

bpmonline

bpm'online release

7.10.1

04/28/2017



Simplify the future

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BPM'ONLINE SERVICE



- All recipients of the original case email now receive same notifications as the case contact. This way everyone involved in the case resolution will stay up to date with all developments.
- Case notifications now include the subject from the original email. This lets the customers track email history of their cases. If a case has been created from a call, then the [Subject] field of notifications will contain the subject from the email template.
- Support service is now specified as the sender of emails sent from the case page.
 - By default, the [From] field contains the support service mailbox where the customer's email was originally sent.
 - If a case was not registered based in an email, then the [From] field will contain the email specified as the default helpdesk mailbox in the system settings.

BASE INTERFACE AND CORE FUNCTIONS



GLOBAL SEARCH

- A filter is now available on the search results page. For example, you can view only found accounts, activities or employees.

Filtering search results

Search results > bpmonline

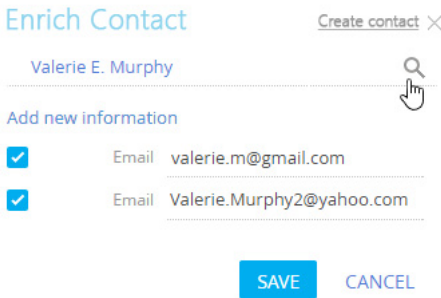
All results			
	Activities		
	Contacts		
	Documents		
	Invoices		
	Orders		
	Full name Vanessa Wilson	Account Alfabusiness	Mobile phone +44 20 7123 4567
	Type: Contact person		
	Number INV-1	Customer Vanessa Wilson	Owner Supervisor
	Contact: Vanessa Wilson		
	Number 101-55	Object Document	
	Contact: Vanessa Wilson		
	Number 101-54	Object Document	
	Contact: Vanessa Wilson		
	Number ORD-2	Customer Vanessa Wilson	Owner Supervisor
	Contact: Vanessa Wilson	Payment status Planned	
	Subject Commercial Offer	Account Alfabusiness	Category To do
	Owner Supervisor	Status Not started	Contact: Vanessa Wilson

- You can now scroll down to load more search results (up to 30 at a time).
- Search results are more relevant now. Partial matches (i.e. only part of a word matches searched string) will not be displayed.

DATA ENRICHMENT

- When enriching data from emails, you can now select a contact whose data will be enriched. This way you can also add new contacts.

Contact data enrichment options




Enrich Contact Create contact ✕

Valerie E. Murphy

Add new information

- Email valerie.m@gmail.com
- Email Valerie.Murphy2@yahoo.com

SAVE CANCEL

- Email data enrichment now uses information from the signatures of all contacts in a thread instead of using only the last contact.
- You can now quickly enrich a contact profile from email by clicking the  button on the contact page. The button is available in the contact profile if the contact's emails have information that can be used for enrichment.

USER EXPERIENCE

- You can now enter time values in "time" and "date and time" fields without using delimiters, such as ":",
- Summaries (number of records, amount, minimum, maximum and average values) in section lists are now updated each time a record is added or deleted, without the need to re-load the entire section page. This includes adding records via pop-up summaries.
- Addresses on the map are more precise now, even if identical street names exist in the region. ZIP/postal codes are now taken into account when searching addresses on the map.
- If you copy an activity and change its assignee, the previous assignee is now deleted from the [Participants] detail.
- Dashboard filter setup has been improved. Now, you can disable a dashboard filter without modifying it in the dashboard settings.
- You can now open a custom section's record pages by clicking links in "List" dashboards.

PHONE INTEGRATION AND MANAGING COMMUNICATIONS

- Fixed the issue with identifying the direction of emails (incoming/outgoing). Previously, if the [From] field was left empty in the [Send email] process element settings, the outgoing emails sent by that element would display as incoming emails.
- Fixed an error that caused email signature images not to display for certain users.



- The list of emails displayed on the [Email] tab of the communication panel has been improved. Previously, email previews could include parts of HTML markup.

INTEGRATIONS



GOOGLE CALENDAR SYNCHRONIZATION

- We have improved the synchronization of “Whole day” meetings with Google. These activities are displayed as dates in the Google calendar, without specific start and end time. This caused the synchronized bpm’online activities to display incorrectly. Now correct start and end time is displayed for these activities in bpm’online.

BUSINESS PROCESSES



- Working with macros in the emails sent as part of a business process has been improved. Now, when sending an email manually, any macros for which no values can be found will be highlighted in the email text. For emails that are sent automatically, the macros with no corresponding values will display as empty spaces the email body.

USER CUSTOMIZATION TOOLS



- If a section was modified in several packages, the changes from all packages will be available when working with the section in the Section Wizard. Previously, fields and details created in such sections were not displayed in the Section Wizard.

BPM’ONLINE MARKETPLACE

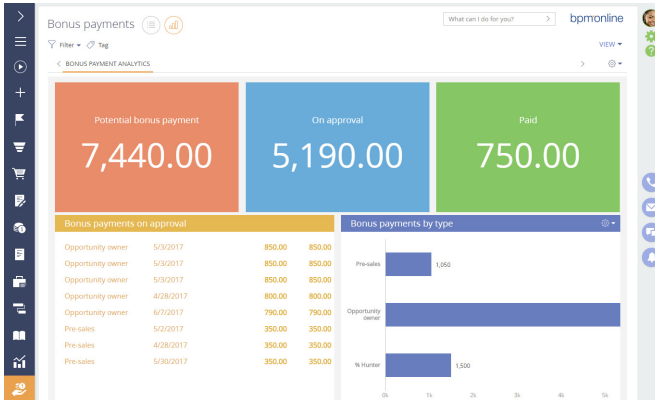


EMPLOYEE BONUS PAYMENTS

The new “Compensation” package automates accrual of bonus payments. You can easily install the package on any base bpm’online product using the System Designer.

- The new [Bonus payments] section contains information about the accrual and payment of bonuses, as well as analytical information, such as bonus payments on approval, paid amounts, etc.

The [Bonus payments] section analytics



- The [Bonus payments] detail has been added to the employee page for tracking bonus payments accrued for the employee.
- The new [Payment rules] section has been added for setting up bonus payments. Benefits:
 - Bonus payment calculation and accrual parameters setup.
 - Automatic accrual of bonuses according to specific conditions. For example, you can set up team-wide bonus payments.

Setting up bonus payments for employees who participated in a sale

1 Accrual conditions

Accrue on **Invoice**

AND Payment status = Paid

+ Add condition

Period field **Paid on**

2 Accrual method

Accrual type **% from indicator**

Indicator **Amount, base currency** X 5.00 %

3 Roles and employees to accrue

Whom to accrue **Activity(by column Owner).Owner**

- There is an option to enable bonus payments approval with the employee's supervisor.