Product Release Announcement

Latest Software Release Notes, April - May 2019

Fixed Issues

CRMs and Third Party Integrations:

- Salesforce (SFDC):
  - All the partner contacts from SF were being synced as users in Mindmatrix. Instead of syncing all the contacts as users, we will be syncing users as per "portal access". This is based on permission settings set by the administrator in Mindmatrix.
  - Organization custom fields from field sets are now available for mapping in SFDC integration.
  - CRM Lead owner will now be updated as per settings configured by administrators.
- General:
  - All CRMs: While pulling opportunities to Mindmatrix, it will now check for mandatory fields and sync only those opportunities that have all the required field values.
  - Added "Push to CRM" in "Actions" for Contact grid in Lists, Contact Report and few Dashboard widgets.
  - Mindmatrix Components (widgets) for Salesforce Lightning introduced.
  - Contacts with invalid email format in CRM was synced by saving the contact without email in Mindmatrix. This has been fixed.
- Connectwise:
  - If there were more than 500 Marketing Groups in ConnectWise, the pull was broken. This has been fixed.
  - ConnectWise will contain a POD with Mindmatrix contact activity feed held within.
  - ConnectWise activities will be pushed as per type configured.

- ZOHO CRM:
  - Checkbox, ‘field push’ was not working. This has been fixed.

Certification:

- Provision to select any email template as a "Certification Passed" email notification for the User, with the option to switch off this notification if necessary.
- A new question type has been implemented: "Match the following types of answers”.
- Even when users passed a certification, a failure message was being displayed when a certification was opened from within a playbook. This has been fixed.
- Expiration dates for Certifications has been introduced.

Contracts:

- Contract pages were not loading if a User and Partner’s permissions were not provided. This has been fixed.

Dashboards & Asset Search:

- Provided ordering of playbooks in "Playbooks - Large Thumbnails", "Playbooks - Small Thumbnails 2" widget.
- Provided an option to open "External Quick links" widgets in a new tab.
- Added "View More" links at the bottom of the Feed in "Contacts Feed" widgets of the Dashboard.
- "MDF available" stat rings will now check for "MDF User" permissions.
- New Linear playbook widget, v2 has been introduced.
- More design variations for Stats widgets has been provided.

Deal Registration:

- Admin User Deal Registration modifications and "Deal Registration: Admin" widgets added.

Drips & Lists:

- Provided "Filters" to be used in condition of Drip Template.
- In Drip Summary report for "Drip Campaign Status" chart and in grid of "Drip Report" provided folder of "Pending" (Drip Medias which were created but never started or scheduled).
- While setting Drip for "on-behalf", if the logged in and the user was not in the first page then it generated an alert to select a User. This has been fixed.
- Provision to select days for drip email sending event (e.g. weekdays only) has been provided.
- In Quick Drip Editor, the preview of email template was taking a long time to load the scroll bar if needed. This has been fixed.
- Drip campaign media editor (quick-drip editor) performance enhanced.
- More conditions for Drip Campaigns (Not Subscribed to Any Drip Campaign, Subscribed but not in Running Drip and Subscribed Drip Campaign Count) in Contact Smart List introduced.
- In smart list conditions, for drop down fields, provided option, "Is Empty".
- Provided "Preview" in Manage > Drip for templates where User can preview the nodes of the campaign.

Emails:

- In Email footer, modification done for "Company Name" which will check for Organization first and then the Main Company.
- Provision to mark recipient list as 'subscription' list and Unsubscribe feature for 'subscription' recipient list provided.

Editors:

- Asset Templates (General update):
    - Provided action to 'download' the HTML for reusable (My favorites) templates.
- Asset Templates (Email):
    - Modifications done in "Personal Footer" Smart Object as requested.

- When "Test Email" was sent from Editor and links were clicked it was redirecting to login page. This has been fixed.
- Provided company-color dropdown in color-picker of black menu bar in email editor.
- Email link in ‘send asset email’ was broken. This has been fixed.

Notifications:

- When a new Deal is registered or a new Fund request is created, email notification will now go to Channel Manager(s).

Plug-ins:

- In Chrome extension, renamed "Reusable templates" as "My favorites". (This will be reflected after Chrome Store is updated)
- In Outlook plugin for Outlook 10, the feed of opened email was getting generated as soon as email was sent. This has been fixed.

Playbooks:

- "Custom URL" (UTM Link) as Asset Object in Linear and non-linear Playbook has been introduced.
- Now videos from 'Video' event/node of non-contact centric and linear playbook will be played in modal window within playbook.
- In playbook 'To Do', the playbook name > Tab Name > Step Name will be mentioned.
- "Linear Playbook" widget design has been changed.
- Adjusted the height of the banner background image in Playbook based on the selected image height.

Reports:

- General updates:
  - If dynamic list is assigned to a Drip Campaign it will display it in the Drip Report.
  - Provided "Created On" and "Start On" date for Drip Campaigns in Summary Report.
  - External Site Tracking: Contact grid displayed from "Pages Viewed" was not sorted by "Last Activity" by default. This has been fixed.

- Email:
  - "Unique Click Through" and "Click Through Rate" counts to be added as columns in Email Summary export.
  - "Total Email Opened" count added as column in Email Summary.

Setup:

- Setting provided to display only selected Channel Managers in "Channel Manager" widget.
- Removed Mindmatrix icon on mobile view i.e. when screen resolution is reduced.
- Provided option in database creation to set the records as "Public".
- Allowed special characters like & , ' ? in drop down options for Contacts, Opportunities and Database.

- Hide/Show tabs based on Persona was not being saved for Opportunities or Contacts. This has been fixed.
- Allowed uploading of 'DWG' files to document gallery.
- Usage of Documents added in Setup > Asset Management.
- Added "Non-personalized Documents" in Asset Report.

UI & Consistency:

- In Nurturing Drip, while creating a new media it will now display template name along with date and time.
- In "Video Quick Link" widget, clicking outside the video preview was closing the modal completely. This has been fixed.
- Text on 'reset password' button of 'Forgot password' email will always be white even when viewed in Outlook.
- Company profile edit icon was missing from profile pop-up for Super Admin with Channel Partner Persona. This has been fixed.
- Course Catalog Banner styling modification will adapt to the size of the Banner image added.
- Grammatical error in 'Account Locked Out' email has been fixed.

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