mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Product Release Announcement

Latest Software Release Notes, January - February 2020

Fixed Issues

CRMs and Third Party Integrations:

- General:
  - ConnectWise & ZOHO: Implemented the "Is Blank Field Mandatory?" feature for Opportunities.
- SFDC (Salesforce):
  - When Mindmatrix syncs contact to SF, it will now create an Account as per mapped fields and link the contact with that Account.
- Sugar:
  - In Opportunities sync, removed "Sync by Name" and kept "Sync by ID" as the only method and the default one.
- Hubspot:
  - Provided Contact Activity push functionality.
- Contact Science:
  - Contact Science Integration with REST API implemented.

Contacts:

- Provided the 'Company' column in the "Contacts" grid across Mindmatrix.
- A column for 'Offline activities' added in the "Contacts" grid of Contact Records page.

Certifications:

- Provided the "Hint" option in Questions that will be displayed if the User is attempting the same Certification more than once.

Dashboards & Asset Search:

- Optimized geo-coding for Organization's Birdseye in the Dashboard widget.
- View Assets page: The Filter toggle value, view type, sort item, and order will be saved in Browser for the User.
- Added "Contracts" into Asset Search and Asset Search Configuration.
- Provided "Stats widget" in all designs for contacts with interest status as Active, Hot, High, Medium and Low
- Provided "MDF Summary - Admin" and "MDF Summary - User" widgets.
- 'Users feed' in the Dashboard will be displayed based on User and Organization permission.

- In "Playbook - Large Thumbnails" and "Videos" widget display the thumbnail image container has been updated to display thumbnails in 16:9 ratio, and in "Playbook - Small Thumbnail" added multiple lines provision for title.
- Provided "Offline Activities" in Dashboard Feed.
- Changed the icon and added text to the "See more reports" widgets in Channel Partner Dashboard.
- Asset Search: If 2,5 or 0 was used in multiple word search, the asset name was broken in the display. This has been fixed.
- Clicking on "Playbooks - Large Thumbnail" widget will now open the respective playbook.

Drips & Lists:

- Quick Drip Editor: Scroll was missing from the "update contact" tab of the "system" event. This has been fixed.
- Provided "Drip Campaigns" conditions in User smart list, drip condition, and scoring.
- User smart lists optimized for some conditions like 'Drip Campaign running status is equal to never' and 'Contacts(all) greater than 0'.
- In the Company list, for condition based on Contact Centric Playbooks, it was pulling templates that are deleted also. This has been fixed.
- For all types of Smart lists, Drip conditions and Scoring based on 'Date', provided the option of "Days Ago".
- In 'Drip Editor Preview', the preview used to vanish on zooming at some resolutions. This has been fixed.

Editors:

- Asset Templates (General update):
  - Provided 'Remove' option for URL of the 'Image' object.
- Asset Templates (Email):
  - In Email Editor, in 'Cell Properties' for "Default Background Color" from palette, if 'Company color' is selected, provided the hex code for it.
- Asset Templates (Form):
  - In the form editor, provided the option to add tab index.
- Asset Templates (Web):
  - Included provision to add custom domains for the "Omit non-company domains" option in Web template and media.
  - Provided option to add validation function in Web template's script section.
  - 'On behalf' setting for auto-responder was not working from Media. This has been fixed.

MDFs:

- Provided a column of "Attached Files" in MDF request grids.
- Setting based hiding of "Reimbursement" functionality for MDF introduced.
- Currency Conversion applied to MDF Summary Report.
- "All" folder provided in MDF Advanced Search.
- MDF: Provided export and Exposed 'MDF Request ID' while exporting from Advanced Search List.
- Provided adding of documents for MDF Activities and made the "Comments" as HTML Editor.

Notifications:

- The user will not get blank email notification when the MDF admin saves the request without changing the status.

Opportunities:

- Removed the "Save" button from the "Associate contacts" page of Opportunities since contacts are directly added on "add".

Password:

- Released a more intuitive password creation experience for users.

Playbooks:

- General updates:
    - Provided option to move steps from one Tab to another for all Playbooks.
    - Subject line of Emails sent via 'quick send' displayed the name of the asset instead of the subject line mentioned. This has been fixed.
    - In all playbooks, ordering of events/nodes within a Step has been provided.
    - The playbook was not working if the filters added in Asset Object were deleted. This has been fixed.
    - In playbooks, if a PDF document from the 'document' gallery is added, it will now display the thumbnail for that document.
- Contact Centric:
    - Preview for external links was not operational. This has been fixed.
    - CRM Contact-Centric Playbook POD: Provision to add a contact to other playbooks has been provided.

Reports:

- General updates:
    - Asset report optimized.
- Email:
    - More stats provided in 'Email Drip Campaigns Usage Report' in Setup.
    - In export, provided separate columns for Total Bounced and Soft Bounced.
    - Provided more stats like Used, Active, Sent, Delivered, Bounced, Unsubscribed, Opened, Avg Open Rate, Clicked, Click-through Rate, Contacts, Hot/High, in Drip Campaign Summary report.
    - In the Email report, provided the default chart period based on the email sent date.
    - Provided "Unsubscribed" and "Spam Complaints" in the Email Report.
    - Tracking of assets from the email provided. Currently, this will be displayed only in the 'email report > Links' page.
- Users:
    - Country and User Groups provided in the exported Users Report.
- Playbook:
    - Contacts export was failing when the total call record was exported from the Playbook Summary report. This has been fixed.
- Organization:
    - Organization Group(s) included in the exported Organization Report.
    - Provided "Created On" date for Organization Report and its export.

- The Organization name was not being displayed when Users report was exported. This has been fixed.

Setup:

- In Company Settings, for 'Cookie Policy Setting' made the second option,'Organization/User Decision'.
- If "Planning" permission was not given, then the User was not being able to save the Organization from 'Edit Profile'. This has been fixed.
- Modifying the password from the 'forgot password' page of custom Login was not redirecting to the dashboard. This has been fixed.
- The image from the gallery was not being saved in the profile of the Welcome page. This has been fixed.
- Provided option in the User custom fields page to hide the tabs based on Personas and User Groups.
- Hid sections of MDF and Deals Registered in Organization report based on the Admin permission of each, respectively.
- An error occuring when an apostrophe was added to the label name of the custom contact field has been fixed.
- Provided upload fields for documents and images in User custom fields, Company field set, and Organization field sets.

Social Posts:

- Introduced 'Include day(s) of the week' and 'Ideal time' for Social Drip Campaigns.
- In social drip, provided frequency option of "every other week".
- Blog posting for Joomla website provided.
- For social posting, if the external URL is used in the message, now, it will extract the meta image from it if available and use it in posting.
- Removed the "My Wall" option from Facebook after integration since we are supporting only Company pages.

UI & Consistency:

- Changed the text of "Active Lists" on Contact's report page (under Contact > Views > Report) to "Active Recipient Lists" as requested.

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*