



# CRM

## 2026.3.1 RELEASE NOTES

### Enhancements & Modifications

#### Take Control Over Required Fields for Prospects and Partners

When adding Prospect and Partners to the CRM through the Customer Dashboard, more than just the Name field can be required. Simply go to Administration – Setup – CRM Settings – Prospect & Partner Form Setup and toggle on the required fields of your choosing.

**Prospect Form Setup**  
Select the required fields for creating a prospect below.

Form Field	Required
Name / Business Name	<input type="checkbox"/>
Title	<input checked="" type="checkbox"/>
Preferred Name	<input checked="" type="checkbox"/>
Website URL	<input type="checkbox"/>
Address	<input checked="" type="checkbox"/>
City	<input checked="" type="checkbox"/>
State	<input checked="" type="checkbox"/>
Zip	<input checked="" type="checkbox"/>
Email	<input checked="" type="checkbox"/>
Phone 1	<input type="checkbox"/>
Phone 2	<input type="checkbox"/>
Phone 3	<input type="checkbox"/>
Date of Birth	<input checked="" type="checkbox"/>

**Partner Form Setup**  
Select the required fields for creating a partner below.

Form Field	Required
Name / Business Name	<input type="checkbox"/>
Title	<input checked="" type="checkbox"/>
Preferred Name	<input checked="" type="checkbox"/>
Website URL	<input type="checkbox"/>
Address	<input checked="" type="checkbox"/>
City	<input checked="" type="checkbox"/>
State	<input checked="" type="checkbox"/>
Zip	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>
Phone 1	<input type="checkbox"/>
Phone 2	<input type="checkbox"/>
Phone 3	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>

**Add Prospect**

Name/Business Name \*

Title

Preferred Name

Website

Address \*

City \*

State \*  ZIP \*

Email \*

Phone   Primary

Phone

Phone

Date Of Birth

- Name is required and must be between 3 and 40 characters long.
- Address is required.
- City is required.
- State is required.
- Zip is required.
- Email is required.

Cancel Save Save & Add Contact



## Save and Add Contacts

Whether creating a new Prospect or adding additional Contacts, there is now a Save & Add Contact button which creates a faster way to add additional Contacts to your selected Household, Customer, Prospect, or Partner. This will save you time and clicks.

**Add Prospect**

Name/Business Name \*

Title

Preferred Name

Website

Address \*

City \*

State \*  ZIP \*

Email \*

Phone   Primary

Phone

Phone

Date Of Birth

## New Website Field

There is now a Website field that can be populated on the Customer Dashboard. This allows you to add a URL such as the business website to Customers, Prospects, and Partners. The Website field is clickable.

**Edit Prospect**

Name/Business Name \*

Title

Preferred Name

Website

Address \*

City \*

State \*  ZIP \*

Email \*

Phone   Primary

Phone

Phone

Date Of Birth

**CRM**

Dashboard Discovery Customer Dashboard Work List Administration

**Customer Dashboard** Prospects

**MARQUIS SOFTWARE**

Preferred: <https://gomarquis.com>

6509 WINDCREST DR  
PLANO, TX 75024  
contact@gomarquis.com

Date of Birth: ( years)

Do Not Mail  
Do Not Email  
Employee

Head of household  
Marketing Opt Out

Manager: **Marquis Support**  
Branch: **Default**  
Region: **Default**

**Household Customers**

Marquis Software



## Work List Now Displays Past Due Icon

If an Activity Log on the Work List has a Due Date in the past, it will display the same icon from the Customer Dashboard to alert it is past due.

The screenshot shows the CRM Work List interface. At the top, there are navigation tabs: Dashboard, Discovery, Customer Dashboard, Work List (selected), and Administration. The marquis logo is in the top right. Below the tabs, there are filter controls for Status (To Be Done, Processing), Activity (Referral), Product/Service (All), For/By (Assigned For), Filter By (User), User (Jennifer Cooper), Date Type (Due Date), From Date (mm/dd/yyyy), and To Date (05/29/2025). Below the filters is a table with columns: Status, Activity Log Type, Subject, Due Date, Logged Date, Processing Date, Done Date, Contact, Assigned By User, Assigned For User, Product, and Service. The first row of data shows: Status: To Be Done, Activity Log Type: Referral, Subject: Signed up Rick for Mobile App on RS Investments, Due Date: 07/09/2025 (with a red past due icon), Logged Date: 07/09/2025, Contact: Richard Martin, Assigned By User: Jennifer Cooper, Assigned For User: Jennifer Cooper, Product: MobileApp. At the bottom, it says "Showing 1 to 1 of 1 logs" and "Show 50 logs".

