Product Release Announcement

Latest Software Release Notes, October - November 2019

Roadmap Items Released:

Custom fields for Users:
Super Admins can now create custom fields and tabs for Users which can be displayed in Setup > Users, Profile and Self Serve, based on Persona or User Group.

Fixed Issues

CRMs and Third Party Integrations:

- General:
  - Playbook To-Do's will now get synced when To-Do is created.
  - Autotask & ConnectWise: When active contact is made inactive in CRM, it will update in AMP.
- SFDC:
  - Sync of Contact Custom Fields while pushing Users to CRM based on setting provided.
  - In the"CRM Settings" tab, provided "Organization Name" , "AMP Owned By" and other Settings fields for mapping for Contact and Leads in case of customization of contact fields
- Zoho:
  - Opportunity push was not working when “AMP Owned By” was mapped without Organization mapping. This has been fixed.
- Hubspot:
  - Implemented Push Associated Contacts Checkbox functionality for Opportunities push.
- Sugar:
  - Exposed the Opportunity ID field for mapping in CRM Organization mapping.

Contacts:

- Provided editing of "Offline Activities" in Contacts.

Dashboards & Asset Search:

- In ‘View Asset’ for Blogger & WordPress, there was an issue in activation process as it repeatedly asked the User to activate even if User was already logged-in. This has been fixed.
- Actions for contact grid of "Contact Activity" widget has been provided.

Drips & Lists:

- In User smart list, created filter called "User's activities" and moved all activities-related conditions from "User Record Data" to this option.
- Added"Contact Filters" in conditions for Company List also.

Deal Registration:

- Approved Deals and the same in contact will behave the same and email, Company and Contact Type will be disabled in both places.
- While registering a new deal, the system will check for duplication in Deals, Contacts and Users created by the User.

Editors:

- Asset Templates (General update):
  - Removed 'select' text from drop down default text in Output.
  - After a User was deleted, and if the email was used to fill a form to create a new contact, the contact was not being created. This has been fixed.
- Asset Templates (Email):
  - If multiple emails related to the same template were kept for resend, then all the resends used to happen only based on the contacts in the last email. This has been fixed.
  - For CTA, applying Company color from the color picker palette was not operational. This has been fixed.
  - Dropdown field value's "space" was being converted into "%20" in the form code and in the notification email of the smart list. This has been fixed.
- Asset Templates (Form):
  - In form palette, added functionality to send form completion notification email once form is filled.
  - Gave option of 'Omit non-company domains' for the email field in form container to restrict email from Yahoo, Gmail and Hotmail.
  - If there were many mandatory fields in form, then the alert's close button was not visible. This has been fixed by not providing each field's details in the alert.
  - 'Space' was being replaced with '%20' for drop down values in smart list notification for form filled. This has been fixed.
- Asset Templates (Web):
  - Web Editor (Template as well as Media): The edit button in the layer palette was not working. This has been fixed.

Imports & Exports:

- Drip Report: In export, provided separate columns for all the values such as hard bounced, soft bounced, opened rate, etc.
- In export of Users, Organizations and Organization Groups Report, provided columns for "Created Contacts" and "Owned Contacts".
- Exporting of contacts of External Site visits was not operational. This has been fixed.

MDFs:

- MDF Advanced Search functionality for custom fields introduced (BETA).

Notifications:

- When User clicked on 'Show me the Opportunity' button in notification email, the Opportunity record was not being seen. This has been fixed.

Opportunities:

- Folders of Manage > Opportunities will now work as per permission of the Opportunity Type if "Is Public" is unchecked.
- Provided multiple selection and deletion of Opportunity records.
- Opportunities tabs can now be displayed based on User Groups as well along with Personas.

Playbooks:

- General updates:
    - In all playbooks on the admin-side, provided option to set group color for each step to mark grouping of steps.
    - All calling activities made from a playbook (direct calling from the grid, profile of the contact or call script) will be registered in the playbook report.
- Contact Centric:
    - Filtering based on contact filters provided in Contact-wise view of Contact Centric Playbook.
    - Provided "Quick Send" for Email events also in Contact Centric Playbook.
    - In To-Do, created provision to save the time along with the date so that the notification will be sent at the set time.

Reports:

- General:
    - Date range provided for "User Activities Report".
- Social Drip Campaign:
    - Displayed Shared, Likes and Comments details in Individual Social Drip Report when clicked through Summary Report.
- Opportunity:
    - Custom Date Range provided in Opportunities Summary Report which will be based on Opportunity creation date.
- Landing Page:
    - Export of Landing page report was not working.This has been fixed.
- Playbook:
    - Contact Centric Playbooks Summary Report enhanced.
    - Non-Contact Centric Playbooks Summary Report introduced.
    - Contacts added to playbook from "Execute Play" action were not assigned Step 1 as current step and hence not being displayed in Report. This has been fixed.

Setup:

- Login ShoutOut for Install login page introduced.
- Provided "Search" in Organization Groups grid for 'Channel Manager' page of User.
- Removed "Web Banner" widget from Mobile version of all personas.
- Mapped "Contact's Work Number" to "User's Phone Number" while converting contact to User.
- Addition of Organization to multiple Organization Groups based on BETA flag has been provided.
- While converting 'Contact to User' if Organization step exists then, on 'Create' it will populate the Contact Company as Organization name and other address fields into Organization.
- While converting 'Contact to User' if Organization step exists then, on 'Create' it will populate the contact company as Organization name and other address fields into Organization.
- While converting 'Contact to User', the 'Contact Mobile Number' will now be mapped with 'User Mobile Number'.
- Removed "Roles" and "Channel Manager(s)" steps from User creation step process.

- Separate permission for "Planning" page in Organization introduced.
- Triggers and Depreciation applied to User Scoring was getting applied to Contact and Opportunity Scoring and vice versa. This has been fixed.
- Provided "STEP (or STP)" file type to be uploaded in Document Gallery.

UI & Consistency:

- Modifications in navigation for Deals done and ‘Import Deals’ added in Status page.
- Text change in tool tip of 'Email Event' in Non-Contact Centric Playbook has been done.
- UI issue in hover of elements of Data Room asset has been fixed.
- Changed icon for "import" in Product Databases page to 'fa-upload' making it consistent with other areas of the product.
- Provided tool tips for stats item of Drip report.
- Increased character limit for File name in Documents and Images Gallery.
- Tooltip stayed on the page for Course Catalog even when modal was loaded. This has been fixed.
- In 'Card' view of Course Catalog, made the whole section clickable as in Playbooks.
- Resized 'Manage Script' Window in Playbooks to make it easier to use.
- Provided note only for document gallery upload mentioning the file extensions which are supported.
- Increased the width of placeholder for thumbnail view of drip, so that the UI doesn't get disturbed.
