


sweet

Release notes – Sweet Spring Release 2025
version 5.2

sweet

C o n t e n t

-  **Sweet Academy**
- Sweet CRM**
- Sweet Automation**
- Sweet Forms**



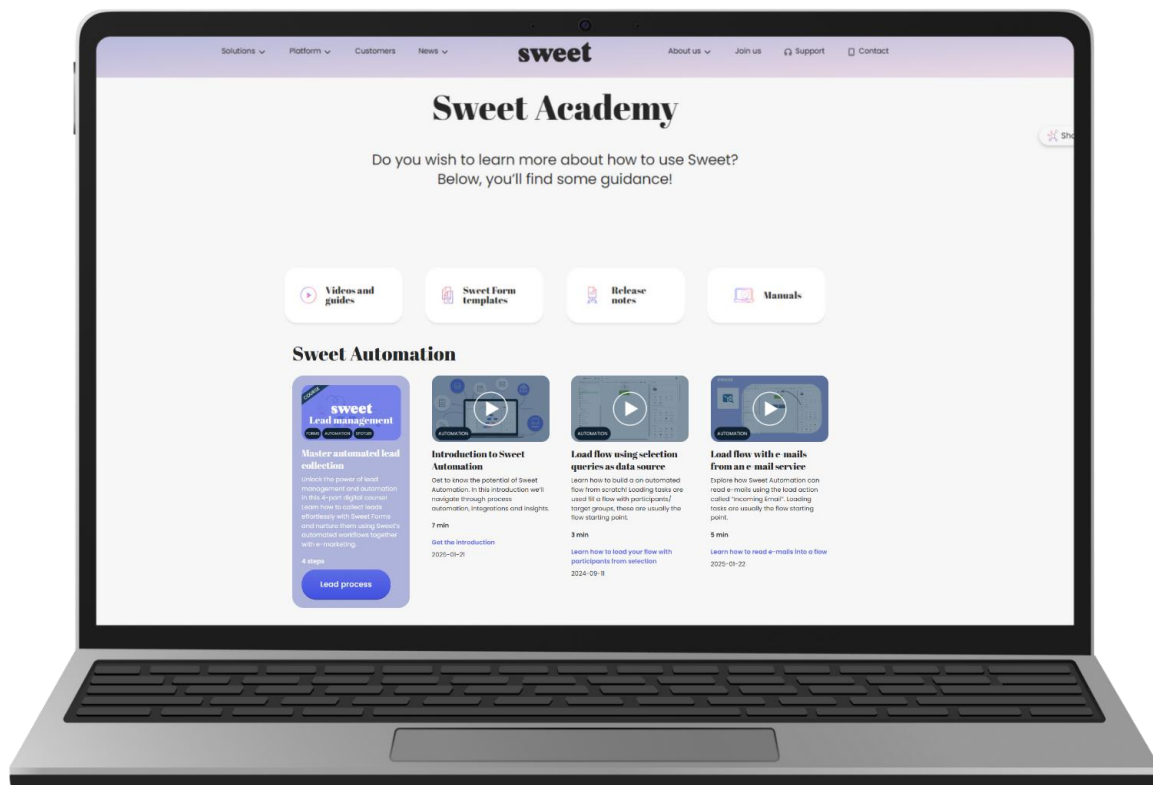
New learning site: Sweet Academy

We're excited to launch **Sweet Academy**, our brand-new learning platform designed to help you get the most out of Sweet CRM!

With **on-demand courses, guides, and tutorials**, Sweet Academy provides everything you need to master the platform—whether you're a new user or looking to refine your skills.

What you'll find in Sweet Academy:

- **Step-by-step video tutorials** and guides for key features
- **Best practices** to optimize your workflows, automation and maximize your usage of Sweet
- **Self-paced learning** so you can progress at your own speed



Access Sweet Academy directly from the main menu in Sweet CRM/Forms, from the start page in Sweet Automation – or save this [link to Sweet Academy](#) and start learning today!

