

# Product Release Announcement

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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 Opportunity when "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.

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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](mailto:support@mindmatrix.net).

--Mindmatrix Services