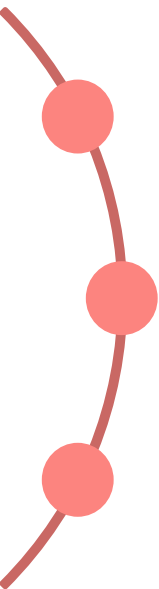


sweet

Release notes – Sweet Spring/ Summer
Release 2025 version 5.3

sweet

C o n t e n t



Sweet CRM

Sweet Automation

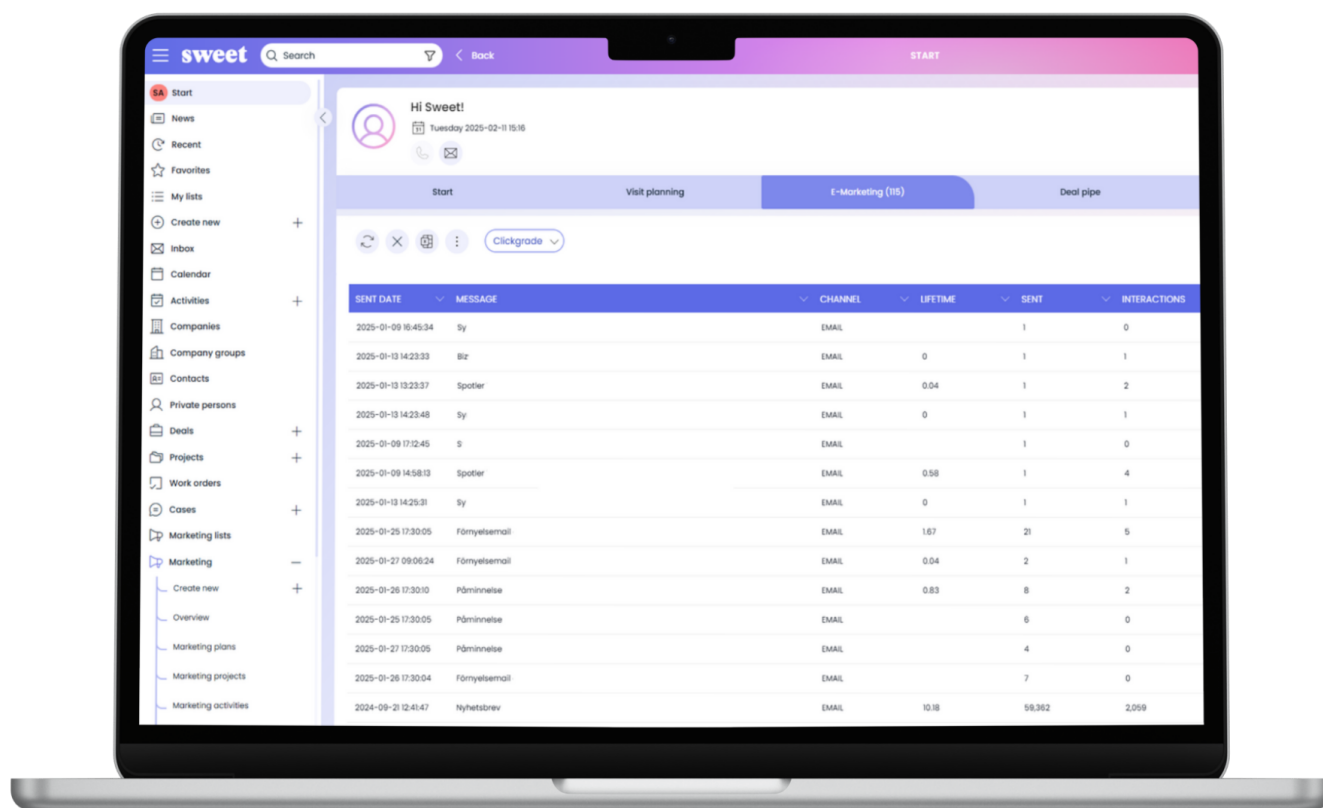
Sweet Forms

sweet

sweet CRM

Sweet CRM just got even better! The new Marketing Module gives you deep insights into your email campaigns, while Panorama View now supports actions and row count for smarter data handling. The new Invoice Module lets you manage invoice data in one place with articles, time reports, and workflow support. Plus, the Smart Panel lets you navigate related data without leaving your current view—making work faster, smoother, and more focused.

Sweet CRM



Marketing Module*

We're excited to unveil the Marketing Module, a powerful addition to Sweet CRM for Marketing. This new feature provides in-depth insights into your email marketing performance, giving you unparalleled control over your campaigns.

By seamlessly collecting data from your email marketing connection and transforming it into actionable **performance KPIs** through **Sweet Automation**, you gain **real-time insights** into how your campaigns perform.

