

# Product Release Announcement

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Latest Software Release Notes, February - March 2021

## **Fixed Issues**

### **Asset Search:**

- 'Do not remember tab visits' setting provided in the "Asset Configuration".

### **CRMs and Third Party Integrations:**

- General:
  - Autotask, ConnectWise, Dynamics, Sugar, ZOHO: If both 'push and pull' are enabled then an option has been provided for each mapped field to turn-off the push or pull functionality.
  - Provided the user profile and the organization profile fields in field mapping for all CRMs other than SFDC.
- Autotask:
  - Provided the static text fields of "Direct Number" and "Alternate Number" for CRM 'Map Fields' Page & on the Asset Configuration page.
- Connectwise:
  - Connectwise POD: Playbooks: When the page is loaded in the iFrame, then the calling button will open a new window and place the call.
  - Added to the log if contact is not available in CRM while pushing the Activity.
  - While creating a new opportunity, the 'opportunity owner' will be the 'contact owner'.
- SFDC:
  - Provided Organization's "CRM configured" field in the mapping for Company level CRM.
  - Pushing of the 'Approved deals' that are associated with an Opportunity as contact has been implemented.
  - Issue while creating print assets in SF Community Asset widget has been fixed.
- Hubspot:
  - AMP will not use the Partner field while syncing accounts to CRM.
  - Only 200 opportunities were getting pulled in Hubspot CRM. This has been fixed.

### **Drips & Lists:**

- Changed the 'Ideal Time Range' of the Drip Campaign if the scheduled start time falls out of the range.

- Provided "Offline Activities" in the smart list, drip condition, and scoring for contacts using the "Type" field.
- Provided the 'Sent' page grid of email in the smart list, drip, and scoring conditions for email media for contacts as well as users.
- If the 'Send event' node template was changed after sending a few emails then the drip was stalled. This has been fixed.
- Notifications and Todos introduced in Organization Lists.
- Additional fields from Certification for User Smart list and User drip conditions have been implemented.
- Drip was freezing when a company list was associated with the drip campaign. This has been fixed.
- Smart Lists were breaking for other languages like Spanish. This has been fixed.
- "Offline Activities" moved as a separate filter in Contact Smart List.

### **Dashboards:**

- Stats ring widget for "active social drip campaigns" introduced.
- Made the 'settings' for the "New Assets stats ring" the same as that of "New Assets of the View Assets".
- If "Asset Scoring" is enabled, the 'Info popup' for the assets in "View Assets" (both version and all views) will be displayed.

### **Events Calendar:**

- In the Event Calendar, when the time zone setting of the User was changed then the time was converted into the new time zone. This has been fixed.

### **Editors:**

- Asset Templates (General update):
  - Images sent as an email from all pages will provide the link to download the Original image with its filename.
  - In the "Unsubscribe from Email" page, if the User is from an Organization, mentioned this as the Company Name.
  - For all templates (except Certification), reduced the minimum height and width to 75px.
  - The user was not able to enter the RGB/HEX code for the "Section". This has been fixed.
- Asset Templates (Print):
  - Provided new design for the Print "Direct Use" and "Customized" asset view page.
- Asset Templates (Email):
  - Provided the template name for the "Name" field of emails in the draft.
  - When external HTML was imported into the editor and viewed from the template grid it appeared left-aligned. This has been fixed.
- Asset Templates (Web):
  - Added a setting for the web template to "Push TO CRM" based on which if the web template consists of a Form and has the "Contact Type" field value set as "Registered Deal", then it will push the contact instantly to SFDC.
  - "Poll" object in the Web template was not working. This has been fixed.
  - 'Company' field was missing in the form-filled notification email. This has been included.

### **Gallery:**

- Provided the option to upload a thumbnail to assets from the document gallery.

### **Import:**

- Provided 'Time Zone' and 'Date-Time Format' fields for mapping in the Users Import.

### **Lead Routing:**

- Organization Custom fields added for rule matching and multiple rules to a Lead Routing provided.
- Re-routing in Lead Routing implemented.

### **MDF:**

- MDF module's 'Approved' email notification was not providing the details of the actual approver but was displaying the Fund Plan creator details. This has been fixed.
- The provision to change the Activity type for non-approved MDF requests has been implemented.

### **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 be sent multiple times.

### **Playbooks:**

- Non-Contact Centric and Linear Playbooks: Provided download for the 'Images' node.
- When PowerPoint permission is up to view then the user will not be able to see , 'Manage slide', 'info', and 'data' options in the playbook.
- Contact Centric Playbook: On Save of the Disposition, cleared the 'due date' for that contact in that playbook.
- Contact Centric Playbooks: On setting disposition, the pagination jumps to 1 after the refresh. This has been fixed.
- Contact-centric playbooks: When there were too many accounts in the list, the list was getting cropped. This has been fixed.

### **Reports:**



- Email:
  - In the Email Summary Report, when an email report was opened and the "Opened" count was clicked it gave an error. This has been fixed.
- Drip Campaign Report:
  - Provided "Click Rate" along with "Click Thru rate" in the Drip Report.

### **Setup:**

- Partner contact was created in the 'Base Company' for Super/Site Admin when the 'Current Company' was different. This has been fixed.
- Provided validity period for Documents, Images, and Videos.
- Smart list notification status was not copied when 'Sync User' was used. This has been fixed.
- Blocked the creation of new user accounts with some "username" like info@, support@, etc.
- Persona/User group/organization/organization group permissions provided for tabs of Organization custom fields were not applied in Organization Profile, Self Serve or Setup > Organization. This has been fixed.
- The fields in the "Stages" tab of Organization were not being saved. This has been fixed.
- Files filters were being applied for the templates and vice versa for the assets with the same Ids. This has been fixed.
- Added a checkbox in the "Roles > Features" as 'restrict\_document\_upload', which, when checked will hide the "Upload" button in the Document Gallery.

### **Social Postings:**

- A thumbnail image was getting added at the bottom for blog posting. This has been fixed.

### **Scoring:**

- Pagination was not operational in website visits conditions of Scoring. This has been fixed.
- In User Scoring, if the user adds the condition for "Social Post Published", "Social Media Activated" then it was not working as expected. This has been fixed.

### **Self Serve:**

- Pagination was not operational in website visits conditions of Scoring. This has been fixed.

### **UI & Consistency:**

- Changed the text "Here are the latest updates since you last logged in." to "See the latest updates below" in the profile popup.
- Provided tooltip to counts in columns in the Drip Campaign report.

### **Twilio Dialer:**



- Contact-wise view of Contact Centric Playbook: Calls were getting connected to the wrong contacts when another call was tried without disconnecting the first call. This has been fixed.

#### **View Assets:**

- Downloading documents synced from Google Drive with special characters was breaking the process. This has been fixed.

#### **Videos:**

- Based on a Setting, the Name and Description field for filtering the 'Related Videos' has been implemented.

#### **V5:**

- The 'Thumbnail' and 'Card' view of Social drips will display the count of only those social sites which are used in the drip.
- Inserting Videos was not possible in Playbooks. This has been fixed.
- The 'Active Contacts' count in the "Playbooks" widget was not appropriate. This has been fixed and made as 'Total Contacts'.
- In V5, for the Campaign's link, the 'insert' button was missing. 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](mailto:support@mindmatrix.net) -- *Mindmatrix Services*