Product Release Announcement

Latest Software Release Notes

Issues Fixed

Editors & Outputs

- Removed generated collateral from the "Related Assets" section of the PDF preview and fixed page issues from Dashboard widgets along with UI modifications.
- Domain Signing didn't work if the email is sent from Autoresponder.
- Special characters such as '&' used while filling external form broke the form.
- Date and time field UI was broken in form output.
- Contact was shown login page while trying to view Contract.
- While adding a new contact from "Send email" page if upper case is used even for single character it doesn't add the contact.

Filter Management

- All the filters assigned to an asset were removed if one of the filters was deleted from the Filter Management.
- Filter category was not adding a filter called "Floor plan."

Contacts

- Unsubscribed from Email contact's date of unsubscribe changes when contact is saved.

Dashboards & Asset Search

- "View Assets" strips special characters from title and description of the asset.

Social Posts

- Facebook Likes count and Share count were not working this issue has been fixed.
- Social templates were not displayed in "All" folder of Social Drip if no media is created.

Drips & Lists

- In Smartlist, User cannot select specific Web > Media while creating condition
- In drip media editor, after "test" mode clicking on "Done" doesn't close the test mode.

CRM:

- Contact Feed iFrame in CRM was not working.
- AutoTask & ConnectWise: To Dos from Opportunity advanced search will be pushed into CRM.
- ZOHO & SFDC: To Dos from Opportunity advanced search will be pushed into CRM
- SFDC: In Opportunity mapping between CRM and AMP, provided separate mapping for value of "Stage."
- Contact Science: Password field was displaying text.
- Special character in "Account name" was breaking TigerPaw CRM integration.

Setup:

- Hid not-required social reports.
- Custom Field tabs were not displayed if set to "all personas".
- Filters were not working properly in Social as well as Drip Campaign template.

Opportunities:

- If Opportunity static fields are customized then selecting fields in "Notification" of Advanced Search was not working.

UI fixes:

- Note on "link tracking" page was not consistent with rest of product.
- Playbook contact grid fluctuates on wide screen when mouse over on contact.

Certification:

- For Certifications created after previous releases in June 2018, the score for the 'options' was not getting assigned. This has been fixed.

Reports:

- "Message" page doesn't load in email summary if User has only "Edit" permission.

UI fixes:

- UI issue in condition page of lead routing has been fixed.

New Enhancements

Roadmap Items Released:

Advance Email Scheduler
This will enable Users to resend the same email after a scheduled period of relative days from the first email campaign to those who have not opened in the first place.

Thumbnail for Database records
Users, specifically real estate ones, can use an image field or manually upload thumbnail image for database record. This will provide "thumbnail" view for the records.

Opportunity record creation in Step process
Opportunities in a Company can be configured to follow "Step Process" of registering, associating contacts and closure of the Opportunity instead of default information-entering form.

Social Posts:

- Made Social site selection page consistent for "One-off" posting to "Drip"

Filters & Categories:

- Filter and Category Management page optimized.

Notifications:

- Provided portal branding for smart list notification email.
- Added LinkedIn Certification button in Certification Pass email.

Editors & Outputs

- Editor: Ability to add multiple pages of web templates to form has been provided.
- Email Editor: In cell properties, the "default background color" will never in disabled mode.
- In Editor step process, once the page size is selected and the Editor is loaded then on "Previous" the data page will be in disabled mode for size selection.
- In Print Media editor now only "contact" variables can be added.
- Provided "preview text" for email in Media Editor also.
- Provided "On behalf" functionality for form autoresponder mail in web media.
- Editor: Changed text to plural for "Form Property" to "Form Properties" in Form palette.
- In database record picker now it will memorize selections from previous pages when pagination is used.
- Provided scroll for Form template to fit form greater than 1000 px in height.

- Longer CTA issue in properties modal has been fixed and made complete CTA clickable.

Drips & Lists

- "Completed linear playbooks" introduced in User smartlist, drip condition and User scoring.
- In Drip campaign removed mandatory for drip start and end while scheduling.

CRM:

- Enabled sync of ConnectWise company custom fields.
- Disabled CW Sync only for conditions to which notification is sent.
- AutoTask & ZOHO: Option to Pause / Resume CRM Sync and Notify by email provided. (Demo on Monday)
- Modal title for "Contact Science" settings named as "Add-ons".