You will get:

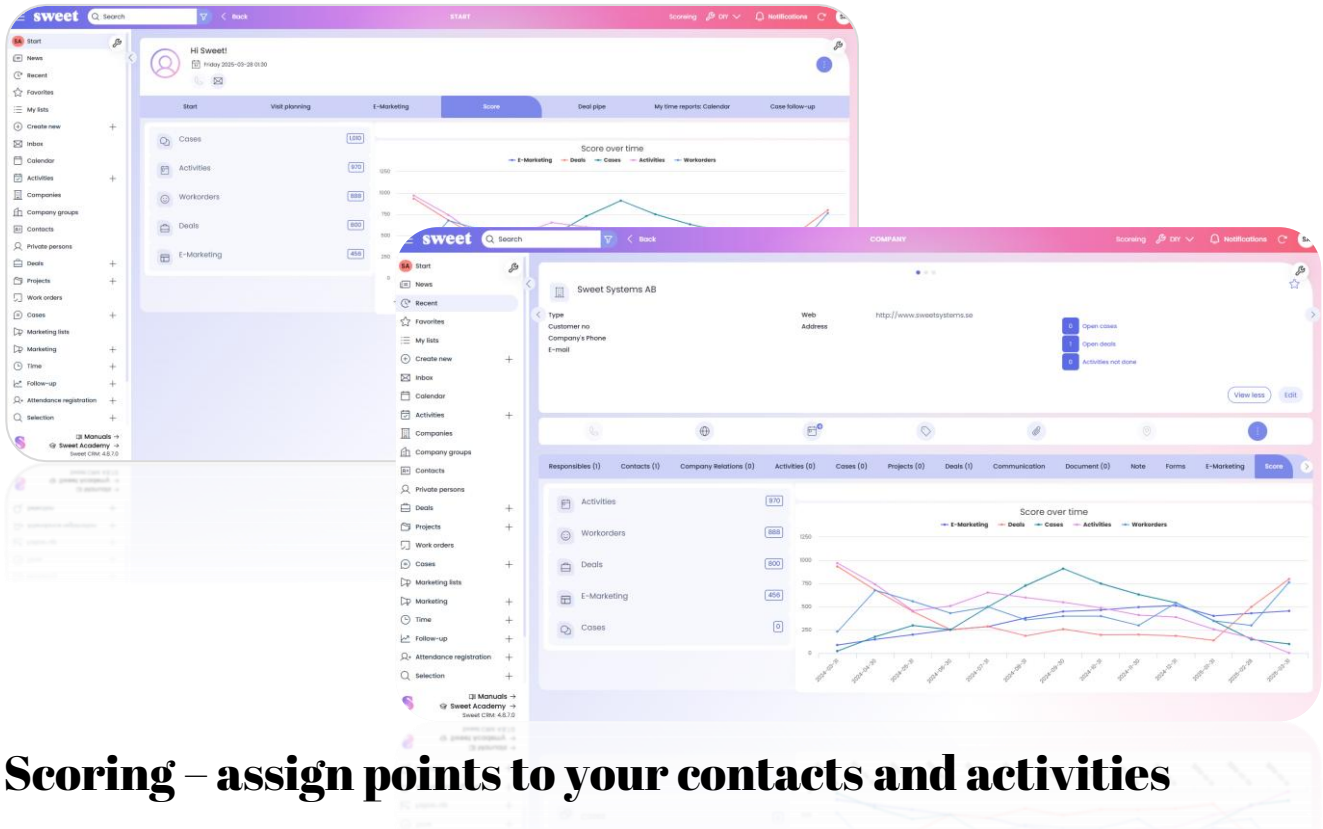
- E-mail summary of performance and statistics on start page for all sendouts
- E-mail batch performance and statistics
- E-mail overview of total statistics, its content and recipients
- E-mail recipient behavior, clicks and conversion

Supported connections are: Spotler Mailpro, Simplify and Lime Newsletter.

** Marketing Module can be bought as an addition to your subscription, or stand alone.*

Watch video

Sweet CRM



Scoring – assign points to your contacts and activities

In version 5.3, we're introducing **scoring** – a new feature that allows you to automatically assign points to sales reps, leads, customers, cases, or marketing activities based on engagement.

With scoring, you can:

- Prioritize the right contacts for campaigns, based on past behavior
- Track customer journeys and engagement over time
- Trigger the right actions at the right time
- Measure sales activities and follow up on goals

For sales teams, scoring provides a clear indication of progress and whether the right actions are being taken.