sweet FORMS **sweet** CRM



Manuals →
Sweet Academy →
Sweet CRM: 5.1.0.29759

sweet AUTOMATION



Go to Sweet Academy

Web



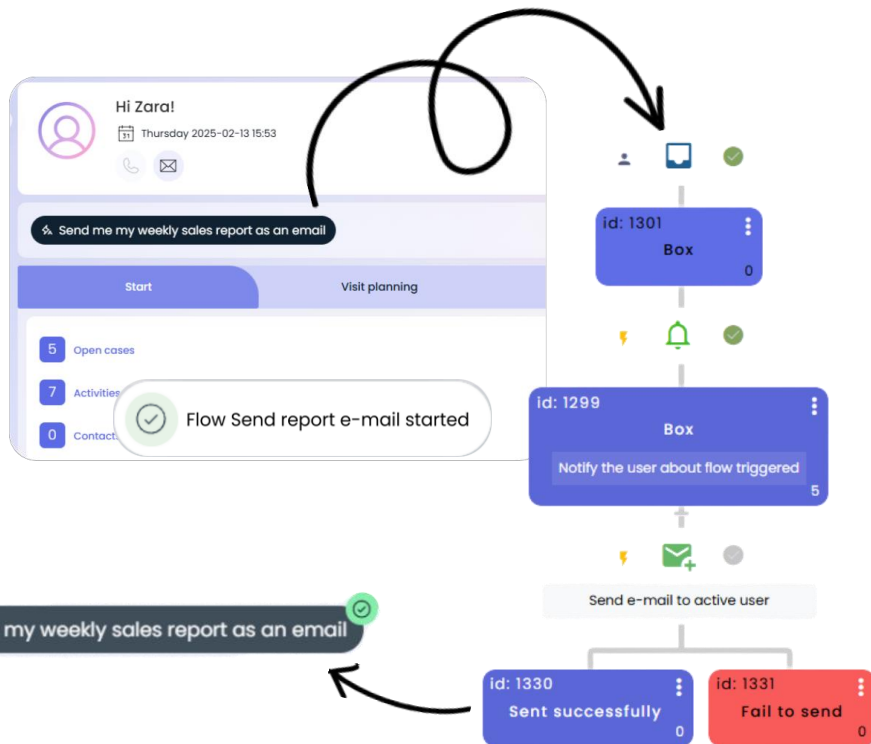
Save as
bookmark

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sweet CRM

The latest Sweet CRM enhancements are designed to make your workflows more efficient, automated, and user-friendly. With powerful new tools like Flow Trigger, the Panorama view and Favorites, navigating and managing data has never been easier.

Sweet CRM



New feature: Flow Trigger

The **Flow Trigger** feature empowers users to trigger automated workflows on-demand! The **DIY Admins*** can easily add action buttons directly to CRM entities and workspaces, allowing users to trigger automated workflows in **Sweet Automation** with a single click. This game-changing trigger button works as a direct integration between Sweet CRM and your Sweet Automation platform, giving you access to connect with all your connections and integrations.

Key capabilities:

- **Activate or trigger your workflows on-demand** by seamlessly calling Sweet Automation flows – and start running the flow tasks and actions.
- **DIY configuration:** Admins can customize button placement, type, and linked flows within the DIY configuration tool.
- **Real-time feedback:** Users receive immediate visual confirmation when triggering workflows, to see successful flow activation or error messages.
- **Workflow logging:** Sweet Automation logs track all triggered flows for transparency and monitoring. Perfect for auditing or follow-up purposes.
- **Visibility controls:** Buttons can be dynamically shown or hidden based on user roles or entity state.

This feature enhances **automation, efficiency, and user experience** by enabling **seamless one-click workflow execution** within Sweet CRM and Forms.

*Admin Core developer feature

Watch video

Sweet CRM

The screenshot shows the 'Admin settings' page in Sweet CRM. At the top right, there are navigation links for 'Filters', 'Column options', and 'Admin settings'. The main content area is divided into four sections: 'Datasource', 'Layout', 'Columns & Filters', and 'Event triggers'. Under 'Datasource', there are dropdowns for 'Change datasource' (set to 'Listkomp demo') and 'Change dataset' (set to 'Fakturor'). Under 'Layout', there are options for 'Use Template' and a toggle between 'Grid' and 'List' views. Under 'Columns & Filters', there are buttons for 'Column options', 'Filter options', 'Default filter', and 'Map entities'. Under 'Event triggers', there is a button for 'Add click event'. Below the settings, a data table is displayed with the following content:

FAKTURATEXT	FAKTURANUMMER	BELOPP
test 5978	124 213 414,00	10 000,00
sdssdsd	124 213 414,00	10 000,00
sdssdsd	124 213 414,00	10 000,00
sdssdsd	124 213 414,00	10 000,00

Lists Component goes Panorama View

We're excited to announce the stable release of the List Component, now renamed **Panorama View**! With this update, you get a more powerful and flexible way to integrate and display your data in Sweet CRM and Sweet Forms. With Panorama View you open windows in all angels for you to see all at once.

