# PBGO, PBSE, PBBO, BL & BM

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#### Meeting Recording

**Meeting Recording:**

<https://propertybase.zoom.us/rec/share/dzmwGrYeDJh-8PbTkfC6ot_gDCqa7iXGruWO9V6NRbl-AYbYMIjwukBCus3l0zOf.Hr4GiAxLb7GwRSfR>

#### Product Feature Request Submission

| **By Email**  **OK TO SHARE WITH CUSTOMERS**   * **pbgo-feedback@propertybase.com** * [**pbbo-feedback@propertybase.com**](mailto:pbbo-feedback@propertybase.com) * [**pbse-feedback@propertybase.com**](mailto:pbse-feedback@propertybase.com) * [**boldleads-feedback@propertybase.com**](mailto:boldleads-feedback@propertybase.com) | * **\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\* CONFIDENTIAL** |
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### 07/08/21 PBGO, PBSE & PBBO, BL & BM

**PBGO**

* **Next-Gen**
  + Blade Sidebar [menus](https://bostonlogic.atlassian.net/browse/BDT-23201)
  + [Templates](https://bostonlogic.atlassian.net/browse/BDT-23356) added to FCK editor (WYSIWYG)
  + [Task recurrence](https://bostonlogic.atlassian.net/browse/BDT-20688)
  + Multiple listings Email/SMS agent-to-lead
  + Add List to saved search, applying also to future lead additions
  + Google Calendar sync - pull events from google, if a lead is attendee
  + Google Contacts sync - choose contact groups to filter by
  + Google Contacts - API deprecation/update
  + Ad-Zips [Greenridge]
  + Agent-to-agent list marketing (text, blast, drip)
  + Mcenearney
    - Bright MLS - Coming Soon - feed combination
* **Mobile**
  + Mobile - Auto-check lead phone type
  + Client’s needed for beta!
* **ADA Compliance**
  + HNR & ONE
    - Premium template ADA updates
    - Today’s call: Maintenance & Upkeep - Recommendation for PBGO Clients (free)
      * [Plugin](https://chrome.google.com/webstore/detail/wave-evaluation-tool/jbbplnpkjmmeebjpijfedlgcdilocofh) (easiest)
      * [WebApp](https://wave.webaim.org/)
* **FRM -** *Clarification needed for desired outcome*
* **Next-up**
  + **Skyslope Integration (issues) -** in progress
  + **CSBox**
    - [API work](https://bostonlogic.atlassian.net/browse/BDT-23064)
  + **Autonomous Client Migration**
    - [Layout design](https://app.moqups.com/YvpVr0mjTl/edit), [Video](https://propertybase.wistia.com/medias/0npmwh6zso) & [Support article](https://docs.google.com/document/d/1OpmOwyraxZnt2DrxjvBhUF-IFlXfG9crKAnx2_R2V0Y/edit)(comp)
    - Banner/Notification system
  + **Landing Page Refresh - Website Builder -** in design
  + **Teams:**
    - “Recommended” Overhaul - Dynamic Checklist
  + **Text Concierge**
    - Batch action sending of leads (*weeks out)*
  + **Client Commits**
    - Barker
      * HTML Email Customization (v1/v2 FCK editor issues)
    - Turnton
      * Welcome & System Generated Email Customization

**PBBO**

* + - * **4.0**
  + **Ongoing work**

Trans share page is fixed

Bulk email/announce page being fixed

* + **MORE**

Document review - done

Transaction - adding document requirement - done

* + **John L Scott -**  feature requests
  + **PBSign -**
    - 4.0 integration - Complete
    - Status/History/Retract - nearly ready
    - Product availability - (days)
  + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** finishing wires, starting data design
  + Centre outages & AWS Migration
* **General**
  + Remax - Commission rounding - done
  + **Next-up**
    - * + **PBForms -** planning/requirements
        + **Client Commits**

Delex/Payload - transactions data

Utility Concierge - White label for Brokers

Judge Fite / RealScout - SSO & API

* + **PBMLS** - Refactoring existing Broker/Agent websites - listings

**PBSE - (**[Shannon Moore](mailto:smoore@propertybase.com) **is OOO)**

### **BoldLeads**

* Text Concierge
  + Reports (In progress)
* Teams
  + [TC Pilot: (Beta)](https://docs.google.com/document/d/138yEJ_2ZCPWvWT4X4W5fXQWDdfKfP5jtVGZgP17PcSE/edit?usp=sharing)
  + Bulk import (Research)
* Product
  + Zapier App updates (Done)
  + Leads captured during CC Decline sent to PBGO/BM after they are active (In progress)
  + Funnels: Ability to specify time (In progress)
  + PB Leads/White label: Realign Setup workflow for Leads +PBGO or PBSF (In progress)
* Compliance
  + Twilio Compliance (In progress)
  + Twilio form client facing (In progress)
  + FB Webhook company leads (In progress)
  + FB Branding feature - (In progress)
* Admin/Operations
  + TC Report - Appt in 1 month (Done)
  + Plans tied to Product type (Done)
  + NonPay form - Add Product Type (Done)
  + Tab Update: Master Control tab (Done)
  + Time intervals for Admin funnels (In progress)
  + Loyalty Plan (In progress)
* Marketing/Sales
  + AMP: Updates to Dashboard filters (In progress)
  + Mass Import - Client leads (Backlog)
* Cron & PHP Update (In progress)

### **BoldMortgage**

* Prequal updates to Landing Pages (In progress)
* Landing page log (In progress)
* Lead Bank (In progress)

### 06/24/21 PBGO, PBSE & PBBO, BL & BM

**PBGO**

* **Next-Gen**
  + Exclusive Listing Management - Clean Up Sub-Nav Options
  + Webapp
    - Navigation Updates
  + SnapEngage (Chat) - Support Deployment
  + Bohemia
  + Mcenearney
    - Bright MLS - Coming Soon - feed combination
  + ONESIR
    - Action Plans Task Recurrence - Customized Frequency - QA
  + Agent-to-agent list marketing (text, blast, drip)
* **Mobile**
  + Bug finalization & Beta Testing
  + Client’s needed for beta!
* **Next-up**
  + **Webapp updates**
    - Blade menus
  + **Google People API** (contact import)
  + **Autonomous Client Migration**
    - [Layout design](https://app.moqups.com/YvpVr0mjTl/edit), [Video](https://propertybase.wistia.com/medias/0npmwh6zso) & [Support article](https://docs.google.com/document/d/1OpmOwyraxZnt2DrxjvBhUF-IFlXfG9crKAnx2_R2V0Y/edit)(comp)
    - Banner/Notification system
    - Feature Gap Analysis - ≈10% remaining (e.g. Ad zips for Greenridge)
  + **Landing Page Refresh - Website Builder -** in design
  + **Teams:**
    - “Recommended” Overhaul - Dynamic Checklist
  + **Text Concierge**
    - Batch action sending of leads (*weeks out)*
  + **Client Commits**
    - Barker
      * HTML Email Customization
    - Turnton
      * Welcome & System Generated Email Customization

### Skyslope API Integration - in progress

* + **CSBox**
    - Roster data into CSBox
    - Update method for regular consumption - until APIs

**PBBO**

* + - * **4.0**
  + **4.0 is Live -** [**Video**](https://vimeo.com/548419023)
    - [Support Docs](https://pboffice-help.propertybase.com/hc/en-us)
    - Client Migration - [Autonomous “Upgrade”](https://stageprod.backagent.net/learn/promo/update/) - released
      * *185 unique systems activated 4.0* 
        + *18,458 Total Logins*
        + *1,708 Unique Total Accounts (Individuals)*

*562 Staff Accounts*

*1,146 Associate Accounts*

* + - Reports - Complete
  + **MORE**

Document review

Transaction - adding document requirement

* + **John L Scott -**  feature requests
  + **PBSign -** 4.0 integration
  + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** wires updates
* **Next-up**
  + - * + **PBForms -** planning/requirements
        + **Client Commits**

Remax - Commission rounding

Delex/Earnestly - transactions data

Judge Fite / RealScout - SSO & API

* + **PBMLS** - refactoring existing Broker/Agent websites - listings

**PBSE**

* **General:**
  + **Offshore dev**
    - Done as of Monday
  + **SF Security Review**
    - Accepted for review by SF
  + **In Progress**
    - **Issues**
      * **Sync issues / PBBO Transactions**
        + Deployed some changes today, need to verify fixes
      * **Detailed Email Events**
        + Reprocessing for all customers on hold for higher priority issues
      * **Integration API**
        + Front end admin portal issue we’re currently fixing caused by release. Fix should be deployed today.
    - **Matching**
      * Technical Debt almost done. New Feature work soon.
    - **Portal Feeds**
      * Working on Realogy feed for Malta Soetheby’s
  + **Upcoming**
    - Focusing on PBSE + PBGO/PBBO sync. Improving reliability, UX
    - Improvements to matching functionality

### **BoldLeads**

* Text Concierge
  + Reports (In progress)
* Teams
  + [TC Pilot: (Beta)](https://docs.google.com/document/d/138yEJ_2ZCPWvWT4X4W5fXQWDdfKfP5jtVGZgP17PcSE/edit?usp=sharing)
  + Bulk import (Research)
* Product
  + Zapier App updates (In progress)
  + Funnels: Ability to specify time (In progress)
  + PB Leads/White label: Realign Setup workflow for Leads +PBGO or PBSF (In progress)
* Compliance
  + Twilio Compliance (In progress)
  + Twilio form client facing (In progress)
  + FB Webhook company leads (In progress)
  + FB Branding feature - (In progress)
* Admin/Operations
  + Time intervals for Admin funnels (In progress)
  + Loyalty Plan (In progress)
* Marketing/Sales
  + SEO Update (Done)
  + Mass Import - Sales lead
  + AMP: Updates to Dashboard filters (In progress)
* Cron & PHP Update (In progress)
  + PHP 7 to Staff (Done)

### **BoldMortgage**

* Account status changes ZD tickets (Done)
* Loan Type (Done)
* Prequal updates to Landing Pages (In progress)
* Landing page log (In progress)
* Lead Volume solution (Story)

### 

### 06/10/21 PBGO, PBSE & PBBO, BL & BM

**PBGO**

* **Next-Gen**
  + Exclusive Listing Management - Clean Up Sub-Nav Options
  + Webapp
    - Navigation Updates
  + SnapEngage (Chat) - Support Deployment
  + Bohemia
  + Mcenearney
    - Bright MLS - Coming Soon - feed combination
  + ONESIR
    - Action Plans Task Recurrence - Customized Frequency - QA
  + Agent-to-agent list marketing (text, blast, drip)
* **Mobile**
  + Bug finalization & Beta Testing
  + Client’s needed for beta!
* **Next-up**
  + **Webapp updates**
    - Blade menus
  + **Google People API** (contact import)
  + **Autonomous Client Migration**
    - [Layout design](https://app.moqups.com/YvpVr0mjTl/edit), [Video](https://propertybase.wistia.com/medias/0npmwh6zso) & [Support article](https://docs.google.com/document/d/1OpmOwyraxZnt2DrxjvBhUF-IFlXfG9crKAnx2_R2V0Y/edit)(comp)
    - Banner/Notification system
    - Feature Gap Analysis - ≈10% remaining (e.g. Ad zips for Greenridge)
  + **Landing Page Refresh - Website Builder -** in design
  + **Teams:**
    - “Recommended” Overhaul - Dynamic Checklist
  + **Text Concierge**
    - Batch action sending of leads (*weeks out)*
  + **Client Commits**
    - Barker
      * HTML Email Customization
    - Turnton
      * Welcome & System Generated Email Customization

