

Release notes

7.17.1 release notes

Version 7.17



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7.17.1 release notes

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.

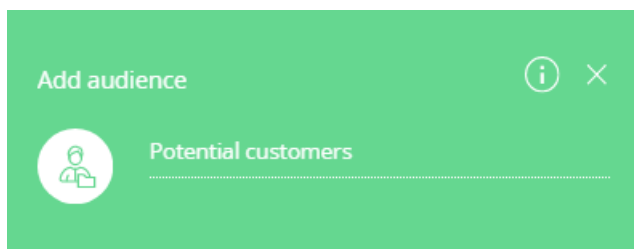
The update guide for the on-site applications is available in a separate [article](#).

@ Marketing Creatio

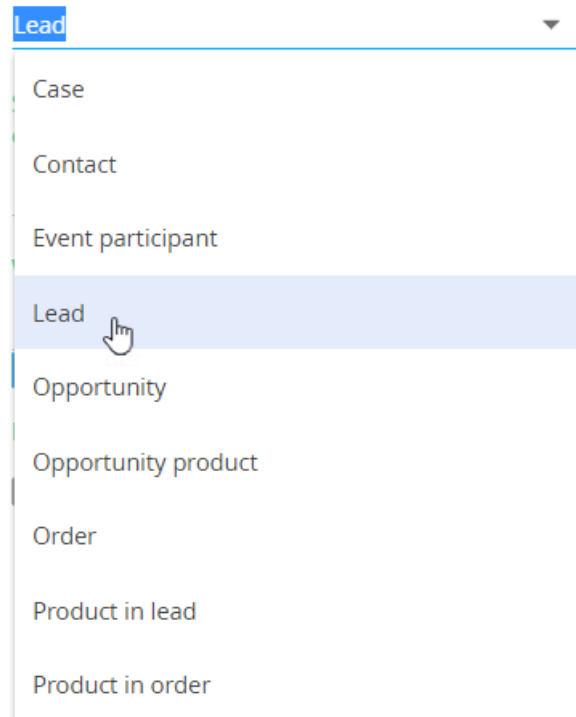
Campaigns

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

Adding campaign audience from a lead



Select an object (entity) that holds the campaign audience data



- 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

1 day ahead of the future: determine customer expectations

What can I do for you? > Creatio 7.17.1.1296 VIEW

SAVE CANCEL ACTIONS OPEN DESIGNER TEST EMAIL

Name* 1 day ahead of the future: determine customer expectations Status Completed Recipients 5,000

Send time at the specified time 12/2/2020 6:44 PM 1,500 900 2,000 150

Audience source Contact

< TEMPLATE AUDIENCE PARAMETERS **SENDING PROGRESS** CLICK STATS EMAIL TOTALS ATTACHMENTS AND NOTES FEED >

Recipients	Preparing to send	Sending in progress	Sent	Canceled
5,000	30.00% 1,500	18.00% 900	43.00% 2,150	3.00% 150