Example point values:

E-marketing:

- Opened an email → +2 points
- Clicked a link → +5 points
- Purchase after email → +10 points
- Unopened/ignored email → -1 point
- Submitted a form → +20 points
- Downloaded a whitepaper → +30 points
- Booked a meeting or submitted an inquiry → +50 points

Activity tracking:

- Completed activity → +1 point
- Missed activity → -2 points

What can you do with the points?

- Automatically move target groups to the next step in a flow
- Trigger specific communications when a point threshold is reached
- Notify the sales team about hot leads
- Identify audiences who actively engage with your email campaigns

All scoring is managed directly in Sweet Automation and can be tailored to your own rules, needs, and target groups – helping you build smarter, more data-driven and conversion-focused journeys.

Watch video

Sweet CRM

Admin settings

Datasource
Change datasource: SA list component
Change dataset: Contact persons

Layout
Show total row: Always
Use templates: Grid, List, Grid

Columns & Filters
Columns: Filter options, Default filter

EventsAndActions
Add click event: Actions

CONTACTPERSONID	CREATED	CONTACTPERSON FIRSTNAME	CONTACTPERSON SURNAME	COMPANY NAME	E-MAIL	CATEGORY	POS
-	2025-01-24	Erika	Johansson	AlennadsI	Erik@gmail.com	-	-
-	2025-03-05	John	Doe	My new company	john@mycompany.se	-	-
-	2025-01-24	Mal	Lus	AlennadsI	maja@gmail.com	-	-
-	2025-01-24	Mike	White	AlennadsI	anna@gmail.com	-	-
-	2025-01-24	hus	boss	AlennadsI	-	-	-

Total items: 72 | Page 1 | Number of rows: 20

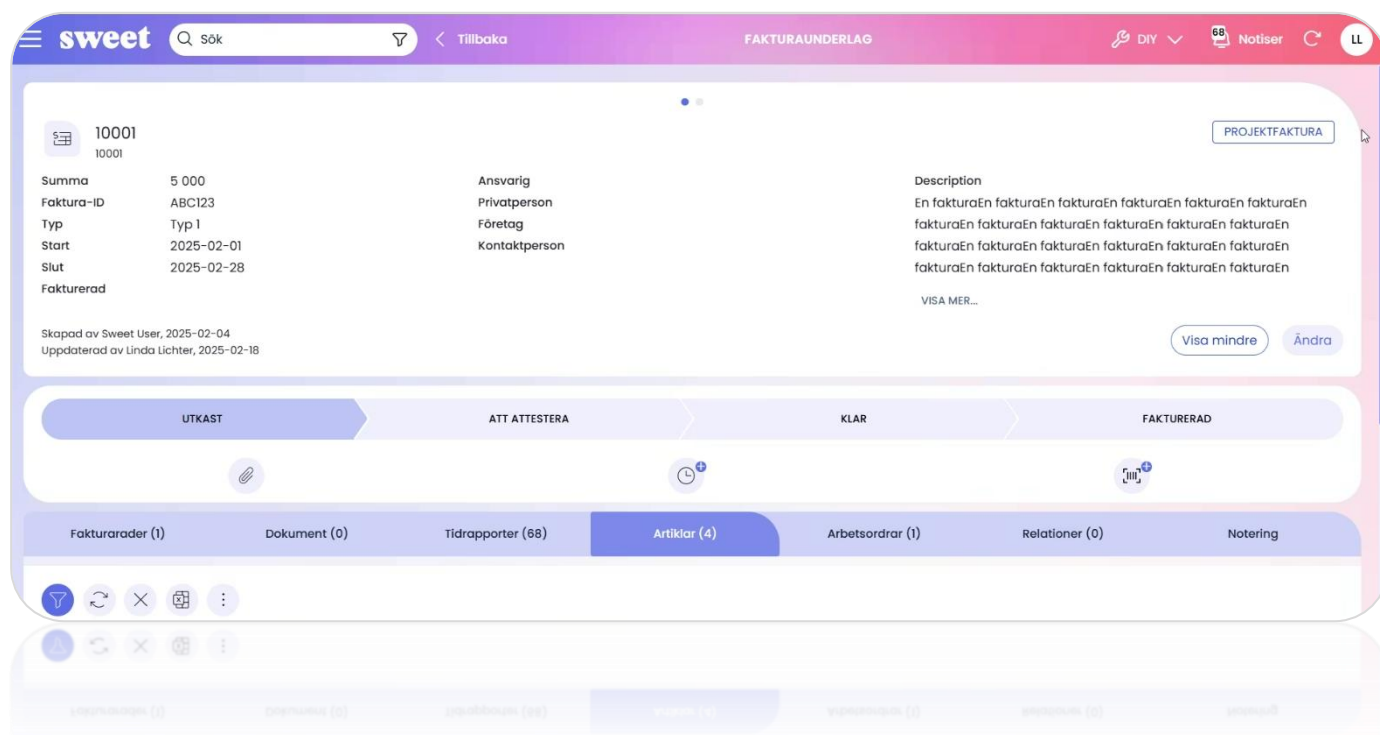
Updated: Panorama View - now with actions and row count

Panorama View has been enhanced with two powerful features:

- **Panorama actions:** Users can now take action directly from the Panorama View. By combining Panorama View with Flow Trigger, selected rows can be sent to automation workflows—perfect for task management, updating records or triggering integrations based on selected data.
- **Row count:** Instantly see the number of results returned in your Panorama View for quicker overviews and insights.

