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Release notes – Sweet fall release 2023

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Content
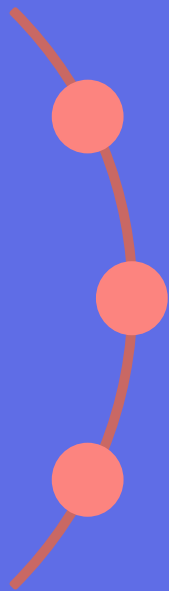
- **Sweet Forms**
- **Sweet CRM**
- **Sweet Automation**

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Sweet Forms

Sweet Forms now offers expanded storage options, driven by customer demand. The primary focus of this update is the seamless integration of external third-party document storage providers. This empowers you to choose your preferred data storage location, giving you full control over your information, if Sweet for some reason isn't your perferred place.

A nice and neat new feature to help you move from test to production, is the new import function where you can chose to import a new stand alone copy, or a new version.

In addition, we've dedicated resources to enhancing the authentication and security aspects of Sweet Forms. Your data's safety remains our top priority, and we've implemented crucial enhancements to ensure its protection.

Sweet Forms

Document storage

In Sweet Forms, we've broadened the horizons of answer set storage possibilities. Beyond the default storage within the Sweet database, we've opened the door to integrate with third-party storage solutions. You can choose to store answer sets in **SynkZone**, or in other leading file storage companies. This empowers you with the flexibility to choose a storage option that aligns with your data management strategy, whether it's within our native system or through an external document storage provider.


External document storage in Synczone

Form Designer

Enhanced PDF Preview

In the latest update of Form Designer, we've enhanced the PDF preview feature. Now, while working in form designer, you'll find that the preview mode closely matches the final output. For those pages that's for PDF's only, there's a PDF sign on the page, section or question level. Additionally, tags representing 'PDF' and 'Digital' views have distinct colours for easy identification.
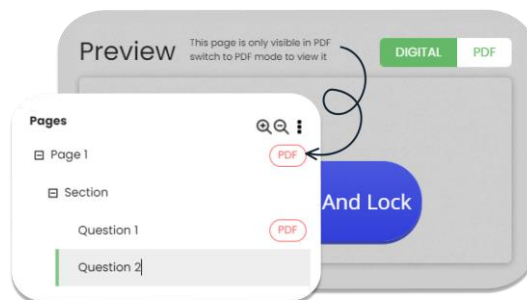
PDF indicators

Default redirect for new forms

Form Admins can now enhance the user experience by setting default redirect links for new form templates. Whether a form is e-signed, closed, or completed, guide your users effortlessly to a predefined page of your choice. Dive into the Admin panel to discover these new settings. Keep in mind, this feature is designed exclusively for new forms, leaving existing form redirects untouched.

Sweet Forms

E-signing and Authentication

Signicat authentication configurations

Further enhancing our integration with Signicat, form designers now have greater flexibility in determining authentication methods for viewing and signing separately. This increased flexibility ensures a smoother, more streamlined experience for end-users, based on individual form requirements.
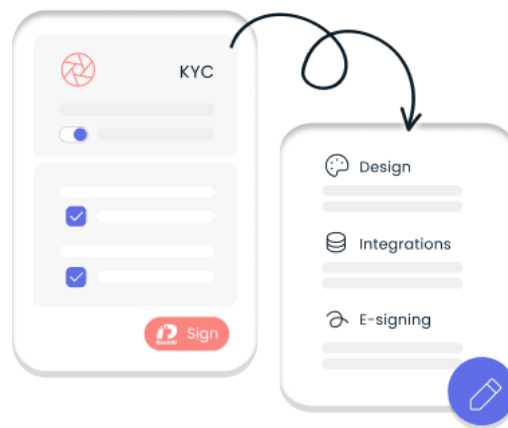
Authentication mode for accessing answer sets

Sweet Forms introduces an adaptive authentication mode, adjusting based on the 'personal number' field within answer sets. If this field is empty, users can freely access the answer set. However, once populated, it triggers a security check, requiring authentication matching the entered 'personal number'. This feature seamlessly integrates with leading authentication providers like Scrive and Signicat, ensuring a balance between user experience and data security.

