Product Release Announcement

Latest Software Release Notes, May - June 2020

Roadmap Items Released:

Asset Scoring

Just like Scoring for Contacts, Users, and Opportunities, now we have scoring for "Assets" based on Usage and other criteria.

Fixed Issues

CRMs and Third Party Integrations:

- General:
  - Opportunity was showing the "Push To CRM" button when "Opportunity Push" was Unchecked under "Sync Settings" Page. This has been fixed.
  - Filters of Mindmatrix will now be available for mapping of contacts and are being used for 'Pull' only.
- Autotask:
  - Opportunity 'Description' field was not being synced when mapped. This has been fixed.
- Connectwise:
  - Contact was auto pushed to CRM irrespective of contact push settings & To-Do push was disabled when a playbook To-Do is associated with the contact. This has been fixed.
  - When SOT was set to CRM, Update Contacts were not working. This has been fixed.
- SFDC:
  - Contact Duplication issue in CRM, if contact and user exists, has been fixed.
- Zoho:
  - Instant syncing of Registered Deals introduced.
- Hubspot:
  - Contact/Company fields having null values were breaking the sync. This has been fixed.

Currency Conversion:

- Currency Conversion applied on the "Opportunities" report.

Configuration:

- Removed the beta flag of "Organization in multiple Organization Groups". In all installs, organizations can be added in multiple Organization Groups.

mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Campaigns:

- Clicking the save button twice was creating two records for campaign links. This has been fixed.

Contacts:

- While Creating Contact To-dos, the date field was not accepting future dates. This has been fixed.

Drips & Lists:

- Provided sharing of assets based on the Company level User list.
- "Created On" was missing from the contacts grid in the "Company List" preview. This has been provided.
- Provided User custom fields and Organization custom fields in User smart list and User drip conditions.
- A wrong validation error was displayed for a few time zones while setting "Ideal time range" in drip media. This has been fixed.
- Smart list conditions based on the "Recipient List" have been implemented.

Deal Registration:

- When admin users clicked on an approved deal, it threw an exception. This has been fixed.
- Deal Registration: In the Deal Grid pertaining to the "Similar Records" section, made the "Partner User" data consistent.

Events Calendar:

- The “Description” field of Events Calendar will now support HTML. There is now also a "Copy" option in "View" in the widget.

Editors:

- Asset Templates (General update):
  - Campaigns in Hyperlink Manager of Editor, implemented.
  - Removed 'cache.amp.vg' from all Output URLs of plugins.
- Asset Templates (Email):
  - Provided character limit message for "Subject" and "Preview text" fields.
  - In the "Draft" folder, if the email doesn't have a subject, provided the option to add subject to it.
  - Provided folder for "Bookmarked" templates in the "Use Template" tab of Compose email.
- Asset Templates (Certification):
  - The certification template was not getting created for some Users. This has been fixed.

Import & Export:

- No contacts were being added to the Recipient List during import if the list name contained a comma (,). This has been fixed.
- Provision for selecting User Custom fields while exporting Users based on the visibility of the tabs has been implemented.

Localization:

- Provided localization for the Profile pop-up of Top Navigation.
- Localization in the tool-tip of profile pop-up on Top Navigation was missed out. This has been fixed.
- Localization consistency made in the "View Assets" page.
  (Note: The category of "All" has not been localized and will be done later.)
- Localization in the legends and X-Axis data of chart for email summary and the individual report has been done.
- "Customize" option in Web Banner template in "View Assets" as well as "Web Banners" page was not working when the language was Spanish. This has been fixed.
- Localized the "All" category of "View Assets".
- Filtering of assets based on language and User preferences in the "View Assets" page and widget has been implemented.
- Localization has been done for password changed, user locked out, export contacts, export user, export opportunity, export report notification emails.
- The localization issue for the first name and last name in import contacts has been fixed.
- "Delete" command for User groups, templates, etc, was not working for other languages. This has been fixed.
- For Spanish, there was no "Add Message" button while creating a social campaign. This has been fixed.
- Language asset filter implemented for playbooks on the media side.

Opportunities:

- In the Opportunity step process, the "Add to Data Room" section will be based on Data Room permission for the User.

Reports:

- Web Banners:
  - Individual and Summary report for External Web Banners introduced.
- Certification:
  - Certification 'Taken' and 'Passed' page's user grid will have columns of Number of Attempts, Total Time, Highest Score, Last Attempted, Last Attempt Time, Shared Leads, Opportunities, and Score for sorting.
- Incentive Summary Report:
  - When users select any organization group or organization, it was not displaying any count in the 'stats' section. This has been fixed.
- Opportunities:
  - Clicking on Opportunities count in "Organizations Report" or "Organization Groups Report" stats was not loading the Opportunities. This has been fixed.
- Deals:
  - The cursor was continuously blinking when the user clicked View option for Failed Deals in import deal status. This has been fixed.

Setup:

- Communicate > Social will not be available unless the User has permission to "Social" and "Auto publishing".
- Password and language preference were not getting saved in the self serve. This has been fixed.
- When a user adds any language in 'Other languages' along with default language as English, then only assets with that language in their filters will be displayed for the User.
- Provided option to send the notification to the User the account is "Locked Out" or "Shut Down".
- Filter Categories introduced in "Add attributes" of Templates, Documents, Images, and Videos.
- Provided "Language" in User's Setting page for manual creation and modification.
- The slider was displayed to "NA" even if permission was provided in the "Sharing" page. This has been fixed.
- Copy Company will now create the Company as a child of the Company which was selected to be copied.
- For all template types, renamed the "Data" Step and page into "Settings".
- In 'Organization > Preference', the "Master Agent/Distributor Primary Contact" dropdown populated only 15 records. This has been fixed.
- "Show in the 'Cases" option provided in the "Asset Configuration" page.

Social Posts:

- Removed the image link from the 'Message' of the social post if "Image" is inserted.
  Note: This is not applicable to already saved messages.

Twilio Integration:

- Provided 'Dial Pad' for Twilio calling from the contact grid across Mindmatrix.

Tracking

- Tracking of Print Templates introduced.

UI & Consistency:

- Changed the label text for "Facebook" activation across Mindmatrix.
- Document and video sharing email notification updated as per branding.

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*