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ONE PLATFORM : DIRECT & CHANNEL

Product Release Announcement

Latest Software Release Notes, July - August 2020

Fixed Issues

CRMs and Third Party Integrations:

- General:
    - ConnectWise and Dynamics: If the "Account" record in CRM is updated, then pulling of all the opportunities which are under that updated company record has been implemented.
    - The contacts having duplicate email addresses will not get pulled/pushed but will be displayed as 'duplicate email' in CRM logs.
- Connectwise:
    - Activities were not getting pushed to CRM if the first 500 contacts had more than 2100 records to push. This has been fixed.
    - During the pulling of the contact company team's data, it will now pull the first Account Manager of each contact.
- SFDC:
    - User custom fields made available for mapping for Push and Pull of Users.
    - Opportunity type has been provided as part of opportunity mapping.
    - When User was created from SFDC sync, the partner fields of the user were not being created. This has been fixed.
    - The user was unable to login with valid Mindmatrix credentials in MM Report Tab within Salesforce. This has been fixed.

Currency Conversion:

- Implemented converting Currency based on User's Currency Unit for Opportunities widgets.

Drips & Lists:

- Provided the "advanced smart objects" in the Drip Campaign's email editor when enabled for the Role.
- For Contact as well as User, Drip node of "Update Contact/User" displayed the tabs based on show/hide configuration for the User.
- Added the list owner in the "shared" folder and provided the option to make this User as Owner for Contact Smart lists as well as Recipient lists.
- If the smart list condition is broken then it will be marked with strike-through and the list will be skipped for count calculation.
- "Phone Activities" conditions in the smart list were not working based on the 'period'. This has been fixed.

Dashboards & View Assets:

- Provided "Download" action in the "View Assets" page for Print/Document asset.
- Provided "All Filters", "Categorized filters" and "Non-Categorized Filters" options in "View Assets" (both versions).
- Opportunities Stats widgets were not showing the count of opportunities for Channel Partner Users. This has been fixed.

External Sites:

- 'Copy track code' of the external site was broken. This has been fixed.

Editors:

- Asset Templates (Email):
  - Increased the character limit of the email subject line to 500.
  - "Test" email functionality will now work for 'send asset' also.
  - The user was unable to center align the "Image+Title+CTA" object. This has been fixed.
- Asset Templates (Web):
  - Provided 'Copy' functionality for web media outputs and web banner media outputs.
  - Dropdown options value having accent characters were broken when used in the form of a web editor. This has been fixed.
  - Dropdown field validation was not working on the landing page. This has been fixed.

Google Drive Integration:

- Issues with files imported through Google Drive in the 'Document' gallery and the 'View Assets' page have been fixed.

Localization:

- Contact custom field labels can now be localized.
- Localization of Export to PDF, MDF, Deal Registration, and Certification notification emails have been done.
- Localization of linear playbook notification, asset sharing notification, template approvals, and print vendor notification emails has been done.
- Localization of 'Send Asset' email has been done.

MDF:

- MDF Funds made permission-based for MDF Admin pages, Client pages, Report, and Widgets.
- When a Channel Manager was not in any Organization, he could see all of the MDF requests. This has been fixed.

Navigation:

- In the "Template" module, provided adding of Image Banner, Web templates without Database, and without Questionnaire.
- For Custom Navigation using a template, the iFrame will not show the scroll bars.

Notifications:

- Added "Username" to the notification email sent to Super Admin when a User is locked out.
- Notification emails localized for lead routing, lead reject, contract email, certification expiry, notify, unlock role.

Opportunities:

- In Opportunity Advanced Search, for some opportunity types clicking on the list opened the 'Info' page instead of the 'Preview' page. This has been fixed.

Reports:

- Activity Report Chart:
  - If the 'point' of the value went into the legend section, the value was not being displayed. This has been fixed.
- Incentive Summary:
  - Incentive Summary report enhanced.
- Drip:
  - Provided "Completed" stats in the Drip Summary report and also in the section of the Drip-wise report.
- Deal Registration:
  - "Deal Registration Report" will have the dropdown of Users like other Summary reports.
- Email:
  - Added hover text of 'Best Time of sending on the Email break-down report page of 'Best Time of sending.
- Organization Group:
  - Provided a column of Score for Organization Groups Report page.
- Form:
  - Form Report page optimized for performance.
- Tracking Link:
  - 'Tracking Link' Report page was showing wrong data. This has been fixed.
- Landing Page:
  - The landing page report was not displaying contacts when the user clicked on signups while it was shared with the logged-in users. This has been fixed

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Setup:

- Hiding of Deal Registration at Company level provided via Setting in Company.
- "Company Lists" in the "sharing" page were not available in the 'List' view of the Setup > templates. This has been provided.
- Made "Country" field blank by default when User is created manually (Setup>User) and through converting 'Contact into User'.
- "Updated On" value was not getting updated when layout or fields were changed in the 'Opportunity Type' page. This has been fixed.

Social Posts:

- In the scoring for the social report, the "Comment" & "Share" values were missing. This has been added.
- In Social posting, the video post containing thumbnail was not posting the thumbnail image. This has been fixed.
- Provided "Web Banner" for Social Drip and one-off Social postings.
- "On Behalf" one-off social posting for Users will be following the permissions of Users and Organizations.
- Preview of Social Drip was not working for Image, Document, Video, and Tracking Link. This has been fixed.

Scoring:

- Separated the Contact and User Scoring task for optimizing scoring.
- Provided User custom fields and Organization custom fields in User scoring rules.

View Assets:

- In View Assets, for 'video' assets, the name had a hyperlink and clicking loaded the thumbnail. This has been fixed.