What's new in Panorama View?

- **Display entity information from any data source** – By matching (mapping) fields from any data source with your Sweet data, you can display related information from anywhere into Sweet.
- **Improved click events** – Configure cell interactions with separate target columns and parameters.
- **Enhanced filtering** – Select multiple filters at once for better data refinement.
- **Static filters** – Predefine filters for lists to streamline your workflow.
- **Improved default filters** – Display specific entity names for a clearer view.
- **Updated UI** – "Column options" is now simply "Columns".

With Panorama View, you get a 360° overview of all your data with improved usability and control. Ready to experience the next level of data visualization in Sweet CRM and Forms?

Watch video

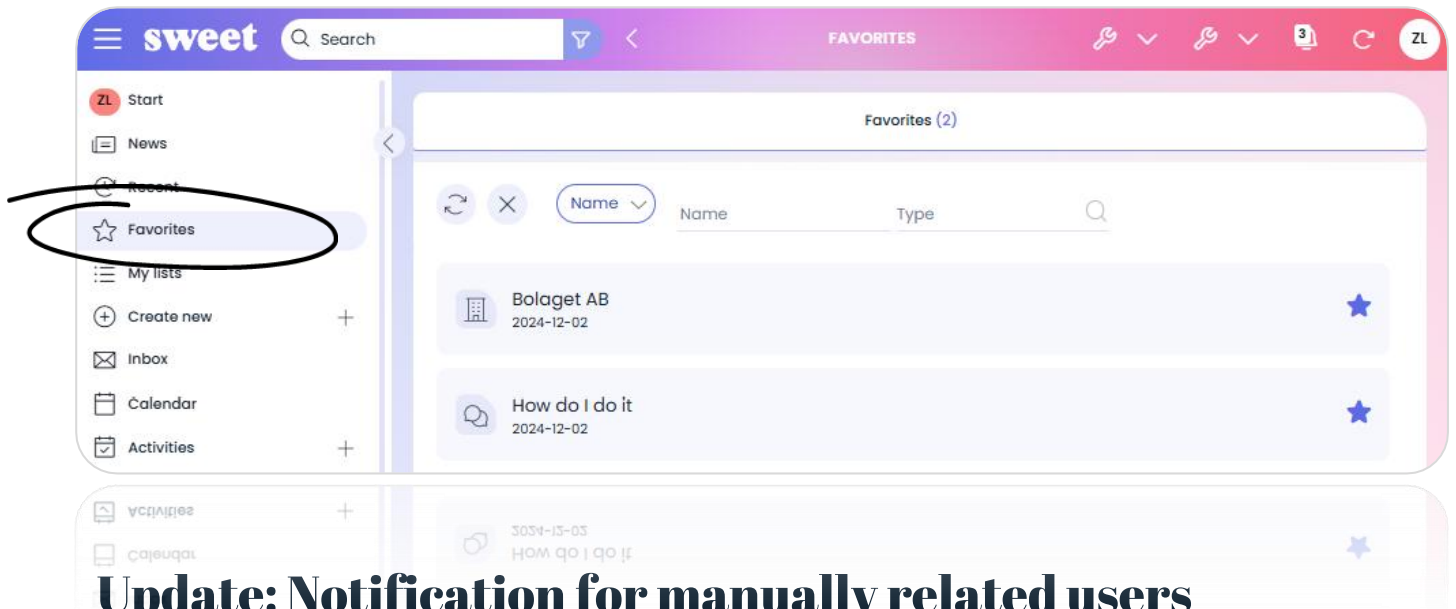
Sweet CRM

Welcome back-feature: Favorites

Users can now **mark important items as favorites** for quick access from the sidebar. Simply click the star icon next to **companies, deals, projects, cases, and more** to add them to your **Favorites** list. A missed oldie is back!

- **Easily access favorited items** from the new **Favorites** section in the sidebar.
- **Quick navigation** to frequently used objects without searching.
- **Manage favorites seamlessly**—click the star again to remove an item.

This feature enhances productivity by keeping essential records just one click away.



Update: Notification for manually related users on cases

Users will now receive a **notification** when they are manually related to a case.

