ExecuTrax Next – Business Insights Marketing Data Platform

1.9.0 Release Notes

ENHANCEMENTS

Discovery – Reporting – New Trigger Reports

Two new Trigger Reports have been added to ExecuTrax Next that allows you to see what Triggers have been sent out within ExecuTrax Next as both a Summary and a Detail.

- **Trigger Summary Report** – breaks down the Triggers sent during a specific time frame grouping by the Trigger Name and Action Type.

Trigger Summary Report

New Customers

Action Type	Action Name	Number Records Sent
Marquis Managed - Direct Mail	New Customers DM	19
Marquis Managed - Email	New Customers EM	19
		38

- **Trigger Detail Report** – provides a list of all Accounts, Customers/Members and Households that were sent a Trigger during a specific time frame grouping by the Trigger Name.

Trigger Detail Report

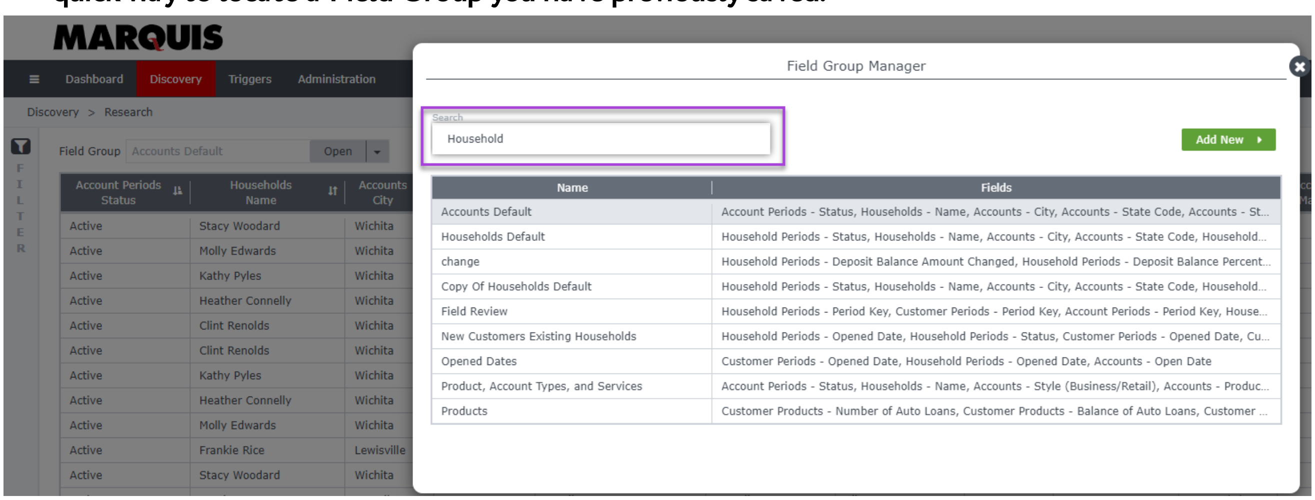
New Customers

Action Name	Action Type	Trigger Level	Number Records Sent	Trigger Date	Version Code/Reference Id	Id	Name	Address	City	State	Zip	Email Address	Branch	Officer
New Customers EM	Marquis Managed - Email	Individual	3	08/15/2023	MC59001	21	Chelle Gordon	592 W Rocky Bluff Cv	Draper	UT	84020		Draper	Kevin Rumble
New Customers EM	Marquis Managed - Email	Individual	3	08/15/2023	MC59001	22	Kevin Glass	11814 S Cottage Side Way	Draper	UT	84020	kevin@mail.com	Draper	Kevin Rumble
New Customers EM	Marquis Managed - Email	Individual	3	08/15/2023	MC59001	23	Shawn Christiansen	1999 E Brookings Dr	Draper	UT	84020	shawn@mail.com	Draper	Kevin Rumble

Setup Adjustments: No setup needed. Automatically added when the release is installed.

Discovery – Research – Field Group Manager Search

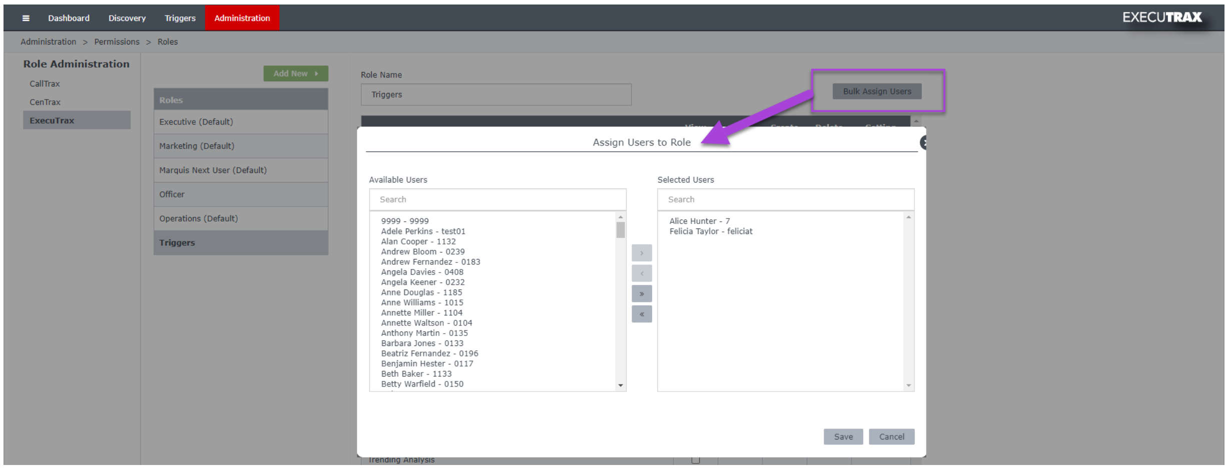
Search has been added to help narrow down your Field Groups by Name and Fields. Making it a quick way to locate a Field Group you have previously saved.



