mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Product Release Announcement

Latest Software Release Notes, September 2018

Issues Fixed

Contacts:

- In the contact grid, if no checkbox is selected then the "actions" will be applied to all contacts filtered or existing in the grid.

Contracts:

- A few alert messages and UI changes have been implemented. A link option has also been provided for "Terms & Conditions".
- The contract module's PDF output will no longer be blurred and will be similar to the Print output.
- A "list view" has been provided along with respective actions for Certification templates in Setup > Asset Management > Templates.

CRMs and Third Party Integrations:

- Salesforce (SFDC):
    - "Partner activity and Organization stats" will now load within the iframe in SFDC for users.
    - Partner User emails may be passed into the "Owned By" custom field within SFDC if no other value is provided.
    - Pushing an User from Mindmatrix to SFDC will check the email address field in addition to the ID to check if contact already exists in SFDC.
    - Option to enable/disable "Account" creation in SFDC when pushed from Mindmatrix has been provided.
    - SFDC: Updated the API call limit as per Edition of SFDC.

- Contact Science:
    - Contact Science import was breaking if "Updated on" field is null.

- Dynamics CRM:
    - Added all installs in the drop down options.
    - Dynamics CRM: While pulling data from Drop Down field it will now pull in Option display value.
    - Dynamics CRM: Contact filter was not working for number type field.

- Connectwise:
    - Contact and Opportunity custom fields filters were not working.
- Autotask:
    - Account type fields also provided for opportunity filter criteria for importing Opportunities.

Dashboards & Asset Search:

- In "Linear Playbook" widget, provided a setting which will not remove the widget on completion.
- Disabled the links for Outlook plug-in and Chrome Extension from Profile pop-up of top menu if "Sales Enablement Tools" permission doesn't exist for the User.
- In "Leaderboard Users", by Default report page will be shown when clicked on User Name even in "Asset Utilization" widget.
- Drop down in "Asset Utilization" widget provided which will provide all the selected Asset types from the configuration done in Setup > Dashboard. (Demo on Tuesday)
- Provided option to change background color in "Videos - v2" widget setting.
- Opportunity viewed from "Leaderboard" widget didn't display all the options in "Views" drop down.
- Clicking on "more" from Profile pop-up of 'Top Nav' will now load all the Announcements.
- "Announcements" widget and the Announcements in Profile pop-up of Top Nav bar will be consistent.
- The Activity feed under the "Web Leads" widget on the dashboard was not loading.
- "Opportunity Summary" Widget optimized.

Drips & Lists:

- In Company list condition the form names were duplicated when "Specific Form" is selected.
- In User drip report, clicking on the "link clicks" didn't display the Users in the grid.
- Smart list condition provided for Contacts who have completed Drip Campaign.

Editors:

- Asset Templates (Web & Form):
    - There need to be 'disconnect' option in form object of mobile version for having disconnected styling.
    - Web Banner: On Edit the drop down values changes to "External Web Address" when CTA was assigned to "Internal Link" has been fixed.
    - Removed Databases option from Web Banner Template Editor.
- Asset Templates (General update):
    - "Save & Close" was not working for editors.
- Asset Templates (Email):
    - "Download email" was not providing the HTML for templates shared upto "View".
    - When Email was made "Left" aligned the left most cell's palette was not been displayed.
    - Default text when text object is added will be displaying real "Lorem Ipsum" text.
    - The "Conditional BG color" was not working in Outlook if applied from Cell Properties.
    - Adding User smartlist to "Send User Email" added Zero Users this has been fixed.
- Asset Templates (Contracts):
    - Signature used to break in Firefox and Safari browser.

Import & Export:

- Export from Opportunity Advance Search displayed blank sheet.

Notifications:

- All notification emails will have "Company Name" as "From" address and "Do not reply" message.

Opportunities:

- Made the "Associate Contacts" page of Opportunities consistent with the "step process" page without the top header and asset search.

Playbooks

- Twilio:
    - Twilio calls in Playbooks have been introduced with an option to record and play a voicemail reply.
- General updates:
    - “Mark as done” buttons were not appearing for action items in linear playbooks. This has been fixed.
    - Social Drip Campaigns starting in Playbooks will now be displayed in Manage > Drips > Social as well.
    - In the contact report page, the name placeholder will now take the complete row width.

Reports:

- General updates:
    - Added columns for "asset created on" and "updated on" under Reports > Asset report.
    - "Videos Sent" count (Usage) will be shown in Setup > Videos based on Users and Organizations permission.
- Email:
    - In Email report and Summary report the link clicked page was not loading.

Setup:

- Social media drip templates:
    - Usage of social drips will be displayed based on permission in Setup > Social drip.
- Company Profile:
    - Removed mandatory check for "Address 1" from Profile and "Score" field from Company.

- Roles:
    - A "Settings" tab has been provided for admins when working in the "Edit User" section under Setup > User Management. This makes this section consistent with the user profile page.
- Users:
    - Made the "Users" grid consistent throughout the application.
    - Trimming of leading and trailing spaces for mandatory fields has been done.
- Companies:
    - "Lock/Unlock" functionality in Setup > Companies for "Child Companies" has been introduced for Super administrators.

Social Postings and Social Drip campaign:

- A sent count will now be provided on both card and thumbnail view for the social media drip.
- There will no longer be incorrect information about posting reported in the summary report.
- In the social media drip, the UI would break when the post count was 3 digits in "Card" view. This has been fixed.
- Messages with Images or Files attached were not saving in the social media drip. This has been fixed.
- Provided a 'note' below the Facebook's dropdown mentioning why posting on "My Wall" is no longer offered.

Please be advised that some product releases listed above are available based on your current plan with Mindmatrix.

If you would like to know more about adding a new feature to your account that may not be included, contact your enablement specialist or account manager with Mindmatrix. You can also email our team at support@mindmatrix.net.

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