

sweet

Release notes – Sweet Spring Release 2024

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C o n t e n t



Sweet Forms

Sweet CRM

Sweet Automation

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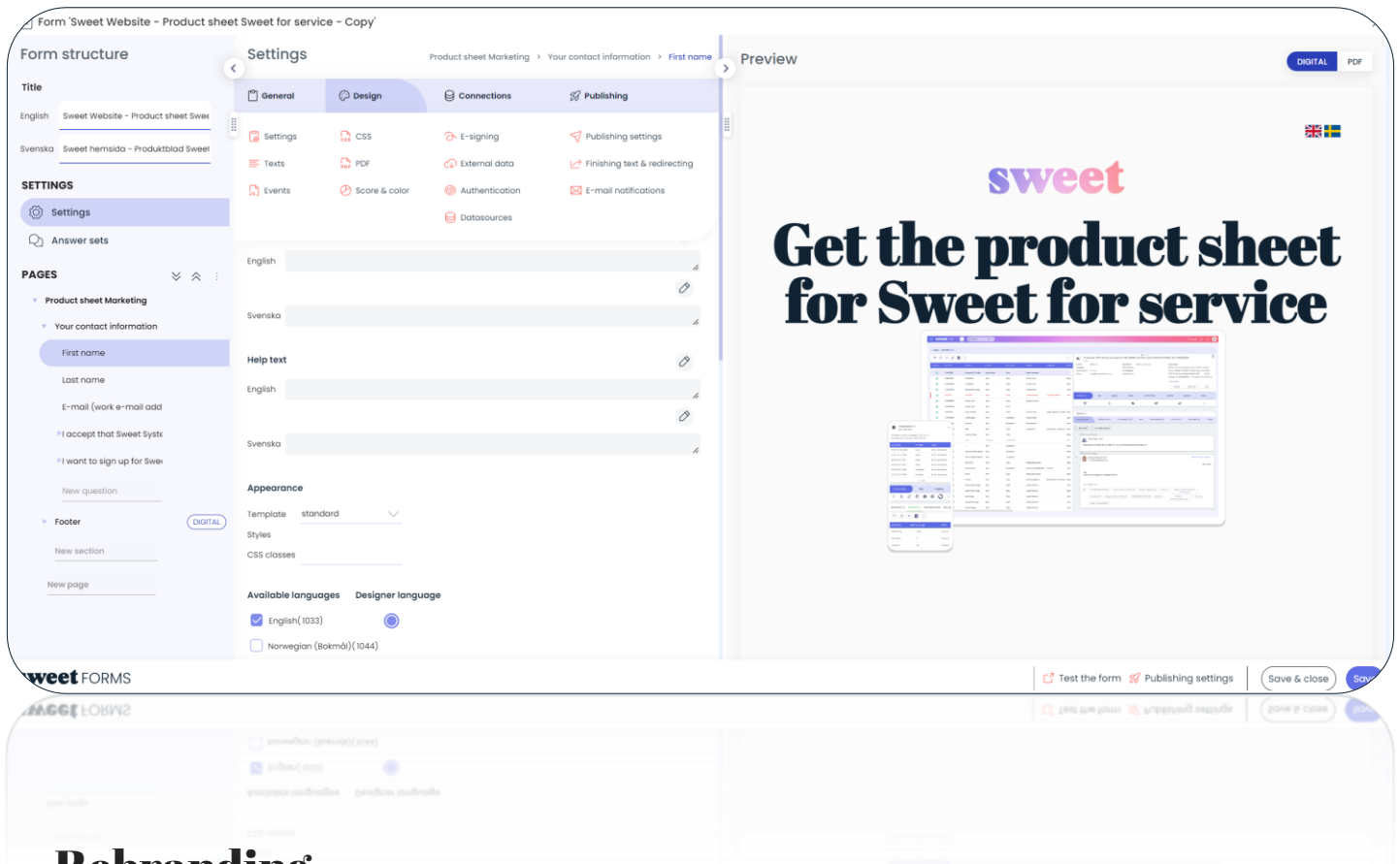
Sweet Forms

Our Sweet Forms platform is now equipped with a revamped user interface, designed to elevate your experience and streamline your workflow. These enhancements are designed to optimize your workflow, providing you with greater flexibility, efficiency, and ease of use.

