

# Product Release Announcement

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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 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' 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).
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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](mailto:support@mindmatrix.net).

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