



Product Release Announcement

Latest Software Release Notes, October – November 2023

Roadmap Items Released:

Collaboration (Chat) Phase 1:

Users can chat and interact with Managers, and other accessible Users from within the Application.

Issues Fixed

Automation Workflow:

- Provided Email Drip Campaigns as an action for User and Organization-based Workflows.

CRM:

- Whenever the CRM mapping page is saved, an email notification will be sent to the current Super Admins 'activated.'
- ZOHO: Implemented association of partner contacts to Zoho look-up.

Drips:

- Displayed the Subject Line of the email in the "Quick Editor."

Editors:

- Implemented ChatGPT within the Editors.
- The direct URL will be used in the Hyperlink Manager for media of assets.
- Copying a layer previously prevented the ability to order it, but this bug has now been fixed.
- Image Banner template: The position palette's tab index is now functional.
- Users were not able to send emails on behalf of Owners. This has been fixed.

Filter Management:

- Filter Management Report and Export implemented.

**Exports:**

- Selected records based on the period for inactive contacts were not exported. This has been fixed.
- The report that showed incentives for export needed to display accurate data. This has been fixed.

Imports:

- Field mapping step redirected to a blank page in import accounts. This has been fixed.

Localization:

- Renamed "Portuguese" to "Portuguese [Brazil]", and "Spanish" to "Spanish [Spain]" on all pages where the language is displayed and also provided localized text for each language.
- Localization was not being saved for Asset Configuration tabs. This has been fixed.

Lists:

- "Asset Used On" (except for Email and Presentation), and "Playbook Activity Done On" parameters were implemented for User lists and Organization lists.
- Implemented User list, drip and coring condition based on contacts in Sales Playbook.
- Asset List: Conditions based on 'Valid From' and 'Valid To' implemented as Date field.
- Provided the "Deal Registered On" condition in User and Organization list.
- When a list gets disabled, it will be striked out in Red color.

MDF:

- Provided the functionality of deletion of expired Fund Plans.

Notifications:

- If Deal Registration notification is disabled for a company, notification emails for registration rejection or any other actions of Deal Registration won't be sent.

Playbooks:

- Provided 'reset' for completion of playbooks and LMS.
- For the delay period, we have provided a text box for the number of days instead of the dropdown.
- Sales Playbook: Setting for the email node to disable/hide quick send has been implemented.
- The 'Step details' in Playbook/LMS Media will be hidden if the Setting of "Display Numbers" is OFF.



Reports:

- Lead Routing Report for Super Admins introduced.
- A new page called "Report Overview" was added.
- The internal page tracking now has an export function in the user grid.
- Campaign Summary Report: Data was inconsistent when a particular user was selected. This has been fixed.

Self Serve:

- Provided "Asset Preferences" in the Self-Serve.
- Provided Company Setting based on which the default asset preference will be the User's language.

Setup:

- The Super Admin page to 'Reset 2FA' for users for whom it is enabled has been introduced.
- Product Fields: Creation of Groups and sub-groups for a set of fields implemented.
- Product Fields: Hiding/Showing Groups of fields based on the condition implemented.

Usability:

- Modified the "Unsubscribe" page to list all subscriptions as checkboxes instead of a dropdown.
- In Organization List Export, the Opportunities amount will be formatted up to 2 decimals.
- Provided two folders, namely, "Added" and "Not Added" for actions of Company lists.
- Renamed the Contact field of "ZIP Code" to "ZIP Code / Postal Code".

Videos:

- Added download option to MP4 videos.

View Assets:

- Approval templates were displayed on the View Assets page. These have been removed as of now.

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*