mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Product Release Announcement

Latest Software Release Notes, February - March 2020

Fixed Issues

CRMs and Third Party Integrations:

- General:
  - Contact To-Dos marked as **Completed** in Mindmatrix were still marked as **LIVE** in CRM. This has been fixed.
  - Organization push was not operational if any CRM is configured at the Organization level. This has been fixed.
- SFDC (Salesforce):
  - &(ampersand) used in standard and custom fields values and labels will now be synced.
- Connectwise:
  - Opportunities were not getting pushed when Score was applied. This has been fixed.
  - "Contact Company" group field from CW to Mindmatrix can also be pulled now.
  - Sync of Contact_Rec_Id will now sync with proper CW ID.
- Zoho:
  - Organization and Contact linking within the CRM can now be done as the reference fields are exposed for mapping.

Contacts:

- Allowed saving of special characters in "Mobile Number" of Contacts and calling to India, UK numbers allowed.
- Provided export for Offline activities of contacts.
- Disabled the email field in contact if the contact is hard bounced/unsubscribed.
- The contact grids in Playbook reports will have actions like export, send an email, etc.

Dashboards & Asset Search:

- External links and Quick links were not operational. This has been fixed.
- Quick links of "Marketing Campaigns" implemented.
- Provided widget of "Last 5 Emails with Spam Complaints".
- "RSS Feed" widget for Dashboard introduced.
- Asset Search: "More" action was getting displayed for files on the "View Assets" without the proper permission applied. This has been fixed.
- In Users' Leaderboard, provided a section for Total calls, Call Time and Avg. Call Time.
- Optimized the "All" tab in asset search.
- To-Dos marked as done in 'Notification Manager' were displayed as pending in the 'To Dos' widget. This has been fixed.

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Drips & Lists:

- If User is in Organization, then the User smart list was not working properly. This has been fixed.
- In all smart lists, company lists, 'Asset Type' added to 'drip conditions to enable distinguishing them by Template or Media.
- Additional User Scoring Rules, smart list and drip conditions provided for Social and MDF.

Emails:

- Email sending 'on behalf' was not operational for the domain registered clients. This has been fixed.

Editors:

- Asset Templates (General update):
  - Provided 'Remove' option for URL of the 'Image' object.
- Asset Templates (Email):
  - The UTM link in the auto template was not working when used in an email template. This has been fixed.
- Asset Templates (Form):
  - Mandatory and 'allow blank' will now be applicable for dropdown fields in Form Output.
- Asset Templates (Blog):
  - Page was getting stuck while uploading an image into the "Blog post" template. This has been fixed.
  - Blog Post template was broken due to a security patch. This has been fixed.

MDFs:

- The Fund plans to MDF Admin will be displayed based on the permission of Users and Organizations.
- MDF Export: Provided currency unit along with the requested amount in the export grid of MDF requests.
- While sending MDF Notification to Channel Manager, it will now also check for "MDF Admin" permission.
- The 'field data value' will now be displayed on the hover of the dropdown option in the output of the form builder.
- Provided the 'ID' column for all grids of different statuses of requests of MDF.
- Changed the message when a user request exceeds the total amount allocated for that activity in MDF.
- In all MDF notification emails, the currency unit will be based on the requested currency.

Notifications:

- When a contact satisfies an already existing smart list, notifications were sent before the contact was shared, as a result of which, not all users received the notification. This has been fixed.
- The system will send notification emails if the smart list is broken and disabled.
- In the smart list's notification email, displayed the label name for "Preferences" static fields.
- All notification emails will henceforth display only the Company logo.
- The system will now send email notification on the 'Due date' for the tab completion in Linear Playbooks.
- In all Deal Registration notification emails, provided a button to "View Deal".

Playbooks:

- General updates:
  - Playbooks would break if special characters were in the tab name or step name. This has been fixed.
- Contact Centric:
  - Contact Centric Playbooks: For the 'Contact-wise' view, provided the option to filter based on dispositions along with filters.
  - For Contact Centric Playbooks (both views) provided a setting for sending "To Do Notification".
  - In the Step-wise view of the Contact-Centric Playbook, if a step action was completed, a new modal window, "Assign to Step" is being provided.

Reports:

- Email:
  - Emails Summary Report for Users also provided based on permission.
- Drip:
  - Displayed the contacts on click of Stats count in the Drip Report.
- Playbook:
  - In the Non-Contact Centric and Linear Playbooks Summary report, provided a column for "Average Completion %".
  - Contact Centric Playbook Report: Provided columns for the number of days in playbook and step.
  - Playbook reports were not visible for non-Super Admin users. This has been fixed.

Setup:

- Provided 'show tooltip' and 'info icon' for all types of Custom fields.
- Sharing of templates provided on media side pages.
- Default values of drop-down custom fields were not reflected while creating Organizations. This has been fixed.
- Provided option to import multiple values for the dropdown field.
- During 'Sync User' functionality, the Opportunities' Advanced search lists will also be copied.
- Tracking and notifying about User 'locked out' functionality implemented.
- The background color of the modal header and footer section will now come from portal settings.

Social Posts:

- If the Blog site is selected for posting then the "Blog Post Title" text box will be displayed even for non rich text posts.
- In Social drip, for some time zones and time range, posts were not being posted. This has been fixed.
- If a user did not have permissions to view the social report, the report would show an error. This has been fixed.

UI & Consistency:

- Alert message mentions "include" for including or excluding domains in accounts. This has been fixed.

Videos:

- The thumbnails of related videos in the "View Video" page will now be the thumbnail from Mindmatrix.

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*