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.

Please be advised that some of the product updates described are available in your account based upon your current plan with Mindmatrix. 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*