To further simplify things for the form designer, there are also new features for creating and bulk updating texts, as well as retrieving dynamic responses from external sources.

Upgrade your experience with Sweet Forms today!

Sweet Forms



Rebranding

We're excited to announce the rebranding of our Sweet Form Designer. Here's a taste of what's changed:

- New fresh Sweet colors
- New settings menu with grouped submenu items and new layout
- More user-friendly layout for the Form Designer with help texts
- New layout on the start form template
- Full screen edit mode for Form designer for better user experience

This rebranding is one step in our direction towards being even more user-friendly, and from an accessibility perspective more readable.

Sweet Forms

New Feature: General texts

This innovative feature streamlines the process of editing informational text across multiple forms in one place, enhancing efficiency and consistency.

General texts (1)

Language Svenska

Key begins with gdpr

Created date greater or equal

Updated by is

Created by is

+ Add new

KEY	CREATED BY	CREATED DATE	UPDATED BY
GDPR	Sofia Järrestedt	2023-12-13 14:46:56	Sofia Järrestedt

Key GDPR

Content Normal

Vi sparar dina uppgifter för att kunna kontakta dig med information som ligger i ditt intresse. När du kontaktar oss ger du ditt samtycke till att Sweet Systems lagrar dina personuppgifter. Vi sparar dina uppgifter till den dagen du inte längre vill ha någon kontakt med oss och du kan när som helst kontakta oss om du vill bli borttagen. Har du några frågor eller funderingar kring hur vi tillämpar GDPR och hur vi behandlar dina personuppgifter? Läs mer i vår Policy (länk i sidfot) eller kontakta oss på info@sweetssystems.se. För allmänna frågor kring GDPR och dina rättigheter som privatperson hänvisar vi dig till Datainspektionen.

Delete Cancel Save

Features of General texts

- **New question type - "General text":**
 - As a form designer, you can now add "General text"/"Generell text" as a question type in your form templates. This allows for the easy integration of general text templates into your forms.
- **Language support:**
 - All languages used in a form template are now supported in "General text"/"Generell text" blocks. This ensures a seamless user experience across different language preferences.
- **Consistency in answer sets:**
 - For end-users, any form containing a "General text"/"Generell text" question will displayed in the user's language at the time of answering.
 - The global text remains consistent and unchanged in submitted answer sets, even if the original template is updated later.
- **Enhanced template management:**
 - The ability to create, edit, and delete "General text"/"Generell text" with a clear editor interface is provided for creating new texts, with fields for names, keys, and content.
 - Information on how many forms are using a particular general text is displayed, aiding in better template management.

Sweet Forms

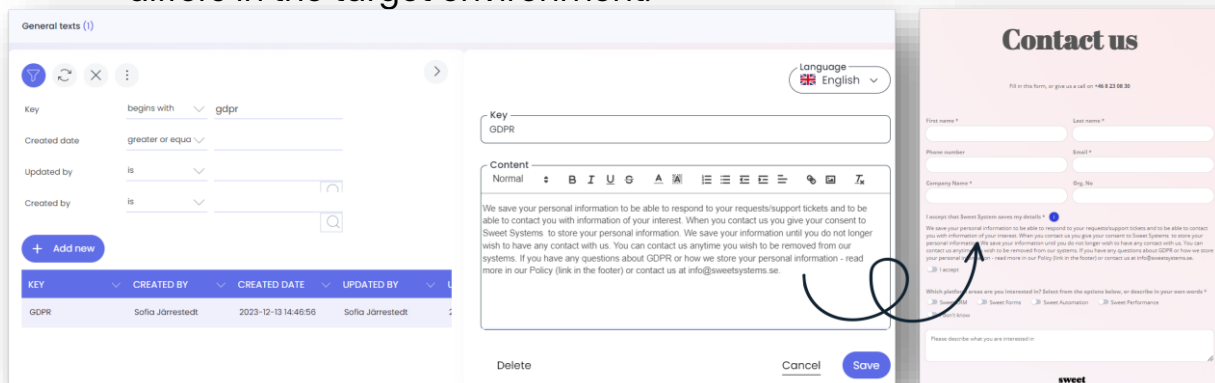
..General texts continuing :

