



# Chardonnay

**Product Release**

February 2020

 **Practifi**



“The best Chardonnays in the world are known for their bold and luminous golden-yellow color. This foresees an incredibly complex flavour that has an amazing way of hyper-stimulating your taste buds.

Depending on the climate and terrain the white grapes are grown in, Chardonnay wines can have one of the widest ranging tastes and aromatic profiles of any grape variety. Similarly, this release was inspired by the wide variety of feedback we’ve received to enhance various aspects of the product including client views, integrations and overall usability.”

**Glenn Elliott**

**CEO**



# Key Enhancements

Each of these features is a critical element of what makes Practifi work, so we've pushed ourselves as a team to examine each one closely and find ways to make it even better.

## Client Profile Tearsheets

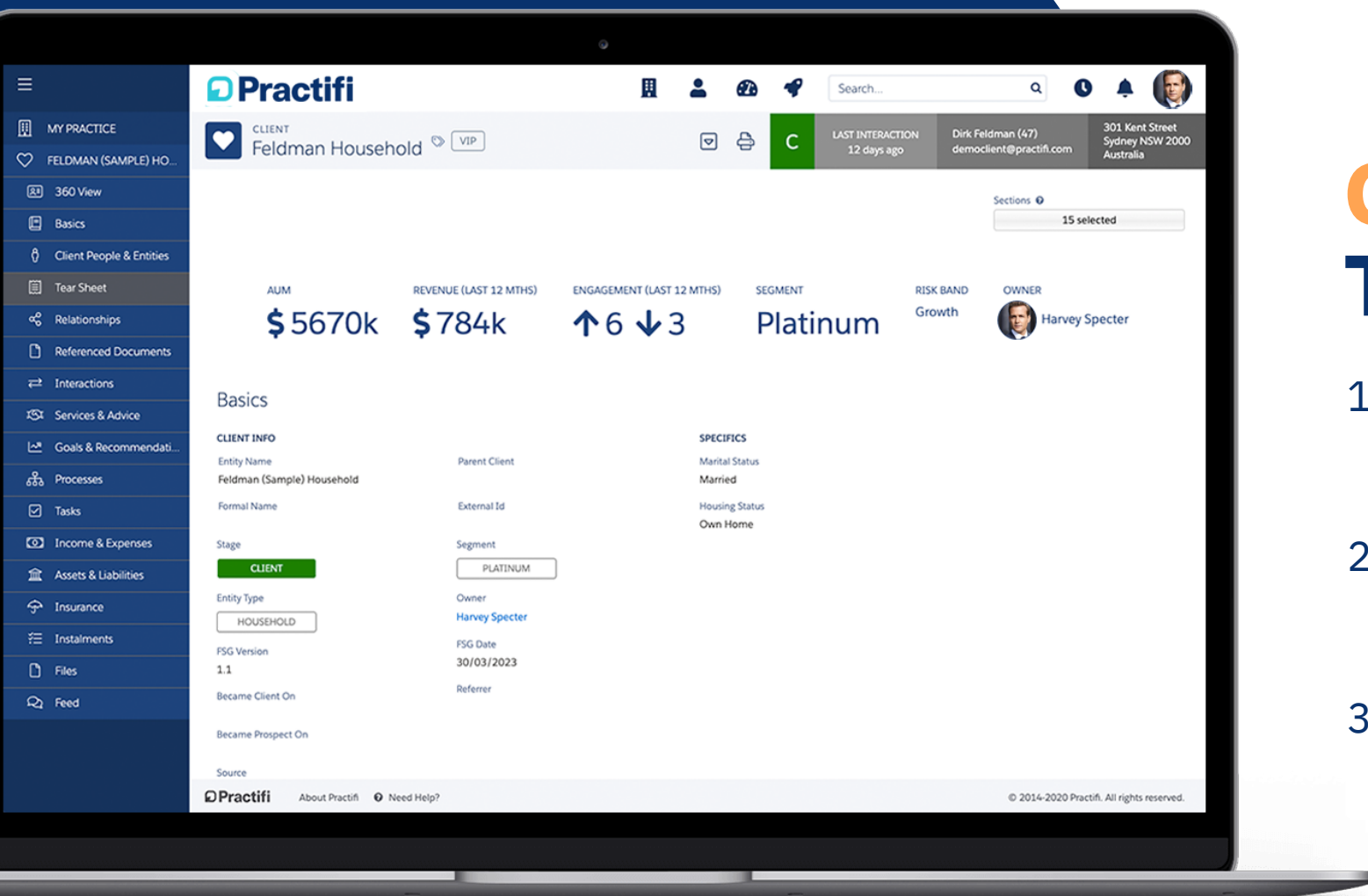
Experience client records in a whole new way. You can now view the **entire client record** in a configurable one-page full view. Better yet, you can **print it out and use it in a tearsheet format** so you can use it on-the-go!

## Task & Interaction Full Views

You can now view individual **Tasks and Interactions** in a full view context. This means all related Interactions, Tasks, Time Entries and files can also be **added and edited directly from the full view**.

