Product Release Announcement

Latest Software Release Notes, October 2018

Roadmap Items Released:

Sales Manager Dashboard with "Sales Manager" widget
We will be pushing Mindmatrix activities (Performed by the user on contacts) to Salesforce (SFDC) which will include emails sent by the user, their (user's) offline activities, phone activity etc., that are associated with Opportunity.

Opportunity Scoring
Scoring based on Opportunity will be introduced wherein an opportunity will be scored based on pre-set rules.

Deals to Opportunity (Non-traditional Deal Registration)
In this type of Deal registration, when a Deal is registered, a Lead is created, and the User can approve the lead to convert into Contact and then into Opportunity.

Stats widget in Metro and Rectangle Style
Two more designs of stats widget styling to be provided.

Displaying 'Answers of Certification'
Henceforth for those who have passed "Certification", the User can view all the question and answers he/she has attempted, along with right answers.

Issues Fixed

Contacts:

- In the contact grid, if no checkbox is selected then the "actions" will be applied to all the contacts filtered or existing in the grid.

Contracts:

- "Accept" and "Reject" button of Contract will be disabled, once either accepted or rejected.
- In the Contract View page, files can now be uploaded.

CRMs and Third Party Integrations:

- Salesforce (SFDC):
  - SFDC: "Mindmatrix Stage" field display value will now be synced with SFDC.
  - SFDC sync will now work with filter criteria values having special characters like "&".
  - SFDC Opportunity manual push now works when contact is associated.
  - "Organization Sync" provided in CRM Log.
  - Number and boolean field support added for Opportunity Filter criteria.

- General:
  - Pushing of "Playbook To-Dos" to CRM.
  - Opportunities created at Organization level will now sync with both Organization CRM as well as Company level CRM.
  - CRM REST API call encoding changed to UTF to support 'umlaut' characters.

- Contact Science:
  - If a contact already exists in contact science, then it will be updated instead of having a new contact created
- Eloqua CRM:
  - ESET Marketing Center - Eloqua Integration customization done.
  - ESET customization textual modifications done.
  - Textual changes for ESET-Eloqua custom enhancement done.

- Connectwise:
  - Opportunity sync for ConnectWise integration optimized.
  - Trimmed leading and trailing spaces from email while syncing contacts from ConnectWise CRM.
- Autotask:
  - Drop-down field in filter criteria for contacts was not operational, hence we fixed this.
  - Opportunity Stage mapping in AutoTask Integration introduced. (Same as in SFDC).

Dashboards & Asset Search:

- Multilingual option provided for Announcements.
- Multilingual option provided for Dashboard Widgets.
- Asset Search: The "more (...)" icon will be hidden if there are no actions in it.
- Web Banner in Dashboard was loading intermittently and has been now fixed
- In "Channel Partner - Option C" Dashboard, the "New Assets" setting will now use "Primary Font Color".
- "Internal Playbook v1" Widget will now adjust itself based on screen width.
- Added descriptions to existing Widgets through script and minor UI changes in "Add Widgets" for Dashboard.
- A new widget to show Hard Bounced, Unsubscribed and Spam Contacts Report has been provided.
- New Stats widgets for "Commission Earned" provided.

Drips & Lists:

- Smart list conditions, Drip conditions and Scoring rules based on Twilio calls introduced.
- Drip Media Editor: Editing a "Send" node template is not updating in the new template.

- Drip Editor: Thumbnail view will be seen by default when we select templates in "Send Event" for Drip Template as well as in Media section.
- The email editor will now have actions like email media editor while editing the node email.

Editors:

- Asset Templates (Web & Form):
    - CTA added on click was getting added behind other existing objects and could not be brought front. Fixed.
    - "Websites" was still seen in Manage > Web though the "Roles". Checkbox was unchecked and the issue was fixed.
    - Permission based "Views" implemented while displaying database records in modal when opened through CTA click of Web Banner.
    - Provided "Disconnect" between Desktop and Mobile design for Image Object also.
- Asset Templates (General update):
    - Provided "Feedback & Ratings" in "Use Template" section of Compose Email - Step 1, if enabled for Company.
    - Alert messages made consistent in Editor.
- Asset Templates (Email):
    - Two column objects added will now be displayed as two column in Image Properties modal.
- Asset Templates (Print):
    - Certification variables provided in Print template.

Galleries:

- Uploading Document/Image into Gallery section will now save the "Title" field as the name of the file including casing.

Grids:

- "Name" was missing from hover of all assets in Media side grid.

Import:

- Import Database mapping modal didn't have "Save" button.

Notifications:

- Enhanced "Forgot password" functionality. Now, the user will be sent a verification link to their email ID for a password reset instead of temporary password.
- "Lead Routing" notification emails will be following branding design.
- Updated Contract Notification email text
- ConnectWise notification emails will now follow brand styling and design.
- Lead Routing: The notification step will now have an option to set escalation emails.

Opportunities:

- In the "Currency" fields in Opportunity, Contacts and Product Database, an alert will be generated when the character limit of 152 is exceeded.

Product Databases:

- Images added to Database Record Gallery could not be deleted, which has been fixed.

Plug-ins & Add-ons:

- UI fixes for Chrome Gmail plug-in for the "New Gmail Interface" has been done.
- If Twilio is activated, then the "Phone Activities" page in Contacts will be displayed through "Views" across Mindmatrix.

Playbooks:

- General updates and fixes:
  - User could not delete tabs when navigation buttons appeared. This has been fixed.
  - “Views" was missing from modal of Print Asset in Playbook, and has been now added.

Registration:

- Provided "Register" link on login page with URL configurable in key value storage.

Reports:

- General updates:
  - In asset report, sorting based on "Usage" has been removed since this cannot be provided in existing architecture.
  - Social Summary Report Enhancement has been introduced.
  - The link click was not working for users assigned to an Organization & having permission of Users only.
  - If Partner Permission exists then in Drip Campaign Summary report it will display the "Contacts" as well as "Users" report in tabs.
- Email:
  - In User email report, recipient list export was not happening, which has been now fixed.
- Social:
  - User-wise overview of comments, likes and shares of social posts has been provided.

Setup:

- General Updates::
  - "Filters & Categories" page’s performance was enhanced.
  - Organization ToS has been provided and it will be appended above MM ToS for users of the organization.
  - If no permission for any action item is granted to the user, then it will hide the "Actions" drop down from contact grid.

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