• Export and import functionality:

- Form templates with "General text"/"Generell text" can now be exported and imported between environments. This feature ensures that all necessary information is transferred accurately.

• Handling of non-existent or different texts in different environments:

- When importing form templates, the system intelligently handles scenarios where the "General text"/"Generell text" either doesn't exist or differs in the target environment.



User scenarios:

- **Creating and using general texts:** Go to General Texts in the menu, create a new text, and then add it to a form. After publishing, any changes made to the general text won't affect existing answer sets.
- **Answering forms:** When users answer a form containing "General text", the text appears in the selected language and remains unchanged in the answer set.
- **Template import and export:** When importing a form template in a different environment, the system will handle the "General text"/"Generell text" blocks, accordingly, ensuring consistency and preventing errors.

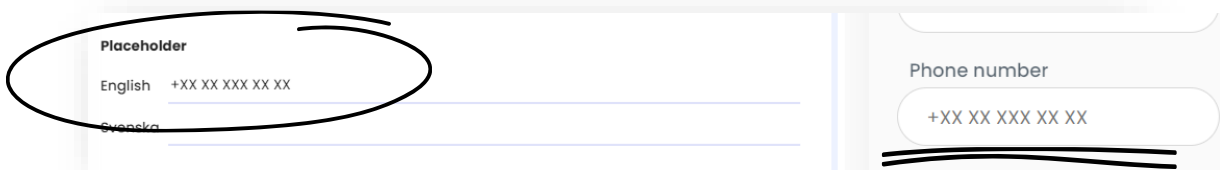
Additional Notes:

- **Global admin capabilities:** As an admin, you can create and edit general texts, customizing content as needed. However, clearing content for a language used by a referencing form template is not permitted.
- **Robust template management:** Scenarios for creating, editing, and deleting templates are fully supported, with safeguards to prevent accidental deletion of texts used in forms.

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Placeholders on questions

Form designers can now add placeholders to "Free Text" and "Number" questions to guide the respondents to fill in the right information in the right format.



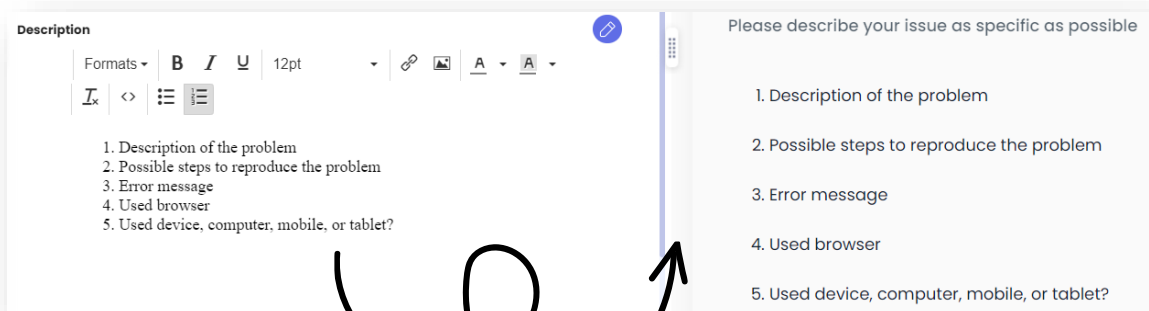
E-Sign uploads with configurable file types

When E-Sign is enabled, form designers may now select permitted file types for upload, giving them additional control over file types throughout the signing process with providers like as Signicat and Scrive.

