

Release notes

7.17.3 release notes

Version 7.17



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7.17.3 release notes

We at Creatio are constantly working to deliver advanced capabilities to accelerate your sales, service, and marketing processes. Here are the **new features** included in Creatio version 7.17.3.

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

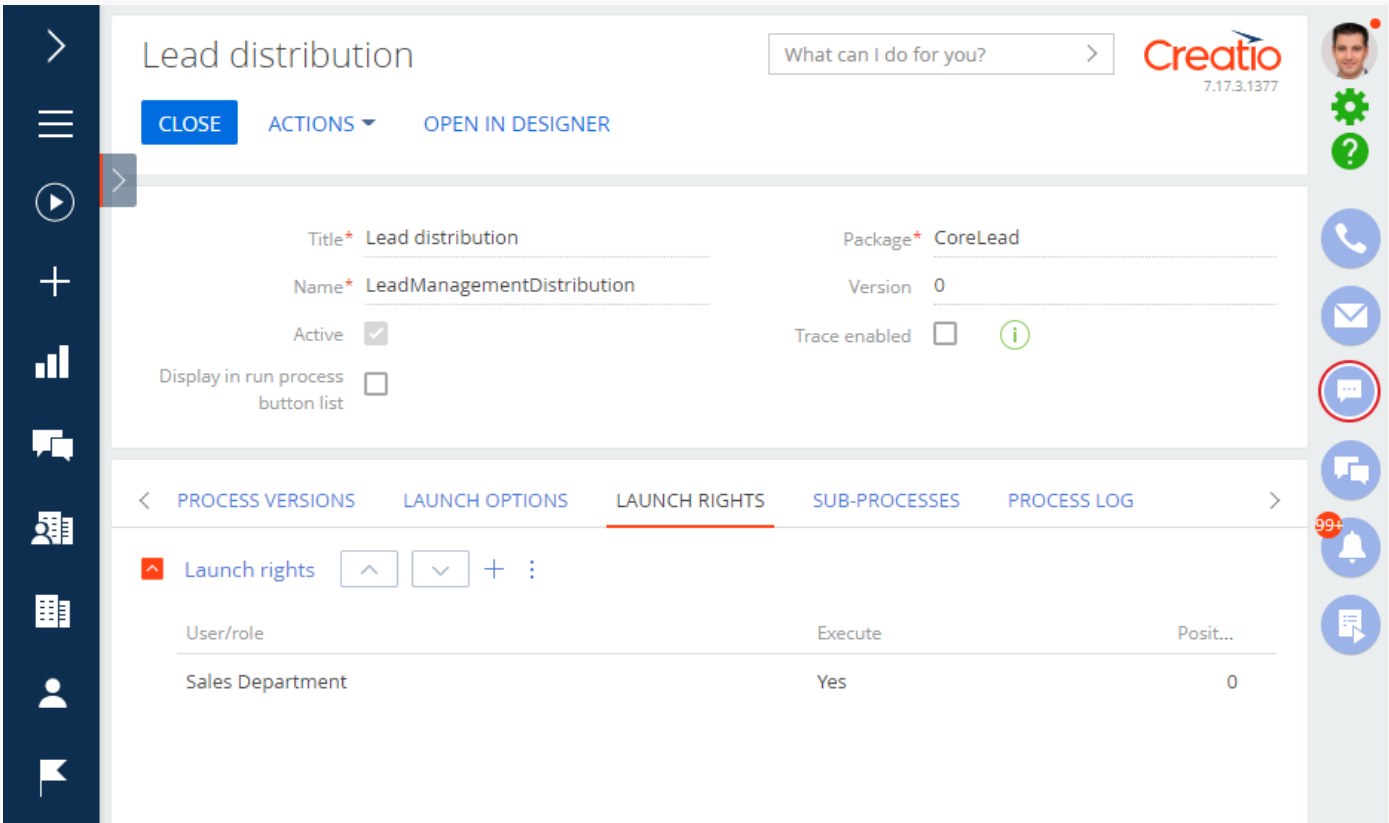
Low-code Platform

BPM tools

Permissions to run a process

- It is now possible to grant permissions to run a particular business process on the process's Properties page without opening the Process Designer. This streamlines the permission setup flow and helps the system administrator to manage permissions based on process folders. For instance, they can grant permissions to run case-related processes to support team and its managers. These permissions affect only manually-launched business processes and only the users without "Can run business processes" system operation permission.

Setting up permissions to run a business process



The screenshot shows the 'Lead distribution' process configuration page in Creatio. The 'LAUNCH RIGHTS' tab is selected, showing a table of permissions for the 'Sales Department'.