✖ Sending duration

Started on 12/2/2020 6:44 PM Duration 0 hrs 02 min

Finished on 12/2/2020 6:47 PM

✖ Sending log

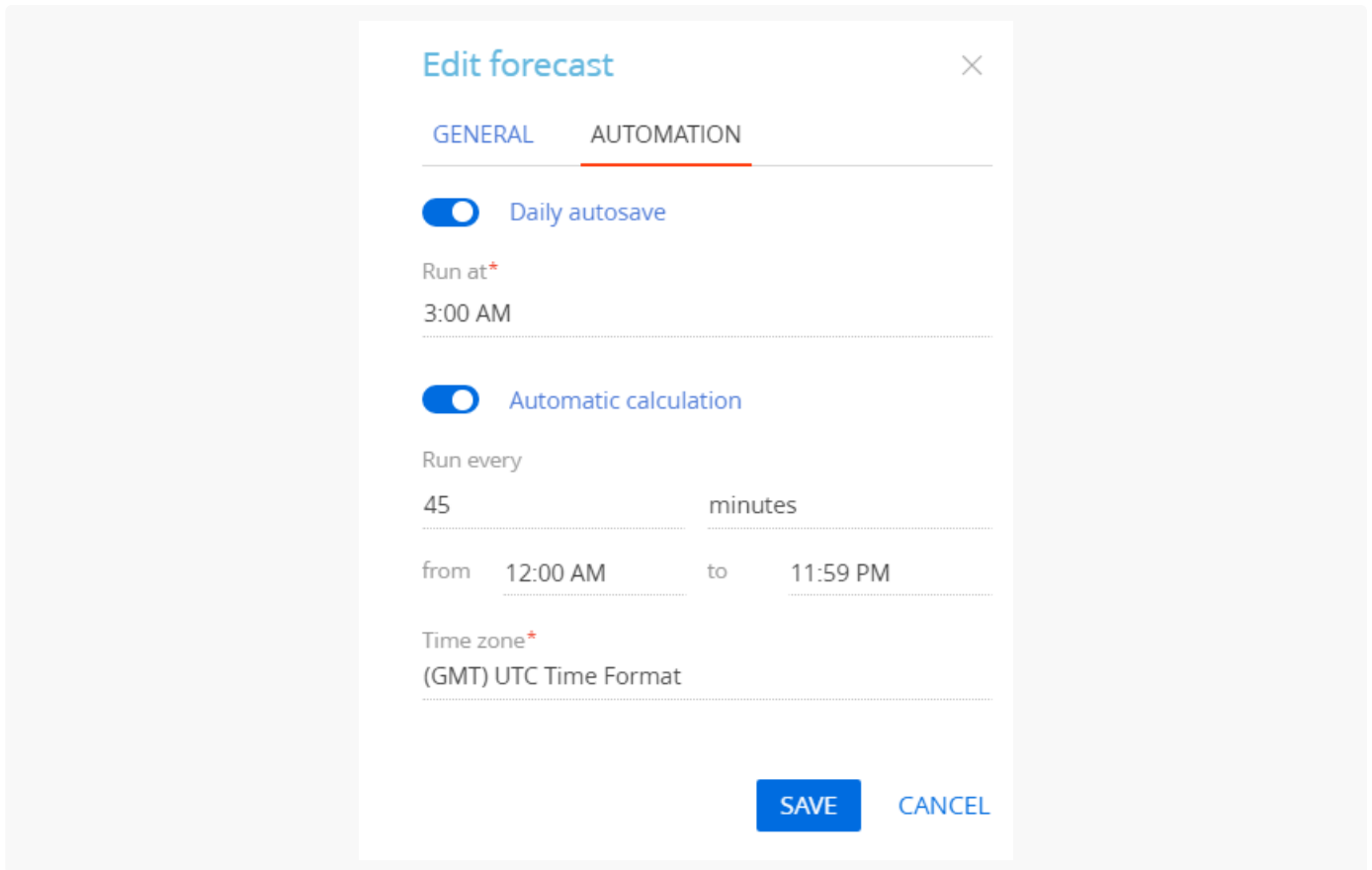
Start date	End date	Type	Event	Description
12/2/2020 6:45 PM	12/2/2020 6:45 PM	Info	Email start	Email sending has started
12/2/2020 2:39 PM	12/2/2020 2:39 PM	Info	Emails was successfully sent	Emails was successfully sent

- 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






The screenshot shows a dialog box titled "Edit forecast" with a close button (X) in the top right corner. The dialog has two tabs: "GENERAL" and "AUTOMATION", with "AUTOMATION" being the active tab. Under the "AUTOMATION" tab, there are two main sections. The first section is "Daily autosave", which has a blue toggle switch turned on. Below it, the text "Run at*" is followed by a text input field containing "3:00 AM". The second section is "Automatic calculation", which also has a blue toggle switch turned on. Below it, the text "Run every" is followed by a text input field containing "45" and the word "minutes". Below that, there are two text input fields: "from 12:00 AM" and "to 11:59 PM". At the bottom of the dialog, there is a "Time zone*" label followed by a text input field containing "(GMT) UTC Time Format". At the bottom right of the dialog, there are two buttons: "SAVE" (a blue button) and "CANCEL" (a gray button).

- 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

Forecasts  

< BY PRODUCTS

ADD  12/7/2020  **VIEW** 

Search <input type="text"/>	4th quarter of 2020		
	Expected	Actual	
Business services	77,237,337	1,795,002.54	
Development	41,713,400	593,751.27	
Business analysis	35,348,720	0	
Software development	6,364,680	593,751.27	
Technical support	35,523,937	1,201,251.27	
Hardware	379,807,323	126,000	
Graphics Cards	73,050	0	
Motherboards	337,013,132	126,000	
Processors	5,599,860	0	
Headsets	77,710	0	
Tablets	37,043,571	0	
Total	457,044,660	1,921,002.54	

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.