HTML editor improved with bullet- and numbered lists

The HTML editor within forms has been updated to incorporate new functionality for bullet lists and numbered lists.

Users may now add bullet and numbered lists to pages, sections, and questions, improving information organization and display.



Sweet Forms

Optional user authentication for Signicat

Form designers now have the ability to choose whether or not to require end-user authentication for form signing.

MitID available for authentication and signing for Signicat

Overview is no longer in form settings

To scale the general setting menu down, we have removed the option for "Overview" where you before could see all the settings merged together

Forms links has moved to publishing settings

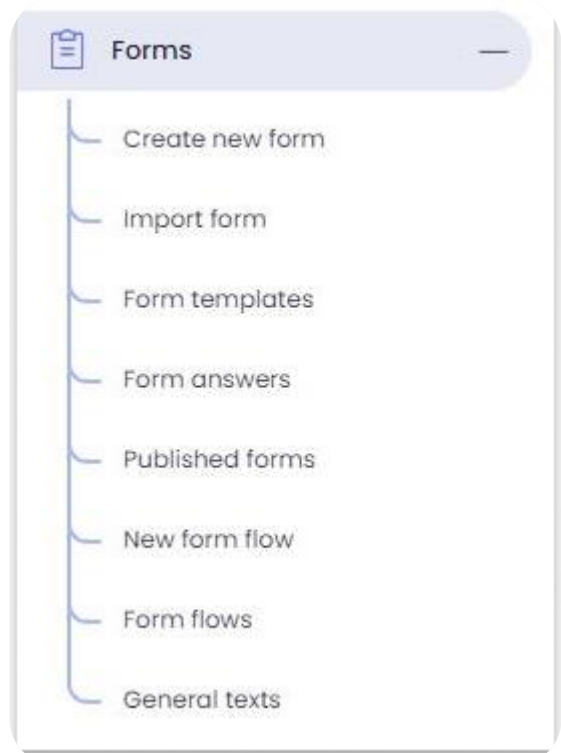
Now you can find the links to your form under "**Publish settings**" instead of "Settings".

Updates to Form designer menu labels and captions

We are excited to announce updates in our application that enhance clarity and user understanding in our form design feature.

Changes Introduced:

- **Renaming "Form Designer" to "Form templates":**
 - The menu item previously labeled as "Form Designer" has now been renamed to "Forms"/"Formulär". This change reflects the broader functionality available under this menu, beyond just designing forms.
- **Updating "Create New" to "Create New Form":**
 - The option "Create New" within the form menu has been updated to "Create New Form". This provides clearer guidance on the action that will be taken.



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Form designer resize to full window

When designing your form template it will no longer be in a pop-up window, instead it will be in a full screen view to make it easier to design the form template.

! Anonymous is renamed to "Public access"

Under authentication options you will now see that the option for "Anonymous" is renamed to "Public access".

Authentication options

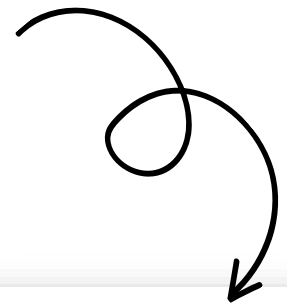
- Public access (no login required)
- Two-factor authentication
- Third-party authentication

Usability changes on "Texts" view

We want to make it easier to understand the "Texts" view under settings, therefore we have grouped the different options and created a hover information text when the different elements will show this text.

▶ Edit general button texts +

▶ Edit general alert texts +



▼ Edit general button texts -

Navigation Buttons:

▼ **Submit** Appears default if the answers is set to not be locked after submitting

English Submit

▶ Submit and lock

▶ Submit for signing

▶ Save and continue

▶ Next page

▶ Previous page

▶ Close form

Sweet Forms

New Feature: Dynamic answers

Do you want to reflect values from a list of options, that usually changes or updates? This new "Dynamic answers" feature allows users to automatically populate dropdown values with data from external sources when using single answer and multiple answers questions. This dynamic loading feature is designed to keep forms up-to-date with information that changes frequently, such as fund lists.

