Product Release Announcement

Latest Software Release Notes, April - May 2020

Roadmap Items Released:

Incentive Programs
Super Admin and Users with User Scoring permission can create different Incentive Programs and assign these programs to a set of Users. The Users to whom the programs are assigned can view the Programs, their earned Incentives and even redeem them.

Template Versioning
Based on permissions, Users can now save the template assets as 'Versions'. At any time User can switch to the older version of a template asset and make it the current version. This is currently applicable for Email, Print, Web, and Dataroom assets.

Campaign Management System
Based on role permissions, Users can create Campaigns with different assets in it and track the effectiveness of the Campaign with different sources and different Users.

Fixed Issues

CRMs and Third Party Integrations:

- General:
  - Autotask & ConnectWise: Contact pull will be based on email only.
  - Exposed CRM SOT status.
  - When the HTML Text area was added in a custom tab, Field mapping for opportunity was broken. This has been fixed.
- Autotask:
  - Partner / Autotask integration users can now choose to either use the MM tracking identifier to access Autotask APIs or their own tracking identifier.
- Connectwise:
  - In ConnectWise it will create a new Company Type as per mapping instead of defaulting it to Prospect.
- SFDC:
  - Pulling of "Leads" from CRM based on Settings has been done as done for contacts.
  - Now showing 'API Limit exceeded' in the log.

- Zoho:
  - Opportunity push log was showing as 'success' but values were not getting updated in CRM. This has been fixed.
  - Pulling of "Leads" from CRM based on Settings as we do for contacts have been implemented.
- Sugar:
  - Sync partner contacts as users to Mindmatrix, implemented.

Currency Conversion:

- Converting Currency based on Organization Currency Unit for Opportunities in "Manage > Opportunity Records" and "Advanced Search" has been implemented.

Dashboards & Asset Search:

- In the export of "Hot and High Leads" stats ring widget, only "Hot" leads were being exported. This has been fixed.
- Beta: New "Asset Search" Design introduced based on Setting.
- "Register deal" quick link widget was showing "Drip Campaigns". This has been fixed.
- The "Bounced & Unsubscribed Contacts" widget will now display count based on "Owned By".
- The pie chart in the "Last 5 Drip Campaigns" widget will now be displaying the 'average open rate' for the drip. (Demo on Monday)
- "All" folder of "View Assets" optimized.
- Provision to show/hide banner in all Personas has been implemented.
- Optimized chart styling in "Bounced & Unsubscribed Contacts" widget.
- Status widget, when placed in 30% placeholder, had broken UI. This has been fixed.

Drips & Lists:

- In the Smart list, only for "Email Media", added the condition of "None Opened".
- Drip: Email was delivered to contact who had unsubscribed to the "subscription" list and the list was used as a dynamic list for the drip. This has been fixed.
- If any event has been marked as 'do not allow to edit' then in Quick Editor, the controls will now be disabled.

Deal Registration:

- Deletion of opportunities from the Deal Registration page were not operational. This has been fixed.
- While registering a deal it will save the "Contact Type" field value as "Deal Registered" even if the field is not rendered (i.e. is hidden for the User).
- Modern Deal Registration without converting to Contacts introduced based on setting for the Company.

Editors:

- Asset Templates (General update):
  - Provided all Smart Objects in Media Editor based on permission.
  - If a 'new message' was created in Media, then provided the "subject" text box in the Editor page.
  - In edit mode and full screen, the email content was broken in the container. This has been fixed.
  - Dummy images for variables were broken since the path was changed. This has been fixed.
  - Provided multiple undo levels in Email Editor.
- Asset Templates (Email):
  - Enabled special characters in the name of the wireframe template in the Editor.
  - Provided the 'Subject' on hover in the thumbnail view of emails.
  - Mozilla: CTA palette in Email Editor used to display an error message. This has been fixed.
  - Provided addition of a subject line for "mailto" option in hyperlink manager and also allowed variables like ##user.email## in it.
- Asset Templates (Form):
  - Provided minimum and maximum character validation in form output based on the corresponding field design.
  - The activation page for double opt-in of the form was not loading if the form had a "field break" in it. This has been fixed.
  - Form output for the text area field, provided the validation of "Too long" and "Too short".
  - Drop down and the text-area field was using Raleway as the default font. This has been removed.
  - Provided an option in Form palette of Media to select recipient list(s) to which the form filled contacts can be added.
  - Form submission will work for host path, content path, and for custom domain pages.
- Asset Templates (Web):
  - Made the Websites/Landing Pages/Web Banners media 'active' only when "Finish" is clicked in the Step Wizard.

Import & Export:

- Made all Export (Contacts, Users and Opportunities) as a step process.

Incentives:

- Provided the option to create incentives with points without scoring rules.

Language Localization:

- Browser language picked in the Login page and User "language' field exposed in Self Serve and Import Users page.
- Localization was missing in the "My Favorites" tab of the "Select template" step of email. This has been fixed.

MDFs:

- While exporting MDF requests from advanced search, it will provide the option to select fields just like in Opportunities.
- Added more conditions in MDF Advanced search functionality like Created On, Updated On, Activities, Request Status.
- Provided a column of "User" in the 'request history' grid of MDF requests.
- Hid the "Informational Documents" section from the MDF requests if there are no documents.
- Currency Conversion implemented in MDF widgets and other pages where the MDF amount is displayed.
- It will now display the "Attached On" date-time for "Documents and Images".(This is applicable for documents and images uploaded hereafter.)

Notifications:

- Smart list notifications were showing blank data. This has been fixed.

