Product Release Announcement

Latest Software Release Notes, July - August 2019

Roadmap Items Released:

MDF Custom fields introduced:
Super admins of a company may add custom fields for MDF funds and use them for different Fund Plans. These fields can be made visible only for Approvers or Administrators who create the Fund request.

Print Campaign in Contact Centric Playbook introduced:
Companies can configure Print Campaigns in playbooks and personalized print assets for contacts can be sent to configured Print Vendor for printing and sending by post.

Fixed Issues

CRMs and Third Party Integrations:

- General:
    - Mindmatrix will pull the first available team/agreement type of contact company from ConnectWise if provided.
    - "CRM Interest status push" setting moved to the CRM settings page so that the setting can be done at Organization level as well.

- Connectwise:
    - Provision to push Mindmatrix "Recipient list" as "Marketing Group" to ConnectWise based on Setting has been provided.
    - "Company Team" was missing under Contact field mapping. This has been provided.
    - MQL Status was available for mapping under Contact section but was not available while selecting the filter for pulling contacts. This has been fixed.

- ZOHO CRM:
    - If lead already exists in CRM, it will verify and update the record.

- Salesforce (SFDC):
    - If "Leads" field is unchecked for a contact in Mindmatrix then it will sync to CRM as contact instead of lead.
    - New MindMatrix Core Package which is independent of the community setting introduced.
    - Added the SSO for lightning and classic.
    - Removed 1min sync time from "Sync Time" drop down.

- Twilio:
    - Dial pad for dialing extensions when on call from playbook has been provided.
    - If Twilio is configured, then the calling functionality will be available for all phone numbers in contacts grid across Mindmatrix.
- Hubspot:
    - To Dos of contacts will now be pushed to CRM if configured.

<u>Dashboards & Asset Search:</u>

- Hide "Assigned Amount" from "MDF" Quick link widget if "Hide Assigned Amount" is checked for even one of the assigned MDF Fund Plan.
- In "View Assets" blog post, posting through 'Rich text' implemented.
- Added a 'Quick link' widget for registering a new deal.
- "Partner & Organization Stats" widget was breaking the whole page if Partner Permission was not provided. This has been fixed.
- Quick Link widget for Event Calendar and Event Calendar Widget introduced.
- Contact Centric Internal playbook TO-DO widget introduced.

<u>Drips & Lists:</u>

- Provided custom contact fields in condition of User smart list.
- Henceforth Smart list notification email will display the label name of custom contact fields.
- Drop down field value containing space was saved as '%20' when used in Form and hence was not satisfying smart list condition. This has been fixed.
- In Smartlist notification email, on click of "show report" button, it will now display the report page of the contact.
- Now the default ideal time range for Drip emails will be 10 am to 6 pm. (This is not applicable for older drip campaigns)
- Drip was sending email for absolute date and even calculating the days to skip based on UTC and not the User's Time Zone. This has been fixed.
- Smart list condition based on particular page visited of External Site was not operational. This has been fixed.
- Provided system event of "Remove Filter(s)" for contact drip campaigns.
- In User smart list, condition containing "between" was not working. This has been fixed.
- In Drip Campaign, provided clearing of schedule if schedule is applied.

<u>Deal Registration:</u>

- Deal Request modal was not closing and clicking on Save again was creating duplicate records. This has been fixed.

mindmatrix
ONE PLATFORM : DIRECT & CHANNEL

Editors:

- Asset Templates (General update):
  - Removed "Fav Icons" from all outputs
- Asset Templates (Email):
  - Language of email footer content will now be changed based on User's language.
  - Added option to provide 'email padding' at Company as well as Email Template level.
  - For cell, if background image is applied, now it won't remove the applied background color.
  - For image object, provided a button to clear/remove the applied link URL.
  - If the 'Reply to' email was provided as logged-in User while 'From' was some other User then the 'Reply to' also was displaying from the other User. This has been fixed.
- Asset Templates (Web):
  - When Landing page was sent as email, the form was not being saved. This has been fixed.
- Asset Templates (Certification):
  - For Certification, if custom email notification template was selected, then, the subject line used to be the default one. This has been fixed.