These updates make Panorama View more interactive and powerful, supporting smarter, action-based workflows.

Sweet CRM



Invoice module

We're introducing a powerful new feature in Sweet CRM – the Invoice Module where you can create invoice documents.

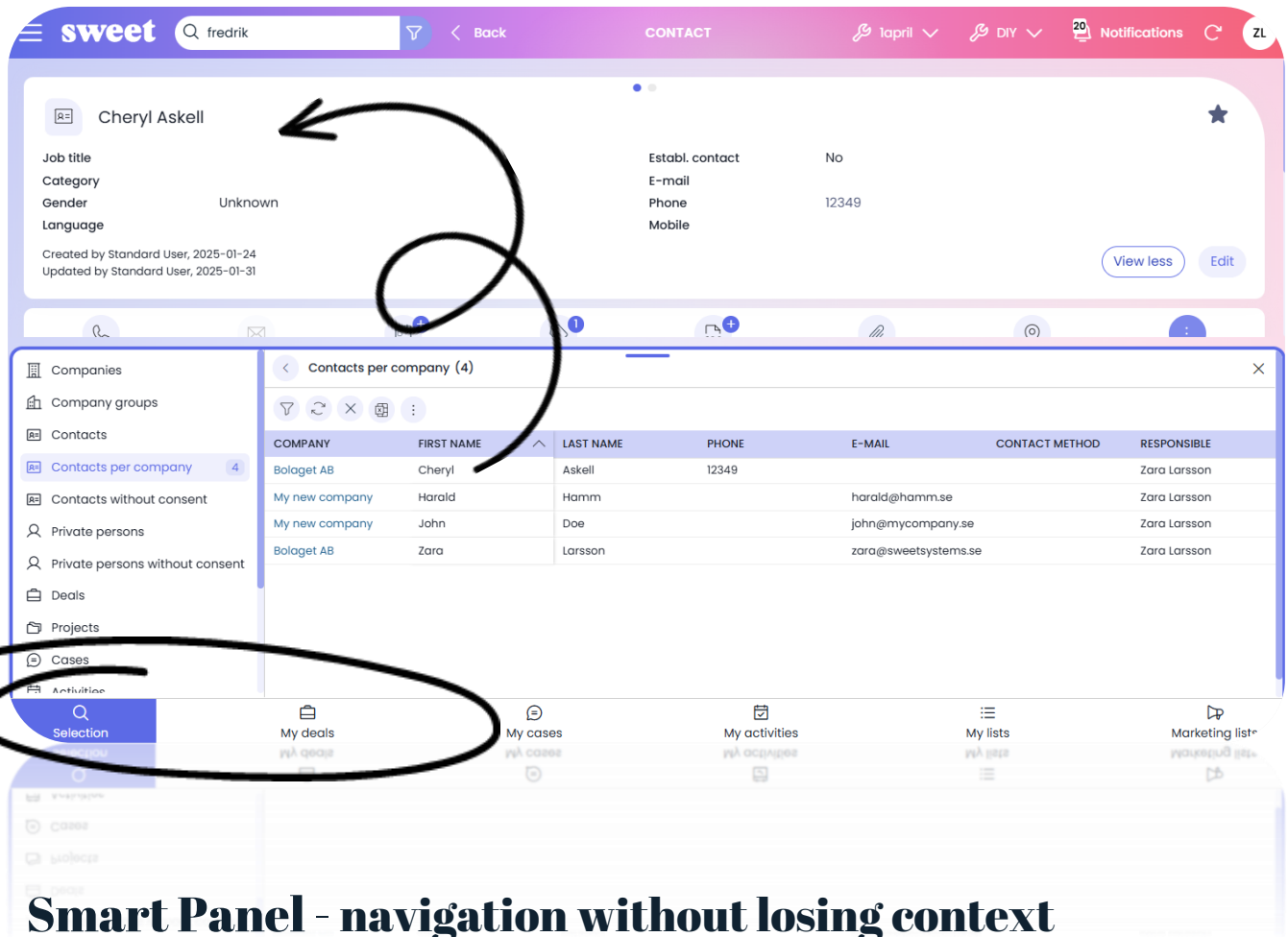
This new module lets you gather invoice-related information in one place, with full support for statuses, relationships, documents, and invoice rows. Invoice rows such as articles and time reports can easily be added to the invoice specification, to keep track of all financial data that is to be invoiced.

