

# Product Release Announcement

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Latest Software Release Notes, March 2019

## Roadmap Items Released:

### **MDF Summary report in "Reports"**

Managers and Admins can now check reports of MDF for all organizations that they have access to.

### **Course Catalog**

Once "Course Catalog" is enabled for a Company, all the Users can navigate to a page in "Manage" which will list all the Linear playbooks and its completed status for the User.

### **Enhanced Notification Manager**

We have provided segregation of notifications between 'action' based notifications and 'informative' ones. Also all notification emails sent will be seen under notifications in this page.

## **Fixed Issues**

### **Browser related:**

- Mindmatrix was not operational in IE 11. This has been fixed.

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

- Salesforce (SFDC):
  - "Send Assets" page of Playbook from SFDC will now use the "Asset Search APIs".
  - SFDC "Assets iFrame" was not using the fields configured in Asset configuration". This has been fixed.
  - Authentication issue in SFDC Lightning has been fixed.
  - SFDC SSO with SFDC as IDP and Destination introduced.
- Hubspot:



- Bidirectional opportunity sync has been implemented and will have an 'Owned by' option to share opportunities to the right partner and Organization.
- Autotask:
  - Field mapping was not loading when field names included an apostrophe. This has been fixed.
- Connectwise:
  - An error notification regarding a Company will be sent to support@mindmatrix.net.
- Sugar:
  - SugarCRM push opportunity and account creation based on logic has been provided.
  - Accounts were being duplicated when SOT was set to CRM. This has been fixed.
- ZOHO CRM:
  - Ownership of opportunities in Mindmatrix will now be visible in Zoho CRM.

#### **Certifications:**

- For multiple choice questions, provided option to set 'minimum' score to give score for the question. i.e. only if score is equal to or more than the minimum score the score will be provided.

#### **Custom Work (Google Drive):**

- Google Drive Integration: If files are deleted in Google drive then it will be deleted in Mindmatrix also.
- Google Drive: When already imported folder is renamed in Google Drive, then in the next sync, the older folder name will be removed and the new folder name will be added as filter in Mindmatrix.
- Google Drive: Deleted ctags of already imported files were not being removed in Mindmatrix after sync. This has been fixed.

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

- "Last 5 Drip Campaigns" widget introduced.
- Quick links widget design 1: Provided more option to stylize using CSS.
- Thumbnails were distorted in "New Assets" widgets as well as "New Assets Stats" widget. This has been fixed.

#### **Drips & Lists:**

- Provided option to send notification email to Organization Group Manager(s) in Company List.
- Provided 'Filters used for contacts' in conditions of Contact Smart List.
- Provided "Activities" chart for Contact Drip Campaign report.
- In Quick Drip Editor, the 'preview' was parsed based on the user the drip was created by, and not the user who was logged in. This has been fixed.
- "Scheduled send event" button was missing from contact and user drip's condition event for email. This has been fixed.
- Verbiage used in email drip campaign delay modified as requested.
- Provided Opportunities-based conditions in Company Smart list.



- Special characters in drip description like (!@#\$\$%^&\*()\_+}{":<>?) was breaking the page on Save. This has been fixed.

### **External Tracking:**

- Provision to add thumbnails to "External Tracking Links" provided.

### **Editors:**

- Asset Templates (Web & Form):
  - Landing page preview was throwing exception when there existed Organization level ToS. This has been fixed.
- Asset Templates (General update):
  - Optimized the "Communicate > Email > Compose - Step 1".
- Asset Templates (Email):
  - Imported HTML email will be displayed as it is when sent in email client with header and footer.
  - Video object was broken in Email Editor. This has been fixed.
- Asset Templates (Data Room):
  - Contact parsing was not happening for data room mobile pages. This has been fixed.

### **Notifications:**

- Double Opt-in email notification will now use Organization variables if a User exists in an Organization.
- If Opportunity layout was done then the default fields did not come as selected for Notification email in Opportunities advanced search nor were the static fields added in email. This has been fixed.