## Mass Tagging Records

Speed up your work-day by **tagging multiple records at once**. List and Data Management pages for Client, Provider, Prospect, Person and Employer records can now utilize this new feature!



# Client Profile Tearsheet

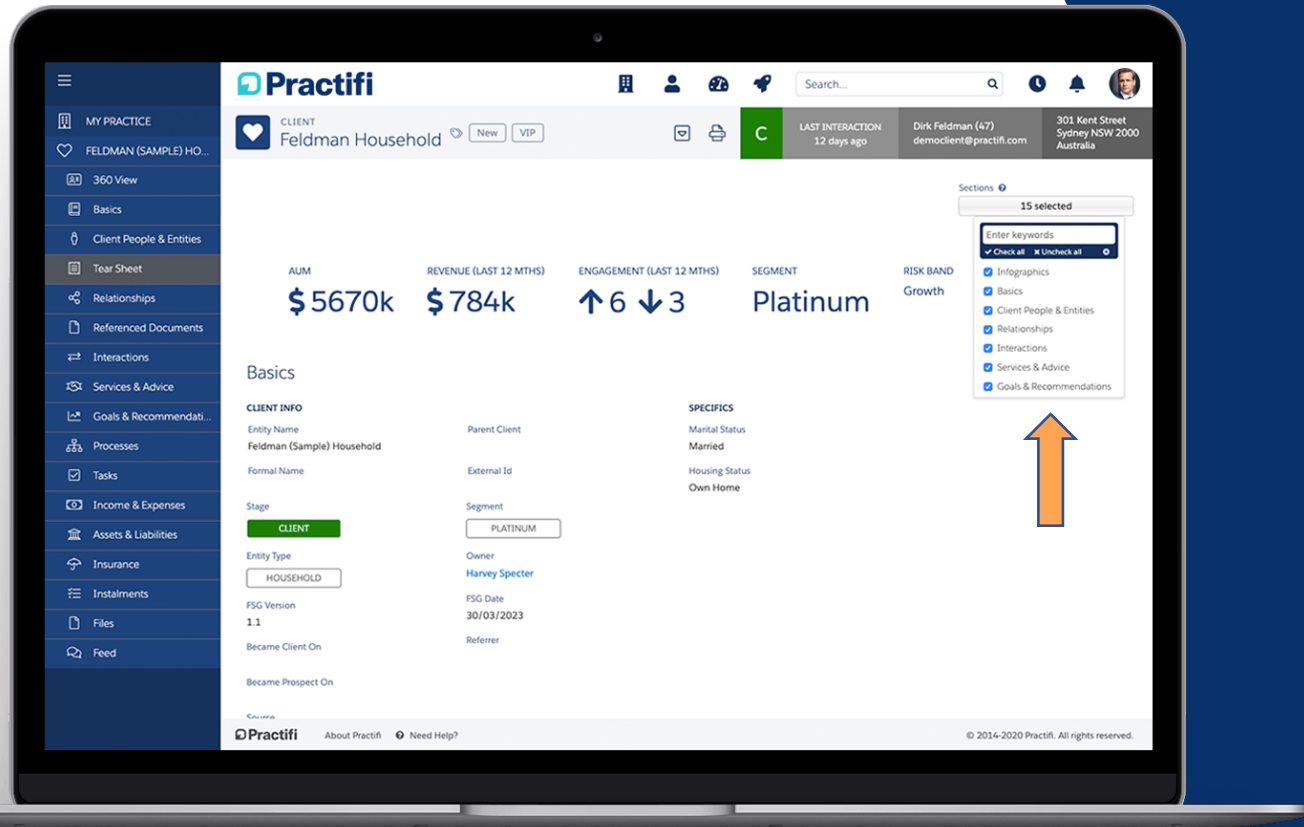
1. Swap out sections to show the client information that's most relevant
2. Quickly check and view all section information in the full view context
3. Easily print the full view so you can use it as a tearsheet while you're on the go!

# Choose your desired **Sections**

By clicking on the Sections button in the upper right-hand corner of the page, you'll be able to choose which Sections of the client profile you want to appear.

All Sections that are currently available in your side navigation bar will be displayed as Section drop down choices.

