

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



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.

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