Release notes

7.17.1 release notes

Version 7.17

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At Creatio we are constantly working to deliver advanced capabilities to accelerate your sales, service, and marketing processes. Here are the **new features** included in Creatio version 7.17.1.

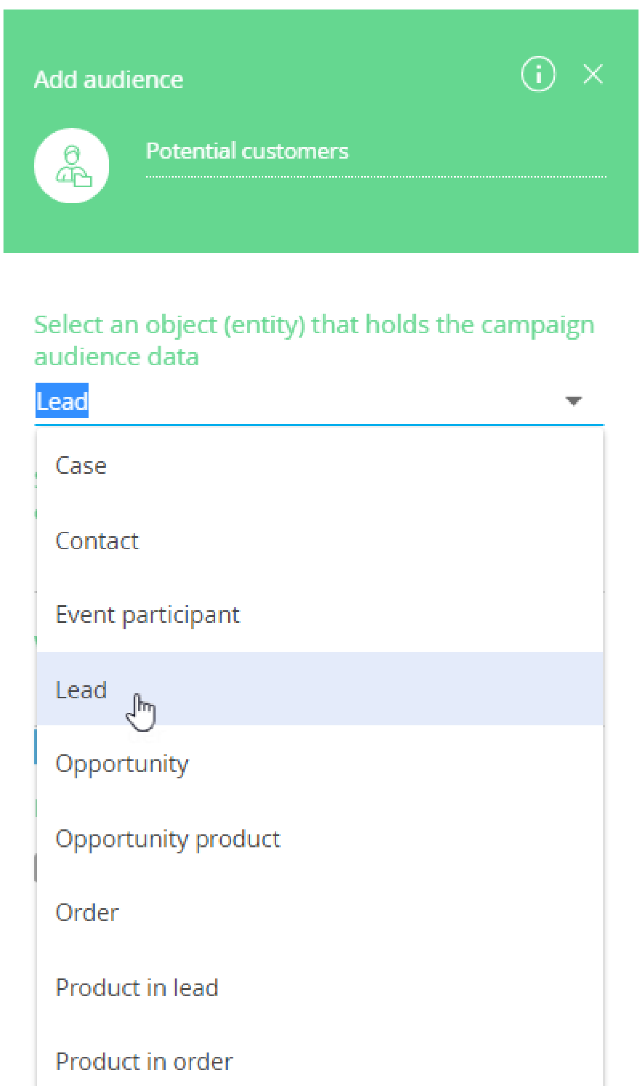
The update guide for the on-site applications is available in a separate article.

Marketing Creatio

Campaigns

- Campaign participants can now be added from various Creatio objects e.g. leads, cases, accounts.