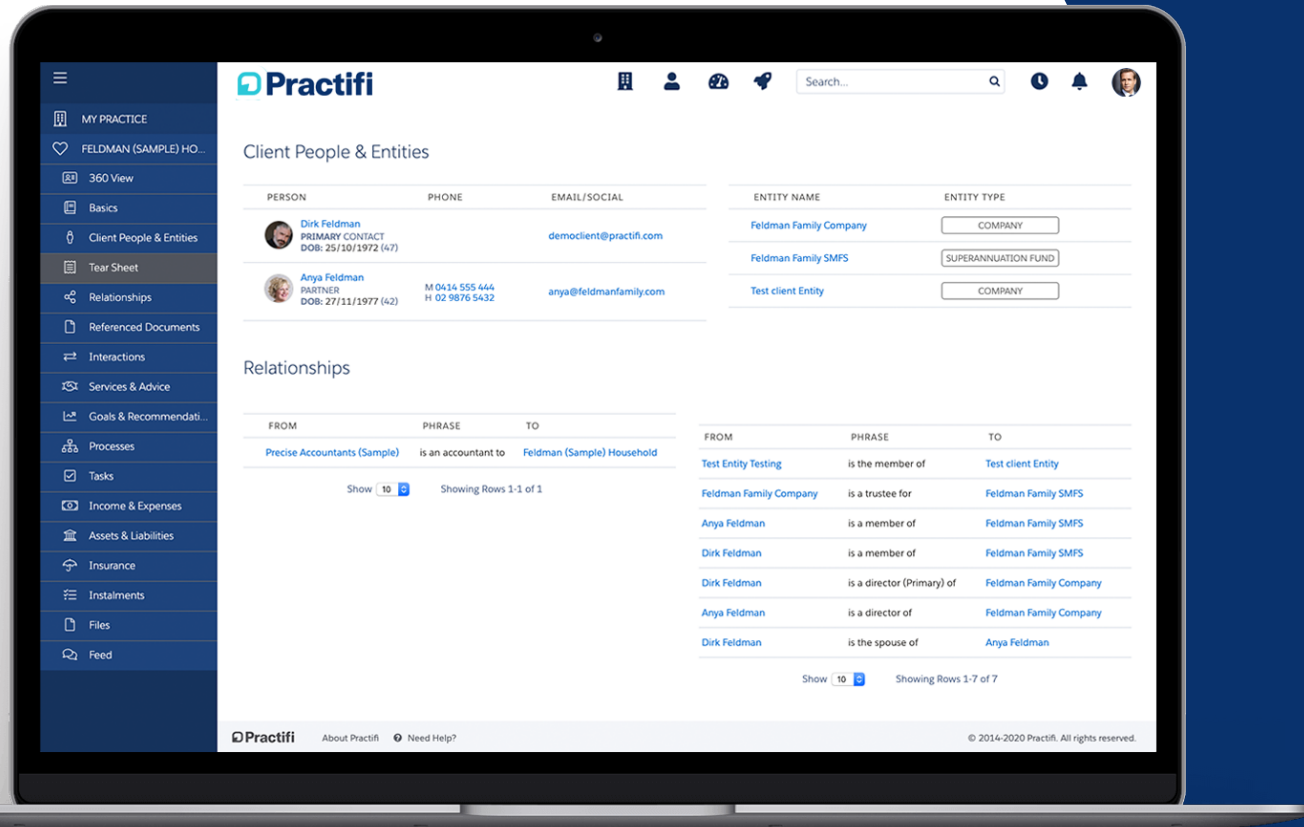
Choose as many (or as few) as you'd like to create the most comprehensive client full view!



# Explore your client profile full view

Once you've chosen your desired Sections, explore your new client profile full view by scrolling down the page.

You'll be able to seamlessly view all relevant client information without switching between tabs.