Imports & Exports:

- Re-importing Users was not updating Partner contacts. This has been fixed.
- In drip, report export added columns of Subject, Hard Bounced, Soft Bounced and Total Sent.
- On import of contacts, if filters was mapped then it removed existing filters. This has been fixed.

Notifications:

- Notification email sent for Certification from Playbook will parse variable for the logged-in User and the 'From' field will reflect Playbook template Creator.

Opportunities:

- In Opportunity Advanced Search, conditions having special characters like '&' was not working. This has been fixed.
- Opportunity Step Process design modified with a new look and feel.
- Opportunities Advanced Search: For all drop down fields provided option of "Is Empty".

Playbooks:

- General updates:
  - Provided settings for Title and Description color of Playbook and for Banner Background color.
- Non-Contact Centric:
  - Provided progress percentage for completion of step
  - Certification can be added as an embedded asset

Reports:

- General updates:
  - Document Usage and other tracking enabled for Google Documents also
  - In Contacts report, the "Owned" column will display only count of contacts for whom the User is the Owner.
  - Currency value will have limit of 2 characters after decimal in Organization Groups Report.
  - Custom date range implemented for Asset reports.
- Certification:
  - In Certification Usage report, if User has Organization permission then Organization-wise report will also be displayed.
- Drip Campaign:
  - Provided Total email opens, Unique Click Through, Click Through Rate, Open Rate, Click Rate and Unsubscribe Rate in export for Drip Campaign Report.
  - Individual Drip Report enhanced as requested by providing data for Total Contacts, Total Emails Sent, Total Links Clicked, Click thru Rate, etc.
  - Provided "On Behalf" details for Drip Campaigns in Individual as well as Summary Report.

Setup:

- Template thumbnails will be parsed based on dummy information for User, Organization, Company and Contact.
- Across Mindmatrix, changed the icon for Currency field to 'fa-money'.
- Increased the default maximum character limit for Text area field to 500 in Site Admin > Contact Fields.
- In Scoring, the date-time of "Updated on" was less than "Created on" if the Company was copied. This has been fixed.
- Some filters were not seen in filter section. This has been fixed.
- On hover of Document/Images/Videos in Setup gallery displayed the "Created By" information.
- Provided User Settings to keep "Auto Save" checked as default in Template Editor.
- Copy Company was not operational. This has been fixed.
- "Remove" button CSS was not operational when clicked for User from Organization Users count. This has been fixed.
- Document Gallery: While selecting documents in templates, it was redirecting to the Preview page. This has been fixed.
- Default folder while creating User/Organization/User Group/Organization Group will be "All" in pages of Organization, Channel Manager, Add Users, etc
- Provided "Save" button on top for non-modal pages like User Profile, Company Profile and Contact Custom field.
- For Setup > Image/Document/Video Gallery, the 'created by' was blank when "Company level" was enabled. This has been fixed.

Social Postings:

- In Social drip, if the media was created using old template, then ,in the media remove URL link was not working as expected. This has been fixed.

Scoring:

- Contact scoring will now be removed when contact is converted into user
- In Contact and User Scoring for External Sites, provided "Rule" based on Total and Average time of visits.

Tracking Links & Site:

- When editing a trackable link that contained a document, the updated link was not being replaced with a new document from the document gallery. This has been fixed.

UI & Consistency:

- Localization issue for alert when contact was added from list in Drip Campaign has been fixed.
- Word-break styling for "View Assets" widget has been removed.
- Grammar issue in text of Users, Organizations, Organization Groups Report has been fixed.
- Clicking on mask for 'Contact record' used to display the alert twice. This has been fixed.
- Modal "Close" button displayed alert of Editor for Notification page of Advanced Opportunity Search. This has been fixed.
- In Contact-wise view of playbook, the "Notes" used to overflow and disturb the UI. This 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