Discontinuation of NemID support for e-signing and authentication

Sweet Forms has updated its platform in response to the NemID shutdown on June 30th, 2023. NemID is now replaced by MitID for e-signing and authentication. Accessing or editing forms previously set with NemID will prompt clear notifications, guiding users to select valid methods. All related documentation has been revised to match these changes, ensuring accuracy and clarity.

Sweet Forms

External Data

Sweet Automation for flow-based retrieval of data in Forms

Merge data from multiple sources directly into your forms with our new integration between Sweet Automation and Sweet Forms. Customize your forms to automatically fetch and display combined data in real-time, enhancing accuracy and user experience. Streamline your data collection effortlessly, making it more efficient and error-free for both your team and clients.

Flexible external data triggering options

We're excited to bring enhanced flexibility to our external data triggering options in Sweet Forms, catering to various scenarios and needs:

- OnAnswered Trigger: Data-fetch from your external sources will be initiated whenever a user answers a form question. This real-time data-fetch ensures that forms are always filled with the most recent information.
- OnBeforePdfGeneration Trigger: Data is fetched right before the form is locked, ensuring that the most updated data is included in the generated PDF and before it's sent to any signing providers.
- OnAfterAuthenticated Trigger: After a successful external authentication, the data-fetch is triggered, ensuring that user-specific data is populated post-authentication.
- OnAnswerSetCreation Trigger: Every time an answer set is created, the data-fetch is executed, which can be particularly useful to generate unique form numbers or other similar uses.

Import

Enhanced form importing capabilities

Now, users have two options when importing forms:

- a standalone copy
- a new version of an existing form

Furthermore, if you attempt to import a form and its key is identical as an existing one, Sweet Forms will automatically suggest importing it as a new version, ensuring consistency and minimizing duplicate forms. This streamlined process makes it easier to transition changes from testing platforms directly to production without constantly switching form links.

Sweet Forms

Form Flow

Ability to hide status bar in Form Flow with CSS

For users who prioritize a streamlined interface, we've introduced a new feature in this release. CSS users can now easily hide the status bar by leveraging a new class we've added to the form flow.

Corrections

- **Languages & Translations**
    - Language copy bug: Resolved the issue where copying sections between forms with different active languages did not trigger the appropriate alert.
    - Language settings and form text saving: Resolved the inconsistent saving of form text when switching language settings.
    - Default language in Form Designer: Resolved the issue allowing users to set a default language that isn't available for the form.
- **Validations**
    - Norwegian mobile number validation: Implemented proper length checks for Norwegian mobile numbers to maintain data accuracy.
- **Autosave**
    - Autosave issue: Corrected the misleading autosave notification for new, unsaved forms.
    - Form Designer autosave consistency: Enhanced autosave functionality for more reliable form saving.
- **UI & UX Improvements**
    - Form Flow overview enhancement: Improved UI clarity between closed drafts and locked forms, aiding user navigation.
    - Visibility settings in Form Designer: Added clearer captions for visibility conditions to improve user comprehension.
- **PDF**
    - Show Only in PDF page-level issue: Rectified the unintentional digital display of pages set to appear only in PDF.
    - Form Designer PDF settings: Addressed the discrepancy between PDF settings and the actual form outcome.
    - PDF Download and E-signing flow: Repaired the misconfiguration, ensuring correct e-signing process post PDF download.

Sweet Forms

Corrections continuation

- **E-signing**
  - E-Signing with Scrive: Fixed the mandatory email prompt, even when email wasn't required for signing.
  - Personal Number Field Autofill with SCRIVE and SIGNICAT: Fixed the prefilling issue post authentication via Swedish BankID.
  - E-signing Document Name Length: Introduced a character limit to prevent long document names from triggering error messages.
  - Default Notification Messages for Signicat Metadata: Removed the extra space in default messages to ensure proper data fetching.

- **Question types & fields**
  - Information Question Help Text: Users can now view the help text added to the "Information" question type.
  - Autocomplete Multi-select: Duplicate entries have been prevented in multi-select questions, maintaining the integrity of the form's responses.
  - Information Question HTML Support: Enhanced the "Information" question type to correctly interpret and display HTML styling.
  - Form Submission with Unanswered Required Questions: Corrected the error that allowed submission of incomplete forms.
  - File Upload Beyond Set Limit: Resolved the issue that allowed users to upload more files even after reaching the set limit.
  - List Question Row Deletion: Rectified the deletion issue in list questions, ensuring a smoother user experience.
  - Locked Answer Set Radio Button Modification: Fixed the oversight that let users modify locked single-answer questions.

