mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Product Release Announcement

Latest Software Release Notes, January - February 2021

Roadmap Items Released:

Social Syndication

This feature will allow Users with permissionof the Company to “syndicate” social postings based on the Category selected and also offers them the option to do the social media postings by themselves or have the Marketing Team post on their behalf.

Fixed Issues

Accounts:

- Modification in the grid of the "Accounts" - “Search on Google” added as a separate link.

CRMs and Third Party Integrations:

- General:
    - The Microsoft Dynamics package has been enhanced and converted to APIs.
- Autotask:
    - Updated Contacts were being pulled and sometimes did not satisfy the account criteria. This has been fixed.
- Connectwise:
    - The Contact/Opportunity push was not working when any custom field value contained an accented letter. This has been fixed.
- SFDC:
    - Re-added the 'Interest Status' and 'Score' for the organization.
    - Pulling opportunities created from deals in the CRM has been implemented.
- ZOHO:
    - Field mapping was not being displayed for the EU domain of the CRM. This has been fixed.
    - Contact pull was not working when there were account fields as part of filter criteria. This has been fixed.

Contacts:

- Unsubscribing shared contacts from the 'action' was not operational. This has been fixed.

Cases:

- Users with 'Cases' permission will now be able to create the 'Case' from the Setup.

Drips & Lists:

- Provided the "Copy" functionality for Drip Media.
- Drip Campaign: The 'on behalf of' step was skipped while creating media if the first node of the drip template was a 'delay'. This has been fixed.

Deal Registration:

- While converting a Deal to an Opportunity, the 'Opportunity' page failed to load if special characters were used in the "Company Name" of the Deal. This has been fixed.

Events Calendar:

- Provided a separate page for "View Event".
- In the Events Calendar, one could not select the 'pm' time as the calendar was going below the screen. This has been fixed.
- In the 'Sharing' page, we removed the "Copy" action as this is not needed.
- Increased the character limit for the 'Description' field of the Event Calendar to 2000.

Editors:

- Asset Templates (General update):
  - Upon the click of "Save" for the 'Info' page, a confirmation message has been provided.
  - The text color change worked intermittently. This has been fixed.
- Asset Templates (Print):
  - For print templates, "Map to URL" was not working for the image object. This has been fixed.
- Asset Templates (Form):
  - Old forms were not getting loaded in the form editor and web editor. This has been fixed.
  - Few issues pertaining to the Date-time field in the Form has been fixed.
- Asset Templates (Certification):
  - Provided a "View" button to view the optimized full-size image for images in Certification.

Image Gallery:

- The "Crop" button from the 'Image Gallery' has been removed across the software. This functionality will be reintroduced once fixed.

Localization:

- Localized the text of the "View Assets" widget.

Notifications:

- "Feed" added in the "Notification Manager" and few textual changes done in the "Notification Manager" as requested.
- Notification Manager was not loading for Users without 'Partner' permission. This has been fixed.
- Fixed an issue that would cause some notifications to send multiple times.

Playbooks:

- Provision to enable/disable notifications for all types of playbooks has been implemented.
- In Contact Centric Playbook, an issue in setting a due date for some contacts has been fixed.
- Blank page appeared while 'send to all contacts' was selected for a step containing a large number of contacts. This has been fixed.
- Playbooks were not loaded if the User language was German. This has been fixed.
- In Non-contact Centric and Linear Playbooks, when assets other than email are added, a setting has been provided in the Setup > Template to enable/disable the sending of the asset as email.

Reports:

- Email:
  - Email preview in the reports could not be viewed for the Users from User Groups which had 'show users among one another' enabled. This has been fixed.
- User:
  - In the User Report, the 'Activity History' chart for the newly created User showed random data from other User's activities. This has been fixed.
- Drip Campaign Report:
  - 'Unsubscribed by admin' will not be counted for the 'active contacts' count.
  - In the Drip Campaign report, clicking on the count was not displaying the contacts. This has been fixed

Setup:

- Only for Super Admins: in the "Setup > User Management > Users - Views" a page has been provided for: "Assigned Roles". Here, you can view which roles have been assigned to a particular user.
- For some Time Zones, the asset's 'valid from' or 'valid to' dates were changed on Save. This has been fixed.
- "Setup > CRM Settings" will be displayed for the Users with the "View" Permission and "CRM" checkbox checked.
- Provided the step wizard on the copy of the template and upon saving of the 'Info' during 'Edit', the modal window will no longer close.
- Capped the number of custom Contact fields per company.
- Provided the filters of *Not Shared*, *Shared to Users* in 'Setup > Asset Templates'.
- The display name of document/images will be displayed instead of the file name in Asset Search and other pages.

Social Postings:

- If a Social Drip was shared with another user and if the template inserted in that social drip was not shared, then "Null" was displayed in preview. This has been fixed.

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- Meta Images were not loading in the social posts for a few assets. This has been fixed.
- The blog posting was not done for certain accounts. This has been fixed.

Scoring:

- In User Scoring, for "Engagement" rules addition of multiple conditions was missing. This has been provided.

UI & Consistency:

- Playbooks: Textual change for the hover text of the 'External Media' has been done.
- The tool tip of the "CTR" stats in the Drip Campaign Report was not completely visible. This has been fixed.
- When a playbook was loading, the default color and icon were being displayed. This has been fixed.
- Legends in the User Activities chart were overlapping with the graph plotted. This has been fixed.

Users

- In the 'Users' grid, if the count of Closed-Opportunity was clicked, it gave an error page. This has been fixed.

Third-Party App:

- Videos synced from 'Google Drive' will now provide the "preview" URL instead.

Twilio Dialer:

- The Dialer will be displayed above the "Assist Me" button.

View Assets:

- The HTML 5 local storage of the visited tab will now be saved only for the main 'View Assets' page and not for other pages like Recommended, My Favorites, and Recently Used.
- On clicking the thumbnail of 'Video', it was loading the thumbnail instead of the video. This has been fixed.

Video Gallery:

- In the Video Gallery, the '?' and few other special characters in the name were replaced with '+' on edit. This has been fixed.

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*NOTE: AMP refers to Automated Marketing Platform (Mindmatrix) software.

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*