



CORETRAC

ResourceOne Release Notes

Version 4.0

April 2018



4325 Alexander Drive, Suite 100 • Alpharetta, GA 30022-3740 • www.aptean.com • info@aptean.com

Copyright © 2018 Aptean. All Rights Reserved. These materials are provided by Aptean for informational purposes only, without representation or warranty of any kind, and Aptean shall not be liable for errors or omissions with respect to the materials. The only warranties for Aptean products and services are those set forth in the express warranty statements accompanying such products and services, if any, and nothing herein shall be construed as constituting an additional warranty. No part of this publication may be reproduced or transmitted in any form or for any purpose without the express written permission of Aptean. The information contained herein may be changed without prior notice. Some products marketed by Aptean contain proprietary software components of other software vendors. Aptean and other Aptean products and services referenced herein as well as their respective logos are registered trademarks or trademarks of Aptean or its affiliated companies.

Contents

- Introduction 1**
- New Features 1
- Action Center* 1
- Enhanced Search* 1
- UX Enhancements* 2
- Optimized for Mobile Devices* 2
- Installation and Upgrade Process 2**
- Known Issues 2**

Introduction

The following release notes describes the new features and known issues for CoreTrac 4.0 release.

- *New Features*
- *Known Issues*

New Features

CoreTrac 4.0 includes several new features which includes a redesigned web based user interface to improve the overall user experience. This release includes the following new features.

- *Action Center*
- *Enhanced Search*
- *UX Enhancements*
- *Optimized for Mobile Devices*

Action Center

The ResourceOne Action Center offers an option to create custom dashboards which contains a graphical description of the widgets. Users can quickly view or edit the dashboards for the widgets in the Home screen.

The widgets available in ResourceOne are:

- Compensation
- Goals
- Case by Categories
- Data review
- In progress
- Organization Message
- Pipeline
- Production
- Queue Summary
- Recent Actions
- Upcoming Activities

For more information about the widgets and the dashboard, see the *ResourceOne User Guide*.

Enhanced Search

Enhanced search allows users to quickly search for contacts, accounts, or support cases. You can view the results in either the grid view or the card view.

UX Enhancements

This application offers an option to create custom dashboards making it easy for the users to track their work.

The Pipeline screen shows opportunities segregated by their sales stages. The total amount and the number of opportunities for each of the sales stage is displayed below the title of the sales stage. Details of the product, amount, contact name, and the forecast details are included in the opportunity pop-up view.

The My Activities widget provides a timeline view of all the upcoming and overdue activities of the user. The Queue Summary widget displays a complete list of queued activities related to opportunity, cases, events, and tasks along with the number of items assigned to each queue. The user who has access to the queue can pull the item from queue.

The Recent Action widget displays the actions that user has viewed/edited recently. This page is a quick way to backtrack to any item that the user has been working throughout the day.

Optimized for Mobile Devices

The ResourceOne application is optimized for mobile devices and makes it easy for users to track their work from their mobile device while on the go.

Installation and Upgrade Process

For information about the installation and upgrade process for CoreTrac 4.0, see the *ResourceOne Installation and Upgrade Guide*.

Known Issues

Following are the known issues in CoreTrac 4.0

Bug ID	Description
319166	User list does not refresh automatically after a user is deleted from the list. Workaround Refresh the list manually using the Refresh button.
317156	Successful launch confirmation message is not displayed after the Launch button is clicked in the Campaign screen. Workaround After the campaign is successfully launched, the Campaign screen is automatically refreshed and Launch button does not appear.
320236	Invalid Report id message is displaying while running reports in the Custom Report Writer application. However, the report is run successfully. The error message can be ignored.

Bug ID	Description
320643	While adding notes to an Event from the Contacts page, if you run the AJAX spell checker tool, the spell menu covers the notes section and does not allow the user to view the notes.
319453	The Export to CSV and Export to PDF options are not available in the Manage Ticket Categories screen available under Administration > Service Center > Ticket Categories.