

bpmonline

bpm'online release

7.14.1

May 2019



Simplify the future

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We at bpm'online are constantly working to deliver advanced capabilities to accelerate your sales, service, and marketing processes. Here are the **new features** included in bpm'online version 7.14.1.

The **update guide** is available in a separate [article](#).

Discover all of the **upcoming features** and improvements to our product range on the [upcoming release page](#).

BPM'ONLINE MARKETING

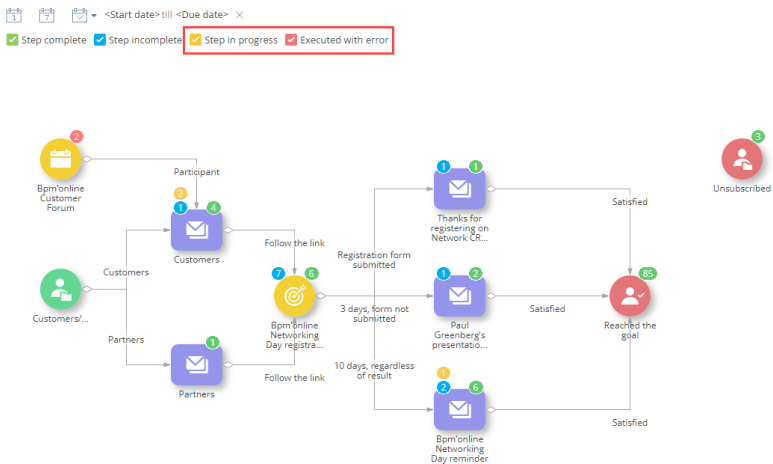


- Implemented automatic deduplication of event participants. Only unique contacts will be added to the event participant list upon their registration.

CAMPAIGNS

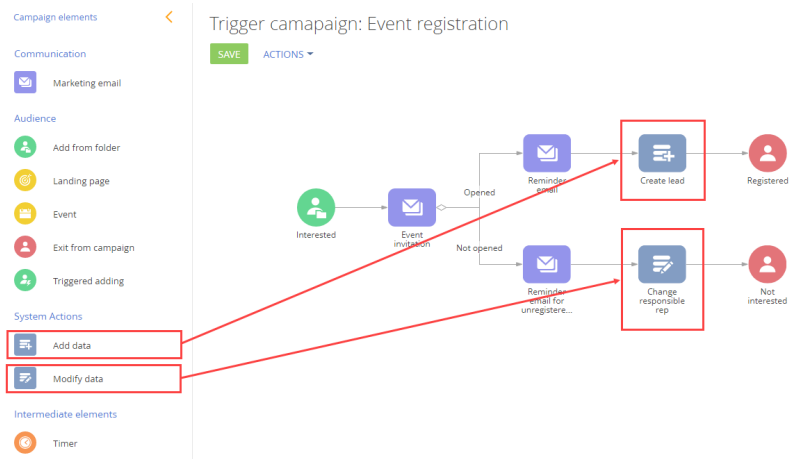
- The campaign diagram displays participant counters for every campaign element.
 - "Executed with error" - the number of participants in the step in which the error occurred.
 - "Step in progress" - the number of participants on the step which is being executed at the moment.

Participant counters for every campaign element



- Implemented new campaign elements for adding and modifying records in bpm'online objects.

New elements on a campaign diagram



The new [Add data] element creates new records (leads, calls, activities, etc.) during campaign execution. The new [Modify data] element edits existing records, connected to a particular campaign participant. For example, a campaign can automatically update a contact profile.

The list of available objects is specified in the new ""Add data" element - allowed objects" and ""Modify data" element - allowed objects" lookups.

Additionally, you can use macros in the new elements.

BULK EMAILS

- The test email template creation algorithm has been optimized. The values of email text fields are sent using the "plaintext" format instead of HTML. As a result, fewer test emails should end up in spam folders.
- Increased the amount of time allocated for mail provider requests. This fixes an issue that prevented some bulk emails from sending due to a high load on the email provider side.
- Implemented a retention period for images stored on the ElasticEmail side. As a result, images should no longer disappear in emails sent through ElasticEmail.
- Fixed an issue that occurred when the changes in the [Content blocks library] lookup were not saved after the application updated.
- Improved how emails with a pre-header are displayed in MS Outlook. Previously, pre-headers were displayed with an excessive top indent.
- Fixed an issue that sometimes occurred after the trigger email was stopped and its UTM markers were modified. Previously, bpm'online would still use the old markers if the trigger email was restarted.
- Fixed an issue that occurred while saving trigger emails that were created by copying a campaign.

BPM'ONLINE SERVICE



- Fixed an issue that occurred while specifying a contact for a new case. Previously, its account was not linked automatically.
- The sender photo should now be displayed correctly on the [Processing] tab of a case.
- Emails that were not delivered due to technical difficulties should no longer be marked as “Sent” on the [Processing] tab of a case.
- Fixed an issue that occurred when sending two case notifications simultaneously (with a sending delay). Previously, only the first email was actually sent.