Key Benefits:

- **Real-time data updates** – Forms will always display the most current information, directly fetched from external data sources.
- **Versatility:** Applicable to both single answer and multiple answers dropdown questions.
- **User-friendly:** Simplifies the process of maintaining current data on forms, saving time and reducing manual data entry.
- **Ideal use case:** A perfect for scenarios where information, like a list of investment funds, needs to be current and accurate. For instance, in a "fund selection form," the "fund list" dropdown will automatically update to reflect the latest data from a provided external source.

New improvement : Read only security level

Focusing on increasing data security and integrity within forms, this improvement allows form designers to precisely control how answers in a form are modified, ensuring that only designated data sources can add or change responses. This change aims to prevent unauthorized alterations by users, enhancing the overall security of sensitive information.

Key updates:

- **Removal of "write protect question" checkbox:** the previous option for write-protecting fields has been replaced with a more versatile and secure dropdown menu.
- **Introduction of "read only/skrivskyddad" dropdown:** this new setting allows form designers to select the level of write protection for each question. The dropdown includes three options:
 - **No/nej:** no write protection (default setting).
 - **Level 1:** this option is the same as the old functionality. Basic protection level that prevents user changes but may be bypassed with web developer tools. Suitable for forms needing minimal security and usage of javascripts.
 - **Level 2:** higher protection level that restricts modifications strictly to external data sources, ideal for forms requiring stringent data integrity. This one is recommended to be used when prefilling sensitive information.
- **Enhanced information access:** an information icon next to the dropdown provides detailed explanations of each protection level, ensuring form designers make informed decisions about the security of their forms.

Sweet Forms

New conditional visibility for signing parties

Form designers can now set visibility rules directly on each signing party, enabling or disabling them based on responses within the form. This flexibility allows the creation of customized signing workflows, such as choosing between different authentication methods like "Swedish BankID" or "Norwegian BankID".

Signing party 1

Signing party

Name: Type: Conditional signing party

All conditions should be met (and) Any condition should be met (or)

All conditions should be met (and) ...

Sign with BankID? = Yes

Settings

Role: Invitation Order: Will answer the form

Invitation: Authentication to view: Authentication to view archived:

Hide SSN in the signing process for Scrive

Now you can decide if you want to hide social security numbers (SSNs) on each signing party. The SSN will then be hidden at the signing page in our integration with **Scrive**. This helps keep sensitive information secure and private.

How to Use It:

Simply check the "Hide at the signing provider" box in your signatory provider settings to keep SSNs hidden during the signing process.

Personal number

Hide at the signing provider ?

Whether the personal number should be hidden in the final PDF verification page and the Evidence Log.

Sweet Forms

Corrections

This release includes significant improvements and bug fixes that enhance the functionality and user experience of our Form Designer. In total we corrected 90 bugs, below are the key updates in this release:

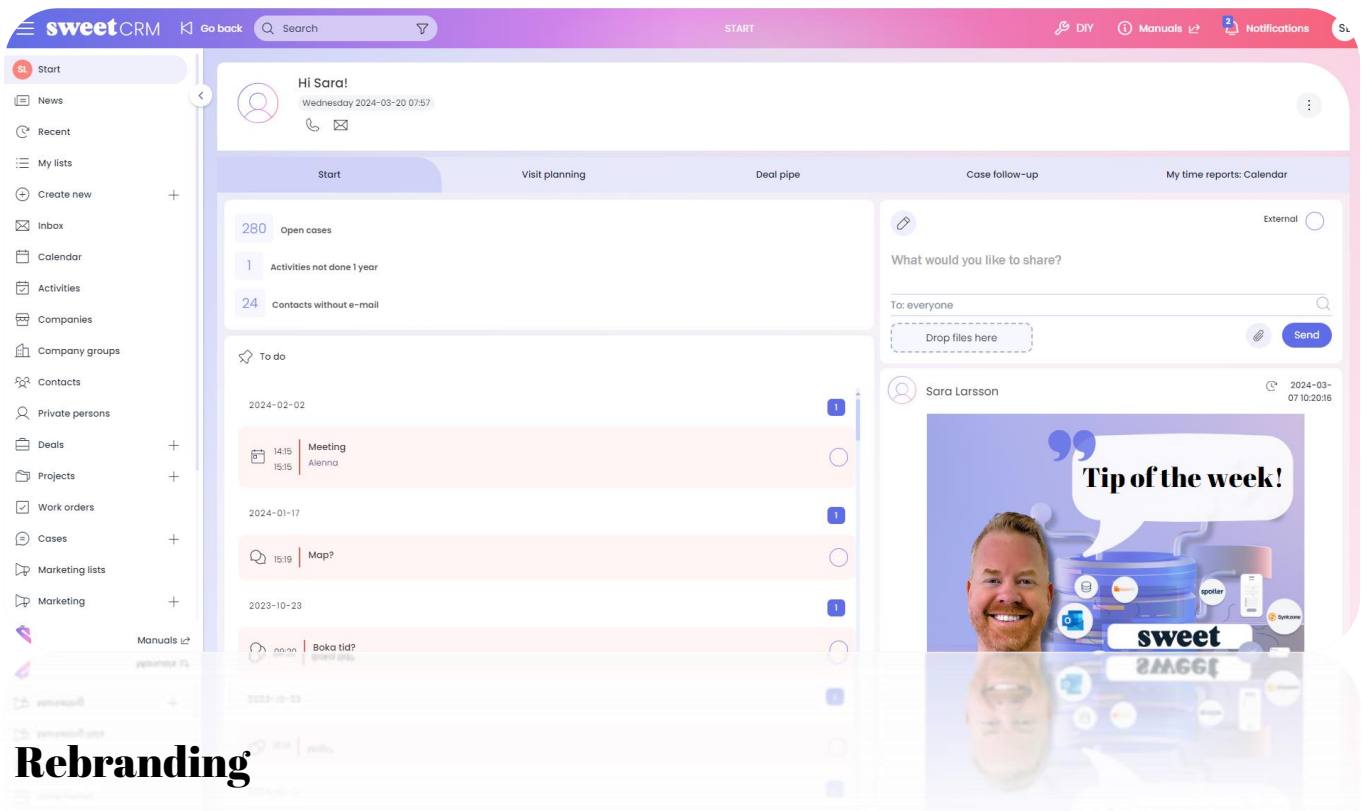
- **Extended Top-Domain Validation in Email Addresses**
 - **Issue:** Serverside validation for email fields previously did not allow top-domains with more than 4 characters.
 - **Fix:** Now, emails with top-domains exceeding 4 characters, such as hello@hello.health, are accepted. This change aligns with real-world email formats.
 - **Note:** This fix was also applied as a hotfix in version 4.8.8.
- **Improved caption for E-signing redirection URL**
 - **Issue:** The caption for the 'URL when the form is signed' in the E-signing section was unclear, causing confusion about the signing process.
 - **Fix:** Updated the caption to "URL when the form is signed at the selected signing provider" (**URL när formuläret är signerat via vald signeringsleverantör** in Swedish). This change clarifies that the redirection occurs post-signing at the signing provider's web.
- **Synchronization of renamed questions with External Datasources**
 - **Issue:** Renaming a question did not reflect the change in the External Datasource (ED) editor.
 - **Fix:** Renamed questions are now immediately updated in the ED editor, ensuring consistency and clarity in form design.
- **Correct validation for 10-Digit personal numbers starting with '00'**
 - **Issue:** Personal number validation failed for 10-digit Social Security Numbers starting with '00'.
 - **Fix:** Enhanced the validation algorithm to correctly accept valid 10-digit SSNs starting with '00', like '0007197619'.
 - **Note:** This issue was also addressed as a hotfix in version 4.8.8.