User/role	Execute	Posit...
Sales Department	Yes	0

Process files

- The report files generated by business processes can now have custom file name patterns. You can set up the pattern in the [*Process file*] element's new [*File name*] parameter. This parameter will appear if the file source in the element settings is set to "Generated report".

New parameter in the [*Process file*] element's settings

The screenshot shows a configuration window titled "Process file". It contains the following settings:

- What is the source of the file?**: Generated report
- What report to generate?**: Quotation
- Section**: Opportunities
- How to filter records?**:
 - Actions:
 - AND | + Add condition
 - Generate separate report for each record
- File name** ⓘ: [#Read lead data.First item of resulting colle...
- What to do with file?**: Use in process

- New file source in the [*Process file*] element: a process parameter.

Send emails

- Improved the localized template selection algorithm in the [*Send email*] element. If the [*To*] field has contacts with different preferred languages or the preferred language is not specified for some recipients, the message will use the default language.

Administration

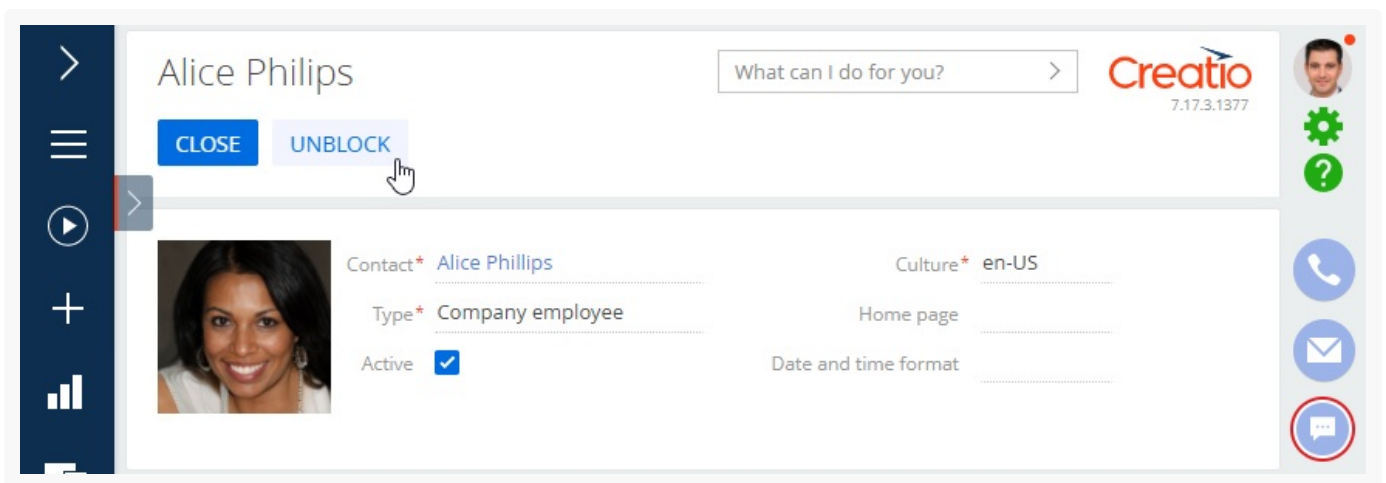
Creatio with .NET Core

- Incoming HTTP request logging is now available for Creatio products using .NET Core platform. You can configure logging in the “RequestLogging” section of the appsettings.json configuration file.

User management

- Improved the automatic user session extension algorithm. There were possible scenarios in the previous version where the session would not get extended automatically.
- Streamlined the flow to unblock users Creatio blocked for entering an incorrect password several times in a row. The system administrator can now unblock users by clicking the [*Unblock*] button on the relevant user’s page.

