



Routzy for Smart Service™

3.6 Release Notes

Enhancements

1. Main Menu Shortcuts / Alerts for New Contacts and Schedule Items. Routzy now includes easier ways to access Follow Ups and Sales Calls. We've changed the Main Menu option for Follow Ups to "Schedule" to include both. From this selection, Routzy users can access the list of scheduled follow ups and sales calls and use the "New" banner to instantly navigate to any new items scheduled from Smart Service, with a filter to view just "New" items or "All". Routzy also now includes Contacts and Schedule buttons at the top of the main screen, with alerts for new contacts or schedule items created in Smart Service. (Enhancement #4235)
2. Proposals Added to Main Menu. Routzy now includes a Main Menu item from Proposals to quickly view the list of Proposals with their statuses. The proposal list includes a status filter, so Routzy users can quickly see proposals that need further action, such as proposals with an "Awarded" status. (Enhancement #4236)
3. Improved Proposal Summary Report. The Proposal Summary view under Analytics has been expanded to include the top 11 proposal statuses in the report. (Enhancement #4253)