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Sweet CRM

Sweet CRM introduces a sleek and modernized user interface aimed at enhancing user experience. These updates together with Time Report updates enhance the functionality and usability of Sweet CRM, empowering users with a more intuitive and efficient experience.

Sweet CRM



Rebranding

The idea behind the new design

The platform design reflects Sweet's identity without detracting from the tasks our users perform daily. Making the platform clearer and more intuitive is important for our users to work more efficiently. Overall, we have made the interface softer, more modern, and more harmonious for a delightful experience.

For Sweet CRM we have created a more modern design for everything from buttons to action fields. All elements have softer corners, lighter shadows, and clearer indications.

A spectrum from blue to pink

Sweet's new color palette ranges in a spectrum from techy blue to warm peach. The blue color is used for navigation and selection, peach for icons, and purple for help elements. All colors are tied together in a gradient that serves as the background and top bar.

Accessibility is important to us

All new colors obviously follow the accessibility directives' contrast requirements. We have added icons and texts to clarify. We have also improved accessibility through expanded clickable areas and clearer indications.

Easier to find

We have clarified navigation throughout to make it easier to see where in the platform you are. The gray side menu and top bar have been given a new look and improved functionality. The top bar in the form of a playful gradient where we have clarified where the links go and an easier access to your profile settings. The search function has been given a more user-friendly flow. The side menu has a clearer visualization of active choices and a tree structure for the submenus.

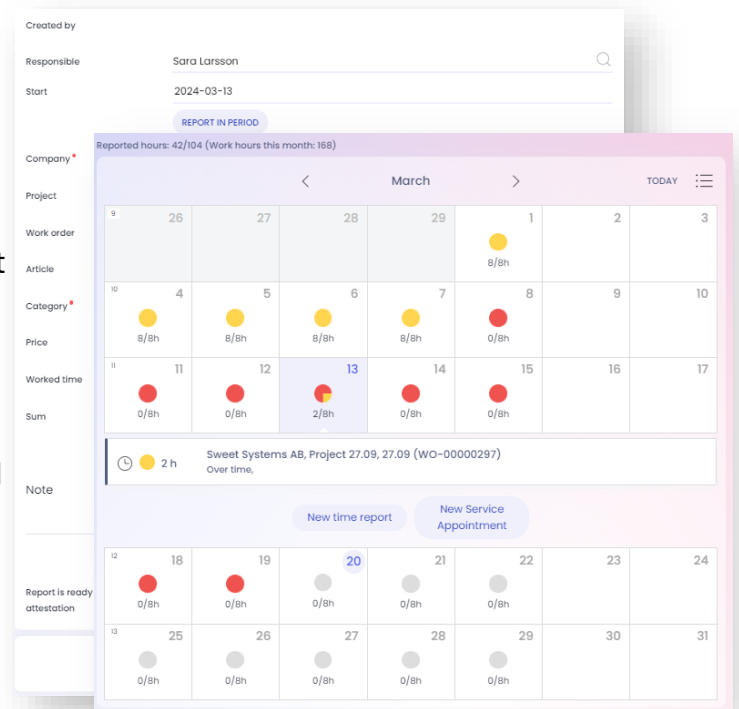
Sweet CRM

Time report

We are re-introducing Sweet Time

Report feature

Introducing the revamped Sweet Time Report feature: a newly enhanced standard module for streamlined time reporting. With improved logic and a more generalized process, accessing your time report has never been easier. Now conveniently available from the start page, managing and tracking your time has been simplified for enhanced efficiency and productivity. The Time Reporting feature helps you register, track and attest time performed connected to Projects, Work orders and Service orders.



Time report as a user:

Now, users can effortlessly report time directly on projects and service appointments, enjoying improved functionality and convenience.