Unblocking a user



Licensing

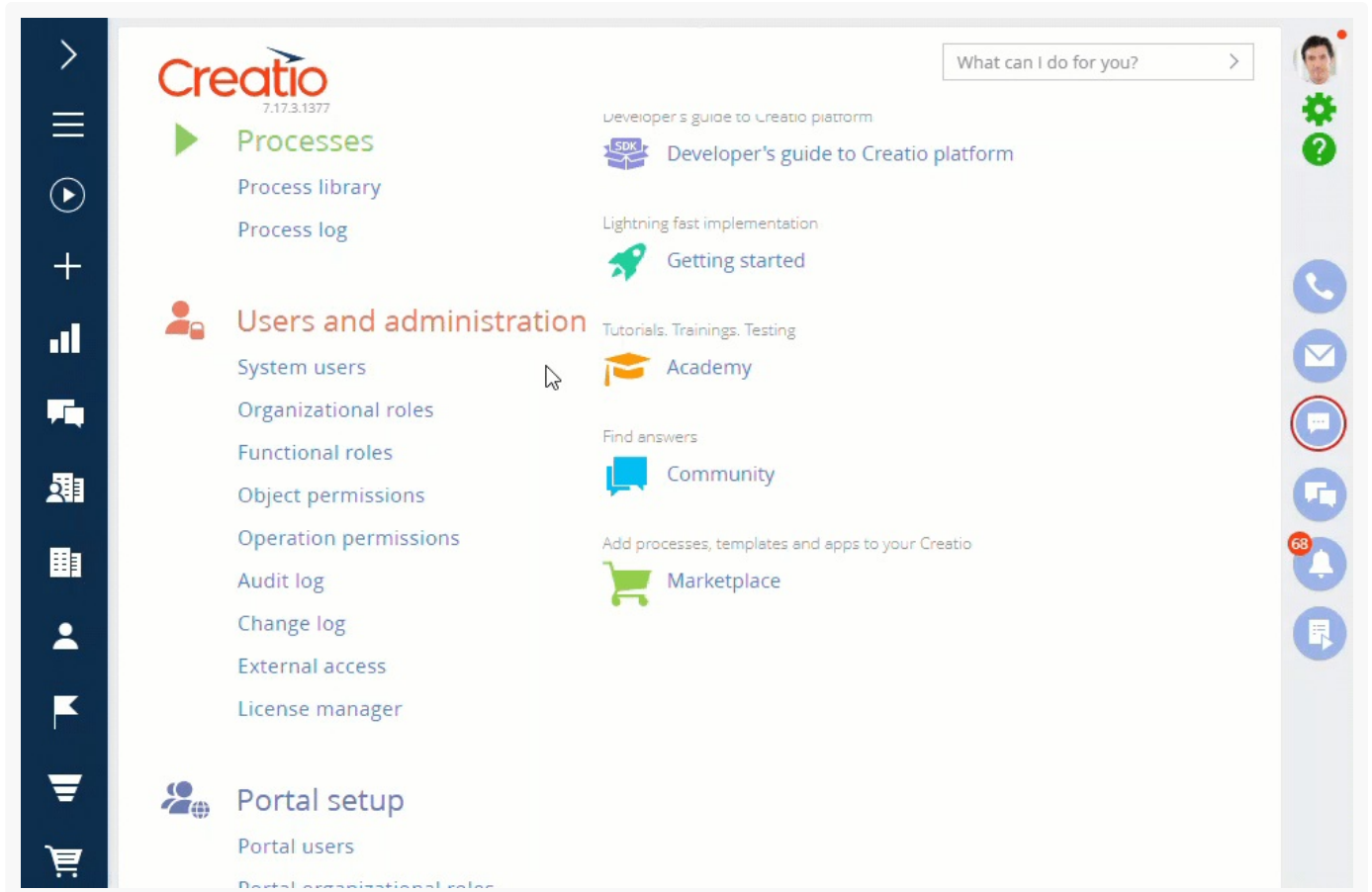
- Starting from version 7.17.4, you will need to request new licenses and specify the Creatio version you are going to use before updating on-site deployed Creatio instance. This will streamline the update flow as the new licenses will support the specified version and earlier.

Integrations

Web services

- It is now possible to integrate SOAP web services automatically. The integration wizard lets you upload a relevant WSDL or XSD file in a couple of clicks. You can select only the necessary web service methods and their parameters. Creatio will set up the web service integration with the corresponding options. The web service call code will be generated automatically based on the uploaded file.

Setting up the SOAP web service integration



Telephony

- Cisco Finesse integration libraries were updated. New libraries support Cisco Finesse 11.5 and later. If you need to integrate an older Cisco Finesse version, contact Creatio support.

Performance

Notification center

- Communication panel now processes a large quantity of new notifications faster.

