

## February 2017 Aegis CRM Release

A major software update will be applied to Aegis CRM between 5:00 PM and 7:30 PM MST on Thursday, February 9, 2017. During this time, there will be no access to Aegis CRM and Rapid Entry. **Please close batches and exit out of Rapid Entry before 5:00 PM MST.** We appreciate your patience.

Aegis Premier Technologies has introduced new features and functionality, as described in the Release Notes below.

### Aegis CRM Major Software Release Notes

The following updates will be made to Aegis CRM during the release update:

#### Branding

- Brand the application to Aegis CRM
- Reports Module is being renamed as the Analytics Module
- Application URL is being updated to [crm.aegispremier.com](http://crm.aegispremier.com)

#### Online Help

- Launch of a new search-based online help platform

#### Email Pulls

- Email pulls that do not contain counts will trigger errors and specify reasons for the errors

#### Events

- When creating Event tickets, the default Fund ID for the ticket is automatically set to the Event default Fund ID.

## Analytics

- The addition of Fund Groupings to GL Export.

## Rapid Entry

- Ability to Create a New Partner from Rapid Entry Search Page

## API

- Ability to set Fund Code when creating a pledge via the API
- Ability to create custom note types tied to a transaction
- Pledges created via the API to be wrapped in an Activity/Batch

## Release Questions

Please contact Aegis CRM Support with any questions regarding this release.

## Online

<http://support.aegispremier.com>

## Email

[support@aegispremier.com](mailto:support@aegispremier.com)

## Phone

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