### Skyslope API Integration - in progress

* + **CSBox**
    - Roster data into CSBox
    - Update method for regular consumption - until APIs

**PBBO**

* + - * **4.0**
  + **4.0 is Live -** [**Video**](https://vimeo.com/548419023)
    - [Support Docs](https://pboffice-help.propertybase.com/hc/en-us)
    - Client Migration - [Autonomous “Upgrade”](https://stageprod.backagent.net/learn/promo/update/) - released
      * *185 unique systems activated 4.0* 
        + *18,458 Total Logins*
        + *1,708 Unique Total Accounts (Individuals)*

*562 Staff Accounts*

*1,146 Associate Accounts*

* + - Reports - Complete
  + **MORE**

Document review

Transaction - adding document requirement

* + **John L Scott -**  feature requests
  + **PBSign -** 4.0 integration
  + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** wires updates
* **Next-up**
  + - * + **PBForms -** planning/requirements
        + **Client Commits**

Remax - Commission rounding

Delex/Earnestly - transactions data

Judge Fite / RealScout - SSO & API

* + **PBMLS** - refactoring existing Broker/Agent websites - listings

**PBSE**

* **General:**
  + **Offshore dev**
    - Will be wrapping up work with PBSE at the end of next week
  + **SF Security Review**
    - Submitted to SF, fixing a few submission items for it to be accept for review
  + **In Progress**
    - **Issues**
      * **Sync issues / PBBO Transactions**
        + Noel (new ruby dev) is investigating
      * **Detailed Email Events**
        + Done reprocessing events for customers with tickets, investigating root cause, replaying events for other customers
    - **Email Campaigns**
      * On hold for security review work - ability to drop HTML emails in to email campaigns without creating a template first
    - **Matching**
      * Working to re-write the component in lightning
      * Next up: allow different matching experiences based on record type
    - **Portal Feedback Parsing**
      * Done
    - **Portal Feeds**
      * Working on Realogy feed for Malta Soetheby’s
  + **Recruiting**
    - **Noel started Monday!**

### **BoldLeads**

* Text Concierge
  + Reports (In progress)
* Teams
  + [TC Pilot: (Launch)](https://docs.google.com/document/d/138yEJ_2ZCPWvWT4X4W5fXQWDdfKfP5jtVGZgP17PcSE/edit?usp=sharing)
  + Bulk import (Research)
* Product
  + Pride month banner on website (Done)
  + Twilio: Compliance updates phase 1 (Done)
  + Zapier App updates (In progress)
  + Funnels: Ability to specify time (In progress)
  + PB Leads/White label: Realign Setup workflow for Leads +PBGO or PBSF (In progress)
* Compliance
  + Twilio form - (In progress)
  + FB Webhook company leads (In progress)
  + FB Branding feature - (In progress)
* Admin/Operations
  + New user type: Sales Outreach (Done)
  + Loyalty Plan (In progress)
* Marketing
  + Availability Checker: Update data (Done)
  + AMP: Updates to Dashboard filters (In progress)
* Cron & PHP Update (In progress)

### **BoldMortgage**

* Prequal updates to Landing Pages (In progress)
* Landing page log (In progress)
* Lead Volume solution (Research)

### 05/27/21 PBGO, PBSE & PBBO, BL & BM

**PBGO**

* **Next-Gen**
  + ADA Compliance - Website Builder
    - Non-primary pages (≈100 completed, more to go!)
  + SnapEngage (Chat) - Support Deployment - QA
  + RoofAI Integration (HNR) - Complete
* **Mobile**
  + API work, API work, API work
  + Next sprint: Polish, Bug Fixes & Beta Testing
* **Next-up**
  + **Autonomous Client Migration**
    - [Layout design](https://app.moqups.com/YvpVr0mjTl/edit), [Video](https://propertybase.wistia.com/medias/0npmwh6zso) & [Support article](https://docs.google.com/document/d/1OpmOwyraxZnt2DrxjvBhUF-IFlXfG9crKAnx2_R2V0Y/edit)(comp)
    - Banner/Notification system
    - Feature Gap Analysis - ≈10% remaining (e.g. Ad zips for Greenridge)
  + **Landing Page Refresh - Website Builder -** in design
  + **Teams:**
    - “Recommended” Overhaul - Dynamic Checklist
  + **Text Concierge**
    - Batch action sending of leads
  + **Client Commits**
    - Agent to agent list marketing
    - Bohemia - In QA
    - ONESIR
      * Action Plans Task Recurrence - Customized Frequency
    - Mcenearney
      * Bright MLS - Coming Soon - feed combination
    - Barker
      * HTML Email Customization
    - Turnton
      * Welcome & System Generated Email Customization

### Skyslope API Integration

* + **CSBox**
    - Roster data into CSBox
    - Update method for regular consumption - until APIs
  + **Tech Debt**
    - **Import cleanup**

**PBBO**

* + - * **4.0**
  + **4.0 is Live -** [**Video**](https://vimeo.com/548419023)
    - [Support Docs](https://pboffice-help.propertybase.com/hc/en-us)
    - Client Migration - [Autonomous “Upgrade”](https://stageprod.backagent.net/learn/promo/update/) - released
  + **MORE & John L Scott -** 4.0 feature requests
  + **PBSign -** 4.0 integration
  + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** wires updates
* **Next-up**
  + - * + **PBForms -** planning/requirements
        + **Client Commits**

Remax - Commission rounding

Delex/Earnestly - transactions data

Judge Fite / RealScout - SSO & API

Vivo / Dagley - transactions data - *Complete*

Remax DFW/Deltagroup - Transaction data - *Complete*

* + **PBMLS** - refactoring existing Broker/Agent websites - listings

**PBSE**

* **General:**
  + **SF Security Review**
    - Put together fixes for review, now working on getting submission ready for SF
  + **In Progress**
    - **Issues**
      * **PBBO Transactions**
        + Still a work in progress
      * **Detailed Email Events**
        + Some customers have complained they have not received any to their orgs in months
        + Working to replay those events to those orgs
    - **Email Campaigns**
      * On hold for security review work - ability to drop HTML emails in to email campaigns without creating a template first
    - **Matching**
      * Working to re-write the component in lightning
      * Next up: allow different matching experiences based on record type
    - **Portal Feedback Parsing**
      * Working a bug for customers in Australia when the listing ID sent from the portal sometimes does not associate correctly with the listing in SF
    - **Portal Feeds**
      * Working on Realogy feed for Malta Soetheby’s
  + **Recruiting**
    - **New dev starting early June!**

### **BoldLeads**

* Text Concierge
  + Reporting (Done: 1, In progress: 2)
  + Updated Teams TC experience (In progress)
* Teams
  + Welcome funnel suppression for Teams & BM (Done)
  + Bulk import (Research)
* Product
  + Remove Eppraisal field for new clients (Done)
  + Hide $50 Referral fee page (Done)
  + Fix typo in LP 396 (Done)
  + Zapier reset button (Done)
  + Zapier App updates (In progress)
  + Funnels: Ability to specify time (Research)
* Compliance
  + Twilio form - (In progress)
  + FB Webhook company leads (In progress)
  + FB Branding feature - (In progress)
* Admin/Operations
  + Client Dashboard Controls: Add funnels, Address Capture page (Done)
  + Agent Seat - Remove information (Done)
  + One time payment form - Partner update (Done)
  + Refund form - Partner update (Done)
* Marketing
  + Company Lead widget (Done)
  + Availability Checker: Update data (In progress)
  + Amp: Updates to Dashboard filters (In progress)
* Cron & PHP Update (In progress)

### **BoldMortgage**

* Prequal updates to Landing Pages (In progress)
* Landing page log (In Progress)

### 05/13/21 PBGO, PBSE & PBBO, BL & BM

**PBGO**

* **Next-Gen**
  + ADA Compliance - pt. 3
    - Non-primary pages
  + SnapEngage (Chat) - Support Deployment - QA
  + RoofAI Integration (HNR) - in Test (with client)
* **Mobile**
  + API work, API work, API work
  + Next sprint: Polish, Bug Fixes & Beta Testing
* **Next-up**
  + **Autonomous Client Migration**
    - [Layout design](https://app.moqups.com/YvpVr0mjTl/edit), [Video](https://propertybase.wistia.com/medias/0npmwh6zso) & [Support article](https://docs.google.com/document/d/1OpmOwyraxZnt2DrxjvBhUF-IFlXfG9crKAnx2_R2V0Y/edit)(comp)
  + **Teams:**
    - Bold Leads - Leads TC Integration
    - “Recommended” Overhaul - Dynamic Checklist
  + **Dedicated Property Pages**
    - UX enhancements (ease of use)
    - Autopop fields
  + **Client Commits**
    - Bohemia - In QA
      * Task Recurrence - Customized Frequency
    - Mcenearney
      * Bright MLS - Coming Soon - feed combination
    - Barker
      * HTML Email Customization
    - Turnton
      * Welcome & System Generated Email Customization
  + **CSBox**

**PBBO**

* + - * **4.0**
  + **4.0 is Live -** [**Video**](https://vimeo.com/548419023)
    - [Support Docs](https://pboffice-help.propertybase.com/hc/en-us)
    - [Autonomous “Upgrade”](https://stageprod.backagent.net/learn/promo/update/) (Coming Soon)
  + **S3 Data Storage** - Document Send & Retrieval, Disassemble legacy
  + **Development environment on AWS** - Continuous Improvement
  + **PBSign -** QA
  + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** deep dive + wires updates
* **Next-up**
  + - * + **4.0 Existing Client Migration -** planned
        + **PBForms -** lockdown reqs, detailed design/architecture
        + **Client Commits**

Remax - Commission rounding

Delex/Earnestly - transactions data

Vivo / Dagley - transactions data

Judge Fite / RealScout - SSO & API

* + **PBMLS** - refactoring existing Broker/Agent websites - listings

**PBSE**

* **General:**
  + **SF Security Review**
    - Security review has been returned to us, fixes need to be made. Have until June 3rd to re-submit. Likely will have fallout from changes for months.
  + **In Progress**
    - **Issues**
      * **Salesforce Outage**
        + Salesforce had an outage earlier this week on May 11th in the afternoon. Affected PBSE services. Investigating.
      * **Facebook to Front Desk Integration**
        + A few customers reported issues with the integration sending blank leads. When trying to reconnect, they couldn’t. Investigation in progress
      * **PBBO Transactions**
        + Still a work in progress. Need to fix test suite in the integrations API before we can triage transaction issues
    - **Email Campaigns**
      * Ability to drop HTML emails in to email campaigns without creating a template first
    - **Matching**
      * Working to re-write the component in lightning
      * Next up: allow different matching experiences based on record type
    - **Portal Feedback Parsing**
      * Working a bug for customers in Australia when the listing ID sent from the portal sometimes does not associate correctly with the listing in SF
  + **Future features**
    - Improvements to image watermarking
  + **SendGrid**
    - If you need access to the PBSE SendGrid, let Shannon know
    - Permissions and access will be limited
  + **Recruiting**
    - **Offer out to a Ruby developer**