Adding campaign audience from a lead

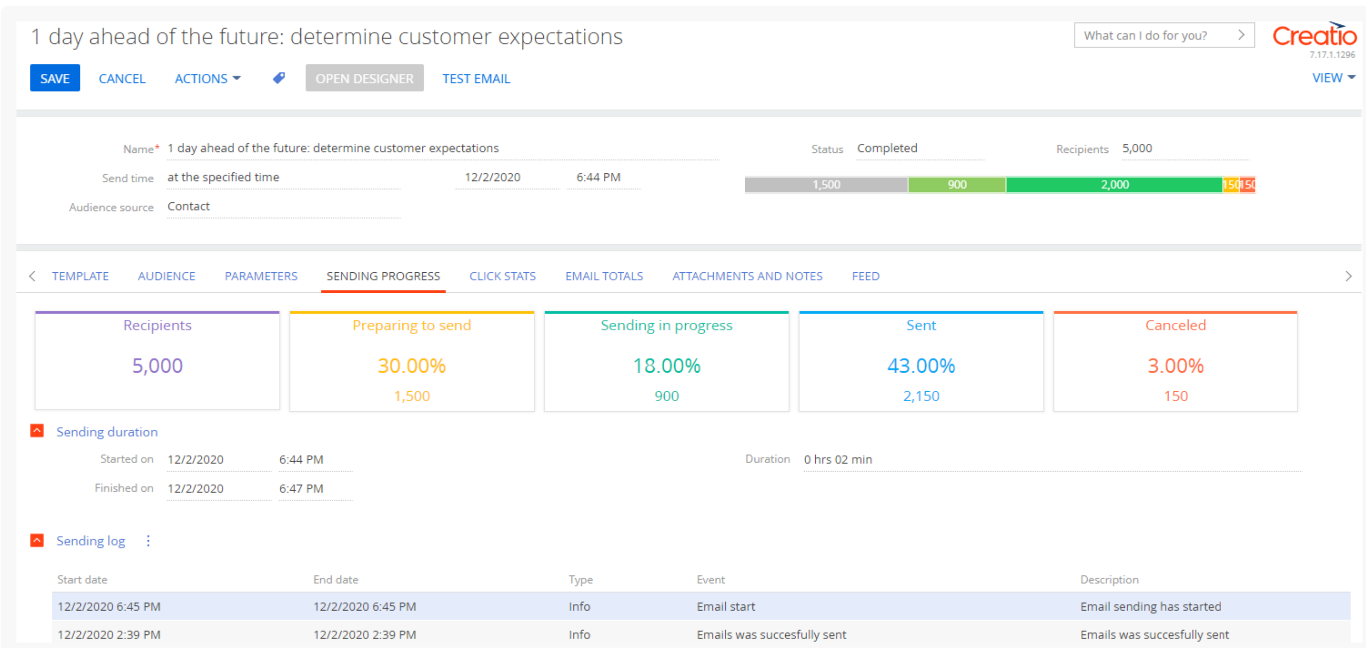


- The data of the objects used to import the campaign participants can now be passed to email templates for building macros, as well as to conditional flows for setting up filters.

Email marketing

- A new “Sending progress” dashboard tab has been added to the [Email] section. It is used to display data for all emails sent within the past 72 hours: email start time and total number of recipients, whose emails were prepared or processed.
- The [Sending progress] tab has been added to the email page. It displays the current email status, the bottlenecks and the sending duration, initial provider responses and issues that occur during sending.

