

Product Release Announcement

Latest Software Release Notes, December 2018

Fixed Issues

CRMs and Third Party Integrations:

- Salesforce (SFDC):
 - Mindmatrix Package fields will now be ignored from SOT.
 - In the CRM settings page, an option has been provided to select the default "User Group" for User creation in the CRM as well as importing to associate an Organization with an "Organization Group".
 - Removed the default field in Mapping of "Stage" in layout.
 - The "Push to CRM" button will be invisible to all users, when CRM Push is Disabled.
 - Registered Deals from "Modern Deal Registration" will now be synced into SFDC instantly.
- General:
 - The CRM setting page has been modified for AutoTask, ConnectWise and Zoho CRM.
 - All Users of the Company whether within the Organization or not, can activate their Twilio account if the Twilio add-on is enabled for the Company.
 - SFDC, ConnectWise, Autotask and ZOHO CRM Field Mapping pages have been optimized.
 - Provided a setting to turn on/off the "User Activities Push" within the CRM settings page for Connectwise and SFDC.
 - Hubspot & TigerPAW: Manual 'Push to CRM' for contacts has been provided when "CRM Push" setting is disabled.
 - Optimized CRM opportunity sync for ConnectWise & Autotask.
- Contact Science:
 - Optimized "Contact Science" contact pull.
- Connectwise:
 - Opportunity filter if not selected, (default value) was being saved as NULL. This has been fixed.
 - Implemented ConnectWise new feature of multiple select for "Company Types" per Account.
 - Opportunity Stage options mapping introduced like SFDC.
- Sugar:
 - Opportunity integration in SugarCRM has been introduced.
- Autotask:
 - If Opportunity fields were not mapped, then contact field mapping was not being saved. This has been fixed.
 - It is now possible to push activities performed by Users on contacts to AutoTask CRM



- Hubspot:
 - It is now possible to manually push contacts to Hubspot.
- Dynamics CRM:
 - Provided the functionality of Manual push for Opportunity when "Push To CRM" in scoring is "Disabled".
 - Optimized pulling contacts from Microsoft Dynamics into AMP.
 - Feature added: Push AMP activities (Performed by user on contacts) to Dynamics CRM.
- ZOHO CRM:
 - Fixed the 'First Import' issue for Leads.

Dashboards & Asset Search:

- "Deals to Opportunities v1" widget has been introduced.
- Provision to add additional "External Quick Link" widgets has been introduced. Users should email support@mindmatrix.net to request additional widget options on your dashboard.

Deal Registration:

- Deal Registration (Modern): While converting an "Opportunity" if only one Opportunity Type exists in the Company, then it will now redirect to "Create" page.

Drips & Lists:

- Provided an option to change the "Subject Line" when Users edit an email template in Drip Media.
- Provided a smart list condition based on "Form Filled Count" for Contact as well as Users.
- Made the contact grid in "Test Mode" of the Drip and Email consistent.
- Old Social Drip templates go missing (are displayed as media) when edited. This has been fixed.
- User Smartlist conditions have been optimized.
- The "Never" option has been added to the smartlist conditions for "DripCampaignCreated" and "DripCampaignRunning", so users may now track whether or not another user has created or run a drip campaign.
- For user-based smart lists, drips and scoring, the condition of "Completed Self Serve" has been provided so users may determine if other users have completed the login process.
- Introduced "Is locked out" field of Users in User Smart list condition.

Exports & Imports:

- The preview export for user smart lists was failing. This has been fixed.
- In the "Users summary report", an option has been added to select additional fields apart from already existing static fields at the time of export.
- Importing contacts with umlaut from CSV was not displaying the characters with umlaut. This has been fixed.

Editors:

- Asset Templates (Web & Form):
 - The "Question" section has been introduced in the Hot spot option for web banners.

- Landing page medias were not getting saved for older templates which had missing attribute of auto-responder for forms.
- Asset Templates (General update):
 - Editors except Email: A few 'first time object insertion' issues in the editor have been fixed.
 - Made the "Field Chooser" text and icon consistent for Email and other Editors and also renamed the "Button" object to the "Navigation Button" in Web Editor.
- Asset Templates (Email):
 - Email Footer alignment issue in Mac OS and iPhone has been fixed.
 - "On Behalf of" feature has been provided for User Email Campaigns.
 - Provided the "Save as Re-usable" option within the email editor as well.
- Asset Templates (Presentation):
 - "Presentation" Asset when downloaded from "Asset Search" page didn't parse Organization variables. Fixed.
- Asset Templates (Certification):
 - Provided "Preview" within the Editor as well as in thumbnail as "View".
- Asset Templates (Contract):
 - Removed "Message" page and included details in "View" Page.

General:

- For all Users across all installs, provided "Top Navigation" (Left Navigation has been done away with.)
- For Image and Document Gallery, provided the action of "Archiving" and then restoring or permanently deleting from "Archived" folder.
- When image used in 'fields' is deleted from gallery, the field will now go blank.

Galleries:

- Provided Thumbnail column in "List View" of "Images" gallery.

Modal & UI:

- UI issue for long email of Creator in hover tool tip of contact has been fixed.
- "Generate" button that was missing in "export contacts" modal of external site report has been added.
- The tool tip appeared distant from the column in the grid. Fixed.
- User Scoring: For "Any Activity" in "Certification" the Activity Type text grammar changed and other UI changes have been done.
- UI changes in "Roles" page grid.
- UI consistency for "Add-Ons" Settings page.
- In "Welcome > Self Serve" for the Organization step, removed the mandatory check from "Address 1".
- MDF fund pages labels User Interface made consistent.
- The file for exporting Email report of recipient /opened/ bounce/unopened/unsubscribe contacts will now display the name of the email and the page.

Notifications:

- Internal playbook notification emails (To Dos) will now be in the branding design.

Opportunities:



- Optimized the **Advance Search** creation and condition page for Opportunities.

Reports:

- General updates:
 - Website Summary report page revamped, based on Users and Organizations permission.
 - Certification Report: "Test Completed" percentage will now be of "Completed Vs Taken".
 - Mismatch in the count in Chart Stats and in the grid of External Tracking page has been fixed.
- Drip:
 - In Drip Summary report, the report page for other Users was not loading if "All" was selected in Users drop down. This has been fixed.

Setup:

- "List View" for Drip and Social Templates in Setup with actions for multiple permissions and filters have been provided.
- New "Thumbnail View" provided for images (this will be the default view).
- "Flyout View" made the last view type by default.

Social Postings:

- Social Media previews didn't parse Organization variables as per the logged-in user for the web template link. This has been fixed.

Users:

- All "Roles" available in "Setup > Users > Assign Roles" will be visible in "Import Users > Assign Roles".
- Modifications in the User Creation and Edit pages by moving User Groups, Roles and Organization Groups are pages instead of tabs.
- The "Create User" modal is not closing for non-Super Admin Users. This has been fixed.
- While converting a 'Contact to a User' from a Smart list, a few steps were missing. These have now been included.

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