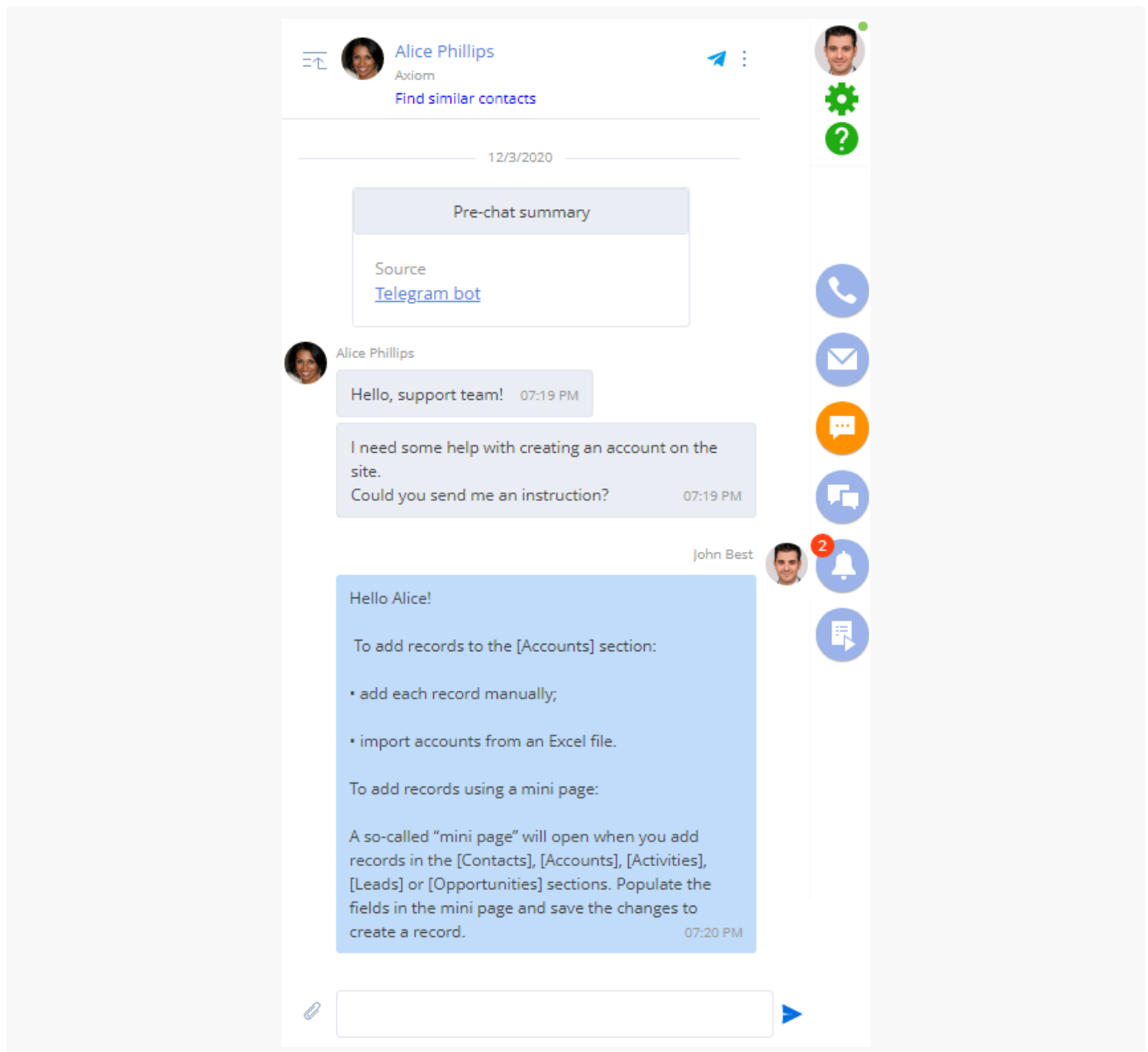
Example of setting up a recommendation model

The screenshot displays the 'Similar cases' configuration page in the Creatio system. The page is divided into several sections:

- Header:** Includes a search bar with the text 'What can I do for you?', the Creatio logo (version 7.17.1.1296), and a 'VIEW' dropdown menu.
- Actions:** A 'CLOSE' button, an 'ACTIONS' dropdown, and a 'RETRAIN MODEL' button.
- Form Fields:**
 - Name:** 'Similar cases'
 - Type:** 'Text similarity'
 - Search for similar among (Object):** 'Case'
 - Search for similar to (Subject):** 'Case'
 - Done:** A progress bar and a 'Prediction enabled' checkbox (checked).
- Frequently Asked Questions:** A section with a question mark icon and links for 'Predictive analysis', 'How to use machine learning models', and 'Machine learning service'.
- Parameters Tab:**
 - Which records should be included in the training dataset?** (with an info icon):
 - Actions: Status = Resolved
 - AND
 - + Add condition
 - Which columns does the predicted value depend on?** (with a plus icon and info icon):
 - Subject
 - Description
 - Resolution
 - Search similar values by these columns** (with a plus icon and info icon):
 - Subject
 - Description

- 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

The screenshot shows a business process flow editor for 'Send meeting protocol'. The flow consists of the following steps:

- Meeting completed (Trigger)
- Read meeting data (Action)
- Process protocol (Action, highlighted with a red box)
- Send protocol to meeting participants (Action)

The right-hand panel shows the configuration for the 'Process file' element:

- Which object to receive file from?** File and link of activity
- How to filter records?**
 - Actions:
 - Activity = Read meeting data.First item of resulting collection.Activity
 - AND
 - + Add condition
 - Read first 50 records
- How to sort records?**
 - Name Ascending
 - + Add
- What to do with file?** Use in process

- 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

The screenshot shows the 'Business rule' configuration window. At the top left, there are 'APPLY' and 'CANCEL' buttons. The window title is 'Business rule' and the Creatio logo is in the top right corner. On the left side, there is a 'Name*' field with the text 'Filled in automatically'. The main area of the window displays a logic tree structure. The tree starts with an 'IF' condition, followed by a 'THEN' action. Below the 'IF' condition, there is a button labeled 'Add condition +'. Below the 'THEN' action, there is a button labeled 'Add action +'. A mouse cursor is visible over the 'Add action +' button.

Administration

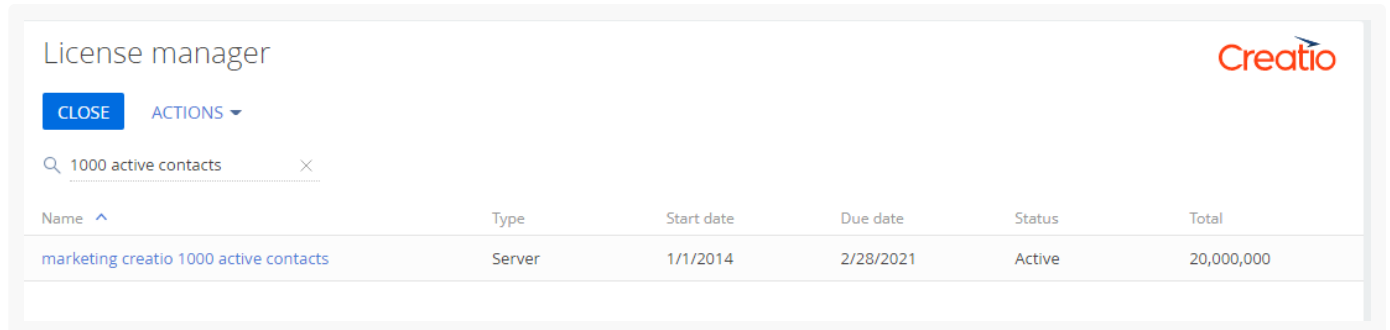
- When managing objects by records is disabled, the change log settings remain unaffected.

- 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



The screenshot shows the 'License manager' interface. At the top right is the 'Creatio' logo. Below the title, there is a 'CLOSE' button and an 'ACTIONS' dropdown menu. A search bar contains the text '1000 active contacts'. Below the search bar is a table with the following columns: Name, Type, Start date, Due date, Status, and Total. The table contains one row of data.

Name	Type	Start date	Due date	Status	Total
marketing creatio 1000 active contacts	Server	1/1/2014	2/28/2021	Active	20,000,000

- 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.