Development tools

Configuration settings

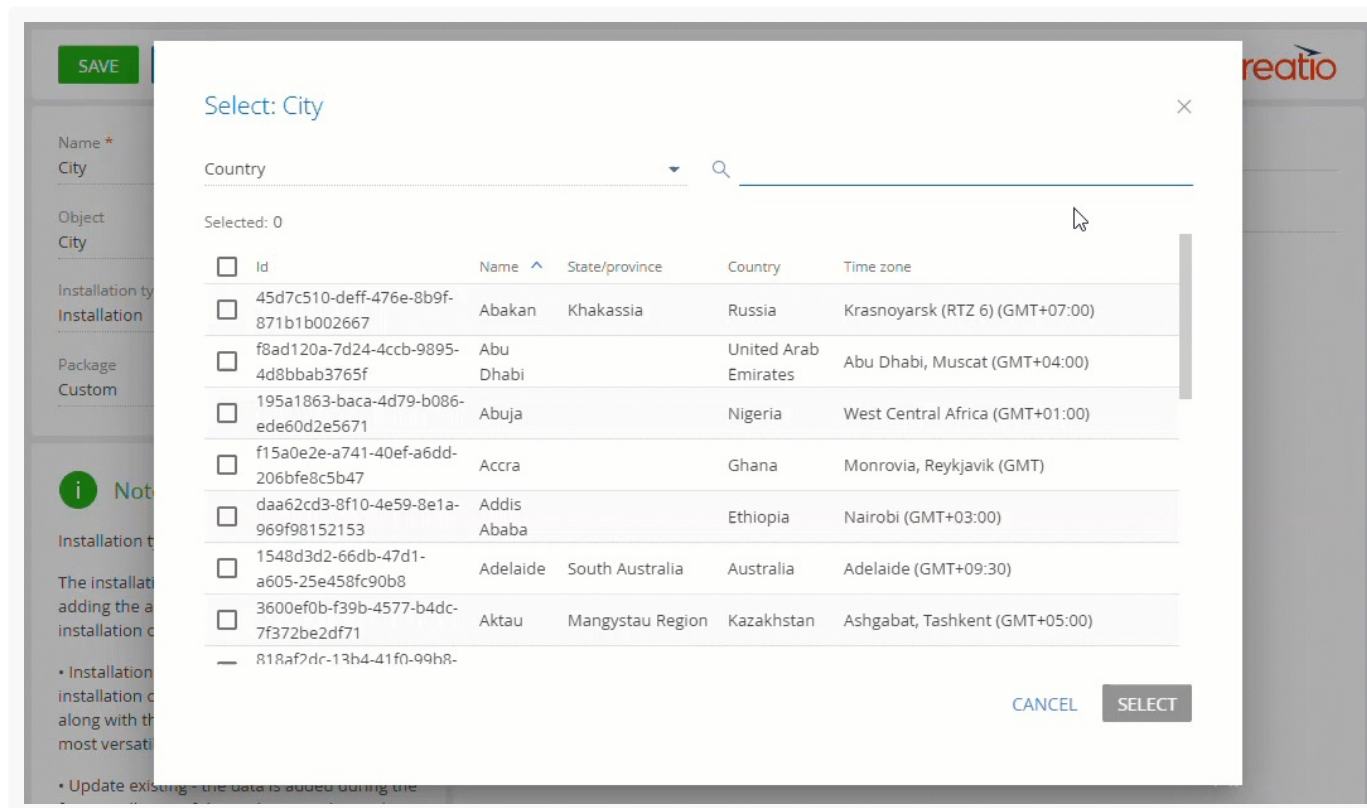
- Creatio now checks for the prefix from the “Prefix for object name” system setting (“SchemaNamePrefix” code) when setting up configuration elements. If the element has no prefix, Creatio will display a hint in the relevant field.
- Creatio will now generate the schema heading and name automatically during the configuration element’s setup. The heading and the name will include the prefix from the “Prefix for object name”

("SchemaNamePrefix" code) system setting.


Work with packages

- Data transfer errors between packages are now displayed in an easy-to-analyze table format.
- Specifying objects for data connection is now easier. The new multiple-choice option lets you select:
 - several objects from the list;
 - several objects that meet several filter conditions;
 - all objects that meet one filter condition.

Specifying objects for data connection



Work with the source code

- It is now possible to work with the code in full-screen mode. The mode also supports hotkeys. You can review the list of available key combinations in the source code editor's hint  section.

Work with data

- The [previously announced](#) removal of deprecated API data management methods was delayed to the version 7.17.4.

