Product Release Announcement

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 'emoticons' 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.