### **BoldLeads**

* Text Concierge
  + Updated Teams TC experience (In progress)
  + Reporting (In progress)
* Teams
  + Funnels available in all accounts (Done)
  + Cancel API button (Done)
  + Update Agreements to reflect PB’s address (Done)
  + Automating setup notification (In progress)
* Product
  + Zapier App updates (In progress)
* Compliance
  + Twilio form - (In progress)
  + FB Webhook company leads (In progress)
  + FB Branding feature - (In progress)
* Admin/Operations
  + Welcome email - Resend with Login (Done)
  + Disable button (Done)
  + Website update (Done)
  + Client Dashboard Controls: Add funnels, Address Capture page (In progress)
  + Agent Seat - Remove information (In progress)
  + Welcome funnel suppression for Teams & BM (In progress)
* Marketing
  + Daily Leads Reporting (Done)
* Cron & PHP Update (In progress)

### **BoldMortgage**

* $499 Leads Only Pricing Plan (Done)
* Daily Leads Report (Done)
* Cancel Account ZD ticket (Done)
* Prequal updates to Landing Pages (In progress)
* Landing page log (In Progress)

### 04/29/21 PBGO, PBSE & PBBO, BL & BM

**PBGO**

* **Next-Gen**
  + ADA Compliance - pt. 3
    - Non-primary pages
  + SnapEngage (Chat) - Support Deployment - QA
  + RoofAI Integration (HNR) - in Test (with client)
  + Font Support - QA
* **Mobile**
  + API work, API work, API work
  + Next up - Ancillary (action screens) & Gestures
* **Next-up**
  + **Autonomous Client Migration**
    - [Layout design](https://app.moqups.com/HKCwzbKsya/view/page/ad64222d), Video & [Support article](https://docs.google.com/spreadsheets/d/1T2PkQfcbUfTfnks9Ju_R5vsPncSUqOf4hVUo4MdJHFY/edit#gid=970327942)
  + **Teams:**
    - Bold Leads - Leads TC Integration
    - “Recommended” Overhaul - Dynamic Checklist
  + **Dedicated Property Pages**
    - UX enhancements (ease of use)
    - Autopop fields
  + **Client Commits**
    - PBSE Integration issues
    - Bohemia - In QA
    - ONESIR Commits
      * Listing Report Load Time
      * Task Recurrence - Customized Frequency
    - Mcenearney
      * Bright MLS - Coming Soon - feed combination
      * Font Support
    - C. Dan Joyner
      * Traffic reports
    - Barker
      * HTML Email Customization
    - Turnton
      * Welcome & System Generated Email Customization
  + **CSBox**

**PBBO**

* + - * **4.0**
  + **ALL NET-NEW CLIENTS ON 4.0** 
    - MORE
    - John L Scott
  + **S3 Data Storage** - Document Send & Retrieval, Disassemble legacy
  + **Development environment on AWS** - Continuous Improvement - Done
  + **PBSign -** QA
  + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** design/architecture - 04/30 deep dive
* **Next-up**
  + - * + **4.0 Existing Client Migration -** planned
        + **PBForms -** lockdown reqs, detailed design/architecture
        + **Client Commits**

Remax - Commission rounding

Delex/Earnestly - transactions data

Vivo / Dagley - transactions data

Judge Fite / RealScout - SSO & API

* + **PBMLS** - refactoring existing Broker/Agent websites - listings

**PBSE**

* **General:**
  + **SF Security Review**
    - Security review has been submitted, and it will take 6-8 weeks for more info from SF
  + **In Progress**
    - **Issues**
      * **PBBO Transactions**
        + Still a work in progress. Need to fix test suite in the integrations API before we can triage transaction issues
      * **Drip Campaigns**
        + Fixed an issue where large amounts of scheduled drip campaign emails would occasionally cause duplicates to be sent to some recipients
    - **Email Campaigns**
      * Doing technical exploration on how to give customers the ability to simply drop HTML emails in to email campaigns without creating a template first
    - **Matching**
      * Working to re-write the component in lightning
      * Next up: allow different matching experiences based on record type
    - **Portal Feedback Parsing**
      * Working a bug for customers in Australia when the listing ID sent from the portal sometimes does not associate correctly with the listing in SF
  + **Future features**
    - Improvements to image watermarking
  + **SendGrid**
    - If you need access to the PBSE SendGrid, let Shannon know
    - Permissions and access will be limited
  + **Recruiting**
    - **Looking for Ruby developer**

### **BoldLeads**

* Text Concierge - Updated Teams TC experience (In progress)
* Compliance
  + Twilio form - In progress
  + FB Webhook company leads (In progress)
  + FB Branding feature - In progress
* Admin
  + New fields for Referee and Referrer (Completed)
  + Client Dashboard Controls: Add funnels, Address Capture page (In progress)
  + BoldLeads Resend Welcome email (In progress)
  + Disable button (In progress)
* Marketing
  + Reporting (In progress)
* Cron & PHP Update (In progress)

### **BoldMortgage**

* BoldMortgage Zendesk connection from Admin to Unify ZD (Completed)
* Resend Welcome email button (Completed)
* Prequal updates to Landing Pages (In progress)

### 04/15/21 PBGO, PBSE & PBBO, BL & BM

**PBGO**

* **Next-Gen**
  + ADA work - Website Builder Compliance
    - Colors, alt-tags,completed -
  + Fastly live for Super-theme (*Pulling metrics for Sales team)*
  + Contact Import
    - Client notification of failed import
    - In-app messaging for threshold and/or batching (10k)
* **Mobile**
  + API work
  + App is live and in test!
  + Next up - Tasks, Events, Contacts List/Drip/Notes, Listing Email/Texting & Gestures
* **Next-up**
  + **Autonomous Client Migration**
  + **Chat**
  + **Client Commits**
    - Custom Fonts
    - PBSE Integration issues
    - ONESIR Commits
      * Task Recurrence - Customized Frequency
    - Mcenearney
      * Bright MLS - Coming Soon - feed combination
    - Keefe Realty
      * Custom Reporting
    - Harry Norman
      * RoofAI
    - Barker
      * HTML Email Customization
    - Turnton
      * Welcome & System Generated Email Customization
    - Federated Roster Management & Cross Platform Sync
    - PBBO, PBSE, PBGO - client list match-up

**PBBO**

* + - * **4.0**
  + **ALL NET-NEW CLIENTS ON 4.0 AS OF 04/05**
    - MORE
    - John L Scott
  + **S3 Data Storage** - Document Send & Retrieval, Disassemble legacy
  + **Development environment** - Continuous Improvement
  + **New Hires:** John Snable, Michael Trabalka
* **Next-up**
  + - * + **4.0 Existing Client Migration**
        + **PBSign -** QA items
        + **PBForms -** lockdown reqs, detailed design/architecture
        + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** design/architecture
        + **Client Commits**

Remax - Commission rounding

Delex/Earnestly - transactions data

Vivo / Dagley - transactions data

Judge Fite / RealScout - SSO & API

* + **PBMLS** - refactoring existing Broker/Agent websites - listings

**PBSE**

* **General:**
  + **New product Feedback tool**
    - Product board
      * Or Submit product feedback and feature requests here [pbse-feedback@propertybase.com](mailto:pbse-feedback@propertybase.com)
  + **SF Security Review**
    - Security review has been submitted, and it will take 6-8 weeks for more info from SF.
  + **In Progress**
    - **Issues**
      * **PBBO Transactions**
        + Working with the team to determine the cause of Transaction sync issues
        + Will be making improvements to the integrations API to make it easier to triage questions/issues
      * **Drip Campaigns**
        + Investigating duplicate emails sent on drips for very large campaigns
    - **Matching**
      * Working to re-write the component in lightning
      * Next up: allow different matching experiences based on record type
  + **Future features**
    - Improvements to image watermarking
  + **SendGrid**
    - If you need access to the PBSE SendGrid, let Shannon know
    - Permissions and access will be limited
  + **Recruiting**
    - **Salesforce dev Trey Lane has joined!**
    - **Looking for Ruby developer**

### **BoldLeads**

* Agent seat email - Do not send - Completed
  + All Products - [Screenshot](https://boldleads.atlassian.net/browse/SD-3874)
* Teams funnels available in all Products [BoldLeads & Teams] - In Progress
* Compliance
  + Twilio form - In progress
  + FB Webhook company leads - In progress
  + FB Branding feature - In progress
* Admin
  + Disable/Enable button in Admin Client profile - In progress
  + Add funnel to client accounts - In progress
* Marketing
  + AMP - Automated Marketing Payment - Completed
* PHP Update - In progress

### **BoldMortgage**

* BoldMortgage Landing pages Pre-qual updates - Completed
  + 1003 and 1103 = true/false
* BoldMortgage FAQ https://boldleads.slack.com/files/UJR3Y6WR1/F01U2SGS602/boldmortgage\_faq.pdf?origin\_team=T02A55QSP&origin\_channel=Pcomposer
* Demo video
  + <https://dannyloschiavo.wistia.com/medias/ltr4734sek>
  + Thank you Sara Putnam
* Landing page log - In progress
* Resend welcome email - In progress

### 

### 04/01/21 PBGO, PBSE & PBBO, BL & BM

### **Touchbase:**

* Meeting rescheduling for leadership standup

**PBGO**

* **Next-Gen**
  + ADA work
  + Fastly live for super theme
* **Mobile**
  + API work
  + App is live and in test!
* **Next-up**
  + **Client Commits**
    - **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up

**PBBO**

* + - * **4.0**
  + **ALL NET-NEW CLIENTS ON 4.0 AS OF 04/05**
  + **S3 Data Storage** - Document Send & Retrieval
* **Next-up**
  + - * + **PBSign -** QA items
        + **PBForms**
        + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053)
        + **Client Commits**

**Delex - mortgage integration**

**Vivo**

**Judge Fite - SSO & API**

**PBSE**

* **International efforts:**
  + **Done**
    - International TSO launched, trials can now be created, no license issues
* **General:**
  + **New product Feedback tool**
    - Product board
      * Submit product feedback and feature requests here [https://portal.productboard.com/ugsl7ra3wiobonnx4r1fyoi7/](https://portal.productboard.com/ugsl7ra3wiobonnx4r1fyoi7/tabs/4-pbse)
      * Or Submit product feedback and feature requests here [pbse-feedback@propertybase.com](mailto:pbse-feedback@propertybase.com)
  + **SF Security Review**
    - Gathering materials to go through SF security review
  + **In Progress**
    - **Issues**
      * **Manda**
        + Bayut feed now fixed
        + unpublish and re-publish any listings that aren’t updating
      * **Front Desk**
        + improvements have been made, should be good now!
        + Investigating heavy traffic.
      * **Feedelio**
        + Should notice performance improvements
        + Still a WIP.
      * **Auth Service**
        + Investigating an issue/possible outage with auth service
      * **Mailservice**
        + No delays in the last 30 days.
    - **Matching**
      * Working to re-write the component in lightning
    - **Future features**
      * Finished evaluating proof of concepts with SMS/Whatsapp Partners, moving to commercial conversations
  + **Recruiting**
    - **Salesforce dev joining beginning of April**
    - **Signed contract with new Salesforce dev Magicforce**
    - **Looking for Ruby developer**

### **BoldLeads**

* Product
  + Client Dashboard: Updated Agent Seat Welcome Email & Update default to include Training tab (In Progress)
  + Text Concierge: Setting to turn off text msg in a funnel (In Progress)
  + Leads + FB Requirements (In Progress)
* Operations
  + Company field added to Agreements
  + Partner Company field added to Agreements and Admin
  + Ability to Add funnels to client account (In Progress)
* Sales
  + Updated Dashboards
* Marketing
  + AMP - Automated Marketing Payment - Roll out
  + v2 stories (In Progress)
* Teams
  + Updated Reply to email address
  + Ability to send leads captured from PBGO website sent to TC (In Progress)
  + Making some updates to TC that will impact how PBGO appears (In Progress)

