Product Release Announcement

Latest Software Release Notes, March - April 2019

Roadmap Items Released:

Customization of navigation:
Site Admin can customize the navigation menus for each Company Dashboard by adding custom menu headers and re-arranging the sub-menus in them.

"Contact-wise" view of Contact-centric playbook- Beta:
This feature will help the User act based on the action taken by contacts upon the approach of the set date, using “To-Do”.

Fixed Issues

CRMs and Third Party Integrations:

- Autotask:
  - Provided "Owned by" feature for Autotask CRM Integration.
  - Opportunities will sync as per External ID which will allow Mindmatrix to sync opportunities with duplicate names.
  - Syncing contacts from CRM will omit deleted contacts.
- Salesforce (SFDC):
  - Contacts without email address were getting pushed. This has been fixed.
- Sugar:
  - SugarCRM was not getting synced correctly for opportunity name and description, if it had “&” (ampersand) symbol. This has been fixed.
  - All opportunities were not getting pulled from CRM to Mindmatrix. This has been fixed.
  - Sugar opportunity sync will be as per opportunity scoring.
- General:
  - In CRM sync, now, if To-Dos are pushed, then respective contacts will be pushed into CRM irrespective of "Push" being disabled/enabled in settings.
  - From CRM, all the Mindmatrix tabs/widgets of Non Integrator user's CRM contacts/opportunities will get synced to Mindmatrix, as per Integrator User.
  - User CRM notifications will now be sent based on Company level Settings.
  - Provided separate options to push activities and ToDos.
  - For opportunity push, provided a checkbox of "Push associated Contacts".

- Connectwise:
  - To-Dos were being created with type as blank when pushed from Mindmatrix. This has been fixed.
  - Contacts were not syncing when contact sites were more than 20. This has been fixed.
  - ConnectWise API version upgraded to support multiple contact type pull.
  - Opportunities will sync as per External Id which will allow Mindmatrix to sync opportunities with duplicate name.
- ZOHO CRM:
  - Contact with special characters in import criteria for account type was not getting imported. This has been fixed.
  - Provided support for ZOHO CRM's Sandbox accounts to integrate with Mindmatrix.

Dashboards & Asset Search:

- In Channel Partner Dashboard when "Report Widgets" were opened through the toggle, the 'Company list' in-line graph was not rendered for "Contact Activity" widget. This has been fixed.
- Provided confirmation message for "Set as Default" in Dashboard Settings.
- Provided settings to select asset types for "New Assets" stats ring.
- Sending videos had permission restrictions while sending from "Videos" widget but was working from "Assets> Non-personalized". This has been fixed.
- Action to "Send" External Tracking links from "View Assets" has been provided.
- CSS Styling provided for Quick links widget Design 2

Drips & Lists:

- When Drip Media is created, the name of drip template will carry a time stamp and the media will not be active unless moved to Editor Step.
- Made "Origin from CRM" condition in Contact Smart list available for all Users.
- In “edit smart list” when conditions were saved, the notification 'on behalf' used to reset to "Owner". This has been fixed.
- Provision to configure notification email for User Smart Lists provided.
- In "Connections > Lists" made "Recipient Lists" as the first folder instead of "Smart Lists".
- In Drip Media Editor, for Quick Drip as well as Flow Chart when "Edit template" is done, the event name is replaced to the template name and vice versa.

Deal Registration:

- Registered deal will not be displayed to other Users except creator in "Deal Registration Requests" page.
- Issues and Enhancements in Deal Registration for Non-Admin Users has been done.

Editors:

- Asset Templates (Web & Form):
  - Error page was displayed when shared contact clicks on web with form link in email or contact clicks on the web with form link in on-behalf email. This has been fixed.
  - Form filled was not getting saved when landing page containing the form was loaded from link in email. This has been fixed.

    - Forms shared with other companies with "View" access, was not loading in Web Editor. This has been fixed.
- Asset Templates (General update):
    - "Delete" lock functionality for objects in Print, Web and Dataroom templates provided.
    - Footer section for imported email made consistent with generic email footer.
    - Logged In user was not able to view the Media link created in other user's account, if the content path is same as host path. This has been fixed.
- Asset Templates (Email):
    - For Emails, `changed"Reusable Templates" to "Favorites".
    - In Email Editor "Save as reusable" will first save the template and then save the copy of Media.
    - Added new objects (Logo and Banner) in "Header" section of smart objects.
    - Text changes in smart objects as requested.

MDF:

- If there is any Fund Request for an activity in a fund plan, Admin User will not be able to delete that activity.

Opportunities:

- Provided advanced search condition for opportunities based on 'pushed to CRM indicator'.

Playbooks:

- Removed hidden report button for Non-Contact Centric and Linear playbooks. Also made the whole placeholder in "Card" View as clickable.
- Provided "All" folder and made it default in "Playbooks".
- Edit option in "Action Items" going missing after save and page re-load. This has been fixed.
- Linear Playbook: Certification always displayed “failed” as result!. This has been fixed.
- Web template in Playbook (Non Contact Centric as well as Linear) will load "Customize" modal on click of the thumbnail.

Reports:

- General updates:
    - If contact is shared with User then the Active Drip Campaign will be displayed in the other User's contact report page as well.
- Web:
    - Custom Date Range provided in Landing Pages Summary Report based on Media creation date.
- Opportunity:
    - Provided "Associate Opportunity" button in Contact Report Page if Opportunity permission exists.
    - Provided "All" option in 'Opportunity Status' drop down of Opportunities Report

Setup:

- Increased the character limit of drop down options to 100 from 50 for Contacts, Opportunities and Product Databases.
- Updated regex of United Kingdom Postal Code to latest one.
- In "Layout" page of Opportunity Type, when display based on persona modal was 'saved' it gave close modal alert. This has been fixed.
- Hid "Mobile Application" link from profile pop-up if User has SSO enabled and also made it configurable for install based on config setting.
- Added 'View' and 'Copy' buttons in message box for permission check of templates shared till "View", only in Setup > Templates.
- Provided setting to add tool tips to fields in Contacts only.
- Setting page in Site Admin listing all the Super Admins for sending "locked out" Users email notification has been provided.
- Provided option to select default pages in social site in "Self Serve" as we do in "Profile" page.

UI & Consistency:

- In Company list's contact view page made the whole row clickable to view contact report.
- In Test Mode of Drip, the contact was loaded on click of row and not on "Start" button. This has been fixed.
- "Save" button was missing in "Permission" page when Opportunity was viewed in Advance Search. This has been fixed.
- Tool Tip stayed on the page even when another page was loaded from "Playbook" widget of Dashboard. This has been fixed.
- Tool tip was missing from Drip Campaign's Start/Stop button in all views. This has been fixed.
- Close button was not working on 'Video quick link' widget. This has been fixed.

Please be advised that some product updates listed above 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 that may not be included, contact your enablement specialist or account manager with Mindmatrix.

You can also email our team at support@mindmatrix.net.

-- Mindmatrix Services