Key features:

- Create invoice document directly from the work order or project
- Add articles and time reports to your invoice document
- New selection list for report and follow-up of invoice data
- Supports invoice workflows with steps like Draft, Attest, Done, and Invoiced
- Possibility to customize the rules and behavior of how the invoice rows are calculated and represented on the invoice document with Sweet Automation
- Possibility to create the PDF representation of an invoice document (requires the use of Microsoft Graph API)
- Possibility to integrate to financial system using Sweet Automation

This update simplifies and improves invoice preparation, giving you better control and visibility over billing content.

Sweet CRM



Smart Panel - navigation without losing context

The new **Smart Panel** is a smart overlay navigation bar that lets you open worklists, filter data, and explore related information – all without leaving your current view. Whether you're working in a case, a project, or a contact card, the panel helps you stay focused while still giving you quick access to the details you need.

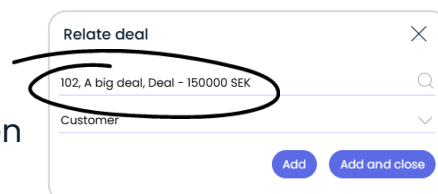
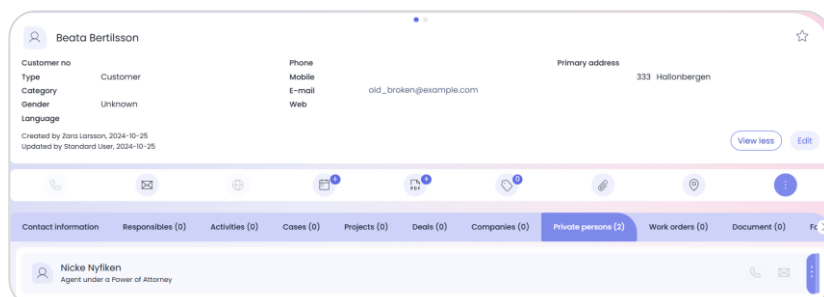
Apart from the smooth navigation bar, we've made it possible to work with the **side menu minimized** by allowing the menu with icons only.

It's smoother, faster, and designed to keep you in flow.

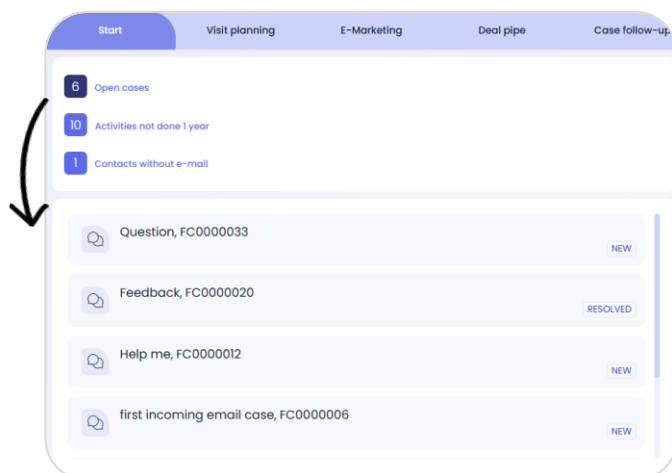
Sweet CRM

Relate deals

Provide more details about the deal when searching for deals to relate to company, private person or contact.



Relating private persons to each other: It's now possible to create relationships between private persons, to easily connect people and businesses with relevant roles for better contact and customer management.



Start page status links

Quickly view the content of the status links directly on start page without having to navigate away. The status links is now expanded below on the start page.

Tags count and sort order

Tags will now be sorted in alphabetical order, first based on tag group, then tag name to improve the sort order. A count of number of selected tags is displayed in the action bar.

External portal: Improved communication view on cases

We've updated the logic in the external portal to ensure externa users only see relevant messages.

External users can now see:

- Only emails or posts directly sent to them (via contact, company, or private person)

This improves privacy while still allowing multiple email threads within a single case.

Replace Microsoft Exchange

We now replace the Microsoft Exchange connection with Microsoft Graph API for e-mail and calendar.

Smaller improvements

Sweet CRM

Deal pipeline: Closed deals with estimated closing date in the past will no longer be highlighted in red since they're closed.

User groups: Now it's possible to inactivate user groups you don't use anymore. Simply find the user group in Admin settings and untick the box for active.

Microsoft graph replaces EWS – action required

Microsoft is phasing out Exchange Web Services (EWS) for Exchange Online. Starting **February 1, 2025**, only Microsoft Graph will be supported.

