mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Product Release Announcement

Latest Software Release Notes, August - September 2020

Roadmap Items Released:

Apply currency conversions to Opportunities

Clients with instances of Mindmatrix may now email support@mindmatrix.net to set currency values for opportunity records. Now across the platform, if these are set, all Opportunity Amount calculations will be based on the User's Currency Unit information available at the Organization level if different from the Company, for display purposes.

Organization lists, phase 1

Super Admins can create Organization Lists based on various Organization and User conditions and perform actions like Add/Remove from Organization Group, Update Organization Profile fields, Add/Remove Filters which will help in the automation of Organization Group Management.

Fixed Issues

CRMs and Third Party Integrations:

- General:
  - Dynamics & Hubspot: Implemented a setting to update CRM Contact Owner while pushing contacts to CRM
- SFDC (Salesforce):
  - The 'Sync With CRM' button was not working for the 'Classic' view in the Salesforce Package. This has been fixed.
- Autotask:
  - The account owner will be assigned to the same user in the CRM when the user also exists in Mindmatrix when pushing contact.
  - 'Contact Push' optimized for Autotask.
- Hubspot:
  - Account Level fields were not getting pushed to CRM. This has been fixed.

Contacts:

- Implemented "Unsubscribe from email" as an action option for selected contacts in all contact grids.

Dashboards & Asset Search:

- Provision to add multiple "Banner" widgets on to a Dashboard has been made.
- "New Assets" stats widget will now display the count of created as well as shared assets.

Drips & Lists:

- In the Contact smart list, the Drip condition and Scoring rule provided the option of "Too Many Soft Bounces" for "Email Bounce Type".
- Implemented 'Period' function for Email Bounce Type.
- The certification completion notification email was not sent from the User smart list. This has been fixed.
- In the Drip template, creating the condition for a specific asset was not loading the asset list. This has been fixed.

Editors:

- Asset Templates (General update):
  - Company Color was not getting applied to the 'Text object' background in Print and Web templates. This has been fixed.
  - Fields from the 'Company' fieldset will now be visible in Editor and parsed in Output.
  - Replaced RadEditor with SummerNote.
  - Removed the 'step process' when a new object was added.
- Asset Templates (Email):
  - From now on,"Subject line" will be displayed in the Media Editor, always.
  - Provided new design for wire-frames.
  - For "Test Email", in the 'recipient' step, provided the option to send to oneself.
- Asset Templates (Web):
  - Web Output: While saving form data, now the trimming of spaces will be done.
  - Provided animations for objects in Web Editor.
  - JS error displayed in the console for the web output has been fixed.
- Asset Templates (Web banner):
  - The user was unable to create an External Web Banner template. This has been fixed.
- Asset Templates (Form):
  - Contact dropdown field values will now display all the special characters consistently in form output and notification email.
  - In the Form Template, the User was unable to set the default value of the dropdown. This has been fixed.
  - Form dropdown values were not rendered if the "Cookie" checkbox was unchecked. This has been fixed.
- Asset Templates (Certification):
  - If the PDF template is assigned to Certification and the Certification was added to the playbook and the playbook shared with Users of another Company, then, the PDF was not loading. This has been fixed.
- Asset Templates (Image Banner):

    - Image Banner preview will now be an auto template link with proper User, Company, Organization parsing.
- Asset Templates (Print):
    - 'High Resolution'/'Low Resolution' download was not working for personalized assets. This has been fixed.
    - In Print Editor and Output, the variables within the Brand Signature will be parsed when the variable of the Brand Signature is used in the Text object.

Google Drive Integration:

- Google Drive: When a file with 'Ctags' and 'Description' was pulled, only the 'Ctags' was showing in Mindmatrix. This has been fixed.

Import:

- While importing contacts, one could not create a new recipient list to associate it to. This has been fixed.
- While importing users, the values of the custom fields were always imported in lower case. This has been fixed.

Localization:

- Localization issues in Drip Campaign have been fixed.

MDFs:

- In MDF grids, the 'search' will be based on a few columns from the grid.

Notifications:

- "Subject" of asset shared notification email modified as per request.
- Notification emails were not sent on completion of Certification. This has been fixed.

Playbooks:

    - 'Asset object' issues in playbooks have been fixed.
    - The option to hide the tab/action number section in Playbooks has been introduced.
    - In Playbooks, when a step is added, deleted, and saved, the alert message was not closing. on multiple clicks of 'Save' and the playbook was saving as 'blank'. This has been fixed.
    - In Playbooks, when new filters were added to multiple asset objects,it was not saving the filters for the newly added node of asset objects. This has been fixed.

Performance:

- Optimized the "Asset Report" export.

Reports:

- General updates:
    - Based on User's and Organization's permissions, the 'Grouping Type' of Organizations and User Groups have been provided for Landing pages and Forms Summary report.
    - 'Company Anonymous' contacts will now be created using reverse DNS.
- Email:
    - Email Report: Only in the "Link Clicked" contacts grid of email report, provided the option to send an email to all the contacts.
    - Displaying 'on behalf' emails also in the Summary Report in the account of the User on whose behalf it was sent.
- Social Drip:
    - In the Social Drip Summary Report, the stats page for drips of other Users was not loading. This has been fixed.
- Opportunities:
    - In Opportunities Summary Report, if a specific "Organization" was selected then it displayed opportunities created/owned by the logged-in User also even if the opportunities were not in the Organization. This has been fixed.
- Deal Registration:
    - Deal registration details were failing to load when the user clicked on the deal count in the report. This has been fixed.

<u>Setup:</u>

- Users will now be made active on completion of step wizard with creating or importing i.e. on click of "Finish".
- Hid all "SMS" field, menu, and SMS notification options across the Platform.
- Only for Super/Site Admin, a page for "Password Reset Requested Users" has been provided.
- 'Apostrophe' character in the name of an Organization Group broke the "Channel Manager" page. This has been fixed.
- "Sharing" was not operational when multiple assets were selected in the 'List' View of Setup > Documents. This has been fixed.
- Folders for 'Shared', 'Unshared', 'All' for the "sharing" page of Assets have been provided.
- Made the "Filter Categories" menu based on permission.
- Made the "Company User List" based on the 'Partner' and the 'Company Lists' permission.
- "Asset Configuration" will be displayed based on the 'Current Company' for Site/Super Admins.
- Removal of Organization Group from the Organization page was not operational. This has been fixed.

<u>Social Posts:</u>

- In Social posting, if the company URL with the simple text is posted then that was causing issues while posting on FB. This has been fixed.
- Provided an option to select multiple pages of LinkedIn while doing the social posting.
- Used the 'meta image' of Web Banner (if existing) while posting on to the Social sites.
- The tracking link in Social posts was not operational. This has been fixed.

<u>UI & Consistency:</u>

- Made the 'Sharing' page title consistent as "Sharing" with the icon of fa-share-alt across the Platform.
- Description text was going out of placeholder in the 'card' view for videos. This has been fixed.
- Applying of Currency Conversion to Opportunities
- We have provided a Site Admin page for storing of Currency Conversion for the install. Now across the Platform, all the Opportunity Amount calculations will be based on the User's Currency Unit from the Organization if different from the Company for display purpose.

View Assets:

- The title HTML was broken in "View Assets" if the search text contained / (slash). This has been fixed.
- Bookmarked assets introduced in the "My Favorites" section of the "View Assets" page (both versions).