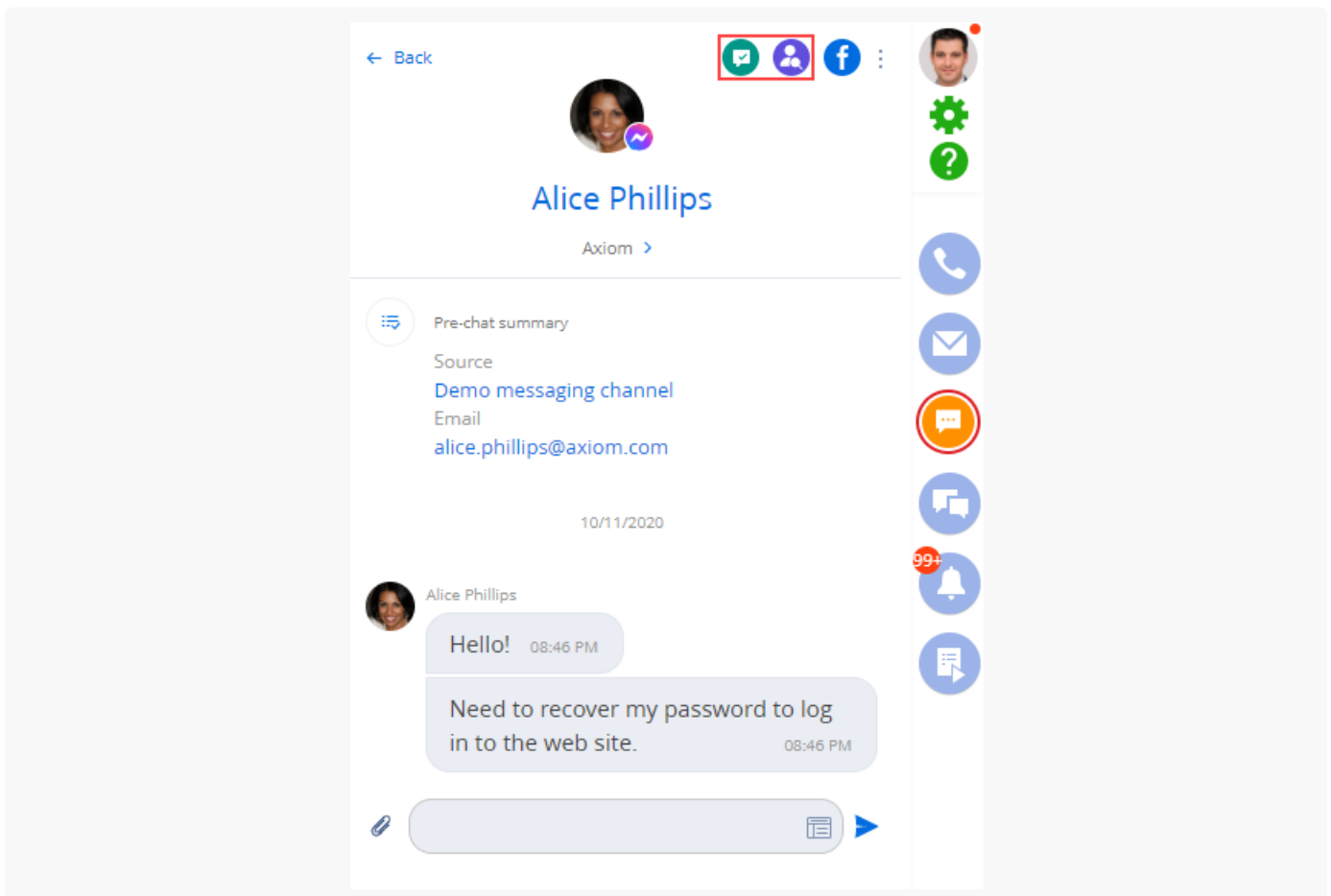
CRM Tools

Base interface and system capabilities

Chats

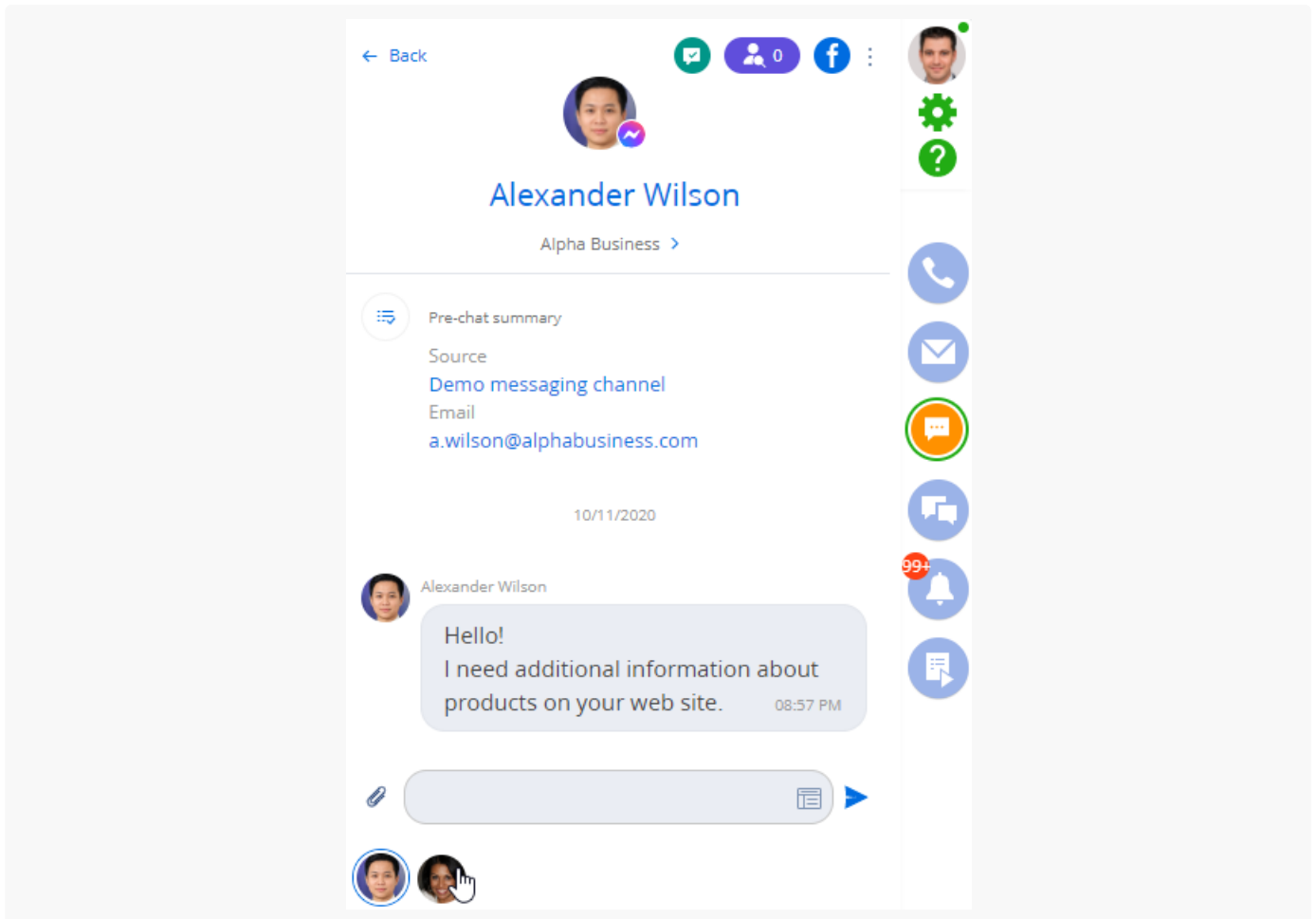
- It is now possible to use bot platforms for the initial processing of messages from Facebook messenger channel. This will help you to reduce the chat agents' workload. Should a bot be unable to process a client's request, the chat will be transferred to an agent, including the client's bot conversation history. The bot platform has to support [Handover Protocol](#).
- For better usability, [*Complete chat*] and [*Find similar contacts*] actions are now displayed as buttons in the open chat.

[*Complete chat*] and [*Find similar contacts*] buttons



- Added an option to quickly switch among chats. Agents can see all the chats they are currently processing along with the number of messages in each chat at the bottom of an active chat. Chats are displayed in chronological order.

Quickly switching among chats



Approvals

- Managers can now hide notifications for approvals assigned to their subordinates. By default, the managers can see these notifications due to the permission hierarchy. This functionality helps to expedite the approval requests and reduces the time spent managing notifications.

