

# Sweet 4.8.5

RELEASE NOTES



# Release notes

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## Version 4.8.5

This document contains a list of new functionality and improvements added to the latest version of Sweet

Sweet One

Sweet Forms

Sweet Automation

Sweet Performance

Corrections

# Sweet One + Automation = Great Case Management

## Incoming case emails\*

Sweet have been replacing the incoming email service that picks up emails and create new cases or match to existing cases. The service previously used have been replaced with our own automation- and integrations engine **Sweet Automation**.

By using Sweet Automation for handling incoming emails, we enable super users to add business logic and rules to the case management. This gives you the possibility to manage and own your processes and change them without the need of developers or any releases.

This is one big step towards shortening time-to-market, but also shortening the upgrade time.

## Monitoring of deviations

On top of moving the email service, we have also moved the monitoring of the incoming emails, if error occurs you can now define who should be notified and when. You can always be the first to know.

We are also tracking if flow participants are stuck somewhere in a flow for some reason, to give you a chance to act upon it in time.

\* This is a breaking change, and you will need to have Sweet Automation for the new incoming email service to work with case management incoming emails.



# Case management

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## Open and view locked cases

Over the years we've been asked to create some sort of "read-only" mode for cases locked by another user – and now it's here! If another user has a case open, others can still open the case with limited permissions. The case viewers are for instance not allowed to change status of the case, or edit the case information, but are allowed to see and read everything on the case.

## Relations

The way relations and its roles are created for cases and incoming case emails has been updated, we now make sure to show *all related entities* using the same email addresses whenever an email address is either the sender or recipient. Also we allow unidentified email addresses to get the "owner" role.

## Additional email addresses

The additional email addresses (additional contact info) are no longer matched as relations when used to send in cases to the case management, this is to enhance performance. This means that only one, the primary email, will create a relation to the entity.



# Security enhancements

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## Password handling

To even further secure your data and access to the system, we have made some key changes to how to handle passwords.

It's now possible to change the validity time of new or forgotten password links to ensure they're now valid for too long.

New users who received a password for the first time, must on first login change it.

If a user, or intruder, tries to log in and fails after five attempts, the user account gets inactivated and must be activated by an administrator. The number of attempts can be changed in settings.



# Sweet Automation

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## **New user interface**

Our much-appreciated Sweet Automation has got a new look and feel thanks to a new and improved layout. While working on colors, fonts and icons we also made sure to give some love to captions and explanations in order to make your user experience smoother.

## **Export and import of flows**

The new copy and paste function allows you to share and re-use flows and the settings between environments over and over again. No need to configure the actions and settings as before.

## **Export and import of dashboards**

Possible to export and import dashboards and links in between environments.

# Sweet Automation

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- **Windows Authentication:** Possible to require AD user to belong to AD-group.
- **Incoming email:** Support for shared mailboxes in IMAP and pop3.
- **REST API action:** Possible to use selection template.
- **Sweet action**
  - Possible to filter relations on User, Private Person, Company, Company Group, Contact Person to only create relations on Active and where the relation is withing date-range.
  - When available using the Config.Entity metadata configuration which allows creating/updating more entity types.
- **UX**
  - Action execution. Live updates in the tooltip.
  - Possible to search for a specific participant in all boxes.
  - Selection admin, possible to search for specific conditions/result columns.
- **Parse/API:** Possible to trigger target flow after load.
- **New actions**
  - Distance calculator between 2 geographical points.
  - Regex action: Possible to extract value from string using regex.
  - Sweet notes: Possible to create a single note on an entity.
- **Action execution settings:** Trigger flow on execution error.
- **E-marketing split:** Possible to split on a specific URL click.
- **Message Queue:** Rudimentary support for triggering/loading flows from message queues.
- **BW PollService:** Possible to exclude certain response types when fetching responses.

# Form Designer

## Header & footer for PDFs

For all PDF versions of a form, you have support to design and insert a header and footer.

## PDF settings and PDF merge

Over the years we've been asked to support PDF attachments from elsewhere in our forms, now it's possible! If you choose to merge an existing PDF into our forms, it will appear as an attachment in the PDF version of the form, but not be visible in the digital version.

## Access limitations

We have developed support to set a time limit of how long a form respondent can open and access a started answer set. As an administrator, you are allowed to open it whenever.

## Other

- Signicat, when using the authentication feature in Forms you can now choose to login with both mobile BankID and regular BankID for Norway.
- Option to create a unique, visible link for each answer set
- Validation for different formats of organization number
- Publish setting prevents access to completed answer sets for security purposes
- Scrive, add functionality to send reminder and set an expiration date for signing a document



# CORRECTIONS



Below are some of the key corrections made since the last version.

## Sweet One

- **Company** – Not all deals were displayed in the list correctly
- **Company** – Not all contacts were displayed in the list correctly
- **Case pipeline** – Case cards moved in between statuses were not saved
- **Admin** – Email templates did not get deleted upon try
- **Price book** – Error appeared when trying to delete a price book
- **Admin:** When you add/edit codes under a specific configuration set using the "old" admin the changes are only saved on Vanilla.

## Sweet Automation

- **E-sign** – No error or indication was given when phone number format, redirect URL format, or file format was wrong, but the action could not execute. Now an error message is shown.

## Sweet Performance

- **Drill down** – When drilling down, and going back, the interface was not right
- **Edit chart** – When trying to undo the adding of a data source, an error appeared
- **Edit chart** – If the used data source is not responsive, the edit data source button was missing
- **Create new user group** – Validation of group name sometimes failed and the group could not be saved
- **Application settings** – User permissions were displaying publisher permission in edit mode, for users only having viewer permission

# About Sweet Systems

We develop smart and business-critical solutions that streamline the operations for sales, after-sales, customer service, and marketing units. We aim to make your everyday life easier and make your customers happier.

A white circle containing a black lowercase letter 'f', representing the Facebook logo.A white circle containing a black lowercase 'in', representing the LinkedIn logo.

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The Sweet Systems logo, featuring a stylized 's' icon with a green leaf-like shape on top, followed by the word 'sweet' in a lowercase, sans-serif font. The logo is positioned inside a white, rounded, irregular shape.