mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Product Release Announcement

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.

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