- **Form edit restrictions on locked forms**
  - We have enforced the restrictions on the editing capabilities of locked forms. Now, once a form template is locked due to a response submission - the majority of settings will switch to read-only mode, preventing any unintended changes. Notable exception: The CSS editor is now also locked and set to read-only mode.
  Despite the lock, the following settings will remain editable to provide flexibility in non-content based modifications: Form Name, Form Description, Authentication settings, Anonymous submission settings, Labeling, Area, Category, Email notifications, Publishing settings (All options within it)
  We recommend users to review their locked form templates to ensure all settings are as intended.

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Sweet CRM

Sweet CRM's latest news has a focus on quality, we keep on working on extending the customization capabilities and at the same time keep automated tests and performance as top focus areas. As part of the product quality maintenance, security has a high rank and we are proud to include even better support to remain secure and keep your data safe and integrity high.

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Sweet CRM

E-mail

Enhanced e-mail interactions

Users can now edit text seamlessly when replying to emails within a case. Also we've added the option to set default font and font size in the html editor to be consistent in your outgoing communication. The input text box for the email body is now a bit bigger, and we made the pasted links in html editor clickable – sweet right?

User configuration

Import users

Our import configuration app now offers more flexible user settings, ensuring smoother data imports and more control over user accessibility.

Performance enhancements

We've refined our user service to better handle cached objects which makes it more optimized for the overall performance.

Themes
Sweet does no longer support other color themes found under user admin, this to secure the accuracy and user-friendliness of the standard theme.

Security

Extended security measures

We value security highly and have now strengthened our security measures for:

- Upgraded Libraries: We've updated our third-party libraries, ensuring that our software leverages the latest and most secure technologies.
- Enhanced Output Security: Our API now encodes JavaScript and HTML in the output, adding an extra layer of security against potential threats.

Enhanced data integrity

We've standardized our data handling methods, ensuring more consistent and accurate data processing.

Technical improvements

Extension of automated tests

We have improved product quality by extending our automated tests even further.

Improved customization capabilities

For businesses using customized controllers and mappers, our platform now offers better integration and adaptability. You'll find it even easier to tailor the software to your specific needs.

Sweet CRM

Corrections

- Address a potential cross-site scripting vulnerability in an API error response. It was already prevented in the browser, but we have now implemented user data escaping also in JSON context.

- Corrected "ontimesetup" issues of the rest API tests.

- Security improvement
  - The /user/{searchTerm} endpoint has been protected against brute force attacks. It no longer allows searching for users matching a string of known users. It now return only the user ID and name instead of more sensitive information.
  - Security Update: To run automatic tests, the SQL user previously required the 'sysadmin" role, which grants extensive permissions on the SQL server. We have updated the testing tools project to remove this requirement, enhancing security while still enabling automatic backups/snapshots.

- Appointment: an error occurred in Outlook when trying to save an appointment after adding the responsible party.

- Case relations: We have resolved an issue where contacts were incorrectly being added as both 'follower' and 'owner' when editing a case. Now, when relating a contact with the role 'follower' and editing the case, the contact will correctly be listed only as a 'follower' as per the expected behavior.

- New work order: We have fixed an error that occurred when creating a work order without associating it with a project. Now, you can successfully create a work order and remove the project from the lookup without encountering any errors.

- Admin
  - Default font size: We have corrected an issue in the Admin settings where the default font size was not being applied correctly. Now, when you change the default font size in the Admin settings and save, the selected font size will be accurately reflected in the HTML editor as well as other parts of the application.
  - Add new users: issue where the admin couldn't add new internal users.
  - Metadata: We have addressed an issue in the Admin settings under Metadata and Captions where it was impossible to add curly braces "{}" to the caption key. Now, you can successfully add values like "${orderId}" and the curly braces will be saved as expected.