### **BoldMortgage**

* BoldMortgage Landing pages Pre-qual updates (Ongoing)
  + 1001 and 1001 = true
  + 1002 and 1102 = false
  + 1003 and 1103 = true/false (In Progress)
* Partner Payments
* Automated Welcome Email (In Progress)
* Help Center article (In Progress)

### 3/18/21 PBGO, PBSE & PBBO

### **Recording:** <https://propertybase.zoom.us/rec/share/_fWVTxaUdfS1kuahnoJHrbXI0A7JEuUp2HsStbyWSpxDpzqoGTsgQuCYdJXkuRq-.ReztgtB88b5Dcfe7> Passcode: TZ1zD=p1

**PBGO**

* **Property Landing Pages,** *by*[Nick Dambrosio](mailto:ndambrosio@propertybase.com)
* [**Bulk SMS**](https://docs.google.com/document/d/16O-PuuivdimhK3az9GCWr1CI69KyRBIAVN-XRMqNG5k/edit) **-** *(Graham’s notes document)*
* **Next-Gen**
  + Listing Sliders opacity
  + Next Gen Admin migration in Sequoia ([meeting recording](https://propertybase.zoom.us/rec/share/eV2tNH1SwdRYQcOIiUbCvXYZxFiRCc8QD7ue-59qjfya-Av7E8pE74VJlktIcN5d.erDnppXe4lwyjc_4))
* **Mobile**
  + Comps: [(1)](https://xd.adobe.com/view/0b88bb68-6caa-46bd-83c4-1f05820e4095-5edb/) & [(2)](https://xd.adobe.com/view/ff58e8fe-c299-4ab6-8c70-59991c17f3d6-aa0b/) - Android & IOS
* **Next-up**
  + **Client Commits**
    - [**Q4 Outreach & Feedback**](https://bostonlogic.atlassian.net/issues/?filter=10715)
    - Bohemia -
      * Custom Search Expanded to 5 categories
      * Specialized amenities
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up

**PBBO**

* + - * **4.0**
  + MVP system is operational
    - Remaining S1 & S2 items ranked for EOM March- new customers
  + [Design, design & design](https://docs.google.com/spreadsheets/d/1Hrm8aiSsaPttss75XLHxDKAYb9VUuhONnmcN7RaCvPA/edit#gid=88281843)
  + **Continuing updates:** 
    - Transact improvements
    - Vendor Integrations
    - Workflow Improvements
    - Reports
* **S3 Data Storage** - Document Send & Retrieval
* **Next-up**
  + - * + **PBSign -** QA items
        + **PBForms**
        + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** in pending engineering signoff
        + **Client Commits**

**Delex - mortgage integration**

**Vivo**

**Judge Fite - SSO & API**

**PBSE**

* **International efforts:**
  + **Done**
    - We can now create trials!
  + **In Progress**
    - Fixing licensing issues with Int’l TSO
    - Putting together last feedback session before launch
* **General:**
  + **New product Feedback tool**
    - Product board
      * Submit product feedback and feature requests here [https://portal.productboard.com/ugsl7ra3wiobonnx4r1fyoi7/](https://portal.productboard.com/ugsl7ra3wiobonnx4r1fyoi7/tabs/4-pbse)
  + **In Progress**
    - **Issues**
      * **Manda** feeds - investigating specific issues now that load on service is normalized
      * **Front Desk -** improvements have been made, making small optimizations
      * **Feedelio -** team is working on search timeouts
    - **Matching**
      * 1.680 users can add notes to matches on inquiries or listings
    - **Tech debt**
      * Updating API versions from 30 to 51
    - **Partnerships**
      * Cloudcall CTI integration review
      * APINation Gmail sync in review with Google
    - **Future features**
      * Finished evaluating proof of concepts with SMS/Whatsapp Partners, moving to commercial conversations
      * Beginning evaluation of Mail Parsing tools
  + **Recruiting**
    - **Salesforce dev joining beginning of April**

### 

### 3/4/21 PBGO, PBSE & PBBO

### **Recording:** <https://propertybase.zoom.us/rec/share/_fWVTxaUdfS1kuahnoJHrbXI0A7JEuUp2HsStbyWSpxDpzqoGTsgQuCYdJXkuRq-.ReztgtB88b5Dcfe7> Passcode: TZ1zD=p1

**PBGO**

* **Property Landing Pages,** *by*[Nick Dambrosio](mailto:ndambrosio@propertybase.com)
* [**Bulk SMS**](https://docs.google.com/document/d/16O-PuuivdimhK3az9GCWr1CI69KyRBIAVN-XRMqNG5k/edit) **-** *(Graham’s notes document)*
* **Next-Gen**
  + Listing Sliders opacity
  + Next Gen Admin migration in Sequoia ([meeting recording](https://propertybase.zoom.us/rec/share/eV2tNH1SwdRYQcOIiUbCvXYZxFiRCc8QD7ue-59qjfya-Av7E8pE74VJlktIcN5d.erDnppXe4lwyjc_4))
* **Mobile**
  + Comps: [(1)](https://xd.adobe.com/view/0b88bb68-6caa-46bd-83c4-1f05820e4095-5edb/) & [(2)](https://xd.adobe.com/view/ff58e8fe-c299-4ab6-8c70-59991c17f3d6-aa0b/) - Android & IOS
* **Next-up**
  + **Client Commits**
    - [**Q4 Outreach & Feedback**](https://bostonlogic.atlassian.net/issues/?filter=10715)
    - Bohemia -
      * Custom Search Expanded to 5 categories
      * Specialized amenities
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up

**PBBO**

* + - * **4.0**
  + MVP system is operational
    - Remaining S1 & S2 items ranked for EOM March- new customers
  + [Design, design & design](https://docs.google.com/spreadsheets/d/1Hrm8aiSsaPttss75XLHxDKAYb9VUuhONnmcN7RaCvPA/edit#gid=88281843)
  + **Continuing updates:** 
    - Transact improvements
    - Vendor Integrations
    - Workflow Improvements
    - Reports
* **S3 Data Storage** - Document Send & Retrieval
* **Next-up**
  + - * + **PBSign -** QA items
        + **PBForms**
        + [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** in pending engineering signoff
        + **Client Commits**

**Delex - mortgage integration**

**Vivo**

**Judge Fite - SSO & API**

**PBSE**

* **International efforts:**
  + **Done**
    - International TSO Security review
    - We can now create trials!
  + **In Progress**
    - Fixing licensing issues with Int’l TSO
* **General:**
  + **New product Feedback tool**
    - Product board
      * Submit product feedback and feature requests here [https://portal.productboard.com/ugsl7ra3wiobonnx4r1fyoi7/](https://portal.productboard.com/ugsl7ra3wiobonnx4r1fyoi7/tabs/4-pbse)
  + **In Progress**
    - **Issues**
      * **Bulkinator** - now generally available again
      * **Manda** feeds - 1 problem customer caused issues for everyone, their feed has been cut until further notice
      * **Front Desk -** team is working on search timeouts
      * **Feedelio -** team is working on search timeouts
    - **Matching**
      * Demo - in 1.678 users can add notes to matches on inquiries or listings
    - **Tech debt**
      * Updating API versions from 30 to 51
    - **Future features**
      * Evaluating proof of concepts with SMS/Whatsapp Partners
  + **Recruiting**
    - **Closing in on a dev for Salesforce**

### 

### 2/4/21 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up -** [**Quick Setup updates**](https://bostonlogic.atlassian.net/browse/BDT-21017) 
    - Onboarding - Chat & Workflow Updates - Pending
  + **Released** - Setup Guide Updates
    - Social media moved under branding
    - MLS ID - descriptive updates
    - New Default State of all Sites (instantly live) + no robots until publish
      * Autodetect branding
        + If none, default to the greyscale color scheme.
        + Logo lookup - or creation ([Image](https://drive.google.com/file/d/1vS0sXDYsrtKVOb83pOPAQYhcIpJhQUaT/view?usp=sharing) | Name)
* **Next-up**
  + **ProductBoard setup for feature requests & product updates**
  + **Client Commits**
    - [**Q4 Outreach & Feedback**](https://bostonlogic.atlassian.net/issues/?filter=10715)
    - Bohemia - SFDC config:
      * Custom Search Expanded to 5 categories
      * Specialized amenities
  + [**Mobile**](https://docs.google.com/spreadsheets/d/1MolG-uzI7cvOKASShgZ1H_kFJ7sAD0cAgM8blz8gBlo/edit#gid=0) **-** Requirements & Vendor identification
  + **ProductBoard Implementation**
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up
  + **Migration to Next-Gen**
    - Batching upgrades to Next-gen
    - Script automation for CS (includes Contacts)
    - Legacy contact type & status - “Legacy Contact”
  + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)

**PBBO**

* + - * **4.0**
  + *Monument Onboarding (temporarily using 3.9)*
  + MVP system is operational.
  + [**Continuing updates:**](https://docs.google.com/spreadsheets/d/1Hrm8aiSsaPttss75XLHxDKAYb9VUuhONnmcN7RaCvPA/edit#gid=88281843) 
    - Documents Interface Improvements
    - Vendor Integrations
    - Workflow Improvements
    - Reports
  + S3 Data Storage Sync completed in December
  + New file storing to S3 update in progress.
    - * [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** in Design
      * **Client Commits**
        + **Monument** - Funding configurations & lead source options
        + **BrokerSumo** - Cloud Partner (discussion) - Worth Clark
      * **PBSign & PBForms**

### 

**PBSE**

* **International efforts:**
  + **In Progress**
    - Prepping for mandatory security review on international TSO
* **General:**
  + **New product Feedback tool**
    - Product board
      * Submit product feedback and feature requests here [https://portal.productboard.com/ugsl7ra3wiobonnx4r1fyoi7/](https://portal.productboard.com/ugsl7ra3wiobonnx4r1fyoi7/tabs/4-pbse)
  + **In Progress**
    - **Issues**
      * Investigating Front Desk token issues
      * Investigating Bulkinator is high loads and stuck jobs
      * Investigating Manda performance issues
    - **Matching**
      * Bugs fixes for matching issues done and will go in next release 2/11
      * Working with external firm new on features
        + Ability to view, add, and edit customer’s notes on a listing without leaving the matching page
        + Excluding previous matching results
        + Viewing/showing creation updates
        + Adding ability to create a reminder/task on an inquiry and relate it to 1 or more listings
    - **Future features**
      * Evaluating proof of concepts with SMS/Whatsapp Partners
  + **Reviewing**
    - Cloud Call’s CTI integration
  + **Recruiting**
    - **Looking for a full stack dev for Salesforce**

