Product Release Announcement

Latest Software Release Notes, November 2018

Issues Fixed

CRMs and Third Party Integrations:

- Salesforce (SFDC):
  - SF Mindmatrix Package fields will now be ignored from SOT.
  - In CRM Settings page, provided the option to select default "User Group" for User creation in CRM & importing and for "Organization Group" in Organization created.
  - Removed default field Mapping of "Stage" in layout.
  - "Push to CRM" button will be visible to all users, when CRM Push is Disabled.
  - Registered Deals from "Modern Deal Registration" will now be synced into SFDC instantly.

- General:
  - CRM Setting page modified for AutoTask, ConnectWise and Zoho CRM.
  - All Users of the Company whether within the Organization or not, can activate their Twilio account if Twilio add-on is enabled for the Company.
  - SFDC, ConnectWise, Autotask and ZOHO CRM Field Mapping page optimized.
  - Provided setting to turn on/off the "User Activities Push" in to CRM in "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. Fixed.
  - Implemented ConnectWise's new feature of multiple select for "Company Types" per Account.
  - Opportunity Stage options mapping introduced like SFDC.
- Sugar:
  - Opportunity integration in SugarCRM introduced.
- Autotask:
  - If Opportunity is not mapped, then contact field mapping was not being saved. Fixed.
- Push Mindmatrix activities (Performed by user on contacts) to AutoTask CRM Hubspot:
  - Provided manual contact push for Hubspot Integration.
- Dynamics CRM::

    - Provided the functionality of Manual push for Opportunitywhen "Push To CRM" in Scoring is "Disabled".
    - Optimized Dynamics contact pull.
    - 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 introduced.
- Provision to add as many "External Quick Link" buttons to an install by Site Admin.

Deal Registration:

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

Drips & Lists:

- Provided option to change "Subject Line" when User edits an email template in Drip Media.
- Provided smart list condition based on "Form Filled Count" for Contact as well as Users.
- Made the contact grid in "Test Mode" of Drip and Email consistent.
- Old Social Drip templates go missing (is displayed as media) when edited. This has been fixed.
- User Smartlist conditions optimized.
- "Never" option added to the smart list conditions (user-based) for "DripCampaignCreated" and "DripCampaignRunning".
- For user-based smart lists, drips and scoring, condition of "Completed Self Serve" has been provided.
- Introduced "Is locked out" field of Users in User Smart list condition.

Exports & Imports:

- Export of the preview Users of User Smart list was failing. This has been fixed.
- In "Users summary report",added option 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.

Editors:

- Asset Templates (Web & Form):
    - "Question" section introduced in Hotspot of Web Banner.
    - Landing page Media was not getting saved for older templates which had missing attribute of auto-responder for forms.
- Asset Templates (General update):
    - Editors except Email: Few 'first time object insertion' issues in editor have been fixed.
    - Made "Field Chooser" text and icon consistent for Email and other Editors and also renamed "Button" object to "Navigation Button" in Web Editor.
- Asset Templates (Email):
    - Email Footer alignment issue in MAC and iPhone has been fixed.

- "On Behalf" feature provided for User Email Campaign.
- Provided the "Save as Re-usable" option within 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:

- Changed the "Twitter" logo to 'fa-twitter-square' across board.
- Social Media preview didn't parse Organization variables as per the logged-in User for web template link. This has been fixed.

Users:

- All the "Roles" available in "Setup > Users > Assign Roles" will be visible in "Import Users > Assign Roles".
- Modification in User Creation and Edit page by moving User Groups, Roles and Organization Groups as pages instead of tabs.
- "Create User" modal was not closing for non Super/Site Admin User. This has been fixed.
- While converting 'Contact to User' from Smart list, few steps were missing which were added.

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