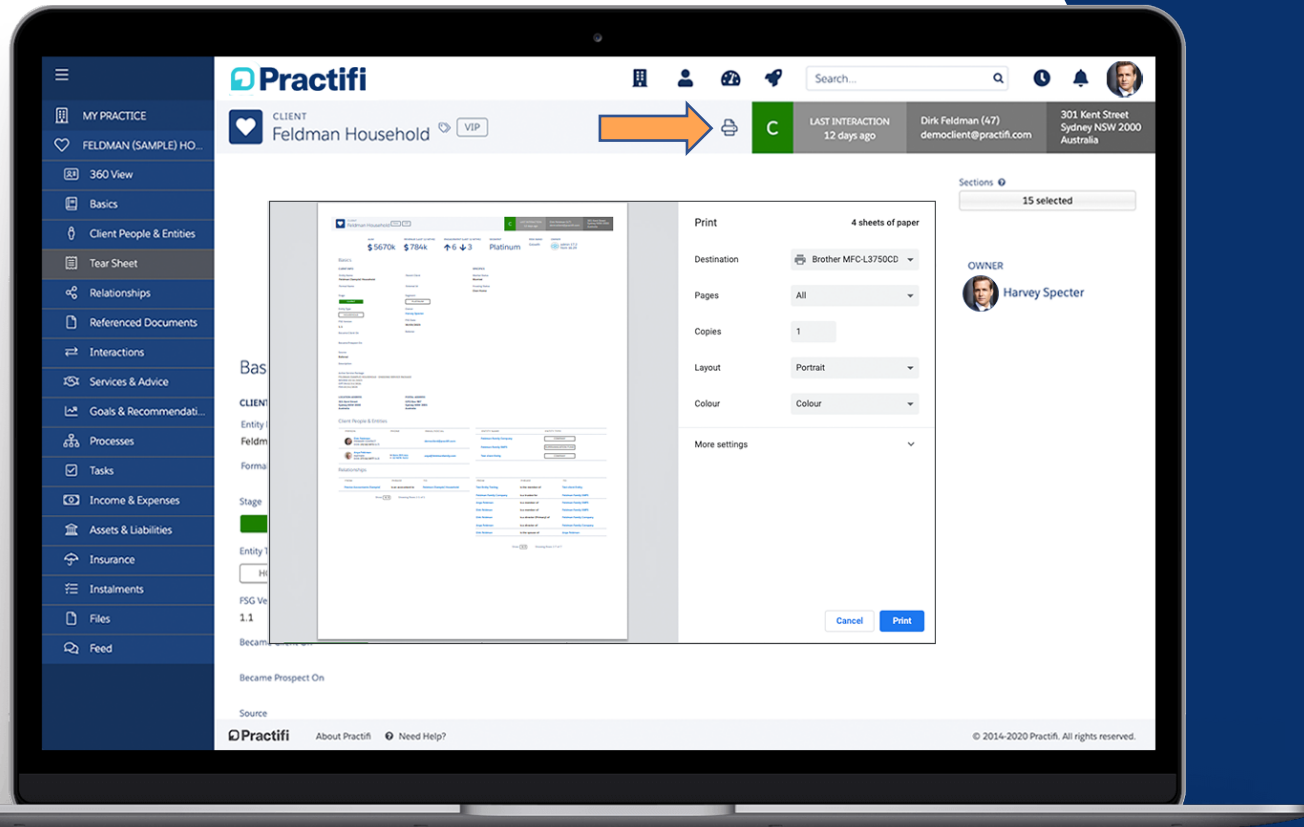


# Print to **use your** **tearsheet on-the-go**

If you want to use your client full view while you're on-the-go, click the printer icon in the top panel of the client record.

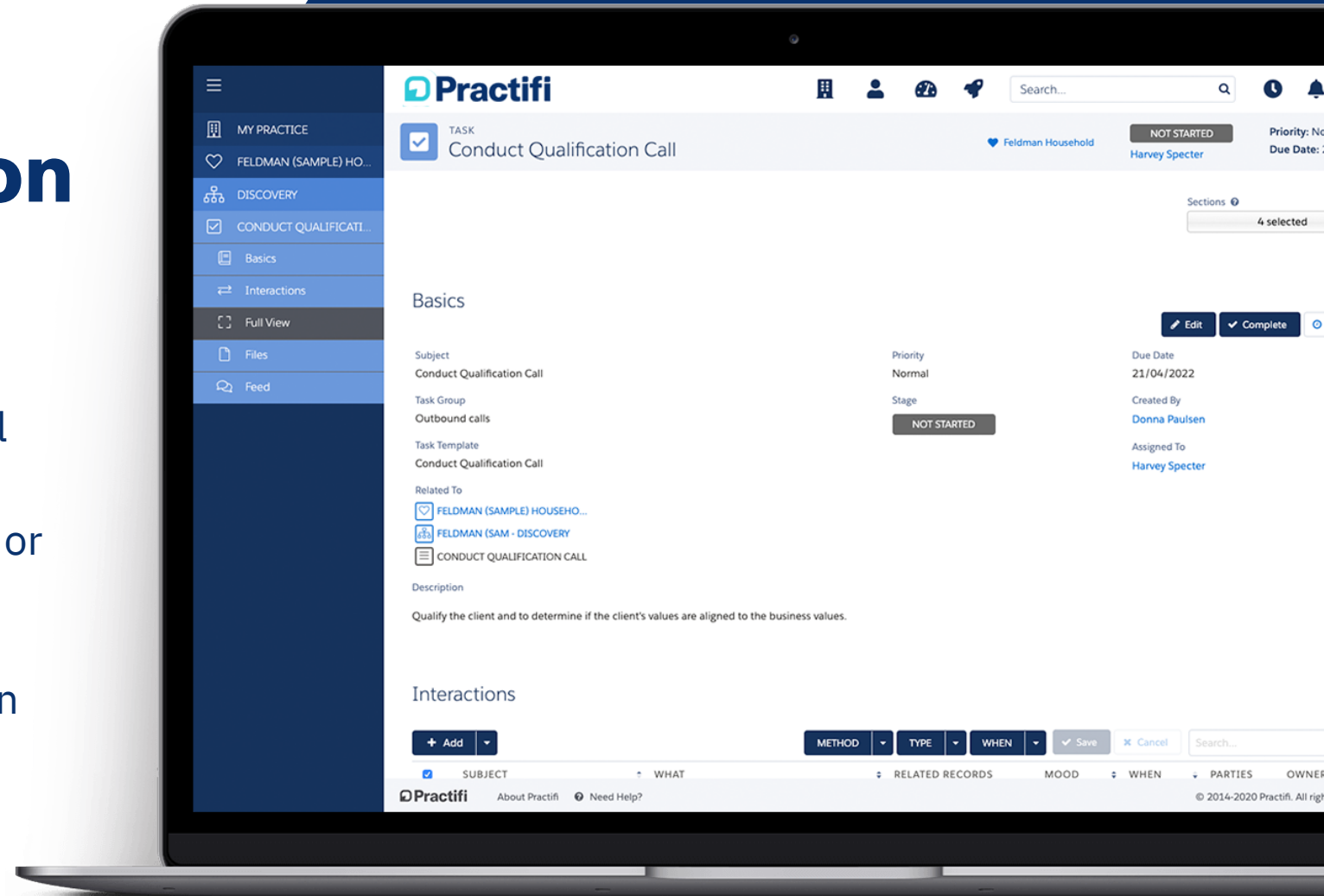
From there, you'll be able to print out all your chosen Sections into a convenient client profile tearsheet.

