Fixed an issue where selecting a date in one form, would prevent that date being selected on the very next form
- Fixed an issue date selector would be unavailable if Annual Event fields were present on a form
- Fixed an issue that prevented saving a Contact after entering a Birthdate
- Fixed an issue where Time selector dropdowns would display incorrectly for Safari users
- Fixed display issues with Activity Start Times
Fixed display issues when using the "Today" button on Calendar

Changes and Enhancements

- Using the new Dialler functionality, will now prompt a user to record a Call History automatically
- Returned "Create Separate Activity for each Contact" in the Create/Edit Activity workflow
- Returned the picklist to the Title of Activities (FKA "Regarding")
- Added a "Do you want to apply colors for this Activity Type to all Existing Activities" to the new Activity Type Color manager.
- Added a light and dark grey option to Calendar Activity color palette

APC Mobile 1.4.0

Dec 4, 2024

Bug Fixes

Fixed an issue where users had to login frequently when returning to the app. Users now stay logged in.

Enhancements

Added the app version number to the Account page.

APC Mobile 1.3.0

Nov 13, 2024

Bug Fixes

Fixed an issue where Birthdays didn't display correctly

Fixed an issue where Monthly Calendar views were off by one day

Enhancements

Added Contact/Company to the Opportunities in the Opportunity List View

APC 24_27

Nov 13, 2024

Bug Fixes

Fixed an issue where Opportunity Currency was incorrectly localised

Fixed an issue where the Title column was not selectable in Customized Columns

Fixed an issue where APC fonts were syncing incorrectly to Desktop clients

Fixed an issue where the bottom 3 rows of the new Activity Color selector were not correctly applying to the Calendar and Task List

Fixed an issue where recurring activities could sometimes cause duplications to occur

Fixed an issue where in some cases a user would be logged out when attempting to delete an activity

APC 24_26

Oct 30, 2024

Bug Fixes

Fixed some localisation and translation issues

Fixed an issue where the selected Time Style was not presenting on Calendar views - the 24:00 style clock is now usable across all Calendar views

Fixed an issue where Show Private and Show Preview options were hidden on History tabs for Groups and Companies

Fixed an issue where manually adding contacts to groups, using current Lookup, could sometimes overwrite associated contacts in that group

Fixed an issue where the Save and Follow-up workflow would not persist the Activity Type in the follow-up

Changes and Enhancements

Tweaks to Calendar resolution and zoom - users can now expect to see their work day in full view when navigating to the calendar; no longer starts you off at Midnight

Attachments can now be downloaded/viewed from the Activity and History screens

APC 24_25

Oct 25, 2024

Bug Fixes

Fixed an issue where editing an Activity from a Recurring series, could cause duplications on save

Fixed an issue where the Invite and Associate fields in the Activity edit screen could be hidden if Contacts were removed

Fixed an issue where old activities could freeze when loading

Fixed an issue where adding multiple Date fields to a layout would sometimes display an outdated Date/Time picker

Changes and Enhancements

Calendar Readability

Changed the Color palette for Activities

📍 ADDITIONAL DETAILS

Location

Resources

Description

🖨️ abc Arial ▼

📄 📄 ☰

Attachment

Priority

Alert

These colors will change the background of Calendar Activities instead of changing the Font on your calendar.

10 Thursday

Testing Colors

Bryant, Eric

Testing Colors - Call

Bryant, Eric

Furthermore, we have added a manager to set default colors per meeting type. Simply navigate to Schedule -> Activity Types, select the Type you want to change color for, and click Edit:








The screenshot shows the 'Edit Activity Type' dialog box. The background is a blurred view of the 'Manage Activity Types' interface with a list of activity types: Call, Meeting, To-do, Appointment, Personal Activity, and Vacation. The dialog box has the following fields and options:

- Name:** To-do
- Active - allow new activities of this type
- Priority:** Low
- Duration:** 5 Minutes
- Default to timeless
- Automatically roll over to today
- Action:** Define activity results options when clearing an activity and adding it to history.

Result name	Set as default
To-do Done	<input checked="" type="checkbox"/>
To-do Not Done	<input type="checkbox"/>

Buttons: Add, Edit, Delete, Ok

Finally, we changed the task list to reflect the above changes. Instead of coloring the Font, which caused issues with accessibility and readability, we now use your color selections to modify the Type column on your Task List:

		<input type="checkbox"/>	Call		10/10/2024	12:00 PM	Low	Eric Br
		<input type="checkbox"/>	Meeting		10/10/2024	8:28 AM	Medium	Anna E
		<input type="checkbox"/>	Meeting		10/10/2024	11:00 AM	Low	Eric Br

APC 24_24

Oct 1, 2024

Bug Fixes

- Fixed an issue where the Remote Sync wizard would present as a blank screen
- Fixed an issue where clearing an activity could sometimes create a duplicate activity
- Fixed an issue where creating a Sync Set could log out users
- Fixed an issue where API users could not filter Opportunities with Date/Time parts
- Fixed an issue where editing a Secondary Contact could mistakenly edit the Main Contact
- Fixed an issue where users were unable to reschedule activities from the Alarms window
- Fixed an issue where changing an activity type could potentially log the user out
- Fixed several issues where the Activity Edit screen could present as blank or become unresponsive

Changes and Enhancements

Major Enhancement: Modified all Phone fields to be compatible with any VOIP or Dialer program you wish to use. Simply click into the hyperlinked number, and your operating system will open up or ask you to select your chosen calling program

Removed the Timeline function from Contacts to streamline the workflow and make room for new features coming soon

Made improvements to the loading speed of Activity and Task Lists.

Fixed an issue where the new Email/Calendar Integration was not respecting the setting to prevent user to user emails from creating public Histories on those users.

Fixed an Issue where photos were being distorted when synced over using the new Email/Calendar Integration