



Product Release Announcement

Latest Software Release Notes, August 2023 – September 2023

Issues Fixed

CRM:

- Autotask: The list name will also get pushed with the to-do description to the to-do description field in Autotask.
- ConnectWise & Autotask: Provided the checkbox for setting of Opportunities/Contact 'Created On' date to be the same as the date on which it was created in the CRM, when importing the contact from the CRM
- ZOHO: Implemented Organization domain sync for Partner Registration.
- Implementation of User Pull and Push For Hubspot CRM has been done.

Dashboards:

- Provided Videos for the Dashboard Banner widget.

Drips:

- In Nurturing drip, the "Copy" option is missing for users with copy permission. This has been fixed.

Editors:

- Provided navigation in 'edit' questions of the Certification template.
- Provided the "Created On" and "Updated On" fields on the hover of templates in the "Compose Email" step.
- Email Media: CTA Text color was not taken as per the style applied when viewed in Outlook. This has been fixed.
- 'My Favorites' : Assets deletion will not depend on any permission.
- Certification Template: When back navigation was used, the question detail was not saved. This has been fixed.
- Input Questionnaire Fields in Editor: Creation of Groups and sub-groups for the set of fields implemented.
- Certification template changes were reverted when the template was saved without making changes to the template. This has been fixed.

**Exports:**

- Column values shifted and the "Completed" field was not exported for the User-wise Certification report. This has been fixed.

MDF:

- When a request was saved in the Reimbursement request folder and Partial request folder, then the request was moved to the New request folder. This has been fixed.

Notifications:

- Provided the option to send the email notification of Incentive assignment to all assigned users or to newly assigned users.

Reports:

- Added "Completion Date" in the Certification report.
- Added "Completion Date" in the Course and Curriculum reports.

Social Posts:

- Social Drip: Provided the option to lock editing/creating/deleting messages at the template level for the created media.
- In Social drip templates, validation of a single message will be for "Regular Post" or "Specific Day".

Site & Link Tracking:

- Provided Partner Admin to configure the tracking link as Public for Organization level.

Scoring & Lists:

- User list, User Scoring condition of 'Unsubscribed from Company Emails' implemented.
- Provided notification action for Asset lists.
- "Email Sent On" and "Contacts Created On" conditions for Users and Organization Lists, User Drip conditions, and User Scoring were implemented.
- Provided the columns of "Shared" and "Notification" for the Company Contact List.
- Provided User Origin and User Created by, fields in the User Smart list, Organization Smart list, User Drip, and User Scoring conditions.

Setup:

- Organization overview page modifications are complete.

**Usability:**

- Sales Playbook: Provided help info on the playbook page when no contacts are added instead of displaying the modal window of "Add Contacts".

UI:

- The UI issue on the Export page has been fixed.

View Assets:

- If "Include customized assets" is checked in the "My Favorites" folder, it will now display all the Media and bookmarked templates.

Please note that some of the product updates described are available in your account based on your current plan with Mindmatrix. You may need to enable an individual feature to gain access to it. If you would like to know more about adding a newly released feature to your account, email our team at support@mindmatrix.net. -- *Mindmatrix Services*