Product Release Announcement

Latest Software Release Notes, June - July 2019

Roadmap Items Released:

Events Calendar:
User can create and share Calendar events with other Users of the Company.

Fixed Issues

CRMs and Third Party Integrations:

- Salesforce (SFDC):
  - The SFDC Package will use CRM Sync settings to sync (Pull) contacts to Mindmatrix.
  - Contacts were not getting linked to Opportunities when pushed to the CRM. This has been fixed.
  - Hid 'Assist Me' from all clean pages i.e. page(s) pulled from third party applications like SFDC.
  - Parent-child Hierarchy of accounts and Partner types going as user groups has been introduced.
- General:
  - The "GoToWebinar" menu will be visible only if enabled in the add-ons section for the Company.
  - The "Push to CRM" functionality has been provided for non-integrated users for ConnectWise and Autotask.
- Connectwise:
  - While pushing TO DOs to the CRM, the Smart list name and Description will be pushed as "Notes".
  - Added a setting for "Location" in Contact Push, which will push the location based on Member location, if contact location is empty.

- ZOHO CRM:
  - Stage Mapping option implemented for ZohoCRM.

- Sugar CRM:
  - “Member of Accounts” will not be synced to Mindmatrix.

Custom login screens and redirect login links:

- The login URL mentioned in the automated welcome email for new users will now include the custom login URL, if configured.
- The custom URL's logout was redirecting to a different domain with a spelling mistake. This has been fixed.
- You can now add a registration link to your login pages, to include a signup form.

Course Catalog:

- Provided addition of filters for "Course Catalog".

Dashboards & Asset Search:

- In "New Assets" stats widget provided settings for documents, images and videos and added these to the “File Assets” folder.
- Permission related issues for widgets of Channel Manager Dashboard have been fixed.
- UI issue in "Contact Activity" widget of Dashboard has been fixed.
- Provided total contacts, late tasks and today's tasks in playbook widget for Company which has Contact-wise View enabled.
- "Social" action was missing from Blog templates in "View Assets". This has been provided.

Deal Registration:

- The user registering a new deal can now delete it using the delete option before it is approved or rejected.

Drips & Lists:

- While creating Social Drip from template, provided the name of the social drip template along with the creation date as the "Name" of the Media.
- In User Smart list and in User Drip conditions, provided option of "User Groups" based on permission.
- In 'System' event of Drip, for "Update Contact Record" if 2 dropdowns were selected, the option here reset. This has been fixed.
- When any list is deleted, it will check for sharing with other Users and if true, it will not delete until un-shared.
- In User smart list, provided condition based on Organization fields.
- Re-introduced "Unsubscribe" and "Bounced" in Contact Smart list condition.
- Incorporated unsubscribe feature for subscription list for dynamic list of drip campaign.
- Database based Email template will now be operational in Contact Drip.
- Provided time range for sending drip emails.
- Provision of 'System Event' for adding Filters to the contacts.
- User Groups added in "Add from list" and Dynamic List section of User Drip Campaign based on Permission of Users and Organizations.

Editors:

- Asset Templates (General update):
  - Hyperlink was not being saved for text in Safari Browser on MAC system. This has been fixed.
  - When Asset is sent on behalf of other User, then clicking on the thumbnail will now load auto template based on the other User.

- Asset Templates (Email):
  - Added "Organization Footer" and "Organization/Company Footer" in Smart objects list of Email Editor.
  - Email templates with broken HTML (tags half out and half inside IF condition of variables) would break in emails that were sent from the software, but would not break as long as the campaign was sent via Test Mode or the Drip. This issue has been fixed so that Test Mode will now correctly send an email with errors intact.
  - Smart Objects of "Organization Signatures" and "Company/Organization Signatures" will be displayed based on permissions to edit Organizations and as well as for Super Admins.
  - Additional tooltips have been added to all Signature Smart Objects.
  - User Groups have been included in the look-up and 'To' section for the User Email Campaign based on permission.
  - There are now two options for "Social Media Icons" in the signature footer.
  - A "Test Mode" has been added to the Email Editor in the compose section.
- Asset Templates (Web):
  - A landing page error when a form was not shared has been fixed.

Opportunities:

- Across Mindmatrix, a column has been added to any grid showing opportunities to sort by "Owned By".
- For the "Opportunity Types" modal, provided confirmation message on click of "Close" also.
- For the "Opportunities Advanced Search" notification setting, provided option of "Manager(s)".

Plug-ins:

- Gmail Chrome Extension:
  - The "Lead Generator" was not operational. This has been fixed.
  - Changed the spelling of "My Favourites" tab to "My Favorites".
  - Added the unsubscribe option for emails.

Playbooks:

- General updates:
  - Provided the addition of the "Contract" template in playbooks, allowing users to create and send contracts from playbooks.
- Contact Centric:
  - When a contact centric playbook was shared with a User, who has access to a contact-wise view, then that User used to get a 404 error on opening that template. This has been fixed.
  - Contact Centric Playbook: In the "Add Contacts" modal, the "Not added in playbook" folder will be the default one.
- Non-Contact Centric:
  - Non-Contact Centric playbook: When an asset is embedded and variables are used, it will now parse for the logged-in User.

Reports:

- General updates:
  - External Site Tracking: In report > Pages visited, added columns for "Total Visits" and "Last Visited".
  - Organization Groups Summary Report introduced.

- Email:
    - In Email report, made the pie chart of 'link clicked' as 'Click Thru Rate'.
    - "Open Rate", "Click Rate" and "Unsubscribe Rate" count added as columns in Email Summary export.
    - "Sent To" added as column in Email Summary export.
- Opportunity:
    - "Associated contacts' activities" report in Opportunities Summary Report introduced.

Setup:

- Added registration button to custom log-in page wire-frames.
- Provided new setting for "Opportunity Ownership" in Roles > Features which is reflected in few Opportunities grid.
- Provided all User related actions for "User Groups".
- "Convert to User" step process was not consistent when clicked from Contact Report page. This has been fixed.
- User was not being created if contact field had mandatory field. This has been fixed.
- "Contact Type" made mandatory in contact custom field configuration.
- Contact Fields tabs can now be made visible based on User Groups as it does for Personas. (Demo on Monday)
- Added "Cookies policy" field to Organization profile and Self Serve pages.
- Provided "Created On" column only in Setup > Users.
- "Manage-> Opportunities" page actions made based on permission in "roles".
- Usage of Images and Videos in Setup > Asset Management provided.
- Added "Images" and modified "Videos" in Asset Report.

Social Postings:

- Social One Off Posting made can be made on behalf of other Users.
- Removal of assets will now also remove the link from the message.

UI & Consistency:

- Provided folder of "Scheduled" for Social Drip Campaigns.
- Changed text of alert message(s) when the step wizard is closed.