- **Instant awareness:** Notifies users as soon as they are added to a case.
- **Better workflow tracking:** Reduces the risk of missing important case assignments.

This update enhances communication and keeps teams aligned on case involvement.

New feature: preview email templates before adding

Users can now **preview email templates** before selecting them, ensuring they choose the right one without trial and error.

- **Quick preview:** View the template's content before applying it to an email.

Sweet CRM

Smaller changes

Welcome back-feature: set and change role for a contact on a company

Users can now **assign and update** a contact's **relationship role** (e.g., employee, consultant, primary contact) when linking them to a company.

- **Edit role anytime:** Update roles to reflect changes in relationships.

Discontinuation of Allabolag integration

As part of our platform updates, we are discontinuing the Allabolag integration in Sweet CRM due to changes in their API. If you have any questions or need alternative solutions, please contact our support team.

Update: Removal of Service Appointment tab from Time Report selection

To improve clarity and avoid confusion, the Service Appointment tab has been removed from the Time Report Selection view. Since adding service appointments is no longer possible within Time Reports, this tab is no longer relevant. This update ensures a more streamlined experience, displaying only relevant and actionable information.

Update: Remove locking feature on Work orders for easier collaboration

Work orders are no longer locked when opened by another user, allowing for **simultaneous access and collaboration**.

- **Improved collaboration:** Enables teams to update and review work orders without delays.

This update eliminates unnecessary blockers, ensuring a smoother and more efficient workflow.

Update: Dedicated Notes tab for Deals

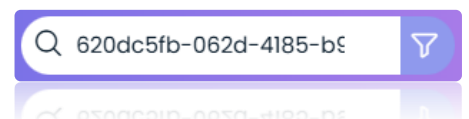
A new **"Notes" tab** has been added to deals, providing a dedicated space for managing notes. No more scrolling—view all notes in one place. This update enhances efficiency by making notes more accessible and organized.

Update: Search by Entity ID

The **quick search bar** now supports searching by Entity ID, making it easier to quickly locate specific records when you have the ID.

- **Instant match:** Entering an Entity ID displays the exact match at the top of search results.
- **Entity ID's** can be found in the database, in Sweet Automation or the API.

This update improves efficiency by allowing users to find specific records faster.



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sweet AUTOMATION

Sweet Automation now offers more control and flexibility with powerful new features. You can now edit flow participant data directly within the interface, ensuring real-time updates and accuracy. Additionally, the string replace functionality allows you to systematically modify text in flow data, streamlining automation and reducing manual work.

