Product Release Announcement

Latest Software Release Notes, August 2018

New Enhancements

Roadmap Items Released:

Asset usage and popularity widget
Admin users may now add a widget to their dashboard that provides insight into how assets are used by other users within Mindmatrix.

Twilio integration for phone calls
The first phase of Twilio call integration for Mindmatrix is now available as an add-on. This integration allows users to record and playback phone calls made to contacts.

Issues Fixed

Contact Sharing:

- The User who is creator of a contact cannot be un-shared from the contact sharing pane.

Contracts:

- A few alert messages and UI changes are now updated. A link option has also been provided for "Terms & Conditions".
- The contract module PDF output will no longer be blurred and will be similar to the Print output.
- A "list view" has been provided along with respective actions for Certification templates in Setup > Asset Management > Templates.

CRMs and Third Party Integrations:

- Salesforce:
  - "Partner activity and Organization stats" will now load within the iframe in Salesforce for users.
  - Partner User emails may be passed into the "Owned By" custom field within Salesforce if no other value is provided.
- Zoho:
  - The contact sync will no longer become stuck when assigning the contact's owner when more than one user has same email address.
- Autotask:
  - Bug fix: Contacts will no longer be pulled into Mindmatrix even if filter criteria is not matched.

- Connectwise:
  - The value of CRM company related fields were not populating when mapped with custom fields in the Opportunity section in Mindmatrix. This has been corrected.
- Contact Science:
  - Custom field integration from Contact Science has been provided.

Dashboards & Asset Search:

- "View Assets" will now no longer strip special characters from the title and description of the asset.
- In the Quicklinks widgets color setting, the color will be reflected immediately after it is set and it will now display the default color if the field is set to blank.
- A new "Videos" widget with a larger thumbnail design has been introduced.
- In the Playbook widget, the Playbook report page has been made consistent with Playbook report.
- When a user clicks on "Send to users" from the asset widget the tooltip will now mention 'Users'.

Drips & Lists:

- Organization colors assigned to the CTA or background color were not being parsed in the email campaigns sent from drip campaigns. This is now fixed in the preview of the template and thumbnail for the user.
- External form completions were working intermittently in Internet Explorer and in Safari due to a cookie not being created in these browsers. This is now fixed.
- Provided preview of "reusable" template while adding in "Send" event of Drip Media.
- Thumbnail view of Database introduced in other places like Contacts.
- Video Gallery in Editor will not have any actions except "Select."
- Hid "Override Ownership" from Company Smart list.

Editors:

- General updates:
  - In the editor's "page list" page, the default view will now be the "Thumbnail" view.
  - Reverted the functionality of hiding "Customize" for assets if the asset is set to "View" in share permission.
  - Provided tab-stop for text boxes in palette like positions.
- Asset Templates (Contracts):
  - In User's as well as Contact's "View & Sign" page provided thumbnail of pages next to canvas.
  - Email in "Sent" folder will be named in same nomenclature as Print asset sent email. For rejected Contracts provided action of "Edit & Resend" which will edit the same media in Editor as first step.
  - Signatures used to break when pages were switched. Users may now switch pages and re-edit the signature block.
  - Signature section font color will be black and also provided setting for color and font-family.
  - The "Send Asset" modal height of Editor will adjust itself based on height of browser.
  - Alert messages in certification templates are now more consistent.
- Asset Templates (Print):
  - In print templates, 'enter line' should behave the same across the board.

- Asset Templates (Web & Form):
  - Provided option to select "Reusable template" for form's auto responder email in Web Media Editor
- Asset Templates (Data room):
  - When a template is copied the mobile page will no longer be broken in the editor. Special characters are also now allowed in the data room asset name.

Notifications:

- When "view report" is clicked from notification email, the contact will open within Mindmatrix instead of clean page if User is logged-in.

Opportunities:

- If Opportunity static fields are customized, then selecting fields in "Notification" of Advanced Search will now work properly.
- Advance Search List name will be unique only for the logged in user and not across Company.
- Persona-based Opportunity tab display setting has been provided.

Playbooks

- Contact-centric Playbook reports will now display for older templates.
- Asset objects will no longer become stuck on loading if filters use two words.
- Embed Asset in Playbook tab feature provided.
- Provided all asset types (except for Email, Playbooks and External Track links) to be used in "Asset Object" of Playbook.

Reports:

- Landing pages:
  - Summary report chart loading time optimized.
  - Summary reports will now show the count for only active contacts and will not include contacts where the contact type is set to "partner".
- Email:
  - Date ranges have been provided for email summary reports.
  - Auto-responder emails will not be displayed in the Email Summary Report.

Setup:

- Social media drip templates:
  - Usage of social drips will be displayed based on permission in Setup > social drip.
- User Profile:
  - A "Settings" tab has been provided for admins when working in the "Edit User" section under Setup > User Management. This makes this section consistent with the user profile page.

Scoring:

- User scoring models now include options to score on opportunity.

Social posts and Social media campaigns:
- Copied "Social Drip" templates will now take the permission of parent templates.
- Social posting date-time was missing on hover of messages posted. This is now visible.

Video Gallery:

- Role permission based Video Gallery actions of Create, Edit, Share and Delete provided only in Assets > Non-personalized menu.

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

If you would like to know more about adding a new 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