- Admin DIY
  - Import: We have addressed an error that occurred when trying to import customizations in the 'Admin Do It Yourself' section. Users can now export, delete, and re-import customizations without encountering any errors.
  - Object manager: We have fixed an error that occurred in the Admin's 'Do It Yourself' section under 'Object Manager' when a user attempted to change the caption of any field. Now, users can successfully add or modify captions, update, save, and add comments without encountering any errors.
  - Object manager: We have fixed an issue in the 'Admin Do It Yourself' section under 'Object Manager' where the fields were not loading when opening 'Deal'. Additionally, the dropdown for adding a new field in the edit view of 'Deal' is no longer empty.
  - Object manager: We have resolved an error in the 'Admin Do It Yourself' section under 'Object Manager' that prevented users from adding new objects. Now, users can successfully add new objects, enter the required information, and save without any errors.

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Sweet Automation

In this release of Sweet Automation you can experience improvements in speed and robustness when it comes to the Sweet Action for the Sweet CRM! We've been speeding up the creation of CRM objects, ensuring much better performance.
But that's not all. In line with our ongoing commitment to backend excellence, this release introduces a significant framework upgrade to .NET and various technical improvements, setting the stage for an even more powerful platform.

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Sweet Automation

Actions

Enhanced Sweet action

We've made significant improvements to Sweet Action when creating CRM objects in Sweet CRM, making it faster and more robust. We have made improvements on

- **Logging :** To enhance overall performance, extensive logging is now turned off by default. (May be turned on if needed)
- **Data trimming:** We've introduced an option to automatically trim data that exceeds the target column size. This feature is enabled by default.
- **Transaction support:** You now have the option to run the action within a transaction. This helps prevent scenarios where, for example, a Case is created even if a subsequent step fails right after. With this feature turned on the Case will only be created if all steps succeeds. This functionality is enabled by default to enhance data consistency and reliability.

Enhanced Roaring capabilities

The information provider action now comes with better address parsing and support for Legal Guardians without social security numbers. Also, we made a few parsing enhancements of address information in CompanyInfo (Address1, Address2, CoAddress) within the Roaring module.

Incoming e-mail action

The incoming e-mail action comes with the extended ability to save Outlook objects like attached email messages.

New pivot/flatten action

Allows users to pivot key/value pairs into flow data columns.

API

Streamlined API selections

Directly stream results from the database, reducing memory usage and latency.

API security enhancement

Introduced a new endpoint for refreshing tokens using POST requests.

API Selections improvement

It is now possible to reference selections using keys in addition to IDs.

Sweet Automation

E-marketing

E-marketing now supports Symplify's "Journey Builder"

Added support for Symplify Journey in our E-marketing module. Symplify Journey Builder allows you to design and automate unlimited customer experiences with a drag-and-drop interface.

E-marketing flow optimization

Improved scheduling of next nodes in flows within Emarketing.

Global communication filters

Introduced the ability to block outgoing email and SMS messages using whitelists and blacklists, aiding testing environments.

Technical enhancements

Updated framework

Our application is now built with .NET Framework 4.8 in preparation for upcoming upgrade to .net 8, ensuring improved performance and compatibility.

Action recovery

Improved the recovery process when the SA Database cannot be reached during action execution.

Flow execution control

The Gate action now allows parts of flows to run for one participant at a time.

Sweet Automation

User experience enhancements

- Improved the appearance of JSON data in flow data preview by formatting it in a more readable manner.

- **Enhanced Search**: Users can now search for selection IDs and flow IDs, making it easier to locate specific items.

- **Automatic Column Sizing**: Columns in forms and other actions now automatically extend to accommodate larger data.

- **Flow UX Improvements**: Users can now hide specific flow data keys in preview dialogs, and progress errors are displayed within the flow interface.

- **Admin UX Enhancement**: Improved navigation of metadata trees and column selection in related tables/column views.

Corrections and improvements

- Fixed issues related to flow data size discrepancies, preventing potential data corruption.

- Improved the performance of flow execution, significantly reducing database queries and enhancing execution speed.

- Addressed bugs in ActionLog table size by optimizing storage of ActionData JSON.

- Selection Admin Enhancement: Fixed a bug that occurred when attempting to create a virtual view twice.

Make sure you get the latest updates

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