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This article applies to:

Lite
Pro
Max

Easy Automations update: Filter by “When” trigger

Quickly find specific Easy Automations with your new filtering options. Select one or more types of automation triggers and all of your automations that begin with any of the selected triggers will be displayed. Learn more.

CRM update: View additional contact details on larger screens

You can now see all of your contact’s information on one screen. Contact info and activity details will be displayed in a new panel on the right-hand side for large screens (1360 pixels wide or more, to be precise ▯). Learn more.

Pipeline update: Closed status for won or lost deals

You can now track whether the deal was won or lost by moving it to a closed status. The name of a status is customizable for each individual pipeline, so you can use the terminology that fits your sales process or project workflow. Learn more.

Pipelines update: Filter deals

Now you can filter your pipelines by deal status, deal owner, date created, and date closed. Use these filters to understand where leads, prospects, and customers are in your sales process, and gain insights about your deals. Learn more.

Bug fixes

- When sending an Appointment invite via text, the message field and send button were not available
- Mass actions like export, send broadcast, and add to automation failed when the contact list was filtered using “between” criteria on a date field and all of

the contacts were selected

- After connecting an Outlook calendar, new appointment types could not be created