



Sweet Portal 4.7.2

NEWS AND RELEASE NOTES

Release notes – Sweet Portal

Version: 4.7.2

This document contains a list of news and improvements since version 4.7.1

News

Case

- Enhanced support for attachments on case notes – add related files, documents and forms.
- Reworked notifications for case-communication in the pipeline and worklist.
- Preview previous case notes before sending them out.
- Improved communication between internal and external portal setups. You can now filter on from-address on cases.
- Added support for internal-user property filtering on cases.
- Cases are now sorted by priority: high, by default.
- Added a between range on actual end date – registered on the case timeline.

Form Designer

- Autocomplete support for answers.
- CSS tab - enabling global styling of the form.
- Added validation on file upload, define approved size and type.
- Toggable help text on questions.
- Expandable sections.
- Sort answers either alphabetically or numerically.
- View number of answered forms directly, in the Form Design – template overview.
- The columns on the published forms list now align with the columns under the forms template list.
- Action to export answered forms to excel.
- You can now see the ID of answers, sections, pages and question in form designer.
- Change and administrate error-messages.

Improved usability in Form Designer

- The finished message/thank you page in forms can now be administrated from its own tab and styled with HTML.
- Create a new page, section, question or answer from anywhere inside form designer.
- Preview your form in PDF before publishing it.
- You can now define if areas in the form should only show up on PDF.
- You can now e-mail started or finished forms, directly from the related object.
- Possibility to select a span of time in the date-picker.
- It's now possible to change the name of: pages, sections, questions and answers directly from the tree structure.

Portal Usability

- Sweet now remembers selected rows, so that users can click items in list and navigate back to the same place they were in the list before. This is not available on mobile devices.

Other

- Performance overhaul for case-management.
- You can filter on: Reason in the deal selection list.
- Marketing plans, projects and activities now show on the recent list.
- Add, remove and browse user or user groups to share selections with.
- New filter for sum local on deals.
- You can now edit "my deals" directly in the deal pipe-list on the start page.
- New improved design, the old design is still available as a theme called "Classic".

Good to know

- When copying both image and text at the same time from a word file to the HTML-editor the image will be broken. However, you can copy the image and the text separately.