## Bug Fixes

### Reporting

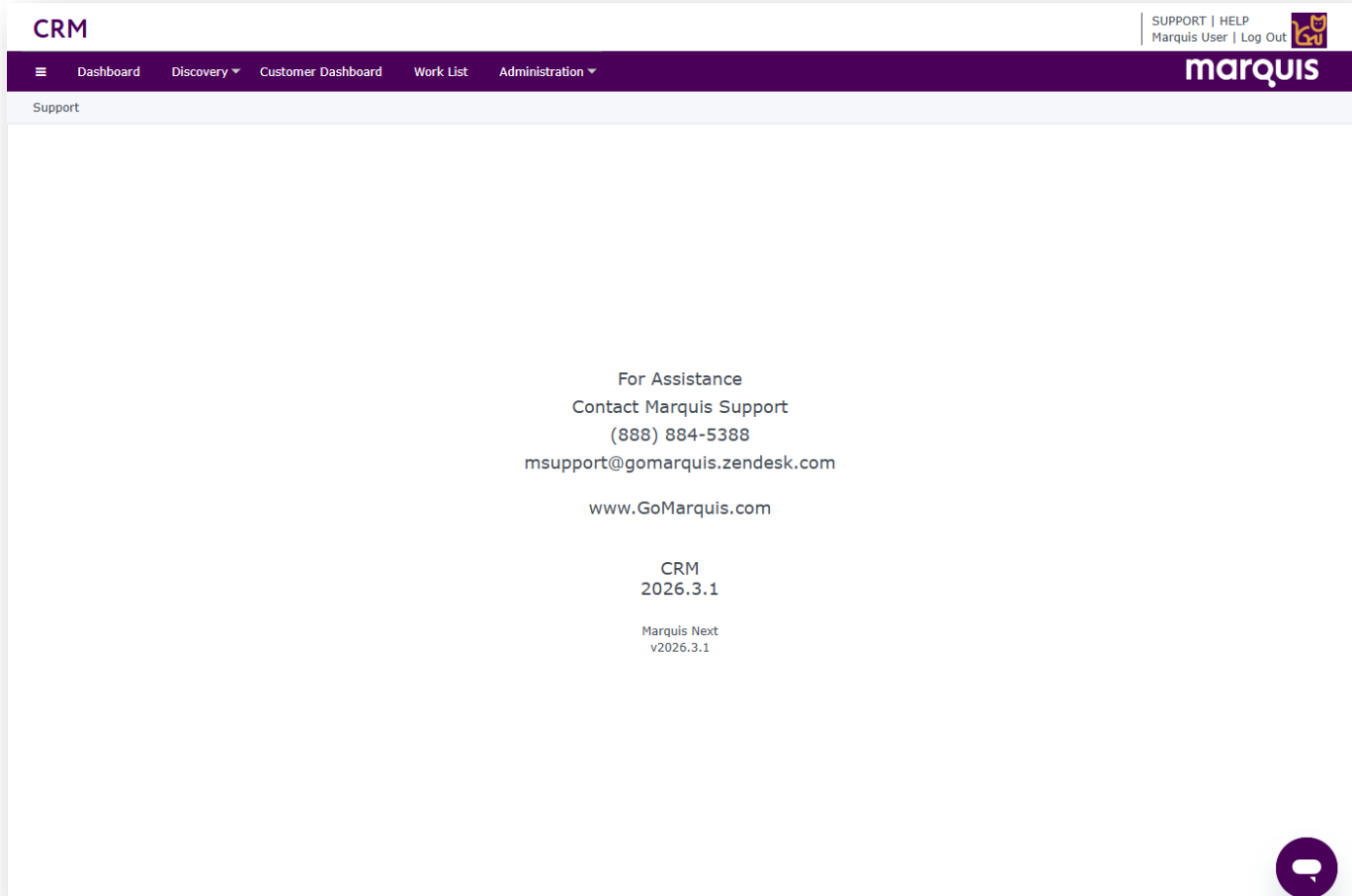
- Improved the performance of the Incentive Detail reports. (ZD #39690)
- Fixed the Activity Log Report to no longer display duplicate Comments (ZD #39932)

### Customer Dashboard

- Fixed the issue that prevented the Autoload from a core system link to the CRM from pulling up the selected customer. (ZD #38513)
- Fixed an issue where the duplicate prospect modal didn't always appear when creating a new Prospect that potentially matched an existing. (ZD #38267 & #39999)
- Corrected inconsistencies with timestamps on Activity log Comments and the History tab.

# Version Check

Ever wonder what version you are on? Simply click the SUPPORT link at the top right corner of the page. If it doesn't match the screenshot below, please contact [Marquis Support](#) or your Client Relationship Manager.



The screenshot shows the Marquis CRM interface. At the top left, the word "CRM" is displayed. The top right corner contains the text "SUPPORT | HELP" and "Marquis User | Log Out" next to a small icon. Below this is a navigation bar with a hamburger menu icon and the following links: "Dashboard", "Discovery", "Customer Dashboard", "Work List", and "Administration". The "marquis" logo is positioned on the right side of the navigation bar. The main content area is titled "Support" and contains the following text:

For Assistance  
Contact Marquis Support  
(888) 884-5388  
msupport@gomarquis.zendesk.com  
www.GoMarquis.com

CRM  
2026.3.1

Marquis Next  
v2026.3.1

A circular chat icon is located in the bottom right corner of the page.