Get ready to experience your client records in a whole new way!



# Task and Interaction Full Views

1. Dive into your individual task and interaction records to enjoy new full view features
2. Swap out sections to show the task or interaction information that's most relevant
3. Experience your task and interaction records in a whole new way





# Dive into an individual record

To access task and interaction full view capabilities, first dive into an individual task or interaction record.

Here, we'll click on the first interaction in this list labelled "Email Tasks".

The screenshot shows the Practifi web application interface. On the left is a sidebar with navigation options: MY PRACTICE, FELDMAN (SAMPLE) HO..., 360 View, Basics, Client People & Entities, Tear Sheet, Relationships, Referenced Documents, Interactions (highlighted), Services & Advice, Goals & Recommendation..., Processes, Tasks, Income & Expenses, Assets & Liabilities, Insurance, Instalments, Files, and Feed.

The main content area is titled 'CLIENT Feldman Household' and includes buttons for 'New' and 'VIP'. Below this is the 'Interactions' section, which has a table with columns: SUBJECT, WHAT, RELATED RECORDS, MOOD, WHEN, PARTIES, and OWNER. An orange arrow points to the first row in the table, 'Email Tasks'.

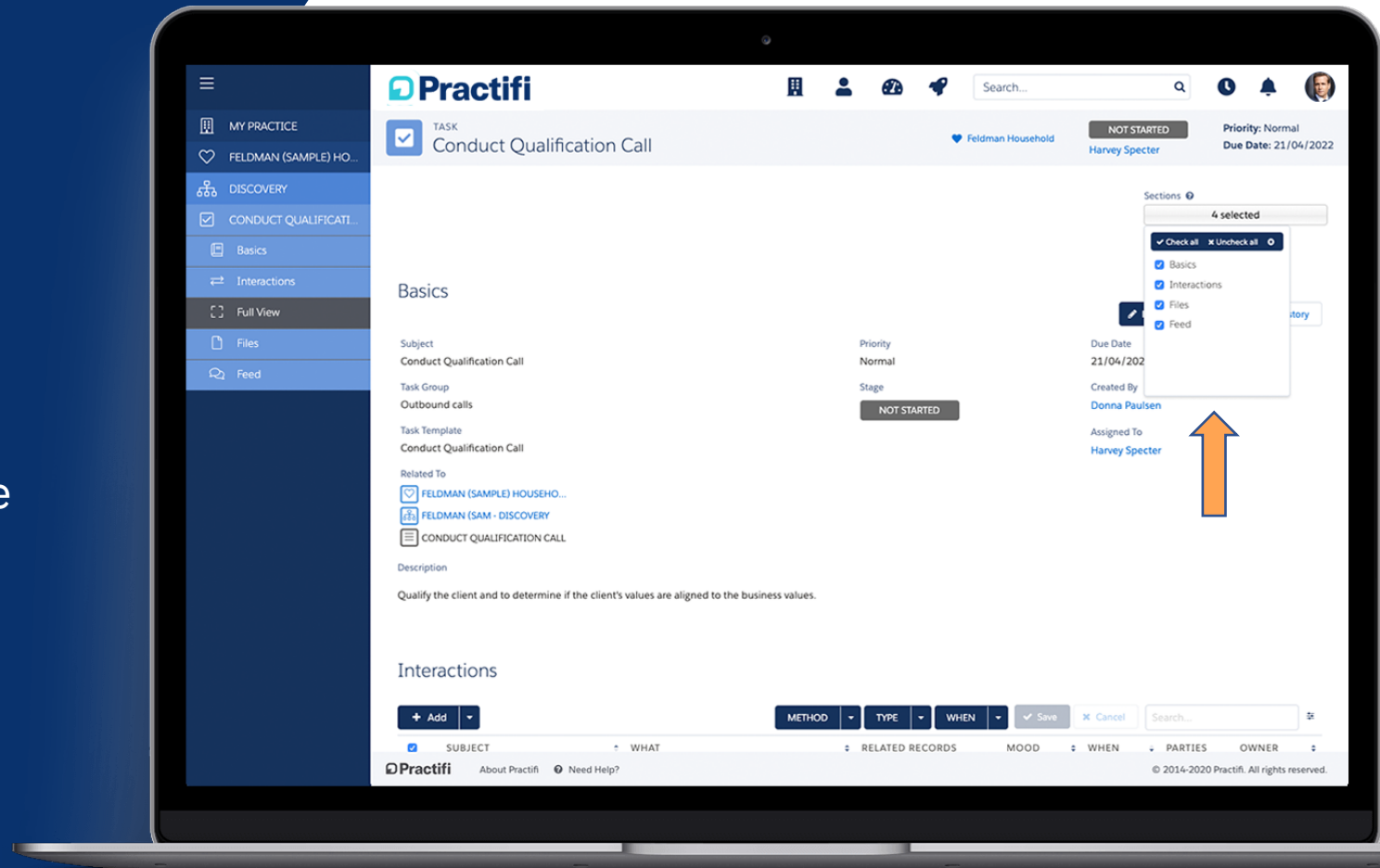
SUBJECT	WHAT	RELATED RECORDS	MOOD	WHEN	PARTIES	OWNER
Email Tasks		FELDMAN (SAMPLE) HOUSEHO...		26/01/2025 11:11 am		Harvey Specter
Call from Dirk	Phone Call with Dirk Feldman General Enquiry	FELDMAN (SAMPLE) HOUSEHO... DIRK FELDMAN		13/08/2024 12:50 pm		Harvey Specter
Email from Dirk	Email with Dirk Feldman	FELDMAN (SAMPLE) HOUSEHO... DIRK FELDMAN		31/07/2023 9:04 am		Harvey Specter
FSG	Email	FELDMAN (SAMPLE) HOUSEHO...		10/11/2022 3:00 pm		Harvey Specter
Qualification Meeting	Meeting with Dirk Feldman	FELDMAN (SAMPLE) HOUSEHO... DIRK FELDMAN	😊	10/11/2022 11:00 am		Harvey Specter
Schedule Meeting	Phone Call with Dirk Feldman	FELDMAN (SAMPLE) HOUSEHO... DIRK FELDMAN	😊	4/11/2022 10:00 pm		Harvey Specter
Qualification Call	Phone Call with Dirk Feldman	FELDMAN (SAMPLE) HOUSEHO... DIRK FELDMAN	😊	2/11/2022 7:00 pm		Harvey Specter
Kick off Meeting	Meeting	DSFSDS HOUSEHOLD	😞	7/02/2020 1:45 pm	DIRK FELDMAN ADMIN 17.2 FROM 16.29	Harvey Specter