Dashboard & Asset Search:

- Added 3 quicklinks which will be marked as external and User will provide link to open a page.
- Made fonts of all Dashboard widgets consistent and "Raleway" as AMP brand font across the board.
- Mandatory check for "Last Name" of User has been removed from Self Serve page.
- For "Quick links" widget, the default header text will be displayed on Edit even if blank value is saved.
- Provided "color settings" for "Stats ring" widget.
- Clicking on web template from asset search will now load "Customize" modal.
- "Settings" introduced in the Dashboard page of "Linear Playbook Summary" widget. (Demo on Monday)
- Provided slider for "Stats Ring V1" widget used in Channel Partner A and B. (Demo on Monday)
- Permission check added for "MDF" quick link.

Reports:

- Total sent column added in email sent modal for User report.
- Provided User email in Users report export.
- Provided drop down of "Lead Source" options for the chart in Shared Lead Source report.
- Contact feed setting made same as Dashboard for Activity feed report.

Scoring:

- Asset Icons consistency in Lead Scoring and media/manage pages done.

Setup:

- Hid not-required social reports.

Opportunities:

- Opportunities displayed in Manage > Opportunities, Advanced Search, Dashboard > Opportunity Summary widget will follow Users and Organizations permission like Opportunity report.

UI fixes:

- Trimming of text in "View Asset" widget will be based on CSS and hence won't disturb the UI.
- Column of ratings removed from "Documents" page while adding document to Data Room.
- Button text modified in "Forgot Password" page.

Notifications:

- If no template is selected for "Pass Certificate" then will not provide link in the email.

Brands:

- Increased the character limit of "Signature" HTML field in Brand to 5000.

Import & Export:

- While exporting data from AMP all date-time fields will use the time zone of the User.

Roadmap Items for Early 2018

SSO implementation with SFDC integration
If SSO is enabled at install level then SSO login is in SFDC.

Twilio Integration for Phone calls
We will be integrating with 'Twilio' to call, record and playback phone calls made to contacts. In next phase we will have the call records incorporated in Smart list, Drip condition and scoring.

"Asset Utilization" Widget for Dashboard which will be default for Marketing Manager.
This widget will provide the Admin User (e.g. Marketing Manager) to view the usage and popularity of the assets among the Users he has permission to.

Modal pages UI changes
All modals will have action buttons of Save and Close even on top and the modals will follow branding colors from portal.

Opportunity Scoring
Scoring based on Opportunity will be introduced and this will score the Opportunity based on rules set for them. e.g. "Market equal to HealthCare will have more score than Real Estate".

Push AMP User activities to CRMs
We will be pushing AMP activities (what the User has done to contacts) to CRMs which will include User sent mail, User did Offline Activity, User did Phone activity, Associated with Opportunity.

Quick Drip Editor
A new view of the media drip editor will be provided where in User can quickly modify the email templates and delay events.

Attaching activities to MDF
User can now attach Contacts/Lists, Email Campaigns, Opportunities and/or Deals registered to MDF requests which will help the Admin to take decision on approval.

"Contact-wise" view of Contact-centric playbook
This feature will make User act on contact-centric playbook based on contacts in the playbook. The filtering is done based on actions to be taken on contacts by setting To Do and the approach of the date.

Recommendation in Opportunity Scoring
User can set recommendation based on previous Opportunity data, previous User closure performance and activities for the Opportunities.

Customization of navigation
Site Admin can customize the navigation menus between Dashboard and Site Admin by adding custom menu headers and re-arranging the sub-menus in them.

User Incentive Program
Site Admin can customize the navigation menus between Dashboard and Site Admin by adding custom menu headers and re-arranging the sub-menus in them. Why is this the same as the item above?

Deals to Opportunity (non-traditional Deal Registration)
In this type of Deal registration, when a Deal is registered a Lead is created and User can approve the lead to convert into Contact and then into Opportunity.

Storing of Currency Conversion and applying it to Opportunities
We will be storing Currency Conversion install-wise which will be updated daily/weekly and then the Opportunity Amount calculation will be based on User's Currency Unit from Organization/Company.