The [Sending progress] tab on an email page

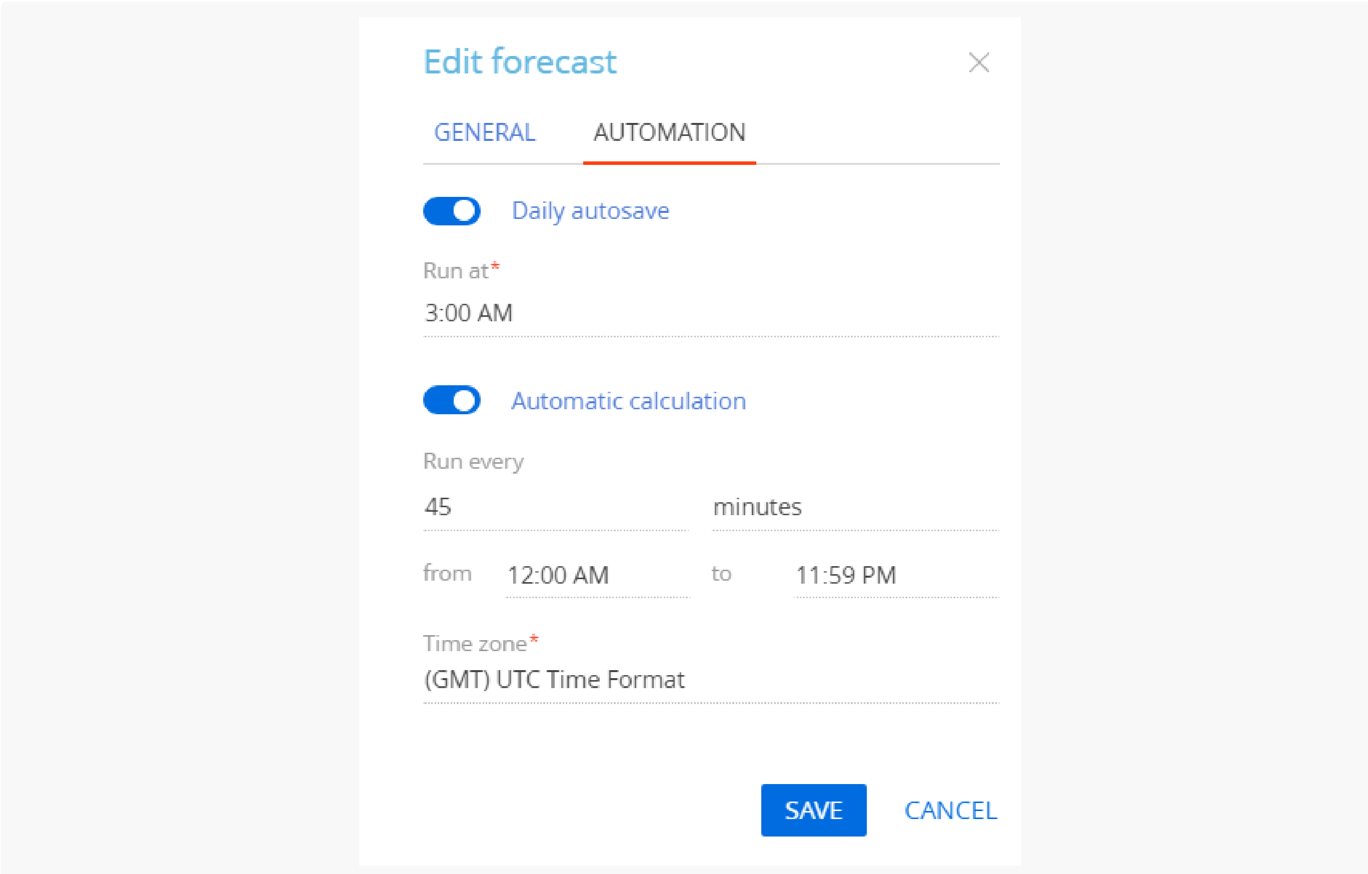


- You can now successfully start the trigger emails whose last sending was performed more than 6 hours ago.

Sales Creatio

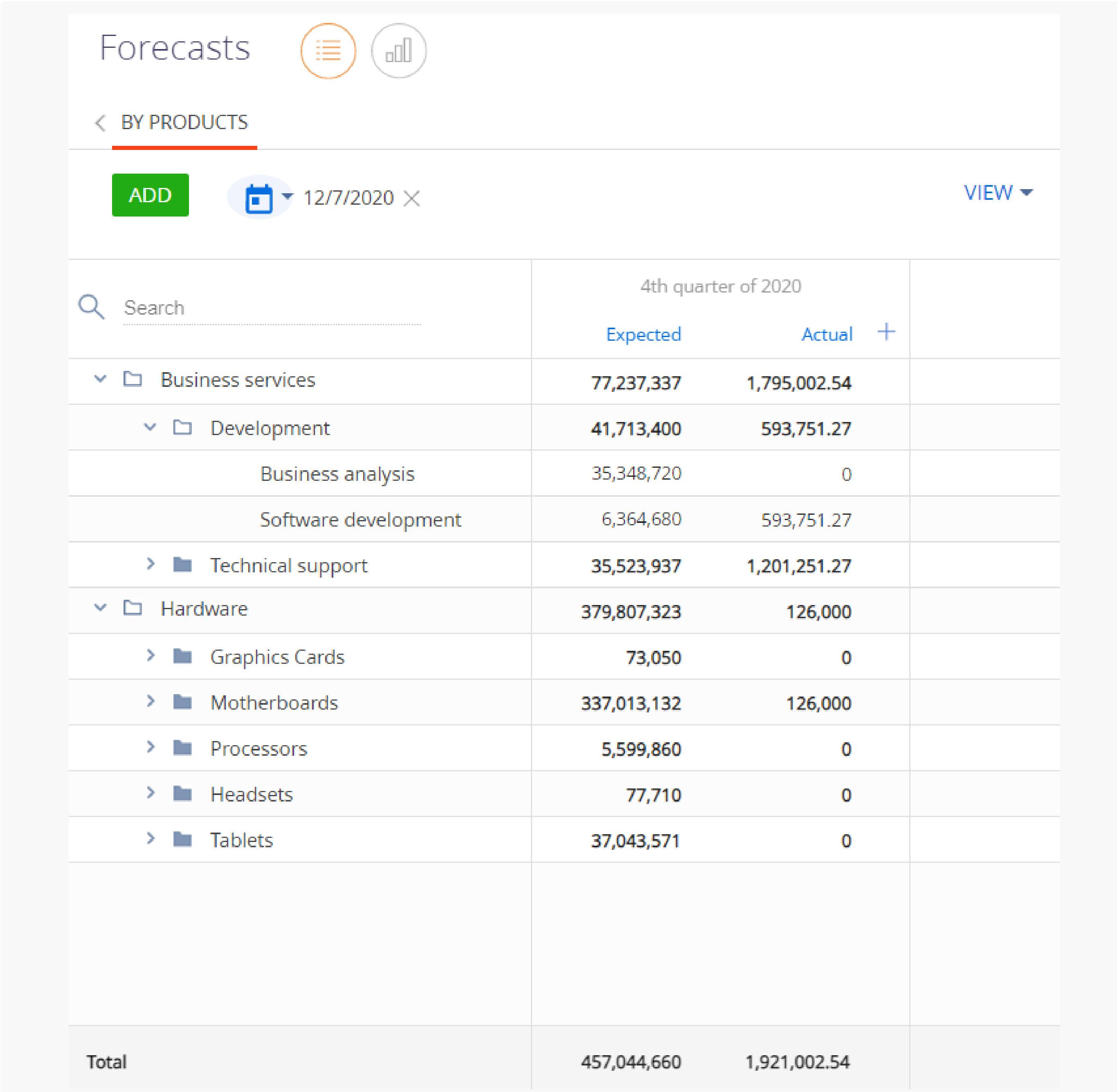
- When working with one forecasting time period on a forecasting tab, the “Total” block on the right handside of the tab is hidden. When working with two or more time periods, the “Total” block is visible again.
- Improved UI for forecast setup. General and the automation forecast settings are now placed in different tabs.