### **Opportunities:**

- Step Process Opportunity: Only fields which are mandatory and marked as "Show in Step1" will be displayed in Step 1.

### **Playbooks:**

- Contact Centric Playbook: "Assign Task" feature introduced to assign multiple contacts to a step.
- "Publish" action provided for Image object in Linear and non-linear Playbooks (not for Contact centric playbooks).
- Provided delay for Non-contact Centric playbook and hid the delay in Media if it is set to 0 days.
- In Linear playbook, if delay is set in template, for media it was always displayed as 0 days. This has been fixed.

### **Reports:**

- Drip Report:

- Custom Date Range functionality provided in Drips Summary Report based on “Drip media created on” parameter.
- Email Report:
  - In Email Summary report, provided separate column for "Total Clicks" count next to "Unique clicks" count.
  - In Email Summary report, if custom period range is selected then the X-Axis will be changed based on number of days.
- Form Report:
  - Made the counts in "Form Summary Report" clickable.
  - Custom Date Range in Forms Summary Report provided (these are for the form created on dates).

### **Setup:**

- Provision to mark "Drop down" field as mandatory for Custom contact, opportunity and database field has been provided.
- Setup > Users: Opportunity created count was not matching with the count in grid on opening in modal. This has been fixed.
- Adding Organization to Organization Group from Organization > "Views" > Organization Group was not operational. This has been fixed.
- Allowed special characters in custom drop down option field value for Contact, Opportunity and Database custom field.
- Provision made for setting Persona even for Super Admins.
- In Playbooks media for all 'views' provided Folders and Filters section.
- Date picker was not closing down after selecting a date in Step Process of Opportunity. This has been fixed across Mindmatrix.
- Field indicator for "Number" field was displayed as text field in Setup > field creation. This has been fixed.
- If image file extension is in capital then the thumbnail was not visible in list view. This has been fixed.
- If the User's ToS field is 'Null', then now it will not display the ToS i.e. For some Users ToS can now be disabled.
- Provided option to enable "ToS for Consent" in Template Editor, and flexibility to have/not have for the Company/Organization/User.
- Instead of displaying modal of ToS, a link is added to open in separate tab with a check box to approve.
- In Asset search while saving keywords, it will ignore keywords with 2 or lesser characters.
- If "Static Fields" of Contacts was not customized then User could not hide all the Custom tabs created for a Persona.
- Deletion of Organization will not be allowed until all Users are dis-associated from it.
- User creation was not working if 'Organization edit' permission was not provided. This has been fixed.
- "Lock Out" User functionality provided for Super Admins also.
- Asset filtering provided by Language and/or User preferences across Mindmatrix.
- Typo in "Date-Time" text of Site Admin Contact Fields has been fixed.
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- Provided thumbnails in List view of Templates and Document Gallery.
- Company level templates will be displayed for Super and Site Admin in Setup > Templates for Drip and Social Drip also.



- For active modal with action button and modal with step process, when clicked out of modal area it will display an alert dialog of closing of the modal.
- Provided "Ratings" in sorting of Assets (Setup>Assets) if "Feedback & Ratings" is enabled for the Company.
- Login and Navigation logo can be hidden based on install level flag.
- Same domain of custom login will be provided for web outputs like landing pages, websites and data room for Users of that Company and the Custom Login page will be displayed as per Current Company of the User.
- Provided "Country" drop down in Bird's Eye widget for Setup > Users and Organizations and Organization Report.
- While Copying Company, in the "Custom Contact Layout", if contact's static fields were edited and not copied, and it was breaking the Company. This has been fixed.

#### **Social Posting:**

- While posting Image into Social, even if the image URL is removed, the image will be posted. This has been done for Facebook and Twitter.

#### **UI fixes:**

- Alert message content for "Contact to Partner" conversion has been changed as per request.
- Typo in alert message of MDF Request has been fixed.

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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](mailto:support@mindmatrix.net).

-- Mindmatrix Services