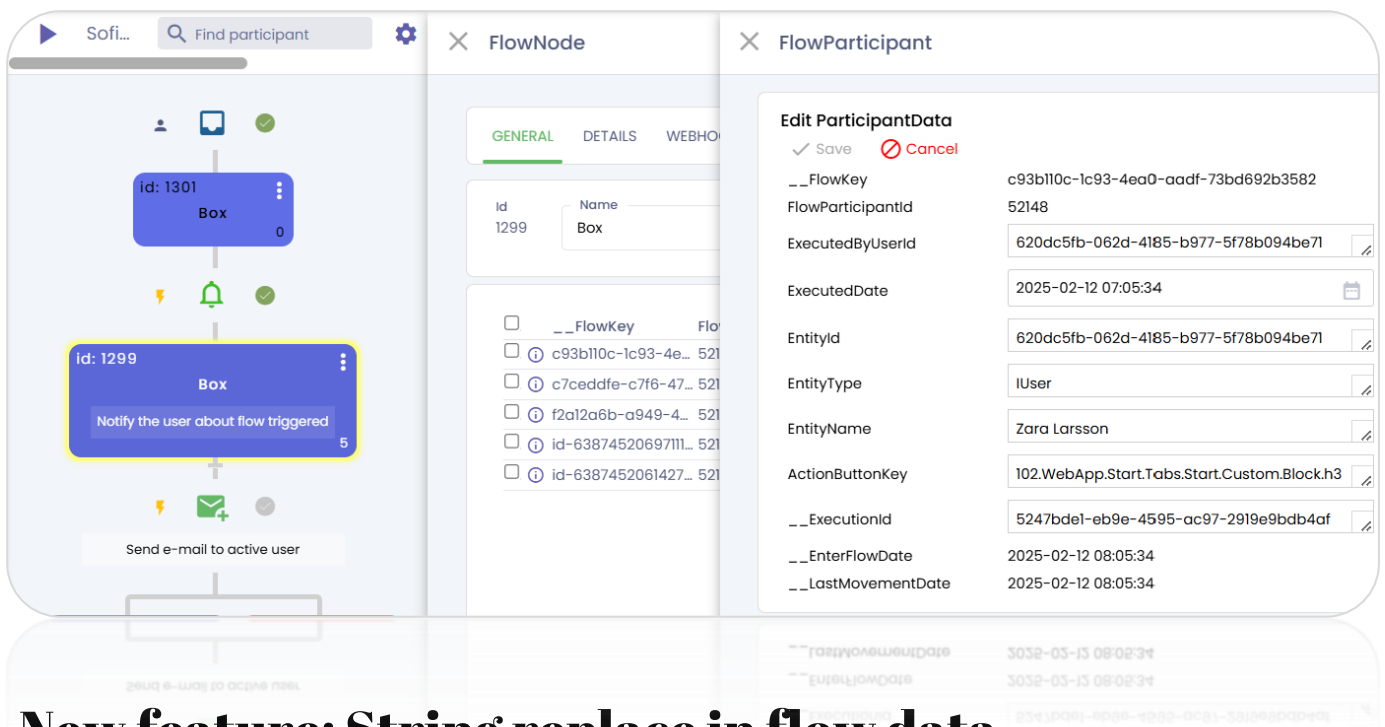
Sweet Automation

New feature: Edit flow participant information

Users are now able to **edit flow data** for individual participants directly within the flow user-interface. This feature enhances flexibility and real-time control over participant flow data, improving workflow management when flow data is either missing or incorrect.

Key functionality:

- Click flow participant information to view it and make it **editable**.
- Modify the value while ensuring correct **data types** (e.g., booleans allow only **true/false/null**, date fields use a **datepicker**).
- **Simply update** to save changes to the **flow storage**.



New feature: String replace in flow data

Users can now **systematically replace text** in flow data, similar to **find and replace** functionality.

- **Automated text replacement:** Modify flow data dynamically without manual edits.
- **Enhanced data processing:** Streamline workflows by ensuring consistent data formatting.
- **Improved efficiency:** Reduce errors and save time when handling text in flows.

This feature simplifies text management within automated processes.

Sweet Automation

New connection: Lime Newsletter for e-marketing

Sweet offers a connection to Lime Newsletter that allows you to use Sweet Automation to segment your target groups, automate and build customer journeys and then send e-mails through Lime Newsletter. The connection is supported by using the Communication and E-mail action.



Email

sweet

sweetFORMS

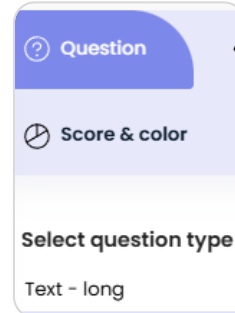
We're making form design more intuitive and efficient with new tools that give form designers more flexibility and control while designing and building forms. These updates make it faster to design, test, and refine your forms—try them out today!

Sweet Forms

Forms smaller enhancements

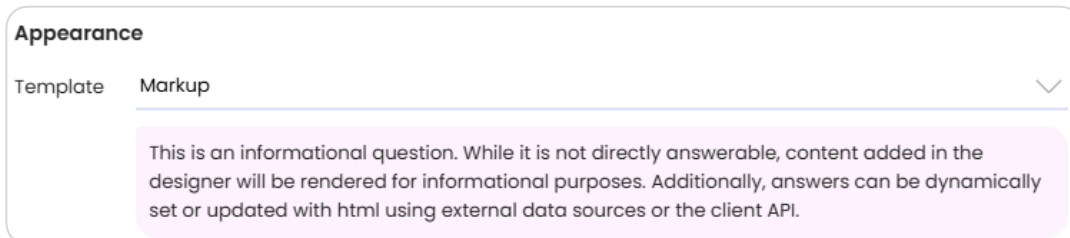
Update: New names on question types

- Short text is renamed **Text – short**
- Long text is renamed **Text – long**



Update: Possible to add html-markup

Add html markup to information questions in forms by using markup template.