What this means for you:

To continue syncing calendars and emails with Outlook/Exchange, your integrations must move from EWS to Graph.

Why?

Graph offers better security, performance, and flexibility for developers.

○ **What to do:**

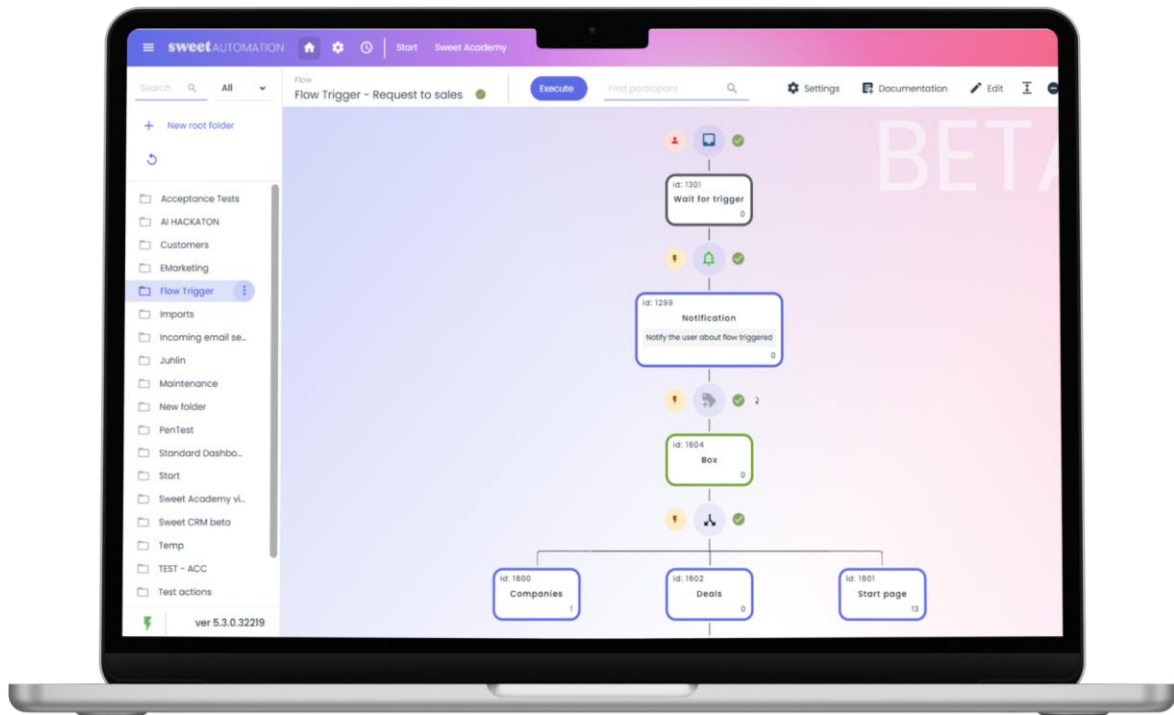
If you're using an EWS-based connection, start planning your migration now to avoid service disruptions. We'll support Graph-based setup – contact us if you need help getting started.

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sweetAUTOMATION

We're excited to unveil the latest version of Sweet Automation — now with a refreshed, modern interface and smarter functionality that boosts both usability and performance. From the sleek new start page and action tooltips to smarter search and built-in flow documentation, this update makes it easier than ever to design, run and manage your automated processes. Plus, with the transition to .NET 8, your platform is now faster, safer and ready for the future.

Sweet Automation



Sweet Automation - refreshed user interface

Sweet Automation has stepped into the future with a brand-new updated interface. While the structure and navigation remain familiar, the updated colors, shapes and styling deliver a more modern and intuitive experience – all while preserving the powerful capabilities you're used to.

.NET 8 upgrade

The platform is now upgraded to **.NET 8**, improving performance, security, and long-term support. This update affects several technical components that may require attention:

- **Custom actions** must be updated to align with .NET 8.
- **SA.Service monitoring** paths need to be updated due to a new executable.
- **SignalR WebSocket** now requires a dedicated port per environment.
- **OIDC redirect URLs** have been adjusted to comply with new authentication flows.
- **Export/import packages** are not backward compatible – exports from versions prior to 5.3 cannot be imported into 5.3+ environments (a workaround is available if needed).

Please consult your system administrator or Sweet support for upgrade planning and guidance.