At the bottom of the table, it says 'Showing Rows 1-8 of 8'.

# Explore the **full view** capabilities

Once you're in the individual record, explore the Full View tab by clicking on the Sections button in the top right-hand corner of the page.

Choose as many (or as few) as you'd like to create the most comprehensive full view.

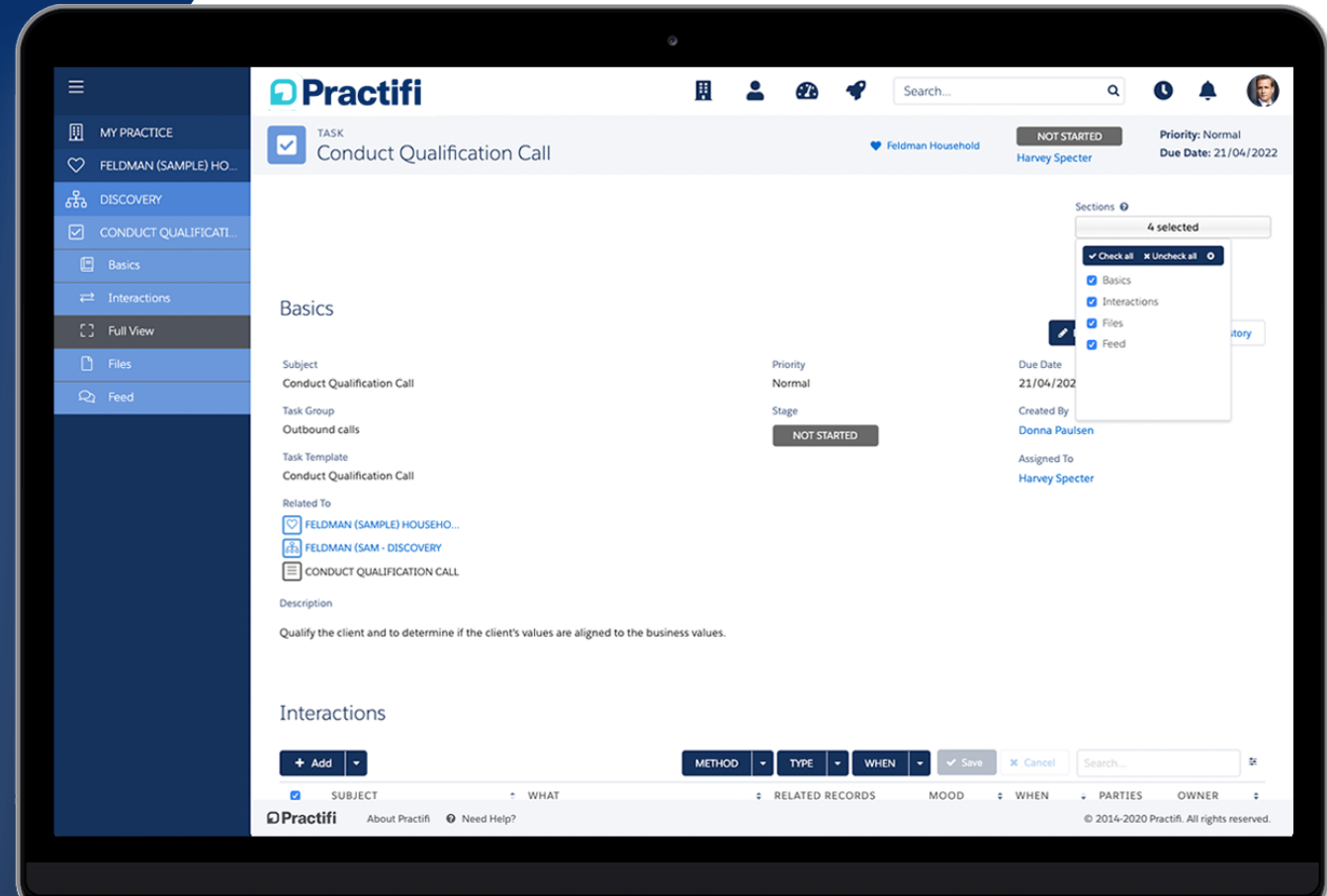


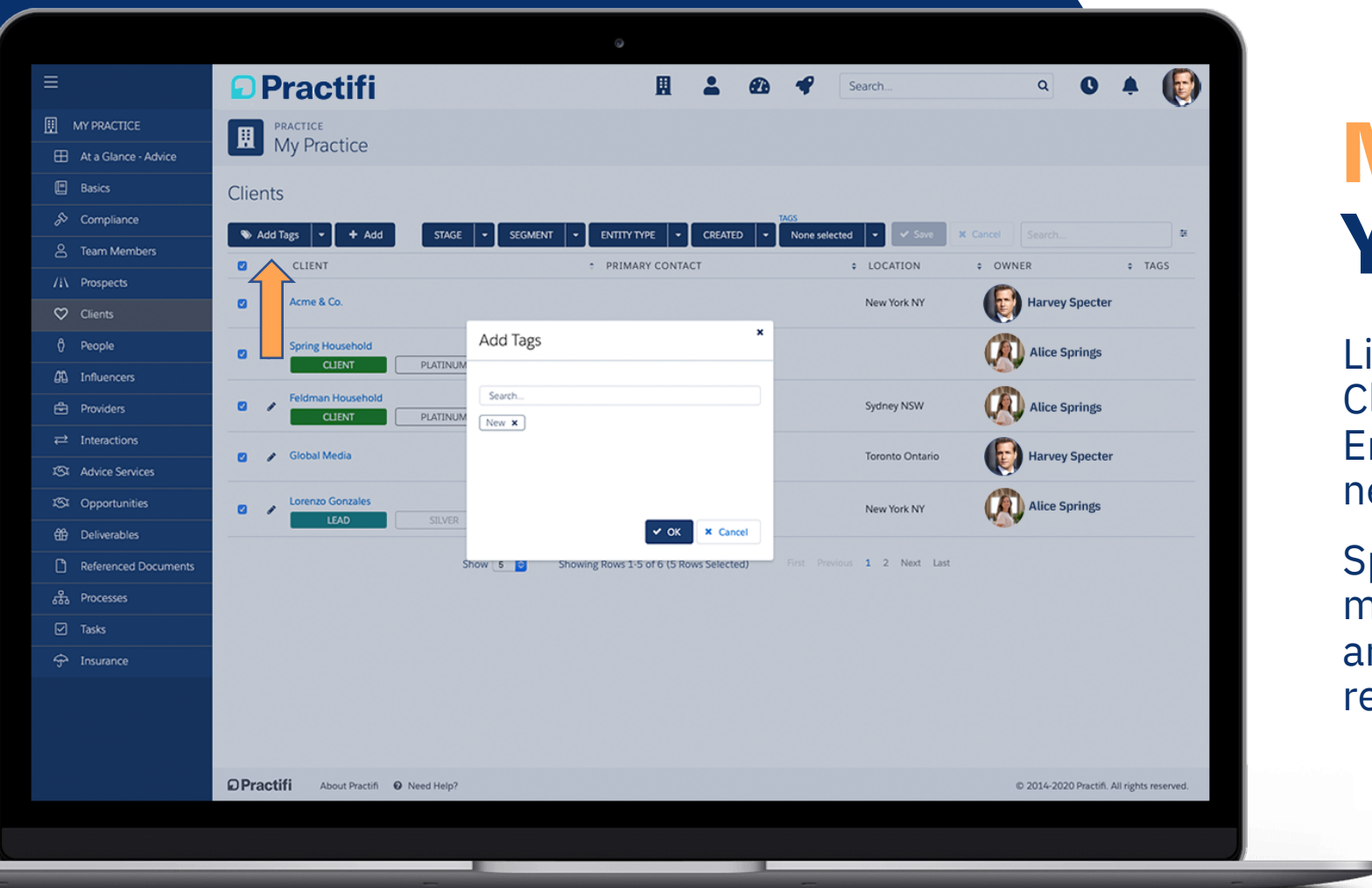
# Experience records in a **new way**

Here you can see the same full view capabilities in an individual Task context.

