

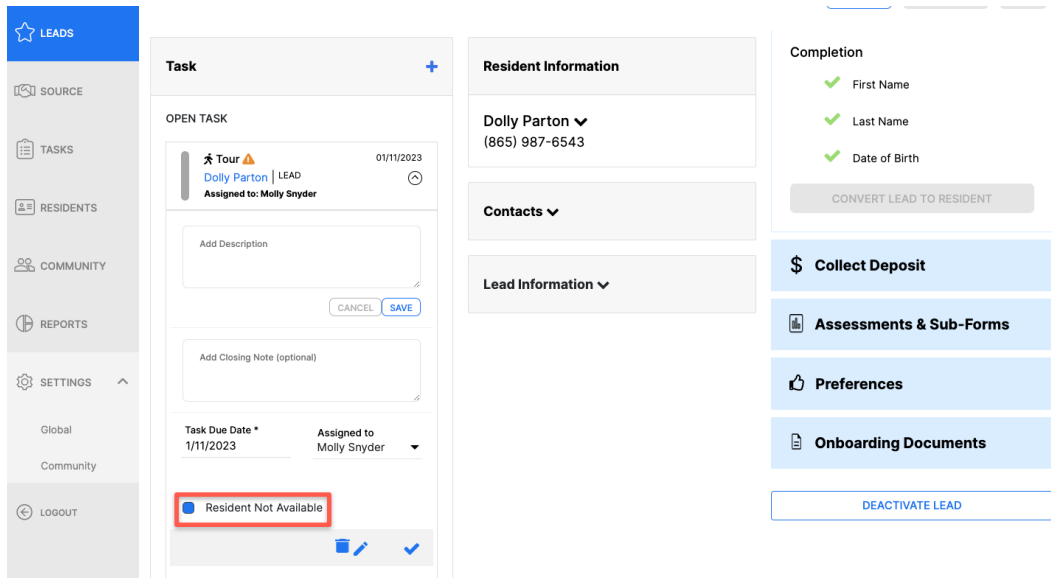
What's New?

Lead Page Redesign

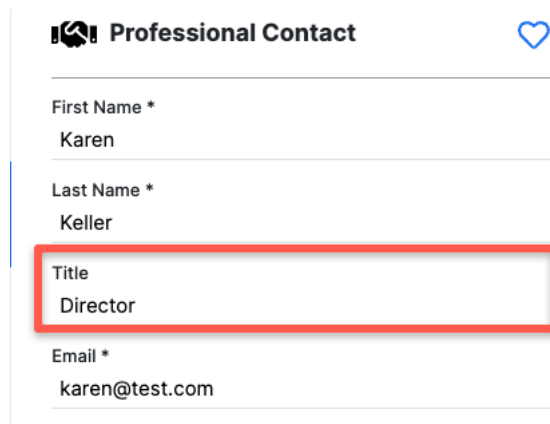
Our Lead Page got a makeover! The changes to the layout should enable you to get to the information you need faster and more efficiently! For a walk through of the new design, please see the Marketing User Guide.

In addition to the overall redesign, other updates include:

You now have the option to mark that the potential resident was not present on a tour. Doing so will remove the requirement to mark behaviors before closing the task.

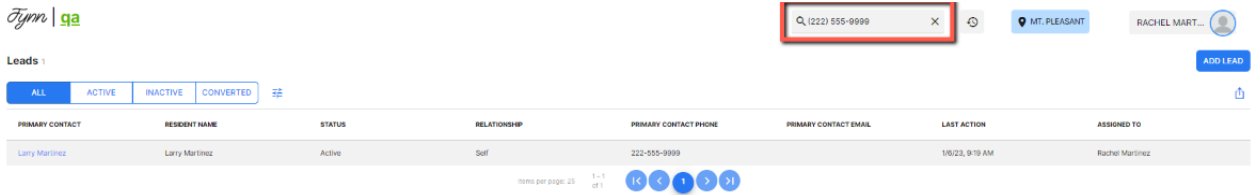


You can now add Business Titles to Professional Contacts.

