mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Product Release Announcement

Latest Software Release Notes, January - February 2019

Roadmap Items Released:

Certification Summary report in "Reports"
Managers and Admins can now check Certifications taken by corresponding users and their results.

Attaching activities to MDF Requests
Users can now attach Contacts/Lists, Email Campaigns, Opportunities and/or Deals registered to MDF requests, giving Admins more insight into requests for approval.

Quick Drip Editor
A new optional drip editor is now available. Using this editor, users can quickly toggle between editing send events and conditions with less clicks.

Fixed Issues

CRMs and Third Party Integrations:

- Salesforce (SFDC):
  - "Send email" page in SFDC was not showing assets. This has been fixed.
  - Optimized CRM opportunity sync for SFDC.
  - Provided "multi-send" and other actions in "View Assets" options of SFDC.

- General:
  - "Google Drive" integration released.
  - Provided push to CRM, for non-integrated users for ConnectWise and Autotask Integration.
  - Provided User email and install name in CRM error notification emails.
- Connectwise:
  - Implemented the "Client Id" feature for ConnectWise.
  - ConnectWise API was only pulling a maximum of 25 Company Types. This limit has been increased.

- Sugar:
  - Opportunity Integration for Partner Account/Organization provided.
  - After two syncs, push / pull was not working. This has been fixed.
- Contact Science:
  - Contact Science API will now provide duplicate suspect error and the returned suspect ID will be saved in Mindmatrix.
- Twilio:
  - Twilio token error has been fixed.
- ZOHO CRM:
  - Zoho API Version updated to 2.0. Hence revamped the entire Zoho APIs and Implemented OAuth2.0

Dashboards & Asset Search:

- Provided option to update the tool tips of "Quick Link" widgets.
- Reordered contact interest- horizontal bar chart based on status (i.e. top to bottom: Active, Low, Medium, High, Hot) in the "Contact Activity" widget.
- "Web leads stats ring" widget optimized.
- "Deals to Opportunities v2" widget introduced.
- Made each Announcement clickable in "Profile pop-up" of top navigation.
- Presentation template thumbnail added manually was not being displayed it in "Asset Search" page. This has been fixed.
- Made "View Asset" across Mindmatrix consistent in design with "Asset Search".
- Optimized "View Asset".

Drips & Lists:

- User Smart List: For all conditions about "status", provided the period in bracket and also the option of "Never".
- Smart list conditions with check box was not operational. This has been fixed.
- User Smart List, Drip and Scoring: Provided conditions, “Print Created” and “Print Downloaded” for Print Collateral.

Exports & Imports:

- Provided "Contact Owner" as default field in Smart list and Company list notification email.

Editors:

- Asset Templates (Web & Form):
  - If Media is deleted, related URL will now be automatically disabled (auto generated as well as PURL if any).
- Asset Templates (General update):
  - Hotspot 'Question' Section: User will not be able to save options in Preview mode in the Editor.
  - Provision to add filters for Internal Links - Database Records for Hotspot has been provided.

  - In RAD Editor the background will be made transparent so that the background object color or the color of object behind is displayed while editing.
  - "Test" emails from Drip as well as Email Campaign will contain the word- TEST in the subject line
  - While selecting assets (database records) for database associated email media, back space in filter closed the modal. This has been fixed.
  - Exposed the "Language" User variable in Editor.
- Asset Templates (Email):
  - Microsoft Edge issues of Email Editors have been fixed.
  - In "Edit" mode of template, "Save" was missing for "Input" page. This has been fixed.
- Asset Templates (Certification):
  - For image in "Question", provided option to resize and set custom size.
  - Provision to add more options
- Asset Templates (Print):
  - eBook was not being created. This has been fixed.

Lead Routing

- Provided drop down for "Reason for Rejection" and renamed the label for text area as "More Details"

Notifications:

- Notifications for To Do of playbook was not showing up in the notification manager. This has been fixed.

Opportunities:

- Column added to Opportunity records grid to mention if Opportunity was synced with CRM.

Outlook plug-in:

If "Recipient List" had unsubscribed contacts, an error message used to pop up while sending mail. This has been fixed.

Playbooks:

- "Add contacts" functionality provided in "Step-wise" view of contact centric playbook. Now User can add from lists or associate dynamic list to playbook.

Reports:

- General updates:
  - Added stats of "Deals Registered" for Organization in ‘Organization Report’t if User has ‘Deal Registration’ permission.

  - Provided "Is locked out" field in the export of Users.
  - Users Summary Report performance optimized.

Setup:

- In Setup > Drip template, the usage export was not operational. This has been fixed.
- Custom login URL will now accept all types of valid URL and button to 'remove' has been provided.

Self Serve:

- Text Changes in "Self Serve" for Website Tracking has been done.

Tracking Sites & Links:

- While adding track link to social post, the items in the grid will be sorted based on "Updated on". Fixed search functionality.
- While editing "Tracking Link" page, the adding of filters was not operational. This has been fixed.
- "Public Company" link in External Sites will be hidden if User is in Organization.
- Delete option was missing from External Sites and links pages. This has been fixed.

Users:

- If User is "Locked Out" then no emails will be sent to the User. i.e User will be unsubscribed.

UI & Consistency:

- Organization search will check only in "Name" field.
- Consistency of 'Card' and 'Thumbnail' View of Social Drip in "Reports > Social Drips" as in "Manage > Social Drips".
- Height of Company Logo in Mobile Dashboard adjusted.
- Custom thumbnail assigned to Video was not being displayed when video was used in playbook. This has been fixed.
- The tool tip was not going away when playbook was opened. This has been fixed.
- Dashboard's "Quick Links Design 1" for External Links was not working at width selection of 50% when placed in Corporate Marketing Dashboard. This has been fixed.
- Special characters like : / etc broke the title in Card view and Thumbnail view of Video. This has been fixed.
- There was a localization issue in "All" folder of "Add Users" of User Group. This has been fixed.
- Playbook: "Action Items" icons in Media will be fa-sticky-note (Font Awesome Icons).

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