

# Product Release Announcement

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Latest Software Release Notes, June - July 2020

## **Fixed Issues**

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

- General:
  - ConnectWise & Autotask: All the contact To-dos will be synced to CRM and assigned to the respective Users in the CRM instead of only the Integrator User.
  - Implemented bulk push for Opportunities as done for Contacts.
- Connectwise:
  - Contacts which were made inactive in CRM were not getting deleted in Mindmatrix (in few import criteria). This has been fixed.
  - Contact was getting auto-pushed to CRM irrespective of contact push & To-Do push being disabled when a playbook To-Do was associated with the contact. This has been fixed.
- SFDC:
  - While pushing opportunity, if any account fields are mapped it will now update the account fields.
  - "Cases" can now be integrated with Mindmatrix.
  - Total Active contacts field has been made available at organization field mapping level.
  - Pulling of account branding from an SFDC account to Mindmatrix has been implemented.
- Zoho:
  - Accounts with Domain of .in, .eu, and .com.au was not getting authenticated. This has been fixed.
  - HTML custom fields will now be available in CRM field mapping (contacts, leads, opportunities, users, organizations).

### **Currency Conversion:**

- Currency Conversion applied for "Opportunities" in the Contact grids across Mindmatrix.

### **Contacts:**

- If no contact is selected from the grid, then the 'send email' action will now send the email to all the contacts of the grid.

### **Drips & Lists:**

- Provided User smart list, drip and scoring condition for "Shared", "Likes" and "Comments" of Social posting.
- The Contact "Origin" field options made consistent in Company Smart list and Smart list.
- Drip and smart list conditions for email templates displayed web templates on the page when 'specific' was selected. This has been fixed.
- In Drip, if the user performed the "Add From List" action then the list was not loading. This has been fixed.
- Moved all of the MDF conditions to "User Activities" from "User Record Data" in the User smart list conditions.
- Smart list conditions with links having special characters were breaking. This has been fixed.
- While creating a smart list based on links in email, the links were not populated if the email was media. This has been fixed.
- The smart list with "Phone Activities" was broken. This has been fixed.

### **Deal Registration:**

- The "Registered Deal" option was missing from the "Contact Type" field. This has been added.

### **Dashboards:**

- Rounded the "Amount" field of Opportunity to 2 decimals while displaying in widgets.
- The "Settings" option of the "View Assets" widget in the "Dashboard Settings" page was not loading. This has been fixed.
- "Segment-wise Email" widget was not loading for a few users. This has been fixed.
- Playbook To-dos marked done in the "Notification Manager" were not marked done in the Dashboard widget. This has been fixed.

### **Events Calendar:**

- For events, shared till the "View" option, disabled all other controls, hid the color row, and kept only the 'Close' button.

### **Editors:**

- Asset Templates (Email):
  - Increased the character limit of "Subject" and "Preview Text" of Email to 250.
  - New Design for Email Basic and Smart Object placeholders introduced.
- Asset Templates (Web):
  - Enabled different theme CSS for the form object in the mobile browser.
- Asset Templates (Form):
  - Made the form fill notification work for external forms too.
- Asset Templates (Web banner):
  - The iFrame code of Web Banner output had 36 px added to the actual height. This has been fixed.
- Asset Templates (Image banner):
  - The organization logo was not being pulled when the shared "Image Banner"

template was viewed by Users in other Organizations. This has been fixed.

- Asset Templates (Certification):
  - The issue of certificate variables in the Print template not parsing has been fixed..

### **Google Drive Integration:**

- User was getting "The remote server returned an error: (403) Forbidden." for some files while importing files from Google drive. This has been fixed.

### **Import & Export:**

- Provision for mapping User Custom fields while importing based on the visibility of the tabs has been implemented.

### **Localization:**

- Localized the "All Filters" in "View Assets".
- The 'Logout' message has been localized.
- For the "Stats" widget (all design) the title of the modal header will now be from the "Title" mentioned in the 'Settings' for the language.
- Localized the tab names and labels of Opportunities and Product Databases' custom fields.
- MDF custom fields can now be localized.

### **Opportunities:**

- Provided "sharing" page in Opportunity> Advanced search.

### **Playbooks:**

- Provided 'emojicons' inserts for playbook name, description, tab name, step name, step description.
- Provided "asset object" as an option in "Embed Asset".
- When a list of more than 500 contacts was added to the playbook, the task used to break. This has been fixed.
- Campaigns in Non-contact Centric Playbooks introduced.
- Filters used in the playbook for "Asset Object", if deleted, broke the playbook. This has been fixed.

### **Reports:**

- General:
  - Made the "Link Clicked" pie chart as CTR in the "Usage Report" of assets.
- Assets:
  - The asset report was not working for date ranges. This has been fixed.
  - The filter feature was not working in the asset report. This has been fixed.
- Social:
  - Social One-Off Posts Summary Report.
- Email:
  - Provided "Best time of day" for sending emails in the Email Summary Report.

### **Setup:**

- Tab with only HTML and/or Date-time fields was breaking the "Asset Configuration". This has been fixed.
- In Roles, new permission of "Organization\_Profile" added which is being used for setting the permission of "Organization Profile".
- Provided mapping of Contact to User for the conversion of contact to User.
- "Incentives" permission provided in the "System" tab of the "Roles" page.
- Company level setting-based show/hide "Assets Overview" page introduced.

### **Scoring:**

- Rules with dropdown value were not being saved in Opportunity Scoring. This has been fixed.

### **Social Posts:**

- In the Social drip 'message' grid, the date-time field was not being displayed based on User Timezone. This has been fixed.

### **Users:**

- For "User Engagement Status", provided the date-time stamp for the latest activity.

### **User Profile:**

- '% Completion' progress for User and Organization profile completion has been implemented.

### **UI & Consistency:**

- In "Course Catalog", the hover pop-up stayed on the page even when navigated to the template. This has been fixed.
- Thumbnail image for the "Overview" page will be using the 250 x 250 thumbnail.
- "Full Screen" was not working for YouTube videos from the 'view' page. This has been fixed.
- UI issues in 'Contact to User' conversion step wizard has been fixed.
- The text of "Expected Close Date" for Opportunity made consistent across Mindmatrix.
- Design modification for the 'new user notification email' has been done as requested.
- "LinkedIn" has now being spelt consistently across Mindmatrix.
- In the Drip Campaign Report, changed the text of "Delay until" to "Delay until after" for 'Delay' Node.
- In the event calendar, the time displayed on the calendar was not appropriate. This has been fixed.

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