CORE FUNCTIONS



- Bulk duplicate search version 1.2 has been released. In this version, bulk duplicate search mechanism will try to reconnect if the connection to the services is lost. Learn more in the “[Setting up bulk duplicate search](#)” article.
- All details now include a tooltip with full names of their columns. If a column name is only displayed partially, hovering the cursor over it will display the full name.

PORTAL



Portal user management and portal access permission management have been improved. Permission management is now available both in the main bpm'online application, and on the portal. In the main application, portal users can be registered by system administrators or users who have permission to perform the “Manage portal users” (CanAdministratePortalUsers) system operation. On the portal, new users can be registered by portal organization administrators - users with the “Administrator for organization on the portal” functional role.

- You can now configure different access rights for portal users belonging to different organizational roles (e.g., “Global clients”, “European clients”). A new [Roles for portal organization] detail is added on the organizational role page for this particular purpose.

An example of different access rights for portal users

The screenshot displays the 'Organizational roles' management interface. On the left, a tree view shows the hierarchy: 'All employees' > 'All portal users' > 'Portal users - clients' > 'European clients' (highlighted with a red box). On the right, the 'European clients' role page is shown. Under the 'FUNCTIONAL ROLES' tab, a new role 'Roles for portal organization' is listed, highlighted with a red box. This role includes three sub-roles: 'Accounting (access to knowledge base)', 'Support (access to knowledge base)', and 'Administrator for organization on the portal'.

You can add portal organizations and their users to each organizational role.

Organizations and users in the “European clients” organizational role

The screenshot shows the configuration page for the 'European clients' organizational role. On the left, a sidebar lists organizational roles, with 'European clients' selected and highlighted in red. The main content area displays the details for 'European clients', including a search bar, a 'Synchronize with LDAP' checkbox, and two tables: 'Users' and 'Organizations'. The 'Users' table lists three users: Sheila Andry (Head of department), Ronald Young (CEO), and Tiffany J. Martin (Specialist). The 'Organizations' table lists two organizations: Clearsoft and Alpha Business.

- Portal administrators (“Administrator for organization on the portal” user role) now have the ability to activate or deactivate portal users in the company profile. In the main application, the [Portal users] detail on the account page now features an ability to activate or deactivate portal users. This feature is available to system administrators or users who have permission to perform the “Manage portal users” (CanAdministratePortalUsers) system operation.

Activating a portal user in the organization profile on the portal

The screenshot shows the 'Alpha Business' organization profile. The top section displays the organization's name and phone number. Below this, the 'GENERAL INFORMATION' section is expanded to show 'Portal users'. A table lists two users: Jordan Anderson and Alexander Wilson. The 'Active' column for both users has a checked checkbox, which is highlighted with a red box.

Name	Contact	Administrator for orga...	Accounting (access to k...	Support (access to kno...	Active
j.anderson@yahoo.co	Jordan Anderson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
a.wilson@alphabusine	Alexander Wilson	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Added an ability to create a portal organization directly on the account page. You can use the [Portal users] detail to create an organization for an account via the [Create organization] button. Additionally, an organization can be created on the portal via the [Contacts] and [Portal users] details. Portal users can be registered by system administrators or users who have permission to the “Manage portal users” (CanAdministratePortalUsers) system operation.
- Implemented an ability to create a portal user directly on the account page. To do this, use the [Contacts] and [Portal users] details. Portal users can be registered by system administrators or users who have permission to the “Manage portal users” (CanAdministratePortalUsers) system operation.

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- Registering new portal users and sending invitations is done separately. Invitations can be sent at any given moment once the user is registered in bpm'online. To do this, use the [Send invitation] action on the account page (the [Portal users] detail) and on the company profile on the portal. All recipients will receive an invitation with a link to access the portal.
 - Implemented the self-registration mechanism on the portal when the required fields (not included in the registration form) were added to the contact page in the main application.

INTEGRATIONS

- While adding a new email account, bpm'online will check if it has already been registered for a different user. If it is, a notification will prompt you to request access from a different user.



USER CUSTOMIZATION TOOLS

CONTENT DESIGNER

- You can now configure the order in which content blocks are displayed on mobile devices. For example, you can display a product image at the top of the email, and its description at the bottom (or vice versa). This is done via the [Group]/[Ungroup] buttons in the content Block Designer.
- Improved the display of HTML content blocks on mobile devices for certain email clients (e.g., Gmail).
- Multiple buttons in the email body should now be displayed correctly on mobile devices. For example, if a template string contains two buttons of the same width and they occupy less than half the total width of the template, they will be displayed next to each other in the same string instead of the same column on the mobile device.



DEVELOPMENT TOOLS

- New features in the bpmcli command line utility:
 - The "update-cli" command updates the bpmcli utility to the latest version. Update-cli checks if bpmcli is updated to the latest version every time a command is executed, and prompts the user to update the utility if new updates are available.
 - The "execut-sql-script" command enables you to execute SQL scripts on the site.

Additional improvements:

- The package installation log can be displayed in the console or saved as a file.
- When executing a command, a confirmation request will be displayed in order to prevent unintended commands on a production environment.
- Added MacOS and Linux support for the bpmcli utility.

The utility, as well as several examples is available on [github](#).