Setup Adjustments: No setup needed. Automatically added when the release is installed.

Administration – Permissions – Roles – Bulk Assign Users

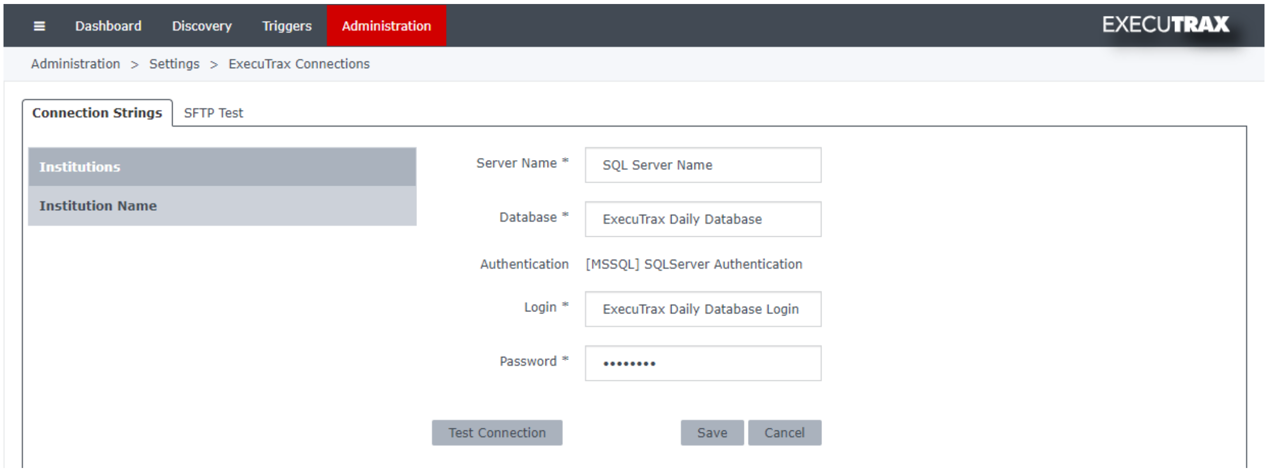
There is now an easy way to not only assign new Users to a Role but also see and remove Users from a Role all under the new **Bulk Assign Users** button. The button has been added to all existing Roles except ExecuTrax Administrator. When a new Role is created, an option to Bulk Assign Users will be given when hitting Save to the new Role.



Setup Adjustments: Bulk Assign Users button is tied to the Administration – Permissions – Users – Edit claim. Will also need the View Roles claim to be able to access the Roles.

MODIFICATIONS

- Triggers – Automated Triggers – Manage page now has an Add New button that will go to creating a new Trigger.
- Triggers – Automated Triggers – Files now automatically include Phone Number based on Trigger Level data for all Action Types.
- Administration – Split out SMTP/SFTP Settings into their own pages. Also gave them their own permissions so Users can be assigned a role that allows them to View and Edit the pages.
  - Administration – Settings – SMTP Settings is used for all emails sent from Next including the Trigger Results Email and Password Resets.
  - Administration – Settings – ExecuTrax Connections – SFTP Test tab allows the ability to test the SFTP connection used for ExecuTrax Next Triggers.
- Administration – Settings – ExecuTrax Connections Page - ExecuTrax Next and CallTrax Next need to communicate with the ExecuTrax desktop application to allow data adjustments within Next to flow back into the ExecuTrax and DataPro applications. To help establish, test, and maintain that connection, a new Connection Strings tab under the ExecuTrax Connections page has been added.



Setup Adjustments: If there was already a connection in the config file, it will be moved into this new page. If there was not one, an ExecuTrax Administrator or any User with the new ExecuTrax Connections permission can adjust the connection.

BUG FIXES

- Fixed a bug where Campaign Tracking may not display results on some Trigger Matrices.

VERSION CHECK

Ever wonder what version you are on? Simply click on the SUPPORT link at the top right of ExecuTrax. If it doesn't match the screenshot below, contact marketingupgrades@gomarquis.com to schedule your upgrade.