Managing approval notifications

The screenshot displays a CRM interface with a left-hand navigation menu and a main content area. The main content area is divided into two sections: a 'Contacts' list and an 'Invoices' list.

Contacts List:

Name	Account	Job title	Business phone	Mobile phone	Email
Alexander Wilson	Alpha Business	CEO	+1 212 542 4238	+1 212 854 7512	a.wilson@alphabusiness.com
Alice Phillips	Axiom	CEO	+1 212 1440 5222	+1 212 1204 5477	alice.phillips@axiom.com
Andrew Baker (sample)	Accom (sample)	Specialist	+1 617 440 2031	+1 617 221 5187	a.baker@ac.com
Andrew Wayne	Apex Solutions	CEO	+44 141 429 1595	+44 141 258 9878	a.wayne@apex.co.uk
Andrew Z. Barber		Specialist	+1 206 480 3801		

Invoices List:

Date	Time	Invoice ID
3/10/2021	12:13 PM	INV-23
3/10/2021	12:12 PM	INV-4
3/10/2021	11:48 AM	INV-085-01
3/10/2021	11:47 AM	INV-089-01
3/10/2021	11:45 AM	INV-3

Import from Excel

- You can now save the following Excel import parameters as a template: object, column mapping, and deduplication rules. The template can be used later to make data import easier.

