Product Release Announcement

Febryary 23, 2018

Software Release Notes - Update 756 Dt 23nd February 2018

Editors & Assets

- Made all asset grid default sorting on "CreatedOn" descending and provided "New" stamp to asset CREATED in last 90 days instead of Updated.
- Step process provided for sending images, documents and videos.
- Reorder of pages in print template was broken. This has been fixed.
- Web Banner template "View" was not loading on LIVE installs. This has been fixed.
- Video object was not working in Email template. This has been fixed.
- Web Editor: The anchor tag option is missing from 'Map image to URL' & Text hyperlink options. This has been fixed.
- Pre-built social icons for User and Company in responsive footer smart object provided. Image and text as rows in a smart object also provided.
- Performance optimization done for loading templates, drip and social drip.
- Print Editor: Moved "Import PDF" icon from black menu to within "Pages" modal and removed the "Add page" from Media Editor.
- Renamed button text in PPT creation to "Add Additional Slides" instead of "Import presentation".
- White patch was seen in mobile output of web and data room. This has been fixed.

Drips & Lists

- Social drip automatically starts when media created has been fixed.
- User Engagement status" introduced in User list condition.
- Added a column in company list mentioning if the list is set as Private or Public.
- Time zone issue in "Send" event of Drip campaign has been fixed.

Playbook

- Thumbnail was missing for email asset in playbook once page re-loaded. This has been fixed.
- When print template is "pre-viewed" for a contact in playbook then it records it as visit. This has been fixed.
- Clicking on thumbnail of the email when print is sent from playbook was not loading the PDF. This has been fixed.

Reports

- Pagination wasn't loading in "Contacts" page of email summary when sorted by "Opened". This has been fixed.
- UI Issue: Organization report title is clipped. This has been fixed.
- Playbook summary report: Count mismatch in "Top 10 playbook" has been fixed.
- Added Bounce Type in Contact Feed Report when contact has bounced.
- Data room summary report to be revamped.
- Few modifications for Individual Organization report scorecard done.

CRM

- While filtering import for CRM, the filter value comparison was case sensitive. This has been fixed.
- Hubspot Push issue fixed.
- Implemented "Is blank field mandatory" functionality for Salesforce Integration.
- CRM: Auto push was not working. This has been fixed

Dashboard

- Changed the search algorithm for exact matches if words are entered in quotes as "Vectre Inc"
- UI issue in contact report page from Dashboard to do widget has been fixed.
- Provision provided to turn on "email notification" for announcements.
- Multiple asset send functionality from Asset search page introduced.
- "Asset search" Dashboard widget modifications for recently used and popular assets
- Portal color used to "Desktop widget" download icon on profile pop-up in nav bar.
- UI issue in thumbnail view of "New Assets" stats widget has been fixed.
- Asset Search UI: Video Assets are getting Static Font color on the template. This has been fixed.

Users

- User stats entry was missing when contact converted to Partner
- Time zone and Date-time settings moved into separate tab in User info page.
- Shared leads count in User grid was not appropriate. This has been fixed.

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Import & Export

- While importing contacts the limit will be checked only for contact creation and not for updation.
- Shared leads count in User grid was not appropriate. This has been fixed.

Opportunities

- Current day for expected closed date of Opportunity was displayed as 12:00 am.
- In Advance Search grid of Opportunities if Notification exists for the User display column of Notification.

Scoring

- Lead scoring optimized for processing of contact with latest activity

Roadmap Items Released:

Linear playbook with Dashboard widget and playbook in NEW UI

Linear playbook for Managers to keep track of partner Users and also for on-boarding the Users has been introduced. This has its own Dashboard widget.
The existing playbooks now has new aesthetic and User-friendly UI.

Roadmap Items for Early 2018

"Leaderboard" widgets for Organization and Users on Dashboard

"Leaderboard" widgets listing top performing Users and Organization based on Score, Engagement, Last Login, shared leads count, emails sent count, assets used count, Opportunities count, Closed count and Closed Ratio count will be displayed.

Hot-spotting in Image for Web Banner

Images in web banner can be hot-spotted to make them more interactive. User can provide URL redirect, text content and/or image for different types of hot-spotting like icons, menu and call-outs.

Google Calendar Integration

User can integrate their AMP account with Google Calendar and sync all the events. All the guests marked for events will be added as contacts and User will be provided filtered assets based on filters configured for Google Calendar by checking in event's name and description.

"Opportunity" fields will be incorporated in Editor

"Opportunity" fields will be incorporated in Editor same as Product database fields and User can create opportunity specific assets like email, print and web by picking up Opportunities for such templates while creating media.

Contract Module

The "Contract Module" where the complete Contract signing of Vendors and clients can be done including eSignature with complete security will be introduced.

Double opt-in from form sign ups

The feature of setting double opt-in for form sign-ups i.e. a link sent through email after form signed up and contact will be created/updated only after the link is clicked. This adds up the security level for form sign-ups.

Opportunity record creation in Step process

Opportunities in a Company can be configured to follow "Step Process" of registering, associating contacts and closure of the Opportunity instead of default information entering form.

Opportunity Scoring

Scoring based on Opportunity will be introduced and this will score the Opportunity based on rules set for them. e.g. "Market equal to HealthCare will have more score than Real Estate".

Sales Manager Dashboard with "Sales Manager" widget

Sales Manager persona Dashboard will be introduced with "Sales Manager" widget in default design.

Marketing Manager Dashboard with "Marketing Manager" widget

Marketing Manager persona Dashboard will be introduced with "Marketing Manager" widget in default design.

Twilio Integration for Phone calls

We will be integrating with 'Twilio' to call, record and playback phone calls made to contacts. In next phase we will have the call records incorporated in Smart list, Drip condition and scoring.

Thumbnail for Database records

User specially real estate ones can use an image field or manually upload thumbnail image for database record. This will provide "thumbnail" view for the records.

Please Note-- The above is a summary of anticipated product releases and may be subject to change.

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

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