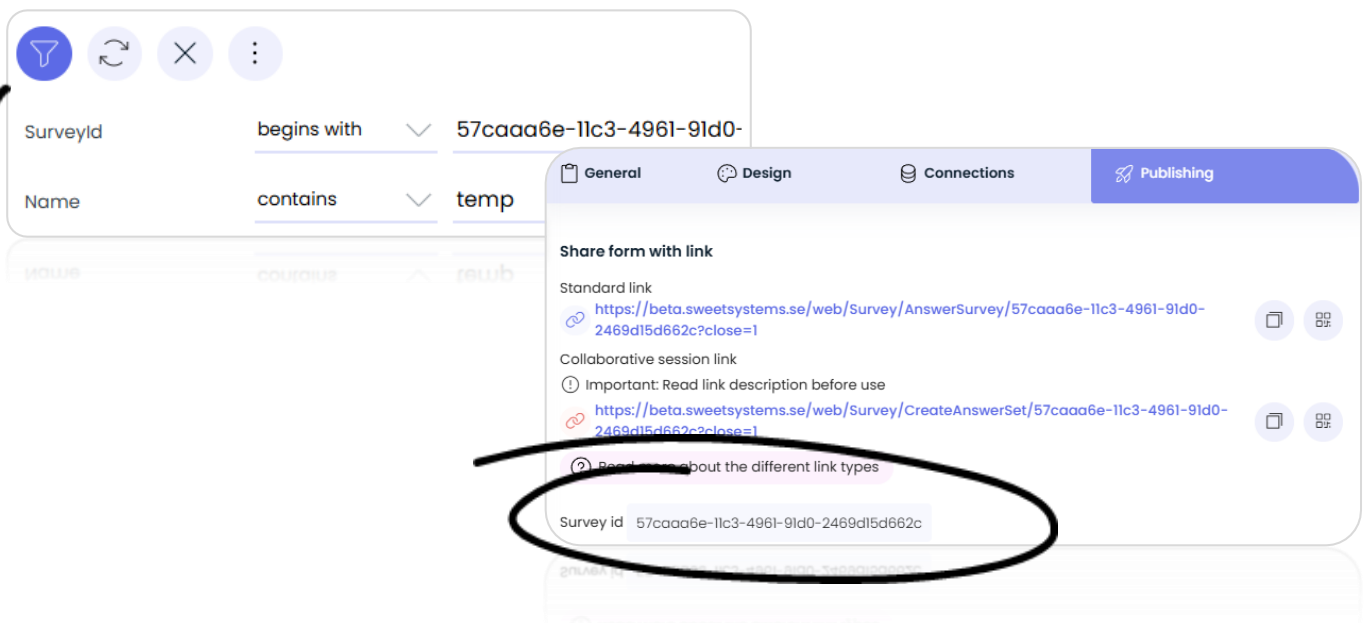


Update: New ID filter to search for survey ID and answer ID

- **Answer set:** Filter/column added for on a AnswersetId on Answer set list

- **Templates:** Filter/column added SurveyId in the Form Template List

The ID's can be fund in Form Designer under Publish settings.



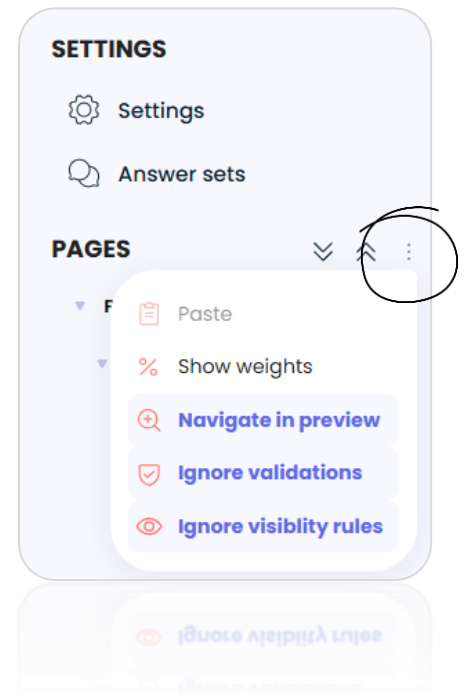
Sweet Forms

New feature: Disable validation and visibility rules while editing

Form designers can now **bypass validation and visibility rules** while editing and previewing forms, making it easier to navigate and test designs.

- **Option:** Enable or disable validation and visibility rules via the three-dot menu.
- **Faster form testing:** Quickly move through the form without being blocked by required fields.
- **Improved design experience:** Focus on layout and structure without validation interruptions.

This update streamlines form creation, allowing for **smoother designing and faster testing**.



Secure your upgrade now

Contact us



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113 60 Stockholm

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