### 1/21/21 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up -** [**Quick Setup updates**](https://bostonlogic.atlassian.net/browse/BDT-21017) 
    - Onboarding - Chat & Workflow Updates - Pending
  + **Released** - Setup Guide Updates
    - Social media moved under branding
    - MLS ID - descriptive updates
    - New Default State of all Sites (instantly live) + no robots until publish
      * Autodetect branding
        + If none, default to the greyscale color scheme.
        + Logo lookup - or creation ([Image](https://drive.google.com/file/d/1vS0sXDYsrtKVOb83pOPAQYhcIpJhQUaT/view?usp=sharing) | Name)
* **Next-up**
  + **Client Commits**
    - [**Q4 Outreach & Feedback**](https://bostonlogic.atlassian.net/issues/?filter=10715)
    - Bohemia - SFDC config:
      * Custom Search Expanded to 5 categories
      * Specialized amenities
  + [**Mobile**](https://docs.google.com/spreadsheets/d/1MolG-uzI7cvOKASShgZ1H_kFJ7sAD0cAgM8blz8gBlo/edit#gid=0) **-** Requirements & Vendor identification
  + **ProductBoard Implementation**
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up
  + **Migration to Next-Gen**
    - Batching upgrades to Next-gen
    - Script automation for CS (includes Contacts)
    - Legacy contact type & status - “Legacy Contact”
  + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)

**PBBO**

* + - * **4.0**
  + *Monument Onboarding (temporarily using 3.9)*
  + MVP system is operational.
  + [**Continuing updates:**](https://docs.google.com/spreadsheets/d/1Hrm8aiSsaPttss75XLHxDKAYb9VUuhONnmcN7RaCvPA/edit#gid=88281843) 
    - Documents Interface Improvements
    - Vendor Integrations
    - Workflow Improvements
    - Reports
  + S3 Data Storage Sync completed in December
  + New file storing to S3 update in progress.
    - * [**Enhanced Commission Plans**](https://docs.google.com/spreadsheets/d/1DM23Fhc3jJosH6KZVBRciY9460aCzXp1sIbrb03utTg/edit#gid=698928053) **-** in Design
      * **Client Commits**
        + **Monument** - Funding configurations & lead source options
        + **BrokerSumo** - Cloud Partner (discussion) - Worth Clark
      * **PBSign & PBForms**

**PBSE**

* **International efforts:**
  + **In Progress**
    - Sample data in the international TSO
    - Will be getting feedback from sales next week
* **General:**
  + **In Progress**
    - **Issues**
      * Mass email campaigns should be sending on time, detailed email events are slow to return, but we have them. Working to fix detailed email event times.
      * Actively investigating Manda performance issues
    - **Portals**
      * 360 Tour support for portals almost done
    - **Matching**
      * Demo
      * First updates have been released in 1.672
      * Fixing a few matching bugs
      * Working with external firm new on features
        + Ability to view, add, and edit customer’s notes on a listing without leaving the matching page
        + Excluding previous matching results
        + Viewing/showing creation updates
        + Adding ability to create a reminder/task on an inquiry and relate it to 1 or more listings
    - **Future features**
      * Pricing discussions with SMS/Whatsapp Partners
    - **APINation**
      * Have access to a beta, ping me for info if interested
  + **Reviewing**
    - Cloud Call’s CTI integration
  + **Recruiting**
    - **Looking for a full stack dev for Salesforce**

### 1/7/21 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up -** [Quick Setup updates](https://bostonlogic.atlassian.net/browse/BDT-21017) 
    - Default state for Teams sites
    - Auto-branding, affiliate or non-affiliate (grayscale) marketing
    - BL notification of domain changes
    - Additional field capture (license #)
* **Released:**
* **Quick Setup Design Overhaul** *(*[*Video*](https://propertybase.zoom.us/rec/share/-CXNRmPhuYnV5if5FASOz3wbtWtazXFolok4UEsjUoYMcEV5-kzpk1h4KSEl-aVp.nuDOrYbVuncQ0o99)*, password: 58y2M%cn)*
* **Next-up**
  + **Client Commits**
    - [Q4 Outreach & Feedback](https://docs.google.com/spreadsheets/d/1AFf8D7iwxzWo1USmigRJr74N3ch6ZLjK7aOak1-hR_g/edit#gid=586240241)
    - Bohemia - SFDC config:
      * Custom Search Expanded to 5 categories
      * Specialized amenities
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up
  + **Migration to Next-Gen**
    - Batching upgrades to Next-gen
    - Script automation for CS (includes Contacts)
    - Legacy contact type & status - “Legacy Contact”
  + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)

**PBBO**

* + - * **4.0**
  + *Monument Onboarding (temporarily using 3.9)*
  + MVP system is operational.
  + Continuing updates:
    - Documents Interface Improvements
    - Vendor Integrations
    - Workflow Improvements
    - Reports
  + S3 Data Storage Sync completed in December
  + New file storing to S3 update in progress.
    - * **Client Commits**
        + **Monument** - Funding configurations & lead source options
        + **Champions/Satechsoft -** VendorData API endpoint updates
        + **BrokerSumo** - Cloud Partner (discussion) - Worth Clark
        + **FortWorth ID -** Zaarly Integration (transaction & roster)
      * **PBSign & PBForms**
      * **Enhanced Commission Plans**

**PBSE**

* **International efforts:**
  + **In Progress**
    - First demo done for Allsopp and Allsopp!
    - Better Homes close to first demo
    - Focused on onboarding Allsopp and Allsopp and Better Homes. Will work on Configuring int’l TSO the week of 1/11/21, will message when ready for use
* **General:**
  + **In Progress**
    - **Issues**
      * **Flash Player** - Old version of PBSE use flash player for listing media management. We’ve reached out to these customers, and Walker and team are working to get them updated.
      * Investigation into mass email campaign delays. Issue with scheduling and enqueuing jobs.
      * Mass email campaigns should be sending on time, detailed email events are slow to return, but we have them. Working to fix detailed email event times.
      * Some performance slowness w/ Manda, still ongoing
    - **Portals**
      * 360 Tour support for portals has been added to Bayut, Dubizzle, PropertyFinder, Rightmove
    - **Matching**
      * Users can now enter multiple values at once in text fields! Ex: Users can search for cities “denver; boulder; colorado springs” at the same time
      * External partner looking at the next set of matching improvements - Now under NDA and have codebase access.
    - **Future features**
      * Set up demos with potential partners for SMS/Whatsapp functionality, and look into what we’ve build already
    - **APINation**
      * Have access to a beta, ping me for info if interested
  + **Reviewing**
    - 1.672 is together, need to finish testing, support docs, and release
    - Cloud Call’s integration
  + **Recruiting**
    - **Looking for a full stack dev for Salesforce**

### 12/23/20 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up -** [Quick Setup updates](https://bostonlogic.atlassian.net/browse/BDT-21017) 
    - Default state for Teams sites
    - Auto-branding, affiliate or non-affiliate (grayscale) marketing
    - BL notification of domain changes
    - Additional field capture (license #)
* **Released:**
* **Quick Setup Design Overhaul** *(*[*Video*](https://propertybase.zoom.us/rec/share/-CXNRmPhuYnV5if5FASOz3wbtWtazXFolok4UEsjUoYMcEV5-kzpk1h4KSEl-aVp.nuDOrYbVuncQ0o99)*, password: 58y2M%cn)*
* **Next-up**
  + **Client Commits**
    - [Q4 Outreach & Feedback](https://bostonlogic.atlassian.net/issues/?filter=10715)
    - Bohemia - SFDC config:
      * Custom Search Expanded to 5 categories
      * Specialized amenities
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up
  + **Migration to Next-Gen**
    - Batching upgrades to Next-gen
    - Script automation for CS (includes Contacts)
    - Legacy contact type & status - “Legacy Contact”
  + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)

**PBBO**

* + - * **4.0**
  + Soft Launch - *Monument*
  + Training:
    - Leadership - Transactions - Next week
    - Agents - Post-New Year
  + Remaining for MVP:
    - Documents Interface Improvements
    - Submit Transaction
    - Review Transaction
    - Reports
  + Storage & I/O Transfer & Access Performance - Amazon S3
    - * **Client Commits**
        + **Champions/Satechsoft -** VendorData API endpoint updates
        + **BrokerSumo** - Cloud Partner (discussion) - Worthclark
        + **FortWorth ID -** Zaarly Integration (transaction & roster)
      * **PBSign & PBForms**

HTML5 (vs. image storage) - optimization - in QA

* + - * **Enhanced Commission Plans**

On Hold

**PBSE**

* **International efforts:**
  + **In Progress**
    - **Almost done!** - Data migration for Allsopp and Allsopp and Better Homes Dubai from ReapIT and Propspace to PBSE
    - Worked to roughly define what was out of scope from a product perspective
  + **Restarting**
    - Configuring int’l TSO, will message when ready for use
* **General:**
  + **Todo:**
    - Research email parsing tools, set up demos with providers
    - Reach out to Salesforce support for help with Hawaii Life issue.
  + **In Progress**
    - Investigation into mass email campaign delays. Issue with scheduling and enqueuing jobs.
    - Backfilling detailed email events for orgs missing them. Done with priority customers, still need to do the rest.
    - 360 Tour support for portals
    - Performance problems w/ Manda
    - External partner looking at the next set of matching improvements - Now under NDA and have codebase access.
    - Set up demos with potential partners for SMS/Whatsapp functionality, and look into what we’ve build already
    - APINation is QAing their Gmail sync; we will soon get access for a beta
  + **Reviewing**
    - Improving flexibility of matching features
    - Cloud Call’s integration

### 

### 12/10/20 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up**
    - (Smaller) cosmetic & MLS ID search updates- post release
* **Released:**
* **Quick Setup Design Overhaul** *(*[*Video*](https://propertybase.zoom.us/rec/share/-CXNRmPhuYnV5if5FASOz3wbtWtazXFolok4UEsjUoYMcEV5-kzpk1h4KSEl-aVp.nuDOrYbVuncQ0o99)*, password: 58y2M%cn)*
  + Google Places - Image Upload - in QA
  + Overview, Branding, MLS/IDX page, Add/Edit MLS ID’s, Text Concierge Vid, Launch
* **(New) Quicker Setup**  (scaled back for property marketing-only)
* **Website Builder Lite** (properties-only website)
* **Agent-to-Agent SMS -** Twilio feature + conversation on profile page
* **Next-up**
  + **Client Commits**
    - Q4 Outreach & Feedback (deep dive results 12/1)
      * Initial feedback grouped, sized & ranked for work
    - Bohemia - SFDC config:
      * Custom Search Expanded to 5 categories
      * Specialized amenities
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up
  + **Migration to Next-Gen**
    - Batching upgrades to Next-gen
    - Script automation for CS (includes Contacts)
  + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)

**PBBO**

* + - * **4.0**
  + Soft Launch - December 18th - *Monument*
  + Training:
    - Leadership - Transactions - Next week
    - Agents - Post-New Year
  + Remaining for MVP:
    - Documents Interface Improvements
    - Submit Transaction
    - Review Transaction
    - Reports
  + Storage & I/O Transfer & Access Performance - Amazon S3
    - * **Client Commits**
        + **Champions/Satechsoft -** VendorData API endpoint updates
        + **BrokerSumo** - Cloud Partner (discussion) - Worthclark
        + **FortWorth ID -** Zaarly Integration (transaction & roster)
      * **PBSign & PBForms**

HTML5 (vs. image storage) - optimization - in QA

* + - * **Enhanced Commission Plans**

On Hold

**PBSE**

* **International efforts:**
  + **In Progress**
    - **Almost done!** - Data migration for Allsopp and Allsopp and Better Homes Dubai from ReapIT and Propspace to PBSE
    - Worked to roughly define what was out of scope from a product perspective
  + **Restarting**
    - Configuring int’l TSO, will message when ready for use
* **General:**
  + **Todo:**
    - Research email parsing tools, set up demos with providers
    - Reach out to Salesforce support for help with Hawaii Life issue.
  + **In Progress**
    - Investigation into mass email campaign delays. Issue with scheduling and enqueuing jobs.
    - Backfilling detailed email events for orgs missing them. Done with priority customers, still need to do the rest.
    - 360 Tour support for portals
    - Performance problems w/ Manda
    - External partner looking at the next set of matching improvements - Now under NDA and have codebase access.
    - Set up demos with potential partners for SMS/Whatsapp functionality, and look into what we’ve build already
    - APINation is QAing their Gmail sync; we will soon get access for a beta
  + **Reviewing**
    - Improving flexibility of matching features
    - Cloud Call’s integration

### 

### 12/01/20 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up**
    - **Quick Setup Design** [**Overhaul**](https://invis.io/7UY7VNH9XZV)
      * Google Places - Image Upload - in QA
      * Remaining: MLS/IDX page, Add/Edit MLS ID’s, Text Concierge Vid
    - **(New) Quick Setup Lite** (scaled back for client need - property marketing-only)
      * (see Remaining/above)
    - **Website Builder Lite** (properties-only website)
    - NOTE - Quick Setup soon to be tested in client-only scenario
      * Client to navigate Quick Setup without assistance and provided with PBGO support number - website audit call with onboarding specialist.

