Product Release Announcement

Latest Software Release Notes, May - June 2021

Roadmap Items Released:

Automation/WorkFlow Management Phase 1 :
Admins can create a series of sequential tasks that will be carried out based on predefined rules and conditions, to execute a business process. It can be a collection of data, rules, and tasks that need to be completed to achieve a certain business outcome. In this Phase, User and Contact based conditions will be processed.

Fixed Issues

Contacts:

- Provided "Notify by Email" for Manual To-Dos of contact.

CRMs and Third Party Integrations:

- General:
  - Provided Organizations' Custom fields mapping for Zoho, Sugar, & Hubspot CRM.
  - 'Push-Pull' buttons will not change as per push-pull sync settings.
- Autotask:
  - The opportunity push log was incorrect when Opportunity was deleted after it was pushed to CRM. This has been fixed.
- SFDC:
  - The user was unable to change/update field mapping for Leads. This has been fixed.
  - Deleted Opportunity fields were displayed in the field mapping of CRM and breaking the mapping. This has been fixed.

Drips & Lists:

- The "Time Frame" option has been provided in the User Smart list for "Interest Status" based on conditions in the Contact Smart list and "User Engagement Status".

- The user smart list for the 'Total deal registered' condition was showing the wrong output. This has been fixed.
- Provided User smart list condition, User drip condition, and User scoring rule based on "Download" of the email template.
- When filters were added as the system event in the drip, the newly added filters were not displayed on editing the event. This has been fixed.

Dashboards:

- If a playbook was completed and it was assigned to the "Playbook" widget with the "Show on Completion" set as true, then the playbook was removed. This has been fixed.
- In the 'Linear Playbook' widget, the 'thumbnail' view will display the complete name of the playbook, and also the name and the description on hover.
- "Lead Engagement" and "Account Engagement" widget logic has been corrected.

Editors:

- Asset Templates (General update):
  - The 'Call-to-action' button text was turning blue in Outlook. This has been fixed.
  - "Alt Text" for images was not being saved. This has been fixed.
- Asset Templates (Email):
  - In the Email Report, it was displaying the auto URLs of the Company and User URL fields. Now it will display the field name.
  - Custom User variables were not being parsed in the email output. This has been fixed.
- Asset Templates (Presentation):
  - For "Presentation" assets (template or media), provided the "Download" link instead of "View",
- Asset Templates (Landing Page):
  - Captcha was not visible in the landing page preview for some templates. This has been fixed.

Events Calendar:

- Events created for multiple days were not getting displayed as stretched events and the "All Day" event was not being saved. These have been fixed.

Localization:

- Linear playbooks were getting stuck upon loading when the language selected was Italian. This has been fixed.

Lead Routing:

- Provided 'Weighted' and 'Ranking' for routing of leads in the round-robin.

MDF:

- MDF auto email notifications can be disabled by the Site Admins based on Company Setting

Opportunities:

- If any Organizations exist within a Company, there is now an option to set the notification to "Channel Manager" in the Opportunities Advanced List for all users of the Company.

Playbooks:

- Provision to add/remove filters from the selected contact in the Contact-Centric Playbook has been implemented.
- In the 'Step-wise' view of Contact-Centric Playbook, displayed the Phone Number to the contact for calling purposes.
- Twilio calling issues in the Playbook have been fixed.
- Content Syndication introduced in Non-Contact Centric and Linear Playbooks.
- In the 'Contact-wise' View, on the "Add Contacts" page, provided the option for multiple contacts removal from the playbook.
- Thumbnails provided for "External Link" of the "External Media".

Reports:

- Email Report:
  - If the email name had an apostrophe, then the 'link clicked' page of the email report was not loading. This has been fixed.
- Campaign Report:
  - The export option for the Campaign Summary report has been implemented.
- Playbook Report:
  - An Error page was being displayed when the playbook report was viewed on the 'Playbook Summary Report' page. This has been fixed.
- Social Report:
  - Social One-Off Report export was not operational for a language other than English. This has been fixed.

Setup:

- Provided the option to mark a field as "Required" in User Custom fields.
- For User & Organization, the character limit of the 'Address' fields has been increased to 500.
- The user was unable to upload the thumbnail for Video files. This has been fixed.
- Provided multiple record deletion for Organizations.
- Asset Configuration: Cases: The settings applied by a User who has access to a tab were being reverted when another user not having access saved the settings. This has been fixed.
- Opportunity records were not seen when the user clicked on the count in the User grid. This has been fixed.

Sharing:

- Templates were not getting shared to Company User Lists, User Smart List, and User Recipient List. This has been fixed.

Scoring:

- 'Too many soft bounces' condition introduced in the Scoring rules.

Social:

- For shared social drip templates, on preview, the same image was being displayed for all messages. This has been fixed.

Twilio:

- The user was unable to dial a number from contact records or smart lists. This has been fixed.
- The user was unable to make calls after sorting contacts in the list. This has been fixed.

UI & Consistency:

- Made the User First Name minimum character limit to 1 instead of 2.
- Removed the autocomplete from the date-time field.
- There was a typo in the alert message that would be displayed when an attempt was made to create a copy of a restricted template. This has been fixed.

View Assets:

- Filters from the "View Assets" categories were working intermittently. This has been fixed.
- The 'View Asset Overview' Page was broken when a category name contained 'Apostrophe'. This has been fixed.
- The last tab was not loading when clicked if there were 10 or more tabs present. This has been fixed.
- "Send to Social" in the "View Assets" will check only for "Auto-publishing" permission.

- The thumbnail of the SVG file was not being displayed on the "View Assets" page. This has been fixed.
- In the View Assets page, the asset count (Sum of all assets under the tab) was being displayed incorrectly unless when the tab was clicked. This has been fixed.
- The "Clear" button for the 'Search' text box on the "View Assets" page has been implemented.
- "Send to Users" action was being displayed to Users without Partner permission. This has been fixed.
- In “View assets” for Blogger Post templates, it will display only the 'rich text' option going forward.
- The thumbnails of the Videos and Documents with manually uploaded thumbnails were not being displayed on the "View Assets" page. This has been fixed.
- Permission-based actions for Presentation templates in the "View Assets" were reverted. This has been fixed.

“Bridge™” V5 of the Mindmatrix UI:

- "Copy" was not operational for Social Drip templates. 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. -- *Mindmatrix Services*