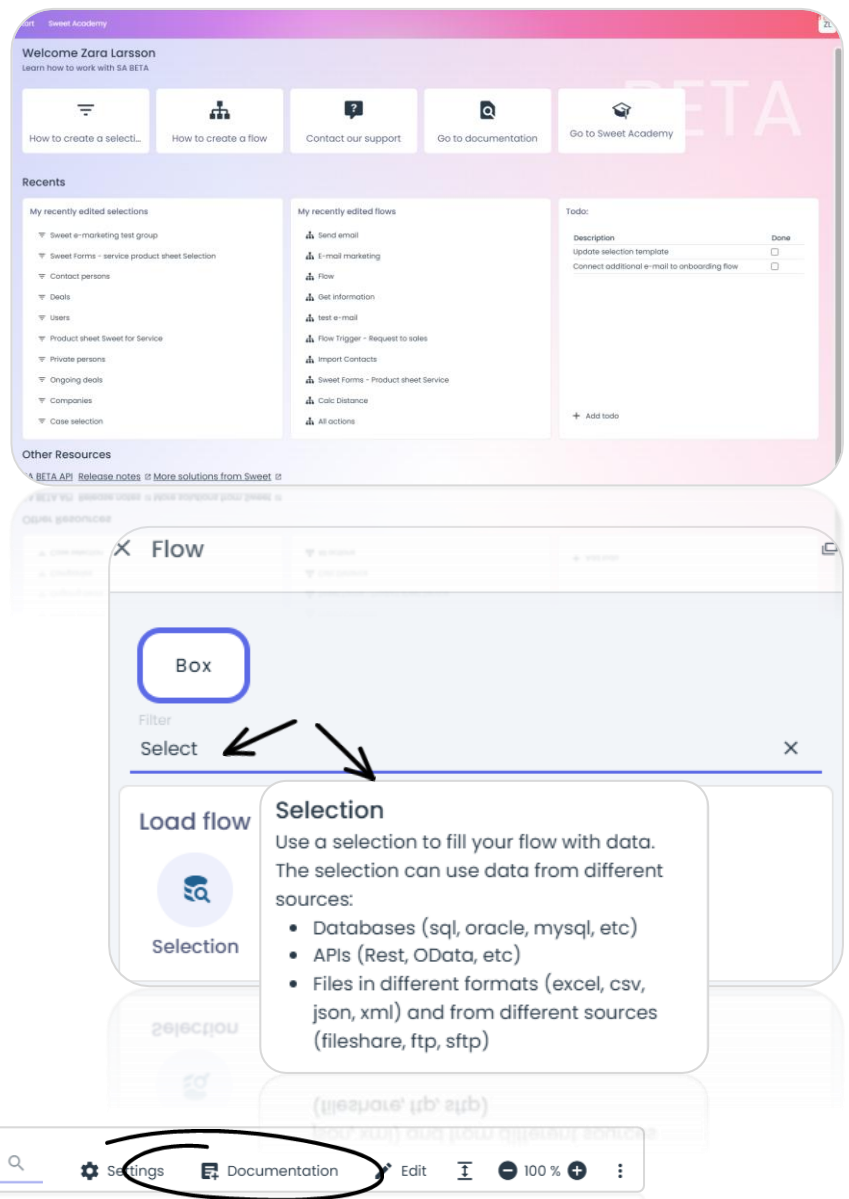
Sweet Automation

New start page

The new start page has gotten a new neat layout as well as new functions to make your own to-do-list in Sweet Automation.

Flow action search & tool tip

To improve usability and user understanding, Sweet Automation now supports tooltips on action buttons. When hovering over an action in the flow editor, users will see a brief description explaining what it does—making it easier to work with complex flows and choose the right action. We've also added a search field to find and filter your actions quickly.



Flow documentation & status

See if the flow is running, completed or failed in the flow top bar. You can also add internal documentation at the flow level – perfect for teams who want to explain flow logic or provide implementation notes. Find it in the flow top bar.

Sweet Automation

API & integration improvements

Roaring actions:

Alternative beneficial owner: New support for verifying alternative beneficial owners using Roaring's (**endpoint alt-beneficial-owners/1.0/**).

Webhook support for Roaring: Now possible to integrate and receive data from Roaring via webhooks.

- Save raw request body
- Customize response and headers
- More flexibility for API-based automations

New API endpoint: Row count in selection

Easily return the number of rows in a selection with a given filter.

Corrections

SQL Action: Prevents recursive addition of flow columns when Id exists in flow data.