The updated UI for the forecast setup



- Forecasting tab versions have been finalized. When viewing the forecasting tab version, you can only see the strings that were relevant for the moment of saving the version. The strings added later do not display. The strings that are not included in the last tab version are highlighted in gray.

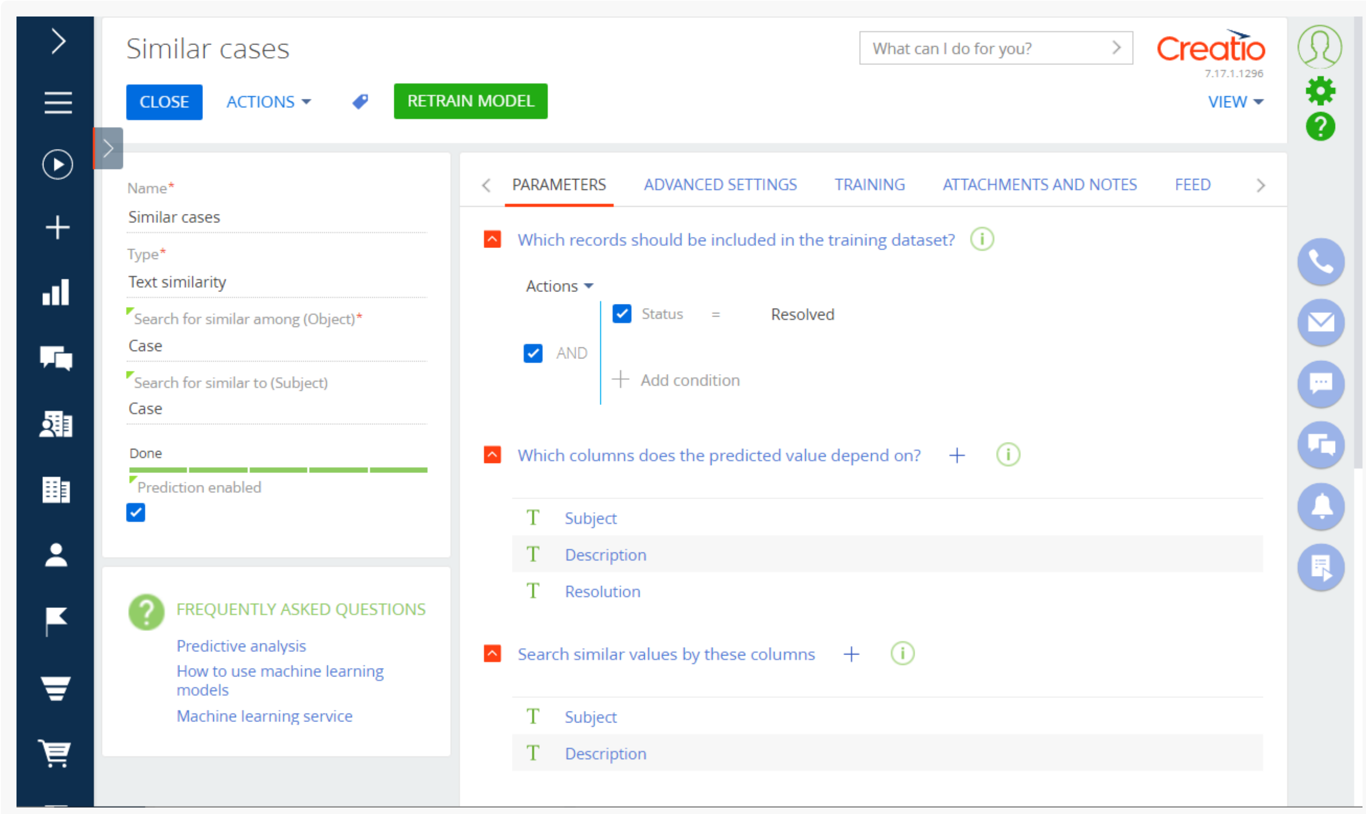
Example of a forecasting tab version



Core functions

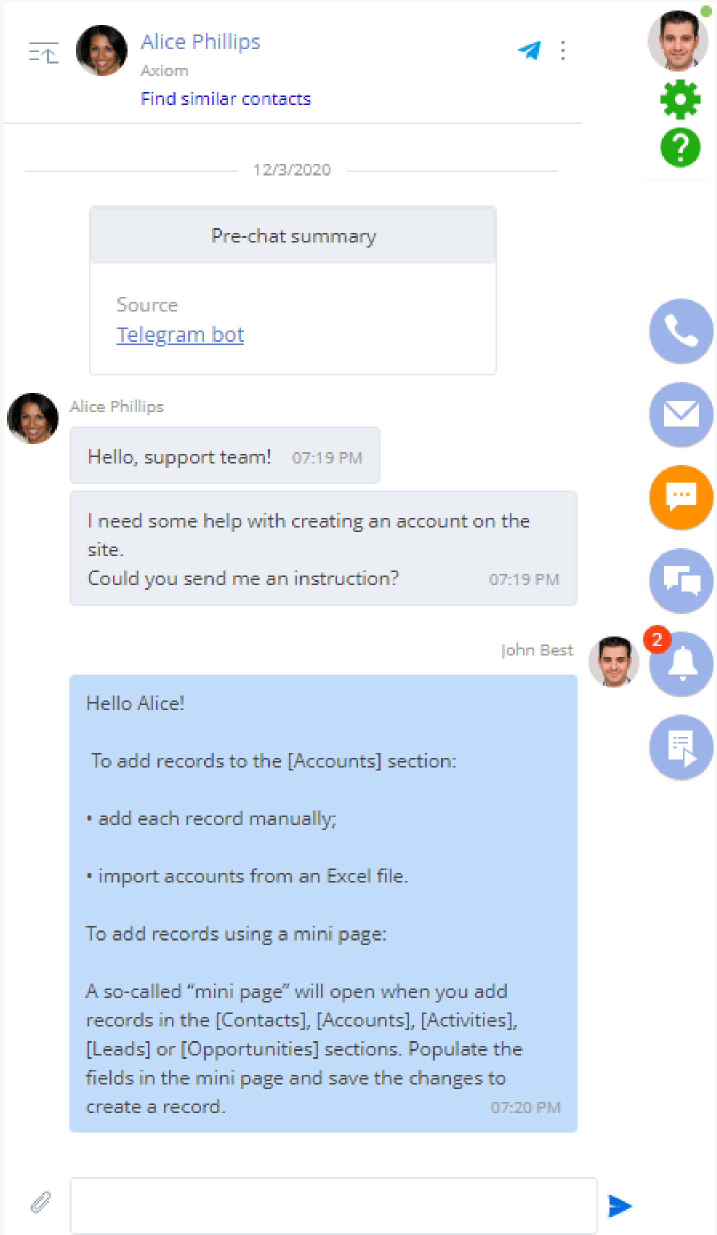
- Enriched pivot tables formulas with the ability to perform calculation on data columns. This will allow a user to calculate e.g., the planned date of closing a case or the actual time of processing a case in days.
- Added notifications about new feed messages in section records for the subscribed users.
- You can now set up AI models to search for similar objects. The models can search for similar Creatio objects by unstructured text data. Use this functionality to search for similar cases, automatically select the knowledge base articles or most relevant answers, etc.