* **Released:**
* **Agent-tp-Agent SMS -** Twilio feature + conversation on profile page
* **Next-up**
  + **Client Commits**
    - Bohemia:
      * Custom Search Expanded to 5 categories
      * Specialized amenities
    - Q4 Outreach & Feedback (deep dive results 12/1)
  + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)
    - Reporting
    - Information on Lead info & email
    - Short lists & weighted averages
    - Secondary information mapping
  + **ADA Compliance - Usability.net**
    - Final decision pending
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up
    - Segmentation for Communication
  + **Migration to Next-Gen**
    - Batching upgrades to Next-gen
    - Script automation for CS (includes Contacts)
  + **Reputation Monitoring/Reviews** - research
    - Birdeye/Podium - PB & PBGO clientbase

**PBBO**

* + - * **4.0**
  + Soft Launch - December
  + Transactions - Finalizing remaining items, soft-launch when ready
  + Enhanced Reporting
  + Storage & I/O Transfer & Access Performance - Amazon S3
    - * **Client Commits**
        + **BrokerSumo** - Cloud Partner (discussion) - Worthclark
        + **FortWorth ID -** Zaarly Integration (transaction & roster)
      * **PBSign & PBForms**

HTML5 (vs. image storage) - optimization

* + - * **Enhanced Commission Plans**

On Hold

**PBSE**

* **International efforts:**
  + Trey joined the international project to coordinate and communicate between each of the departments and the customers
  + **In Progress**
    - Data migration for Allsopp and Allsopp and Better Homes Dubai from ReapIT and Propspace to PBSE
  + **On Pause**
    - Configuring int’l TSO, will message when ready for use
  + **Technical exploration and estimating** 
    - Matching improvements
    - 360 Tour support for Portals
* **General:**
  + **Done**
    - Performance problems with send.propertybase.com
    - Drip campaigns can now be scheduled to send up to 24 hours in the past
    - Backfilled missing mass email campaign events for customers caused by outage
    - Fixed integrations API issue caused by PBGO outage
  + **In Progress**
    - Improving flexibility of matching features
    - Performance problems w/ Manda
    - Putting together projects to vet external resources for help
    - Various other bug fixes
  + **Blocked**
    - Editing "Criteria" Fields on Inquiry Populated by Saved Search Causes Fields to be Blank
* **Other:**
  + Supporting CS’s renewals effort - Still playing support on Hawaii Life’s contact creation issues
  + Waiting on signature for Product feedback, prioritization, and roadmapping tool

### 

### 

### 11/11/20 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up**
    - **Quick Setup Design** [**Overhaul**](https://invis.io/7UY7VNH9XZV)
    - **(new) Quick Setup Lite (scaled back for client need)**
    - **Website Builder Lite (properties-only website)**
    - Google Places - Image Upload
    - MLS/IDX - Updates: LogicMLS, property types, areas, type-ahead
    - NOTE - Quick Setup soon to be tested in client-only scenario
      * Client to navigate Quick Setup without assistance and provided with PBGO support number
      * Option for courtesy website audit call with onboarding specialist.

**Next-up**

* + **Client Commits**
    - Bohemia:
      * Custom Search Expanded to 5 categories
      * Specialized ammenities
  + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)
    - Reporting
    - Information on Lead info & email
    - Short lists & weighted averages
    - Secondary information mapping
  + **ADA Compliance - Usability.net**
    - Final decision pending
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up
    - Segmentation for Communication
  + **Migration to Next-Gen**
    - Batching upgrades to Next-gen
    - Customer to export contacts

**PBBO**

* + - * **4.0**
  + Transactions - Finalizing remaining items, soft-launch when ready
  + Enhanced Reporting
  + Storage & I/O Transfer & Access Performance - Amazon S3
    - * **Client Commits**
        + **BrokerSumo** - Cloud Partner (option) - Worthclark
        + **API Nation**
    - Quickbooks - Integration, Launch & Documentation Overhaul
    - BrokerSumo/Quickbooks - WorthClark
  + **FortWorth ID -** Zaarly Integration (transaction & roster)
    - * **PBSign & PBForms**

Endpoint creation - document retraction

Research - Storage & HTML5 Optimization

* + - * **Enhanced Commission Plans**

On Hold

* + - * **PBBO outbound transactions API**
        + Add gross financials - pending (yet to do)
        + Add net financials for Murney - pending
        + Add username to associate contacts - pending

**PBSE**

* **International efforts:**
  + Trey joined the international project to coordinate and communicate between each of the departments and the customers
  + **In Progress**
    - Data migration for Allsopp and Allsopp and Better Homes Dubai from ReapIT and Propspace to PBSE
  + **On Pause**
    - Configuring int’l TSO, will message when ready for use
  + **Technical exploration and estimating** 
    - Matching improvements
* **General:**
  + **Done**
    - Fix for contact creation issue - to be released today
    - Adding details and fields from related objects to tasks
    - Performance issue with Bulkinator
  + **In Progress**
    - Issue with email campaigns not rendering correctly
    - Fixing performance problems with send.propertybase.com, Manda
    - Various other bug fixes
  + **Blocked**
    - Editing "Criteria" Fields on Inquiry Populated by Saved Search Causes Fields to be Blank
* **Other:**
  + Supporting CS’s renewals effort
  + Started our first sprint
  + Waiting on signature for Product feedback, prioritization, and roadmapping tool

### 10/29/20 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up**
    - [Automation & QS improvements from weekly meeting](https://bostonlogic.atlassian.net/issues/?filter=10703)
    - Google Places - Image Upload
    - MLS/IDX - Updates: LogicMLS, property types, areas, type-ahead
    - NOTE - Quick Setup soon to be tested in client-only scenario
      * Client to navigate Quick Setup without assistance and provided with PBGO support number
      * Option for courtesy website audit call with onboarding specialist.
  + **Completed**
    - Image upload - Mailer
* Leads - Bulk handling & export
* [Reporting](https://bostonlogic.atlassian.net/browse/BDT-19268?) updates

**Next-up**

* + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)
    - Reporting
    - Information on Lead info & email
    - Short lists & weighted averages
    - Secondary information mapping
  + **ADA Compliance - Usability.net**
    - Final decision pending
  + **Federated Roster Management & Cross Platform Sync**
    - PBBO, PBSE, PBGO - client list match-up
    - Segmentation for Communication
  + **Migration to Next-Gen**
    - Reporting essentials
    - Batching upgrades to Next-gen

**PBBO**

* + - * **4.0**
  + Transactions - Finalizing remaining items, soft-launch when ready
  + Enhanced Reporting
  + Storage & I/O Transfer & Access Performance - Amazon S3
    - * **Client Commits**
        + Magnolia - FTP → SFTP
        + **API Nation**
    - Quickbooks - Integration, Launch & Documentation Overhaul
    - BrokerSumo/Quickbooks - WorthClark
      * **PBSign & PBForms**

Endpoint creation - document retraction

* + - * **Enhanced Commission Plans**

On Hold

* + - * **PBBO outbound transactions API**
        + Add gross financials - pending (yet to do)
        + Add net financials for Murney - pending
        + Add username to associate contacts - pending

**PBSE**

* **International efforts:**
  + **In Progress**
    - Data migration for Allsopp and Allsopp and Better Homes Dubai from ReapIT and Propspace to PBSE
    - Configuring int’l TSO, will message when ready for use
  + **Product PRD and Technical exploration**
    - Matching improvements
* **General:**
  + **Done**
    - Create a Setting to hide all tiles in deprecated section of control center
    - Receive JS error when trying to use field migration tool
  + **In Progress**
    - Editing "Criteria" Fields on Inquiry Populated by Saved Search Causes Fields to be Blank
    - Adding details and fields from related objects to tasks
    - Fixing performance problems with send.propertybase.com, Manda, Bulkinator
    - Various other bug fixes
* **Other:**
  + **APINation** 
    - **Outlook + PB integration** **just received an overhaul. Currently live!**
      * **Outlook Mail:** <https://my.apination.com/simple-syncs/office_365/propertybase>
      * **General integrations:** <https://my.apination.com/propertybase/>
    - **Gmail Sync + PB Integration:**
      * Beta sync is in development
      * Google still needs to do the security audit, timeline TBD
      * Looking for beta sync users
    - APINation is willing to run demos and training on the syncs
  + Worked to help Tier 3 support with website sync issues for Carpenter
  + Worked to help Tier 3 support with lead routing issues for Meybohm
  + Working to modify dev team processes and cadence for better predictability and velocity
  + Waiting on signature for Product feedback, prioritization, and roadmapping tool

### 

### 10/15/20 PBGO, PBSE & PBBO

**PBGO**

* **Teams**
  + **Next Up**
    - [Reporting](https://bostonlogic.atlassian.net/browse/BDT-19268?) updates
    - [Automation & QS improvements from weekly meeting](https://bostonlogic.atlassian.net/issues/?filter=10703)
  + **Completed**
    - Launch Section
      * Launch & DNS config w/o Onboarding Assistance
      * FindMe.homes - subdomain provisioning
    - Areas - image upload
    - Hero - image upload

**Next-up**

* + **Meta-data Templates**
    - Templates - In QA
    - URL Structure
  + [**Website Lead Conversion Optimization**](https://bostonlogic.atlassian.net/browse/BDT-19569)
    - Reporting
    - Information on Lead info & email
    - Short lists & weighted averages
    - Secondary information mapping
  + **ADA Compliance - Usability.net**
    - Final decision pending
  + **Federated Roster Management** 
    - PBBO, PBSE, PBGO - client list match-up
  + **Migration to Next-Gen**
    - Existing contacts vs MRR Report

**PBBO**

* + - * **4.0**
  + Finalizing features for initial preview & net-new November 1st launch
  + Burndown of remaining tasks
  + Dynamic Reporting
  + S3 Migration - POC underway
    - * **Client Commits**
        + Transactions API requests
      * **PBSign & PBForms**

Endpoint creation - document retraction

Label control (creator)

Textbox improvements

* + - * **Enhanced Commission Plans**

On Hold

* + - * **PBBO outbound transactions API**
        + Add gross financials - pending (yet to do)
        + Add net financials for Murney - pending
        + Add username to associate contacts - pending
      * **MLS migrations from RETS/WolfNet to PBMLS**
        + Progressing over time - 17 of 112 completed.
      * **Quickbooks Online configuration page - API Nation**
        + Integration Overhaul