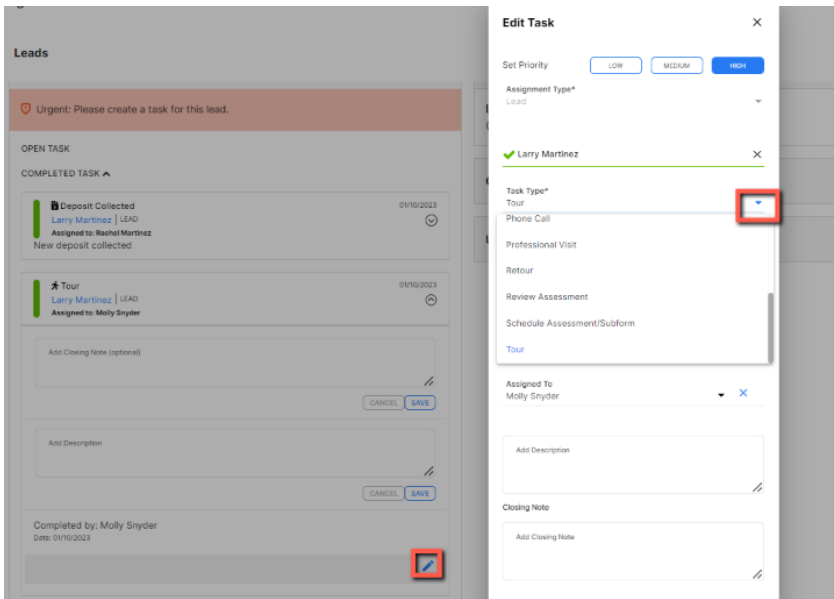




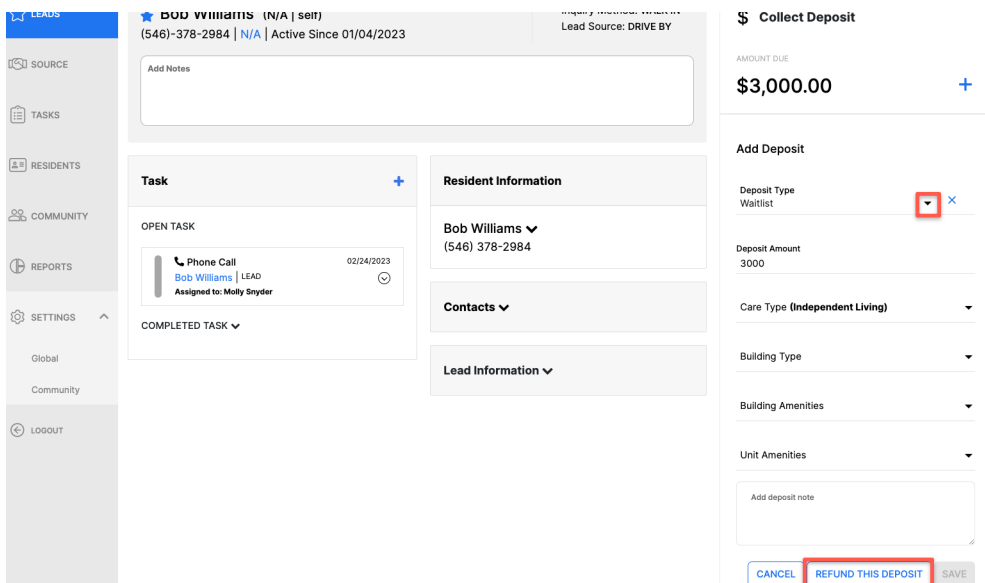
You can now search for a Lead by phone number!



You can now edit task types for both completed and to-do tasks.



You can now edit a deposit type between waitlist and unit. You can also refund a deposit if needed.





Marketing Daily Task Report

In response to your feedback, the Marketing Daily Task Report is now more interactive! You can now click on any of the numbers in the report to be taken to the list of associated leads.

Task Summary Report

Start Time: 1/10/2023 to End Time: 1/10/2023 [UPDATE](#)

	INQUIRIES	DEPOSIT(S)	PAID WAIT LIST	EMAIL	MAIL	LM	V2V	TEXT	TOUR	RETOUR	DEPOSITOR TOUR	PROF. VISIT	CLOSE - LOST LEAD	RE-OPEN LEAD	OTHER	ASSMNTS
Molly Snyder	2	2	0	2	0	0	6	0	2	0	0	0	0	0	0	1
Rachel Martinez	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	2	4	0	2	0	0	6	0	2	0	0	0	0	0	0	1

We are aware of one bug in the report related to Closed-Lost Lead calculations and are actively working on this resolution.