Saving data import template

Data import: Duplicate management

[CLOSE](#) [BACK](#) [NEXT](#)

Specify the duplicates search rule for data import to the system

 Records are considered duplicates if following columns match

- Full name
- Account
- Type
- Full job title
- Business phone
- Mobile phone
- Skype
- Email
- Address type
- Address
- City
- Country

START DATA IMPORT

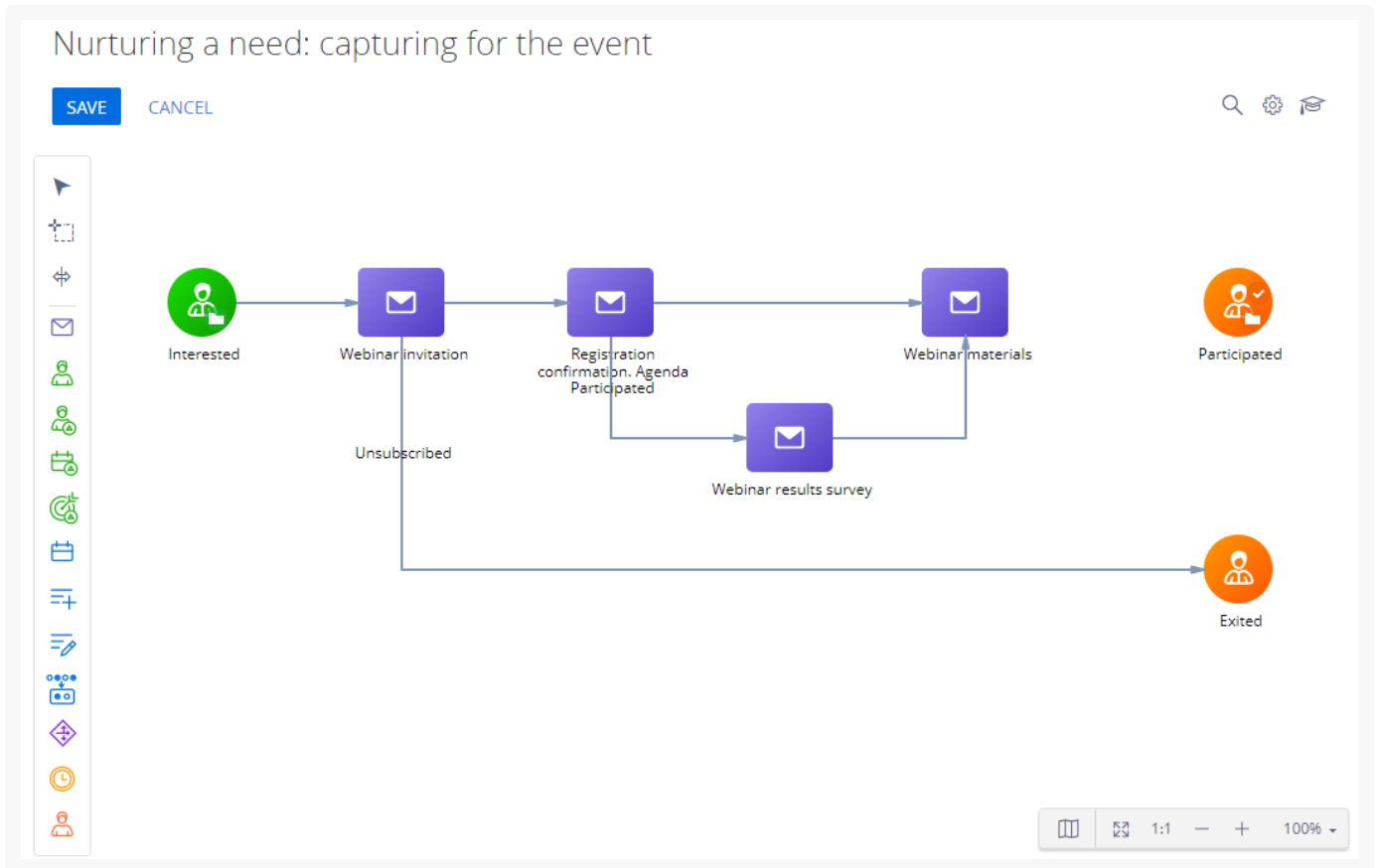
Save as template

Marketing tools

Campaigns

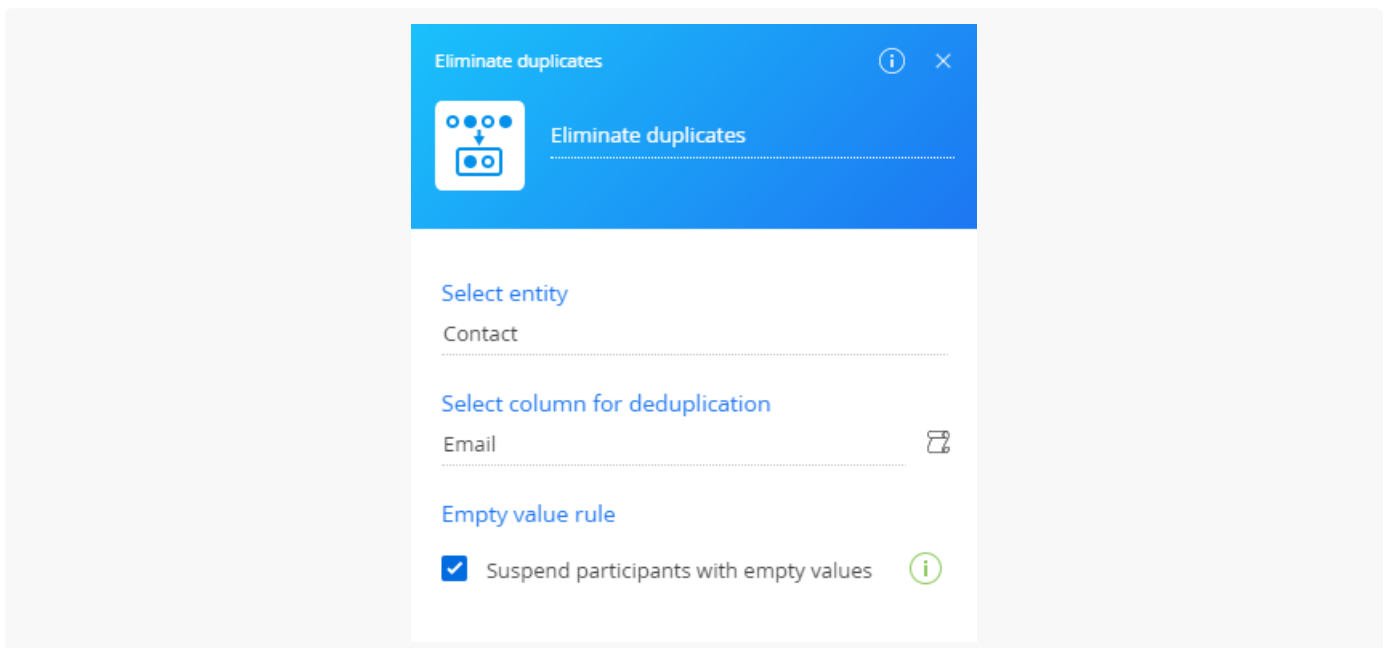
- Updated the campaign elements' visual design.

The campaign elements' new visual design



- Added a new [*Eliminate duplicates*] element. It analyzes the campaign's audience according to the rules you specify and suspends the duplicate participants.

Setting up the [*Eliminate duplicates*] element



- Added a new [*Random split*] element. It randomly moves the participants to different campaign flows. Use this to set up control groups and for A/B testing.

Sales tools

Forecasting

- It is now possible to drill down the data used to populate the columns in each saved version of the forecast. This functionality is only available for the forecast versions saved after updating Creatio to 7.17.3.

Service tools

Portal

- It is now possible to automatically grant the portal users access to connected service agreements and configuration items. The users will only have access to records where they are listed as service recipients.
- To set up this feature, add the relevant clients to service agreements and configuration items ([*Service recipients*] and [*Users*] details, respectively). The portal user or an organization these clients are a part of will receive reading permissions. You can toggle this feature by editing the “Enable rights on service agreements and conf items for portal users” system setting (“EnableRightsOnServiceObjects” code).

Financial services Creatio

Product catalog

- Split product features and customer parameters in the [*Product details*] detail to separate tabs for better usability. You can switch the parameters between the tabs in the [*Parameters*] lookup.