Opportunities:

- Displayed associated Users of Opportunity in the "Sharing" tab.

Playbooks:

- General updates:
  - From contact grid actions across the board, provided functionality of adding multiple contacts to playbook from "Execute Play".
- Linear:
  - Provision to add "Non-contact Centric Playbook" into the Linear Playbook step has been made.
- Contact Centric:
  - Provided 'Calls' and 'Opportunities created' report on the Contact Centric Playbook.
  - Contact Centric Playbook Report: Provided "Call Duration Chart" for Call Activities page.

User Profile:

- In the User Profile, the "Other languages" field was not saving more than one language and data was saved even on 'Cancel'. This has been fixed.
- Now displaying the ToS Link in the User profile only for View after ToS has been accepted by the User.

Plugins:

- Email template, when sent from Chrome-Gmail plugin was sending an email with null in the subject for unsubscribed contacts. Henceforth no emails will be sent for unsubscribed contacts.

Reports:

- Email:
    - Email Summary report will now have filters based on User Groups as well, based on Users' and Organizations' permission.
    - In the Email summary report if a logged-in User is viewing a report of another User, then the "To" section from the "Message" page will be hidden.
    - Data in the columns were switched when the Email Summary Report was exported. This has been fixed.
- Web:
    - In the Landing Pages Summary Report, the User could not check the report for landing pages created by other Users. This has been fixed.
- User:
    - Provided export of grid records from the chart for Users Summary report.
- MDF:
    - MDF amount was not consistent in the Organization Report. This has been fixed.
- Print:
    - Print Usage Report: "Top 10" Usage bar chart was showing wrong data. This has been fixed.
- Drip:
    - "Delivery ratio" in the Drip Summary Report will consider only email events of each drip which has email events.

Setup:

- For Contact fields, provided the option of Organizations and Organization Groups to show/hide tabs.
- Removed the "Google +" field from User Profile, and added the "Google Reviews URL" field in Company and Organization Profile.
- Separate email delivery Server will be used for Certified Users.
- Permission-based document URL loading was implemented and a separate folder for documents used for imports (contacts, users, database records, Deals) was provided.
- Provided the option to add "Banner page(s)" to Navigation Layout for the Company.
- Custom fields: "&" in the dropdown option was breaking the sorting of the options. This has been fixed.
- "Save" button was missing from the 'Sharing' page of the brand. This has been fixed.
- Organization and Company custom field tabs to be hidden based on Personas and User Groups.
- Euro sign (€) was not working in the field label name of custom fields. This has been fixed.
- Increased the character limit for "import dropdown options" to 500.
- "Help" menu is now company-wide.
- Provided the 'Organization Custom fields' from Fieldset in Design Editor and parsed it in Media.
- If a hyperlink is used in the HTML area field and set as default, then in Output it will allow clicking to open the link.
- Install-level Custom Login page introduced.
- Provided the display/hide of tabs based on Organizations and Organization Groups for all types of Custom Fields.
- Based on the config key for 'mobile app', hid the "Download to Mobile" button for Print Media.
- No Access page was seen when User clicks on the 'View' link of Imported Documents. This has been fixed.

- Opportunities were not loading for the user in an organization and channel manager. This has been fixed.
- Provided KVS based 'Support' email for messages, like the wrong username/password.
- Custom messages provided for the grid if data is not present on some pages.
- Notification emails for New User, Forgot Password, and action pop-up messages of login page localized.
- Based on the Company setting, the "Organization logo" from the Welcome page can now be hidden.
- Localized tab names and labels of User, Organization, and Company custom fields.

Social Posts:

- Provided 'previous' and 'next' buttons while viewing messages in the Social Drip template and media.
- Social Drip Preview: Post containing assets with more than one meta tag broke the preview. This has been fixed.
- In Social Drip preview, if a message with a thumbnail is succeeded by a text-only message, then the second message showed the image of the first one. This has been fixed.
- In the media page of Social templates if the message contains an Image asset then upon edit, the thumbnail preview was not displayed. This has been fixed.
- In the User Profile Social setting for the blog, provided the option to select a category for Joomla and WordPress and Blog sites for Blogger.
- 'External Sites and Link' page was not opening under Communicate > Social. This has been fixed.
- Provided posting of Video link from "Video Gallery" in social.

Scoring:

- The grid of web templates was not loading in the 'Scoring rule' for specific activity with unique and template options checked for Web Asset. This has been fixed.

Twilio Dialer:

- Provided labels of alphabets to the dialer for reference.

To Dos:

- Provided adding/editing/deleting manual To-Dos for contact.

UI & Consistency:

- Renamed 'sharing' as 'contact sharing' in the 'smart list sharing' page as requested.
- User scoring rules were blank due to migration of some conditions from "User Data" to "User Activities". This has been fixed.
- The Opportunity page grid was not being displayed fully on the smaller screen instead of giving the horizontal scroll. This has been fixed.
- Removed the minimum character limit of 2 from "Last Name" of User.
- Moved "Recipient Lists" above "Smart Lists" in the Lookup page of "Send Email".
- Removed the "break-all" CSS style from the message section of Social Post Preview.

- The "help" image was not loading for example of 'step process' in the Opportunity Layout page. This has been fixed.
- Contact Centric Playbook Report: For Call Activities as well as Email Activities matrix chart, provided the total count for each period and each day.
- In the profile pop-up of Top Nav, if Organization 'View' permission exists then the ‘View’ icon will be displayed

View Assets:

- Metro-style "Overview" page of categories/tabs for "View Assets".

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*