Example of setting up a recommendation model



- Added Telegram customer communication channel. All messages sent to the Telegram channel configured in Creatio will be available for processing by agents in the communication panel. Use “Chats settings” available in the System Designer to add and set up the new channel.

Processing Telegram chat messages in the communication panel



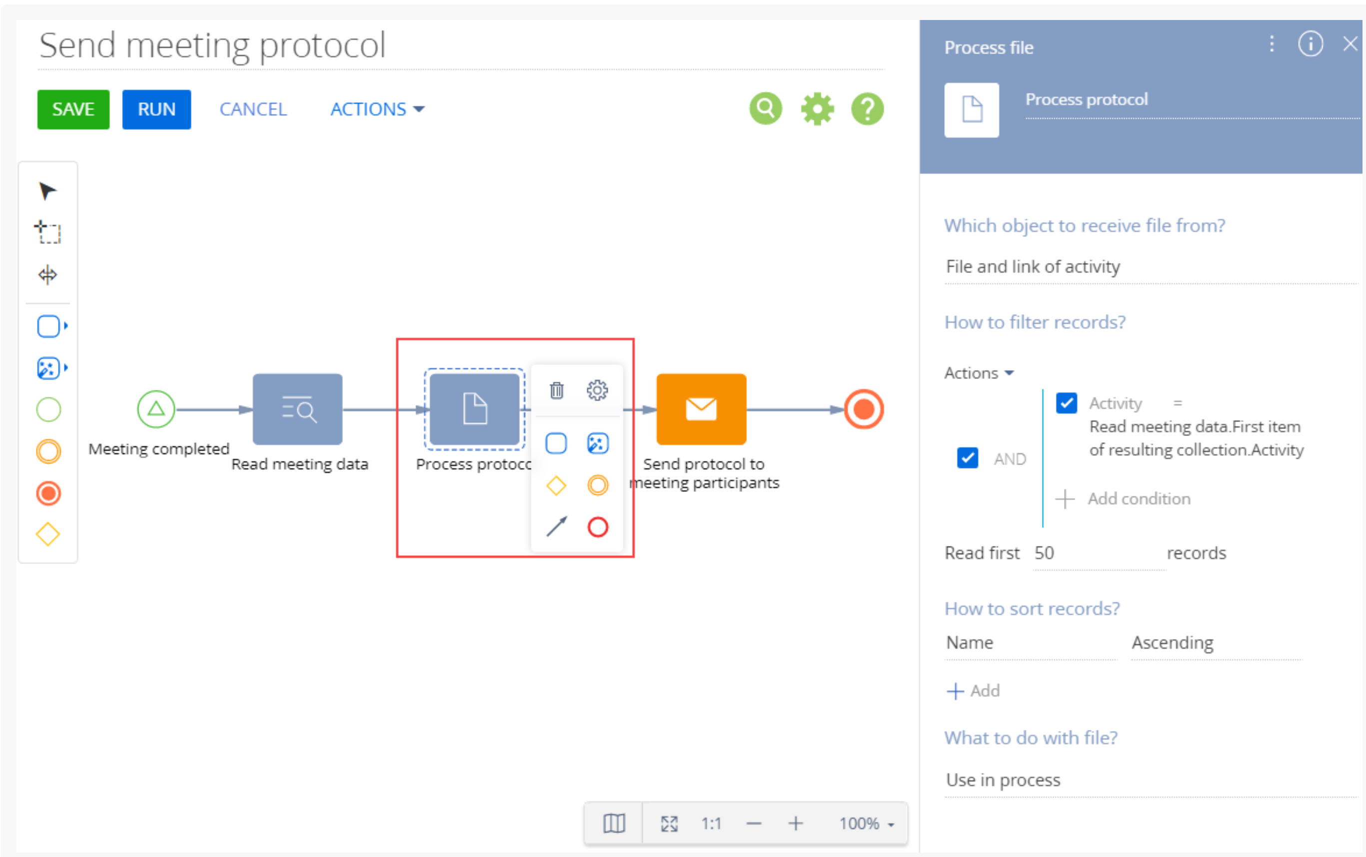
Integrations

- You can now work with meetings marked as private when synchronizing with Exchange and Google calendars. In the Creatio calendar, caption of such meetings will display as "Private meeting". The meeting subject and description are not available.
- We have changed the redirection address for registering Creatio in GSuite to synchronize with Google calendars and contacts. To ensure the correct synchronization, create a new OAuth 2.0 client ID and perform the setting. Read more in the [Register Creatio application in Gsuite] article.

Business processes

- Enabled file automation with new business processes elements. Use newly added [Process file] business process element to read and copy files available on any [Attachments and notes] detail. For example, the [Send email] element can add the needed files as attachments to emails.
  This element can only work with files stored in the application database. If you store your files in a third-party repository (a file system or the cloud), the element will not process them. We will provide an API for working with the files from the third-party repositories in the upcoming releases.

Example of using the [Process file] element



- A new “File” process parameter has been added. This parameter stores information about the file and enables passing this information between the business process elements.
- The [Send email] element can now add attachments to outgoing emails. To implement this, add the parameter to the element and specify the needed files as the data source. Use the [Process file] element to receive the list of files.
- You can now receive one or more resulting parameters when starting interpreted business processes from the client JS module or a C# code.