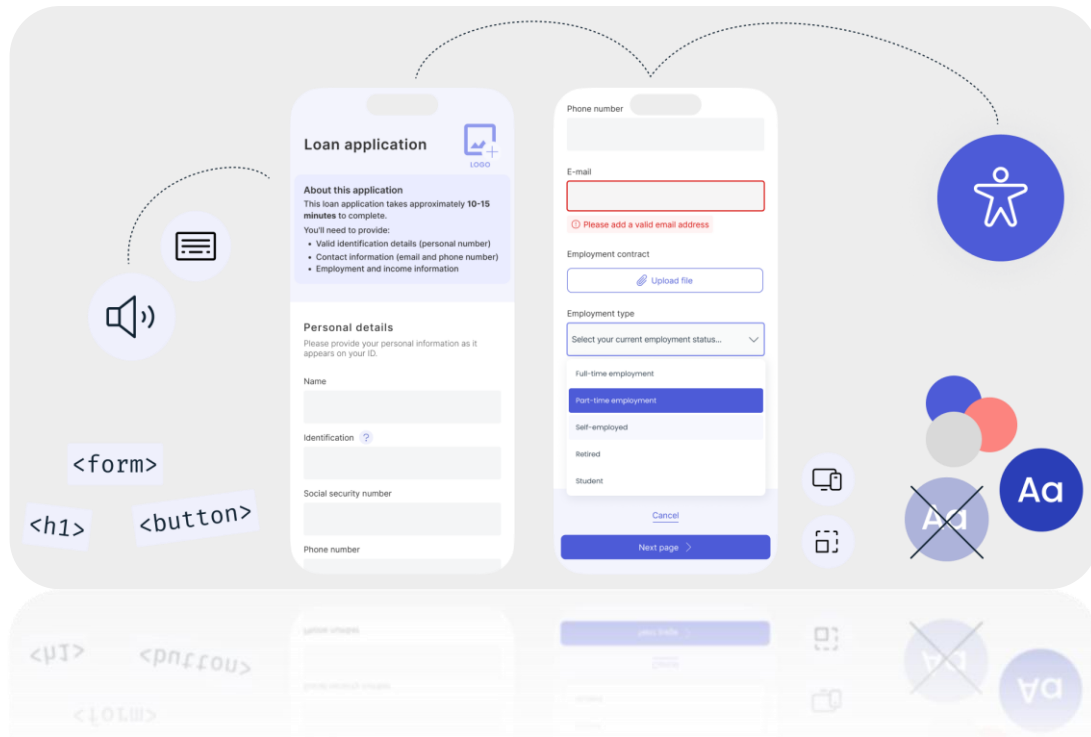
EWS integration: Fixed issue with reading emails from specified folders per account in Sweet Incoming Email Hosts.

sweet

sweetFORMS

This version truly focus on meeting the Accessibility Act and the requirements of WCAG 2.2 AA to make digital information easy accessible to people with disabilities.

Sweet Forms



Accessible forms to meet the Accessibility act & WCAG 2.2 AA

Sweet Forms now supports the requirements of the Accessibility act and WCAG 2.2 to ensure digital accessibility for people with disabilities for services and information online.

Sweet Form now comes packaged with a new **template** containing a form template with good contrasts, text and input box size and more. The new technical features of this template enable support for:

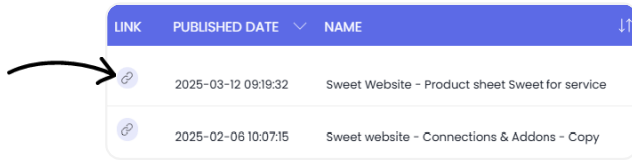
- **Zoom 200 %:** It's now possible to zoom 200 % on the screen, and still get good resolution and dynamic user interface.
- **Text alternatives:** add alt-text as an alternative for any non-text content such as images are provided.
- **Keyboard navigability:** the website and form tools are fully navigable using a keyboard, no need for mouse clicks.
- **Screen reader compatibility:** the website and forms are compatible with most website screen readers.
- **Semantic HTML:** we are rewriting our html code to ensure it is semantic and accessible.
- **Calendar module replacement:** replacing the calendar module for question types "date interval" and "date & time" to enhance accessibility.



In order to achieve the best accessibility, changes could be needed in your current CSS templates.

[Read more](#)

Sweet Forms

Smaller enhancements

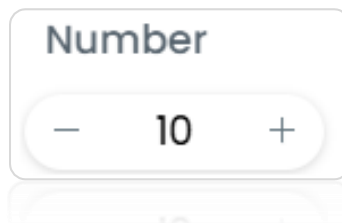


LINK	PUBLISHED DATE	NAME
	2025-03-12 09:19:32	Sweet Website - Product sheet Sweet for service
	2025-02-06 10:07:15	Sweet website - Connections & Addons - Copy

Copy form link: In this version you can easily copy the general form standard link directly from the list of *form templates* and *published forms* without having to open the form itself. Note that you still must open the form template to find the collaborative session form link. **The form link works only for published forms.**

Possibility to add a "default" value for the spinner apperance

For the numeric question type – with apperance "Spinner" we have now added the possibility to set a default value that always will be shown when the respondent opens the form.



Number

– 10 +

Secure your upgrade now

Contact us



sweet

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113 60 Stockholm

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