Resident Profile Updates

We've added some new fields for tracking and documenting important resident information. We added the ability to add more than one insurance provider on the Resident Profile. In addition, we also added a field for the BIN on a prescription insurance policy.

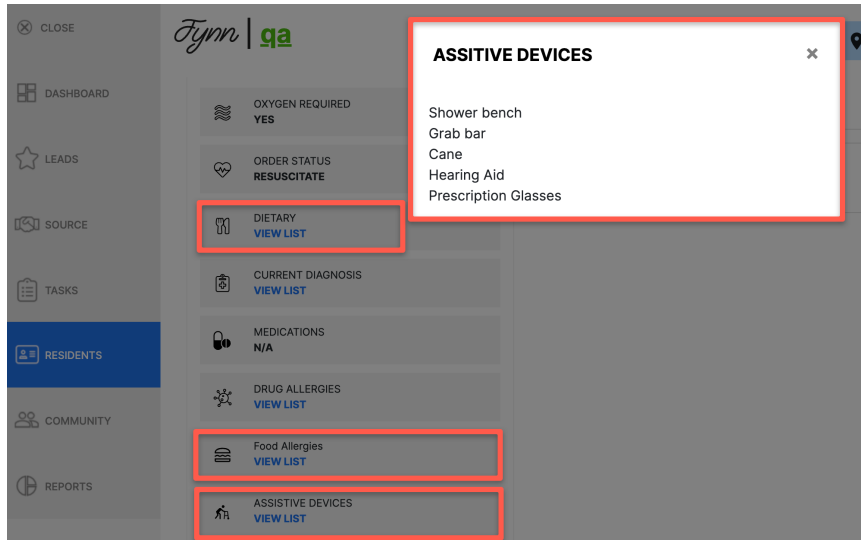
The screenshot shows a resident profile for Joe Riley. The 'Insurance' section has been updated with the following information:

- Health Carrier:** Blue Cross & Blue Shield of SC, 1180 Sam Rittenberg Boulevard West, Ashley, Charleston SC 29407, Phone Number: 843-788-9455, Member ID, Group ID.
- ADD HEALTH CARRIER** (button)
- Prescription Carrier:** Humana, 240 Harbison Boulevard, Columbia SC 29212, Phone Number: 803-865-7663, Member ID, Group ID, **BIN: 345678**, Fax Number.
- ADD PRESCRIPTION CARRIER** (button)

The 'Medical' section shows the Primary Physician Name as Dr. Emily Hund and the Pharmacy as CVS Pharmacy, 59 George St, Charleston.



We now have an expanded Dietary section and new sections for Food Allergies and Assistive Devices. Edit a Resident Profile to input Resident information in these sections.



Temporary Warnings

We have made some improvements to our Temporary Warnings capabilities. Temporary Warnings can now be added to a Resident directly from the Resident Profile page. You will no longer update these under Edit Profile.



You can now put an end date on a Temporary Warning. If there are no active Temporary Warnings, the Temporary Warning symbol will no longer display. Only active Temporary Warnings will display on the Resident's profile. Once they are inactive (the end date has passed) they will no longer be visible.

Temporary Warnings 1 + ADD TEMPORARY WARNING

Start Date * 12/11/2022 × End Date * 1/10/2023 × UPDATE

END DATE	MESSAGE TYPE	REQUIRED DOCUMENTATION	WARNING BY
01/13/2023	Currently Infectious	No	Rachel Martinez



What's Updated?

Lead Saving Issues

We resolved a number of issues related to saving information on the Lead record. All saving issues have been resolved and addressed with this release. This also includes favoriting a lead, adding new contacts to a lead, entering the age of a resident without the date of birth, and updating any preferences.

Tasks

The issue of tasks that are due today being shown as overdue has been resolved. Tasks will not show as overdue until after 12 AM in the time zone of the community.

ADL History

We addressed several issues related to ADL History and Reporting. ADLs should now be showing up in the correct date/time zone in which they are scheduled and/or completed.

Coming Soon

Be on the lookout! At the end of January, we will be sending out a Fynn Satisfaction Survey. Those who complete the survey will be entered to win a prize!

Need Help?

Do you have questions or need additional support? Please email the support team at support@fynn.io. We are here for you!