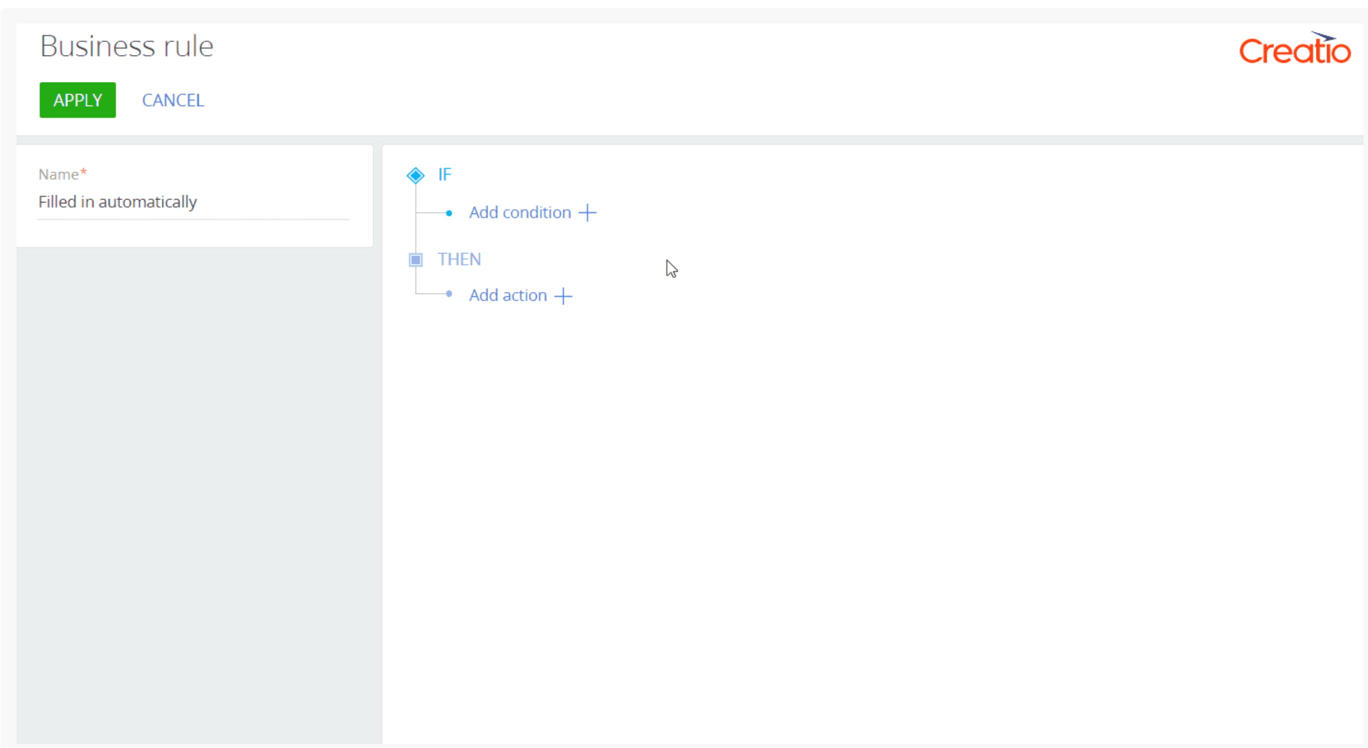
User customization tools

- Use the Section Wizard or Detail Wizard to display a lookup field that references a data view on a page, e.g., an organization company structure or a business process library.
- The following features are now available in the Section Wizard to accelerate and simplify the detail setup:

- Create an object for a new detail and register the detail by the created object.
- Create a detail based on the existing Creatio object.
- Create a lookup column that would connect the new detail to the configured page.
- Open the Detail Wizard from a detail property window to set up the detail. If you do not close the property window that you used to open the Detail Wizard, the detail name and the columns will display right away after you save the changes in the Detail Wizard.
- When specifying the connection fields for the columns, the available values are now filtered by lookups linked to these fields. If the connection exists between the page and the detail, Creatio will suggest establishing such connection automatically.

- When setting up page tabs in the Section Wizard and the Pre-configured Page Designer, you can edit the tab code while creating it.
- You can now specify the UI element captions in different localizations in the Section Wizard and the Pre-configured Page Designer. This option is available for the tab captions, detail captions and the connection lookup columns. In the Pre-configured Page Designer, you also have this option available for the buttons.
- In the “Set field value” business rule, you can now operate on a date using formula. This enables, e.g., calculating the actual duration of a task completion, the date of the next invoice payment, etc.

Example of setting up a business rule for calculating a time period



Administration

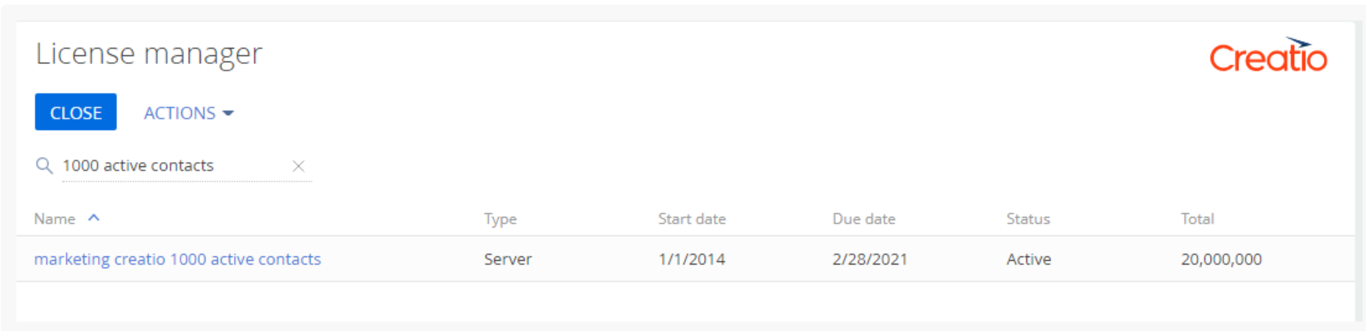
- When managing objects by records is disabled, the change log settings remain unaffected.

- For the .Net Core applications, we have enabled installing a Marketplace app using the standard download UI without downloading a file.

License manager

- You can now work with server licenses in the License Manager.

Example of displaying server licenses



- Enabled deleting all licenses from the applications.
- To make licensing more convenient, we have added license request and upload buttons to the action menu.

Development tools

- When working with SelectQuery in Data Service, you can now filter records by current user inclusion in a role: direct membership, delegation, manager inheritance, hierarchy inheritance, etc.. It enables, e.g., setting up filtering records by the source of including in the section lists.

Advanced settings

- Packaged Dependency diagram is now available from the Configuration section.
- Enabled working with metadata in the updated [Configuration] section. You can open the metadata from the element action menu or the schema action menu.