Product Release Announcement

Latest Software Release Notes, February - March 2024

Issues Fixed

Accounts & Contacts:

- From now on, the origin of the account will be recorded and shown when hovering over it.
- The Display of the Contact Activity module will depend on the permissions granted in the Roles.

Automation:

- Provided Deal Lists in the Automation Manager.

CRM:

- Hubspot CRM: Enabled 'UserEmail' and 'OrgName' Field Sync (Only Push) for the Contact Object.
- Enabled Organization Domain Name Sync for the Hubspot CRM.
- The multi-select fields in ZOHO CRM have been designed to be updated to text fields for the push and pull operations.
- When CRM and Add-on (Contact Science) are configured for the user, a setting is provided to push contacts to either CRM or Add-on (Contact Science).
- We have successfully added the feature of linking partner contacts to Zoho lookup for Registered Deals in Zoho CRM.
- A new checkbox has been added to the Hubspot CRM to filter only 'isPortalAccess' Partners.

Dashboards:

- The default banner was changed for all the personas.

Deals:

- The feature to share registered deals and assign ownership has been implemented.

Drips:

- The Flow Chart Editor can be hidden in the Email Drip Media based on role permissions.

Editors:

- The default size for the text object upon addition will be 300 x 200 pixels for all editors except Email.

Exports:

- While exporting the drip report, provided the option to send the file by email.

Imports:

- Import Events functionality implemented.
- While importing contacts/users, the list section provided the option to create a new list.

Incentives:

- On the Assignment page of Incentives, folders of "All," "Assigned," and "Not Assigned" are provided.

Lists:

- Provided the 'up to next days' for the Date field in the Asset list.
- Provided the "Phone Activities" condition in the Company Smart list.

Profile:

- Moved the "Check your Incentive" feature to the folders section.

Reports:

- The implementation of the Account Overlap page has been completed.
- We have introduced a new page for the Partner Marketing ROI report.
- We included the time range for sent emails in the drip campaign report.

Setup:

- Provided the "Create" button in the "All" folder of the Setup > Templates.
- The custom dropdown field will allow the user to clear the default option.
- Email notification has been enabled for sharing Email Drip and Social Drip templates.
- Included shared assets (images, documents, and videos) in the transfer of ownership of shutdown user accounts by the site admin.
- Provided a checkbox to create a user group with the same name as the role and assign the role to the group.
- Provided role assignment to entities in Set up > Roles.

Usability:

- Clicking outside the modal won't trigger the alert. The modal size has been increased.

V5:

- The Sales Playbook's new "Selling View" design has been provided to select users for alpha testing.
  Note: This will be enabled for initial feedback after the 14th of March for limited users. The User can toggle between the new design and the old design.

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*