Product Release Announcement

Latest Software Release Notes, September - October 2020

Roadmap Items Released:

New V5 'List' View Grids Beta

Based on Settings for User/Company, the new design 'List View' grid can be configured. There will be a toggle switch in the Beta Release to switch between the V4 and V5 design of the 'List View'. This can be provided to a few clients for feedback.

Note: The "View Assets" page in this is being separately worked upon.

Fixed Issues

CRMs and Third Party Integrations:

- General:
    - Menu and Configuration folders will be displayed based on the Permissions of Users and Organizations.
    - Disabled the "Save" button until all the components are loaded in the "CRM Settings" page.
    - ConnectWise & Autotask: If there were two contacts with the same email in the CRM and they were inactive, it was failing the import. This has been fixed.
    - Added contact email column to contact ToDo logs in the CRM health.
    - Smartlist unshares activity/todo will not sync to CRM.
    - Approved deal notification email was sent every time, the "First Import" is triggered for CRM pull. This has been fixed.
- Autotask:
    - Contact To-Do was not getting pushed for new contacts. This has been fixed.
    - Updated contact was not getting pulled in second import. This has been fixed.
- Connectwise:
    - Non-Integrator's opportunity was not getting pushed due to the associated contact being shared with Integrator slower than the sync interval. This has been fixed.
    - While syncing contact from CRM, it will first check for the ID and then the email.
- Sugar:
    - While pulling users from CRM, some partners were getting the failure message, "Object reference not set to an instance of an object.". This has been fixed.
- SFDC:

    - "ToS status" exposed in CRM User sync.
- GoToWebinar:
    - 'GoToWebinar' health logs were not loading. This has been fixed.
- Google Drive:
    - Permissions given to the Owner was not getting saved on the 'Add-ons' settings page. This has been fixed.
    - When Files from Google Drive were renamed and pulled again, renamed files were getting duplicated in Mindmatrix. This has been fixed.
    - A checkbox for send has been provided on the permissions page while configuring the add-on.
- Hubspot:
    - Casing of the values in dropdown fields will be ignored while pushing and pulling contacts and opportunities.
- ZOHO:
    - Provided Partner pull and push for Zoho CRM.

Certification:

- For old Certification templates, even after the Certification was completed and passed, the status in the playbook displayed as "Not Completed". This has been fixed.

Contacts:

- In the manual To-Dos, the future date was not being accepted for some Time Zone Users. This has been fixed.

Dashboards & Asset Search:

- When users do not have permission for the feature, the widgets in the Dashboard will now display a message.
- "Incentives: Admin" widget introduced.

Drips & Lists:

- Provided the 'System' event of "Remove from List(s)" in the Drip template.

Export:

- For all exports, provided a text box which will mention the name for the exported file and can now be modified by the User.
- When PDF export was done then the space in the file name appeared as %20 in the Notification Email. This has been fixed.

Editors:

- Asset Templates (General update):

    - The saving of the template in the "Draft" was not updating the date-time of the "Updated On" field. This has been fixed.
    - Template Editor: The "Save & Close" button was not operational. This has been fixed.
- Asset Templates (Email):
    - Tracking the clicks of the 'mailto' from email has been implemented.
    - Any 'Test email' will not be tracked henceforth.
- Asset Templates (Web):
    - If the form security option was set to 'Recaptcha', then the landing page form was not getting submitted. This has been fixed.
- Asset Templates (Form):
    - Made "Captcha" of Form accept the styling from the theme.
    - Form in Web: For mobile view, the form can be made in a single column even if multi-column in desktop view.
- Asset Templates (Video):
    - Adding a new video from the Video Gallery within the Editor was not operational. This has been fixed.
- Asset Templates (Print):
    - "eBook" was missing in "Views" of Print 'direct-use' templates and media. This has been added.

Filter Management:

- Filters used in filter categories if deleted will be removed from the category.

Gallery:

- In the "Non-Personalized Assets > Image Gallery", provided the folders of Image Banner Template and Media.
- When an image is downloaded from Image Gallery it will now download the 'Original' image.

Localization:

- Localization issues in Drip Campaign have been fixed.

MDF:

- Currency Units will now be editable by the requester till the MDF request is approved.
- Provided confirmation message while saving "New Request" and "Approving" requests.

Plugins:

- In Chrome Extension, for existing Draft messages the "Send Via AMP" will now be displayed.

Playbooks:

- For Social Drips in Playbook, if a non-blog template is added then in the Media side the action of "preview" has been implemented.
- If permission doesn't exist, then on click of the 'Opportunities Report External link' node in a playbook provided the "No Access" page.
- Provided settings to display the 'OR/AND' conditions for steps/actions in the playbooks.
- '&' was not accepted in asset object filters of Playbooks. This has been fixed.
- Provided selecting and adding multiple images and videos similar to documents.

Reports:

- Email:
    - Duplicate records were displayed for Users in the Email Report. This has been fixed.
- Drip:
    - In the Drip Summary Report, the "Drip-wise" report will display the count based on Users' and Organizations' permission of the logged-in User.
- Playbook:
    - Export in the Contact Centric Playbook report was not operational. This has been fixed.

Setup:

- The user was unable to add roles to the "Organization Group". This has been fixed.
- "Opted Contact" field was missing after 'customizing static fields'. This has been fixed.
- New Skin of Mega Menu Top Navigation introduced based on Settings.
- Category Filters can now be added/removed from the asset by any User from the Company who has 'Edit' permission of the asset.
- If the template contained more than 80 characters in the name, then it was breaking when the Media was being created. This has been fixed.
- Based on User Group permission, displayed the Users from the user group(s) in Setup > Users and other pages.
- The 'Push' button to push multiple Organizations to CRM on the 'Organization' page has been implemented.

Self-Serve:

- The image gallery was not loading in the 'self-serve' of the "Welcome" page. This has been fixed.

UI & Consistency:

- For the "Description" field of the Incentive Programs, new lines (carriage returns) will be managed in the UI.
- UI Issues in all types of Smart lists based on the collateral condition have been fixed.
- Playbook UI issues have been fixed.
- Provided the 'info' for stats on hover for Email Summary Report & Email Report as requested.
- Provided the 'info' for stats on hover for Certification Summary Report as requested.

User Feed:

- Provided more activities (Social media started, Social media post published, Contacts imported, Drip Campaign started, Email Sent to contacts, Email Sent to users) in User Feed and chart.

View Assets:

- Filter Categories" implemented in "Asset Configuration" so that only those categories will be displayed for the tab in "View Assets".
- FAQs/KnowledgeBase templates implemented in the "View Assets" page.