**PBSE**

* **International efforts:**
  + **In Progress** - Configuring int’l TSO, will message when ready for use
  + **Researching** - Area management
  + **Researching** - Data migration for ReapIT and Propspace
* **General:**
  + **Done -** Winter 21 release’s changes on guest users
  + **Done -** Ability to add property owner on listing creation
  + **In Progress -** Add related object details to tasks
  + **In Progress - Various bug fixes**
* **Other:**
  + Working to modify dev team processes and cadence for better predictability and velocity
  + Waiting on signature for Product feedback, prioritization, and roadmapping tool

### 10/01/20 PBGO, PBSE & PBBO

**PBGO**

* + - **Teams**
      * **Next Up**
        + [**Burndown**](https://bostonlogic.atlassian.net/issues/?filter=10703)
        + Launch Section

Launch & DNS config w/o Onboarding Assistance

* + - * + Areas - image upload
        + Hero - image upload
        + [Leads/Contacts](https://bostonlogic.atlassian.net/browse/BDT-19392) - Additional Information
        + [Reporting](https://bostonlogic.atlassian.net/browse/BDT-19268?) updates
      * **Discussion -** Quick Setup for all clients & migrations to Website Builder
        + Sunset existing onboarding
      * **Completed**
        + FindMe.homes - subdomain provisioning
        + Billing account status notifications
        + CS Feedback

Client Reports - email updates

* + - * + SMS - lead notification
        + Branding Updates (required, other, logo-save)
        + Welcome Email - CC: PB Support
        + BL Urgent Messages → CRM Tasks
        + Google Maps API Key
    - **Murney -** DONE
      * Broker CRM - manage agent & employee roster *(notes, docs, transactions, saved searches, set tasks & events)*
      * Contact Tagging - Add custom tags to contacts
      * Integrated Text Concierge - manage TC interactions from CRM
      * Mailing Labels - download printable addresses
    - **Email Marketing** - DONE
    - **ADA Compliance - Usability.net**
      * Final decision - pending
    - **Federated Roster Management** 
      * Carpenter & One Sotheby’s
      * Ready for Remaining - client list match-up

**PBBO**

* + **4.0**

Finalizing features for initial preview

Executing against remaining, prioritized tasks

* + **Onboardings** - ongoing
  + **Client configuration requests** 
    - Rogers Healy - Blend: Schedule Post Preview, Documentation Download options
  + **PBSign & PBForms** 
    - * Smaller signatures - multi signatures
      * Signature ordering
      * Immediate sign - before send
  + **Enhanced Commission Plans**
    - * In UAT
* Requested full test plan from Chetu
  + **FRM**
    - Most issues resolved.
    - One Sotheby’s = active
    - Next Steps are remaining companies
  + **PBBO outbound transactions API**
    - Add gross financials - pending (yet to do)
    - Add net financials for Murney - pending
    - Add username to associate contacts - pending
  + **MLS migrations from RETS/WolfNet to PBMLS**
    - Progressing over time - 15 of 112 completed.
    - (2) in queue
  + **Quickbooks Online configuration page - API Nation**
    - ApiNation Integration defects - In Progress
  + **On deck internal needs**
    - API trace log data for inbound requests
    - API trace reporting UI for all interactions

**PBSE**

* **General:**
  + We’ve hired a tech lead!
* **International efforts:**
  + Finishing up with a company to migrate all metadata from US TSO to international TSO
* **SE:**
  + **Researching** - Area management and searching improvements
  + **Testing** - Winter 21 release’s changes on guest users
  + **Planned** - Contact creation on listing creation
  + **Planned** - Add related object details to tasks
  + **Planned** - Register a contact from a listing, created inquiry, and link listing
  + **In progress -** Users prompted to login to website from MLS browser
* **Troubleshooting:**
  + Will need to spend time with new tech lead to develop tools, process, and necessary information for bug tickets submitted

### 

### 09/17/20 PBGO, PBSE & PBBO

* **PBGO** 
  + - **Teams**
      * **PBGO Product Use - All provisioning -??**
      * **Lead scoring for TC Leads**
      * **Discussion - @Tim “normal clients”**
        + **GuideCX + Quick Setup elimination - timetable & expectations**
    - **Murney**
      * **Lead Tagging** - DONE
      * Broker CRM
        + Custom contact types
        + Manage your agents like your agents manage their contacts)

Agent Notes, Documents, Saved Searches, Email Marketing *- QA*

Transactions *- Underway*

Agent Tasks & Events, Messages (Email & SMS), Action Plans, Custom Fields *- Planning*

* + - **Email Marketing** - DONE
    - **ADA Compliance - Usability.net**
      * Final decision - pending
    - **Federated Roster Management -** carpenter only
      * Discover clients with >1 PB product lines for testing
      * Support Training PB & PBBO coordination
    - **Zillow API Update** - DONE
  + **PBBO**
  + **4.0 MVP**

Updating Transact, Promote, and Learn interfaces to latest updates.

UX Improvements (e.g. Timeline on Summary page for activity, documents-in, signatures out

* + **Onboardings** - ongoing
  + **Client configuration requests** 
    - RRDonnelly/Markit/Joyce - Problem templates (Harrison), InDesign Crosstraining
    - Judge Fite - enhancements/additions to custom tracking/reporting - sold cards, client club - DONE
  + **PBSign -** all clients removed, HelloSign activated
    - * Assigned to chetu - diagnose and correct reported issues - placements not holding proper position. - PR ready - not sure about this one
      * Creator ability to sign first - PR ready for review/merge
      * Signer order selection - PR ready for review/merge
      * In progress - spec/design for document revoke
  + **Enhanced Commission Plans**
    - * Plan configuration UAT - Login enabled as of 09/10 for testing h[ttps://chetucomm.pboffice.net/transact/detail/funding\_new/plan\_list/](https://chetucomm.pboffice.net/transact/detail/funding_new/plan_list/)
* Includes disbursement UAT at /transact/detail/funding\_new/funding\_disbursement/?T=<id>
* Still needs dynamic connection strings somehow - unknown if this is possible
* Need full test plan and document the results/issues
  + **PBBO outbound transactions API**
    - Add gross financials - pending (yet to do)
    - Add net financials for Murney - pending
    - Add username to associate contacts - pending
  + **MLS migrations from RETS/WolfNet to PBMLS**
    - Progressing over time - 15 of 112 completed.
  + **Quickbooks Online configuration page - API Nation**
    - PBBO - Sandbox environment complete
    - Converting the way account provisioning is done - in progress
  + **On deck internal needs**
    - API trace log data for inbound requests
    - API trace reporting UI for all interactions
* PBSE
* **General:**
  + We’ve hired a tech lead!
* **International efforts:**
  + Finishing up with a company to migrate all metadata from US TSO to international TSO
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  + **Planned** - Register a contact from a listing, created inquiry, and link listing
  + **In progress -** Users prompted to login to website from MLS browser
* **Troubleshooting:**
  + Will need to spend time with new tech lead to develop tools, process, and necessary information for bug tickets submitted

### 

### 09/03/20 PBGO, PBSE & PBBO

* **PBGO** 
  + - **Teams**
      * **Quick Setup Rapid Onboarding (Build) - Deployed**
    - **Murney**
      * **Lead Tagging** - DONE
      * Broker CRM
        + Custom contact types
        + Manage your agents like your agents manage their contacts)

Agent Notes, Documents, Saved Searches, Email Marketing *- QA*

Transactions *- Underway*

Agent Tasks & Events, Messages (Email & SMS), Action Plans, Custom Fields *- Planning*

* + - **Email Marketing** - DONE
    - **ADA Compliance - Usability.net**
      * Final decision - pending
    - **Federated Roster Management -** carpenter only
      * Discover clients with >1 PB product lines for testing
      * Support Training PB & PBBO coordination
    - **Zillow API Update** - DONE
  + **PBBO**
  + **4.0 MVP**

Updating Transact, Promote, and Learn interfaces to latest updates.

Actively working on client and vendor integrations/branding.

* + **Onboardings** - ongoing
  + **Client configuration requests** 
    - Chicagoland - Dotloop, PBSign, HelloSign, Dotloop (Refund)
    - CB&A - updated quick link to CirclePix/CORE ListingMachine
  + **On deck client commits**
    - Judge Fite - enhancements/additions to custom tracking/reporting - sold cards, client club, yard signs
  + **PBSign -** all clients removed, HelloSign activated
    - * Assigned to chetu - diagnose and correct reported issues - placements not holding proper position.
      * In progress - spec/design for document revoke
  + **Enhanced Commission Plans**

<https://chetucomm.pboffice.net/transact/detail/funding_new/plan_list/> - QA

* Need to get chetu working on architecture changes for the data access layer
  + PBBO outbound transactions API
    - Add gross financials - pending (yet to do)
    - Add net financials for Murney - pending
    - Add username to associate contacts - pending
  + **MLS migrations from RETS/WolfNet to PBMLS**
    - Progressing over time - 15 of 112 completed.
    - **Quickbooks Online configuration page - API Nation**
    - PBBO - Sandbox environment complete
    - Converting the way account provisioning is done - in progress
    - Transactions
* Transaction integrations - step by step integration between PBSE & PBBO
* **On deck internal needs**
  + API trace log data for inbound requests
  + API trace reporting UI for all interactions
* PBSE
* **General:**
  + We’ve hired a tech lead!
* **International efforts:**
  + Finishing up with a company to migrate all metadata from US TSO to international TSO
* **SE:**
  + **Researching** - Area management and searching improvements
  + **Testing** - Winter 21 release’s changes on guest users
  + **Planned** - Contact creation on listing creation
  + **Planned** - Add related object details to tasks
  + **Planned** - Register a contact from a listing, created inquiry, and link listing
  + **In progress -** Users prompted to login to website from MLS browser
* **Troubleshooting:**
  + Will need to spend time with new tech lead to develop tools, process, and necessary information for bug tickets submitted

### 

### 08/20/20 PBGO, PBSE & PBBO

* **PBGO** 
  + - **Teams**
      * **Quick Setup Rapid Onboarding (Build) - Nearly *Complete***
      * [**BL & PBGO Runthrough today**](https://docs.google.com/presentation/d/1HaH_41xDKz-bfNq26Nx2E4alTFlDFPaVBInTcu_zpI0/edit?ts=5f3af0da#slide=id.g91686febcb_2_13) - Slide Deck
      * Staging - <http://the-graham-team.staging.bostonlogic.com/admin/setup>
        + Email: gcohen@propertybase.com
        + Password: LsErqf2N
    - **Text Concierge**
      * Agent notes updating from PBGO --> BL
        + Email: sylvia@boldleads.com
        + Password: XLjQyBRw
        + [http://sanders-realty-1.staging.bostonlogic.com/admin/setup](http://email.sequoiarealestatesolutions.com/ls/click?upn=LeKjM6dvYI-2Bybl7cwC6yx49aNz-2BMtxYmteL99AVNUEWO31o4MAtPtJA5leYXlt1d9iYG7ar1p4bLO77cOV00BBcSyUxiRq2k7MWgItyUfsTHAB0WmxvbcDKkMwyqyl2wVBnoFlVXu9KssM3BCQdgik4YR7tLt-2FtqSedeWVOrblq28qrPXTCz72rMSaEwQ2omu3QH_M69VwTVUs01xDlz4BBa0JvN4Q23rKFPt85v5fxwPqPO-2F0mCQX9V8DXy0pUON-2ByfcEGcOWBOY96Uhjz-2F90Zeok0TNIaMGU1TxtUTS3hVRgESqGnBcuOFORL8G0TKBwTCVTTw-2BkpHzg4ZQhXChV-2BZ5YI7QpI9iUEXBCq0r2NprHvORNnHGaI6MsJUU4IxdC0BCz9s7YaVVl1e-2BT67UkDMnPQg0xPlzmzDXfloEisOkZc4-3D)
    - **Murney**
      * **Lead Tagging** - *Ready for Deploy*
      * Broker CRM
        + Custom contact types
        + Manage your agents like your agents manage their contacts)

