

# Product Release Announcement

---

Latest Software Release Notes, September 2018

## **Issues Fixed**

### **Contacts:**

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

### **Contracts:**

- A few alert messages and UI changes have been implemented. A link option has also been provided for "Terms & Conditions".
- The contract module's PDF output will no longer be blurred and will be similar to the Print output.
- A "list view" has been provided along with respective actions for Certification templates in Setup > Asset Management > Templates.

### **CRMs and Third Party Integrations:**

- Salesforce (SFDC):
  - "Partner activity and Organization stats" will now load within the iframe in SFDC for users.
  - Partner User emails may be passed into the "Owned By" custom field within SFDC if no other value is provided.
  - Pushing an User from Mindmatrix to SFDC will check the email address field in addition to the ID to check if contact already exists in SFDC.
  - Option to enable/disable "Account" creation in SFDC when pushed from Mindmatrix has been provided.
  - SFDC: Updated the API call limit as per Edition of SFDC.
- Contact Science:
  - Contact Science import was breaking if "Updated on" field is null.
- Dynamics CRM:
  - Added all installs in the drop down options.
  - Dynamics CRM: While pulling data from Drop Down field it will now pull in Option display value.
  - Dynamics CRM: Contact filter was not working for number type field.

- Connectwise:
  - Contact and Opportunity custom fields filters were not working.
- Autotask:
  - Account type fields also provided for opportunity filter criteria for importing Opportunities.

### **Dashboards & Asset Search:**

- In "Linear Playbook" widget, provided a setting which will not remove the widget on completion.
- Disabled the links for Outlook plug-in and Chrome Extension from Profile pop-up of top menu if "Sales Enablement Tools" permission doesn't exist for the User.
- In "Leaderboard Users", by Default report page will be shown when clicked on User Name even in "Asset Utilization" widget.
- Drop down in "Asset Utilization" widget provided which will provide all the selected Asset types from the configuration done in Setup > Dashboard. (Demo on Tuesday)
- Provided option to change background color in "Videos - v2" widget setting.
- Opportunity viewed from "Leaderboard" widget didn't display all the options in "Views" drop down.
- Clicking on "more" from Profile pop-up of 'Top Nav' will now load all the Announcements.
- "Announcements" widget and the Announcements in Profile pop-up of Top Nav bar will be consistent.
- The Activity feed under the "Web Leads" widget on the dashboard was not loading.
- "Opportunity Summary" Widget optimized.

### **Drips & Lists:**

- In Company list condition the form names were duplicated when "Specific Form" is selected.
- In User drip report, clicking on the "link clicks" didn't display the Users in the grid.
- Smart list condition provided for Contacts who have completed Drip Campaign.

### **Editors:**

- Asset Templates (Web & Form):
  - There need to be 'disconnect' option in form object of mobile version for having disconnected styling.
  - Web Banner: On Edit the drop down values changes to "External Web Address" when CTA was assigned to "Internal Link" has been fixed.
  - Removed Databases option from Web Banner Template Editor.
- Asset Templates (General update):
  - "Save & Close" was not working for editors.
- Asset Templates (Email):
  - "Download email" was not providing the HTML for templates shared upto "View".
  - When Email was made "Left" aligned the left most cell's palette was not been displayed.
  - Default text when text object is added will be displaying real "Lorem Ipsum" text.
  - The "Conditional BG color" was not working in Outlook if applied from Cell Properties.
  - Adding User smartlist to "Send User Email" added Zero Users this has been fixed.
- Asset Templates (Contracts):
  - Signature used to break in Firefox and Safari browser.

### **Import & Export:**

- Export from Opportunity Advance Search displayed blank sheet.

### **Notifications:**

- All notification emails will have "Company Name" as "From" address and "Do not reply" message.

### **Opportunities:**

- Made the "Associate Contacts" page of Opportunities consistent with the "step process" page without the top header and asset search.

### **Playbooks**

- Twilio:
  - Twilio calls in Playbooks have been introduced with an option to record and play a voicemail reply.
- General updates:
  - "Mark as done" buttons were not appearing for action items in linear playbooks. This has been fixed.
  - Social Drip Campaigns starting in Playbooks will now be displayed in Manage > Drips > Social as well.
  - In the contact report page, the name placeholder will now take the complete row width.

### **Reports:**

- General updates:
  - Added columns for "asset created on" and "updated on" under Reports > Asset report.
  - "Videos Sent" count (Usage) will be shown in Setup > Videos based on Users and Organizations permission.
- Email:
  - In Email report and Summary report the link clicked page was not loading.

### **Setup:**

- Social media drip templates:
  - Usage of social drips will be displayed based on permission in Setup > Social drip.
- Company Profile:
  - Removed mandatory check for "Address 1" from Profile and "Score" field from Company.
- Roles:
  - A "Settings" tab has been provided for admins when working in the "Edit User" section under Setup > User Management. This makes this section consistent with the user profile page.
- Users:
  - Made the "Users" grid consistent throughout the application.
  - Trimming of leading and trailing spaces for mandatory fields has been done.
- Companies:
  - "Lock/Unlock" functionality in Setup > Companies for "Child Companies" has been introduced for Super administrators.



**Social Postings and Social Drip campaign:**

- A sent count will now be provided on both card and thumbnail view for the social media drip.
- There will no longer be incorrect information about posting reported in the summary report.
- In the social media drip, the UI would break when the post count was 3 digits in "Card" view. This has been fixed.
- Messages with Images or Files attached were not saving in the social media drip. This has been fixed.
- Provided a 'note' below the Facebook's dropdown mentioning why posting on "My Wall" is no longer offered.

---

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