- **Improved user experience when reporting time:** With better lookup options and support for price per hour, tracking time has never been easier. Plus, the calculated total sum, based on price per hour, streamlines the process further.
- Additionally, users can now easily allocate time to specific entities such as **Company**, **Workorder**, and **Article**, providing a comprehensive documentation of time utilization.

Supervise and administrate the Time Reports

Manage time reporting effortlessly with our latest enhancements:

- Easily see the number of hours that have been reported per day
- Easier to edit, mass attest, filter and control time report by using the Time Report Selection list
- Improved history and deviations report
- Add budget hours for a work order
- Set default value of maximum hours that can be reported

Article and Pricelist

Improved editing of article and price list directly in list.

API-versioning

Allows different versions of the API, not to break external applications or integrations.

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Sweet Automation

In this release of Sweet Automation you will experience enhanced workflow building in Sweet Automation with the ability to switch between different perspectives effortlessly. Navigate through flows with ease using drag-and-drop functionality, providing a clearer overview of complex automation processes.

Sweet Automation

Flow UX Enhancements:

- Added a new navigation mode, "drag," for moving around large flows with panning and zooming.
- Introduced view modes to show only parts of the flow (Actions only, Boxes only).
- Improved console with the ability to hide completed executions
- Better handle large flowdata in flowdata previews.
- Added syntax highlighting and file download capabilities for flowdata preview.
- Implemented a friendlier error message for unconfigured flowkey settings and make it easier to write comments on flow boxes and actions.
- Enhanced flow creation experience with autosuggestions for "Id" and "string" as flowkey name and type, respectively.
- Added manual addition of flow parameters
- One-click option to delete all flow participant data, without deleting the participants.

Selection and Sidepanel UX Improvements:

- Tooltips added to result columns and conditions for better clarity on their origins.
- Simplified the process of identifying flows that utilize specific selections.
- Added confirmation prompts before moving folders, flows, or selections to prevent accidental rearrangements.

Sweet Automation

API and Security Updates:

- Support for bearer token authentication in the Authorization header.
- Improved API performance and error handling, especially for the execute-endpoint.
- Support for selections with calculated columns in selections API
- Fixed issues when scanning OpenAPI-definitions that contain broken JSON in API datasources.

New Actions:

- Introduced the **Communication Map** action for simplifying multilingual flow communications. This action will make it possible to write different email messages (for instance in different languages) depending on flow data. This can then be used in the email action and the subject/body will be unique for each participant
- Launched new **Text and Speech Analysis** actions powered by Azure.
- **Microsoft Graph API:** Added a Graph API document action for saving files in Teams from the SA platform.

Sweet Automation

Corrections

Action Fixes:

- Addressed various bugs in Sweet-action, including deadlocks, extended field matching, and incorrect relation counts.
- Fixed issues in SendEmail-action to prevent TaskWasCancelled errors due to TLS misconfiguration.
- Corrected LoadSweetForms action to handle 404 status codes for non-existent or unpublished objects.

Flow UX Fixes:

- Resolved an issue with building very tall flows that caused maximum call stack errors in Chrome.
- Improved error handling for large flow data and made it easier to manage flow data sort order and dependencies.

Selection and E-marketing Fixes:

- Improved Google BigQuery support and fixed bugs in selection admin functionalities.
- Enhanced email statistics tables and archives in e-marketing and added an option to save properties.

Technical Debt Reduction:

- Removed EntityFramework from the Dashboard-db-layer and updated vulnerable packages.
- Eliminated the use of the vulnerable "RestSharp" package and updated to a secure version of jQuery.

Miscellaneous Fixes:

- Enhanced message queue handling to prevent unnecessary waits and improved cancelation procedures across various actions.
- Updated admin features for better user and group management, including sorting and error message improvements.

General Improvements

- All required fields in actions are now clearly marked as such.
- Implemented a procedure to clean action logs more effectively, retaining only the latest run for each action in a flow.

Note: This release also includes a new MessageQueue provider (Kafka) and various performance enhancements across the platform.

Make sure you get the latest updates

Contact us



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Drottninggatan 97

113 60 Stockholm

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