Once you've chosen your desired Sections, simply scroll down the page to quickly view all chosen information relating to the task or interaction record.

Both Task and Interaction full views share the same capabilities so you can experience both in a whole new way!





# Mass Tag Your Records

List and Data Management pages for Client, Provider, Prospect, Person and Employer records can now utilize this new feature!

Speed up your work-day by tagging multiple records at once. Here's just another easy way to keep your records aligned and organized.



**Lindsey Hanson**

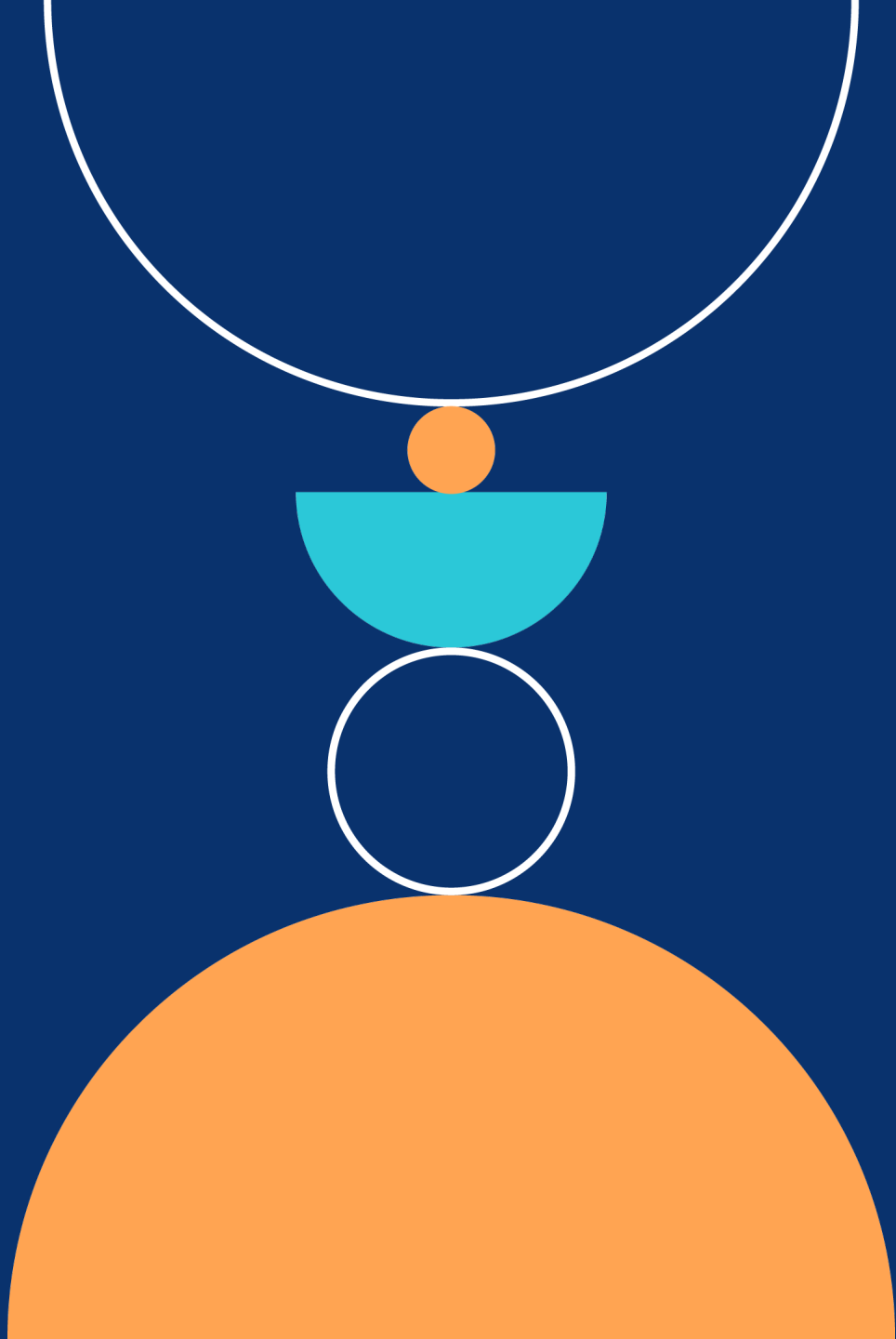
**Head of Client Success**

“Do you have an idea for a product feature or enhancement?”

Be sure to add your idea to our Ideas Community, which was recently created in as a part of our new Support Portal Experience launch.

Share your own unique product enhancement requests, view other’s ideas and vote on ideas you think will make Practifi better for everyone.

Check out the [Ideas Community](#) and share your ideas today. It may even be included in our next product release!”



### Any questions?

Reach out to your Client Success Manager who will be happy to help.

### We're here to help

support@practifi.com

### Chardonnay release notes

To see the full release notes  
[click here.](#)