Agent Notes, Documents, Saved Searches, Email Marketing *- QA*

Transactions *- Underway*

Agent Tasks & Events, Messages (Email & SMS), Action Plans, Custom Fields *- Planning*

* + - **Email Marketing** - *QA (additional marketing items remaining - hopefully* 
      * Template Builder Updates
      * Newsletter and Drip Workflow Updates
      * Date Trigger based emails
      * New recurring newsletter options
    - **ADA Compliance**
      * ADA Vendor comparison / consideration *- Presented, requesting additional information*
    - **Federated Roster Management -** carpenter only
      * PBGO/PBBO - *testing on live clients in production before system wide rollout*
      * PBSE integration - *Planning*
  + **PBBO**
  + **4.0**
    - * Amazon S3 CDN issues resolved - client data migration in progress *(slow trickle during day, bursts every night)*
      * October 1st - net new clients
      * November/December - Existing client migration plans (e.g. BO websites)
  + **Onboardings** - ongoing
  + **Client configuration requests** 
    - ongoing zendesk (questions, date of info, MLS config, wiring instructions)
  + **On deck client commits**
    - Chicagoland - add display of related transactions on listing detail page
    - C21 Judge Fite - addl functionality on custom reports - Sold Cards and Preferred Client Club. Needs spreadsheet download. May also need new report mode for Completed.
  + **Upsell add-ons removed** - fax, rackspace email, agent websites
  + **Enhanced Commission Plans**
    - *UAT is up and ready for testing*
  + FRM / PBBO inbound API
    - (see above)
  + PBBO outbound transactions API
    - Add gross financials - pending (yet to do)
    - Add net financials for Murney - pending
    - Add username to associate contacts - pending
  + **MLS migrations from RETS/WolfNet to PBMLS**
    - Progressing slowly over time - 14 of 112 completed.
    - *Waiting on Tom’s team for SWMLS - urgently needed*
  + **Quickbooks Online configuration page - API Nation**
    - PBBO - Sandbox environment complete
    - Converting the way account provisioning is done - in progress
  + **eSignature**
  + Working & re-enabled
  + Chetu - enhancements underway
* **4.0 MVP**
  + - * Updating Transact, Promote, and Learn interfaces to latest updates.
      * Actively working on client and vendor integrations/branding.
* **Transactions**
* Transaction integrations - step by step integration between PBSE & PBBO (melanie/brad - can indicate whether is working or not)
* **Mailgun email delivery/validation** pboffice.net - issue resolved
* **File Transfer Latency Issues** - Problem - File IO - receiving files - 2 issues (threatening to churn - worthclark, 2 x remax)
  + 1) Taking too long to copy from storage location to webserver n- BO calls from webserver cache
  + Regional internet issue - matters who internet uplink is and routing to L3 technology in Dallas telecom (too many hops w/ throttling)
  + (temp solution - move to isolated web server)
* **On deck internal needs**
  + API trace log data for inbound requests
  + API trace reporting UI for all interactions
* PBSE
* **General:**
  + Still in search of tech lead
* **International efforts:**
  + Working with a company to migrate all metadata from US TSO to international TSO
* **SE:**
  + **Planned** - Add related object details to tasks
  + **In progress -** Users prompted to login to website from MLS browser
  + **In progress -** JS error with field migration
  + **Done -** Ability to delete contacts with active drip campaign
  + **Done -** Visual bugs with some buttons
* **Backend + “Pasar”**:
  + **In progress -** Investigating issue with Pasar not accepting emails with inbox address in the CC field
  + **Done -** Disabling bounced email notification on drip campaign - comes from customer complaint
  + **Done -** Pasar search returning 500 errors
  + **Done -** Ability to update the PB account that owns newly parsed leads

### 08/13/20 PBGO & PBBO

* + Onboardings - ongoing
  + Client configuration requests - ongoing zendesk (questions, date of info, MLS config, wiring instructions)
  + Upsell add-ons removal - fax, rackspace email, agent websites
    - 80% complete. Sales inquiry links have been removed. Will be fully closed to new business after some QA in the next day or so.
  + Enhanced Commission Plans
    - *Trialing Chetu’s code and interfaces.*
    - *SEtting up to run locally*
    - *Figuring out dependencies*
    - *Will push it to our UAT environment, once completed*
    - *Closer than we were last week.*
  + PBFRM / PBBO inbound API
    - Testing, fixes, improvements still in progress
  + PBBO outbound transactions API
    - Add gross financials - pending (yet to do)
    - Add net financials for Murney - pending
    - Add username to associate contacts - pending
  + MLS migrations from RETS/WolfNet to PBMLS
    - Progressing slowly over time - 12 of 112 completed.
    - *Waiting on Tom’s team for SWMLS - urgently needed*
  + Quickbooks Online configuration page
    - Converting the way account provisioning is done - in progress
    - Improving locational logic to support multiple configurations at different office levels.
  + On deck internal needs
    - API trace log data for inbound requests
    - API trace reporting UI for all interactions
  + On deck client commits
    - Chicagoland - add display of related transactions on listing detail page
    - C21 Judge Fite - addl functionality on custom reports - Sold Cards and Preferred Client Club. Needs spreadsheet download. May also need new report mode for Completed.
* eSignature
  + Chetu identified an expired certificate issue in the code. They replaced the cert and have shown successful signatures on final documents. PRs pending for merge and publish.
* Transactions
* Transaction integrations - step by step integration between PBSE & PBBO (melanie/brad - can indicate whether is working or not)
* Mailgun email delivery/validation pboffice.net
* Problem - File IO - receiving files - 2 issues (threatening to churn - worthclark, 2 x remax)
  + 1) Taking too long to copy from storage location to webserver n- BO calls from webserver cache
  + Regional internet issue - matters who internet uplink is and routing to L3 technology in Dallas telecom (too many hops w/ throttling)
  + (temp solution - move to isolated web server)
* Solution - Amazon sourcing/CDN
  + testing plugin for files to write to Amazon, and pull while maintaining security through existing handlers (ensures must be logged in to pull files - amazon creates single-use URL)
  + Client data migration -
  + Data issue solved - Page to Page delays
    - current approach - moving to isolated web servers to solve latency issue
    - 4.0 will be running on many instances across many servers
    - 14k month to Centre, 1400/month with Amazon +IO charges

### 

### 08/06/20 PBGO, PBSE & PBBO

* 4.0 Project
  + Conversion process review:
    - Functionality - Basic functionality and minimal responsiveness - 95%
    - Logic Transfer - Migrating all current 3.9 logic - 80%
    - Aesthetics - Visual & Design (UI/UX) - 70%
  + MVP Version
    - Storing new files to Amazon S3 (which will also \_\_\_ in 3.9)
    - Agent critical interfaces are nearly complete, pending aesthetic/design updates on Transact. Feedback from staff and clients to be absorbed.
* Client data migration to Amazon - backload
* Enhanced Commission Plans
  + PBBO engineering learning codebase for push to UAT
* eSignatures
  + Error identification & file storage scaling problem
  + Chetu handoff/intro
  + Prepared test environment
  + Made code available in Github
* Rogers Healy Video Library
  + Client-commit - Pending deployment
* LoneWolf Financial Integration - In Progress
  + Accounting & reconciliation
* PB API Data Export Updates - Pending
  + Add financial data to API for PBSE/PBGO
  + Identified additional data required for Murney model
* PB Federated Roster Management
  + Continuous debugging - In Progress
* PBGO MLS Data - Migration
* APINation
  + Quickbooks integration improvements
  + Customer support framework
* Ryan’s Birthday
  + Rudely interrupted - In progress
  + Cigars accomplished prior - waiting on resources

### Propertybase Salesforce Edition

* **General:**
  + With Phillip’s departure, we’re currently searching for a new engineering lead for the PBSE dev team. Between this and me (Shannon) getting up to speed with the Salesforce and PBSE, features and bug fixes may be slow for a little while. We’ll have to look at each item as it comes in to determine priority and so be patient with me as I ask for more information on each feature request and bug ticket.
* **International efforts:**
  + Lippi is working on setting up a new TSO for the international market, specifically geared towards the UK and Middle East markets. There will be some development work there, but it is currently mostly configuration.
* **Product tooling:**
  + We’re currently evaluating tools to help make the feedback collection and product/feature development process better and more streamlined. I would like to get away from using JIRA for feature requests and customer feedback. There are tools out there to help us categorize and quantify feedback, then prioritize features that come from that feedback as well as provide a roadmap of when those features will be available. More info to come here. JIRA would still be used for engineering and bug tickets, just not for feature requests and feedback.
  + We recently purchased a tool to help us with product usage data, which will help us take a better, data-driven approach to the PBSE product.
* **Agent adoption, customer retention, churn:**
* If you have ideas, feedback, comments, etc about PBSE and how we get customers to use our product, how we keep customers around, how we prevent churn from a product perspective or any issues with the above, please let me know, as I would love to learn more.

### 07/23/20 PBGO & PBBO

* 4.0 Project
  + Conversion process review:
    - Functionality - Basic functionality and minimal responsiveness - 95%
    - Logic Transfer - Migrating all current 3.9 logic - 80%
    - Aesthetics - Visual & Design (UI/UX) - 70%
  + MVP Version
    - Agent critical interfaces are nearly complete, pending aesthetic/design updates on Transact. Feedback from staff and clients to be absorbed.
  + Full Version
    - Key sections to be included: Reports, staff-only interface/workflow improvements
  + Deployment Goals & Timeline
    - August - complete all aspects of MVP and process feedback
    - September - expand staff features and prepare for rollout, new clients active
    - October - current client migration begins
    - November - client migration completes
    - December - 3.9 is decommissioned
* Martha Turner SIR - OKTA SSO
  + UAT complete, SOW completed.
  + Go-live (post-MTSIR comms) - 07/22
* Enhanced Commission Plans
  + Microservice Functionality - Create/Edit/Delete plans - In QA, pending deep tech review.
  + Design - Underway
  + Integration - Not started
* Funding Disbursement Updates
  + New interfaces in prototype, not yet reviewed by Engineering
* Rogers Healy Video Library
  + Original by-hand solution nearly complete
  + New Vimeo solution identified (Project on hold)
* LoneWolf Financial Integration
  + Big update to member mapping - improved performance, showing office assignment now and filtering inactives.
  + Done
* PB API Data Export Updates
  + To add financial data to API for PBSE/PBGO - it can be done fairly quickly on a client by client basis or a larger update would be needed to deploy it out to all clients.
* PB Federated Roster Management
  + API endpoints completed - pending PB production testing.
* PB e-Signature
  + V1 deployed, V2 needed.
* Dynamic Media / Print Fulfillment
  + Training of Harrison going well, new templates loading in weekly
  + Need design focus to create new general use templates for social media
* Switch to PBGO MLS Data