

Release notes: ClearView CRM 2.11.2

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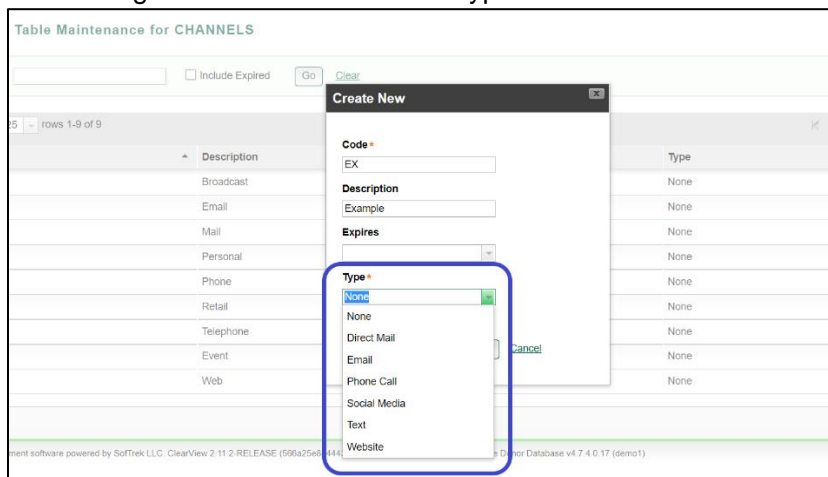
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Highlights

ClearView CRM release 2.11.2 provides new features that set the groundwork for organizations to capture even more information about their engagement and fundraising activities. They also support Campaign and Engagement reporting features to be released over the next several months.

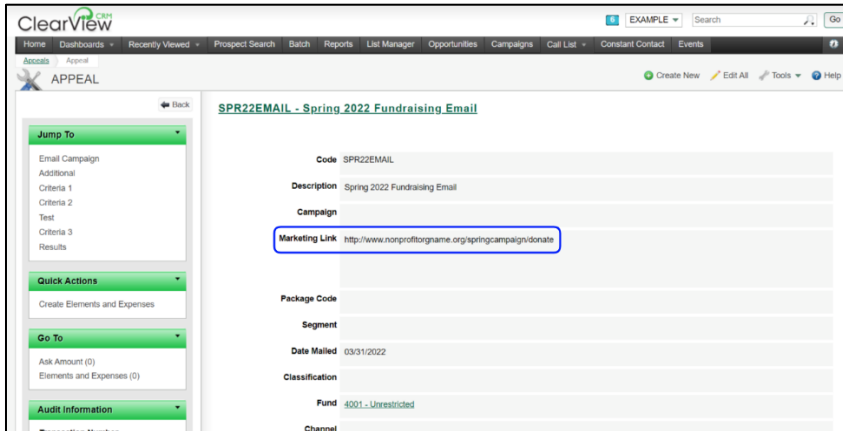
Organizations who want to take advantage of these features should consider:

- Creating Appeal codes for digital appeals that can then be used as Source Codes for incoming transactions with pre-defined appeal codes
- Associating Appeals with Channels
- Associating Channels with Channel Types



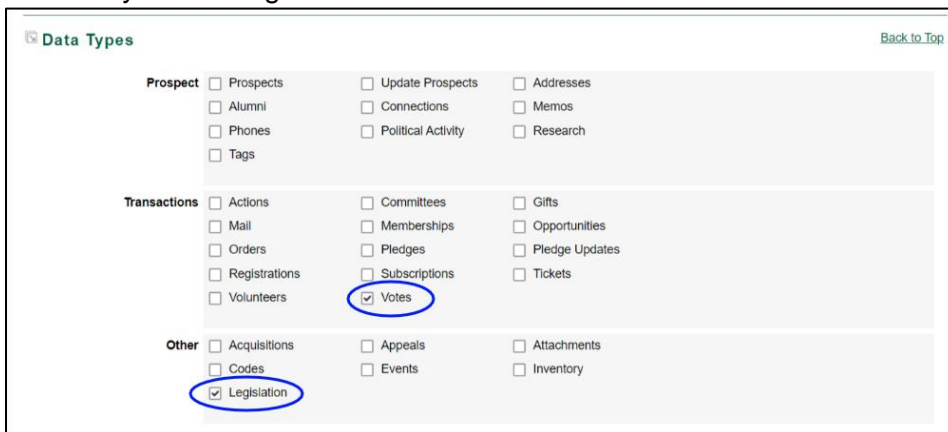
- Recording the email or social media appeal code in the new Source code field when entering transactions in ClearView.

- Using the new Market Link field to store a URL (or other marketing metadata) that is associated with the appeal.

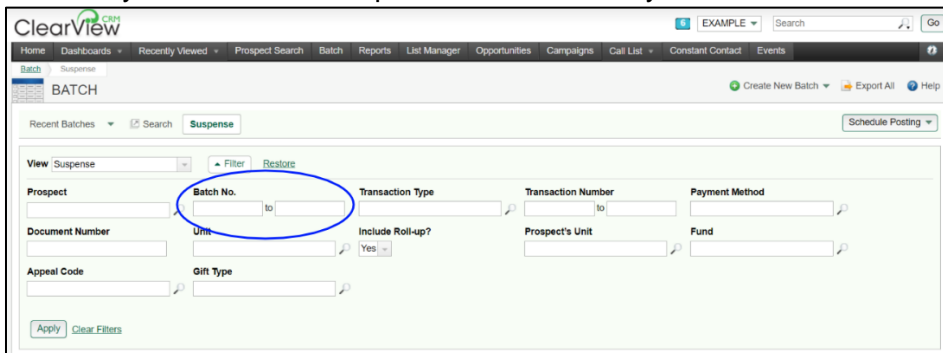


Of note, among the many improvements in this release, are:

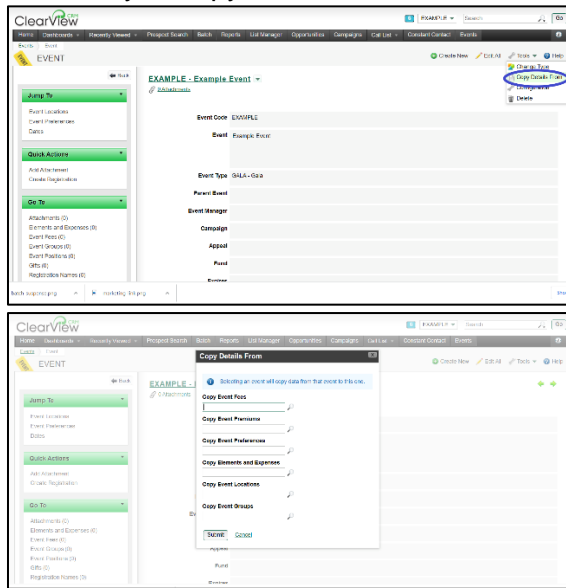
- The ability to load legislative bills and votes via a Data Definition.



- The ability to filter Batch Suspense transactions by batch number.



- The ability to copy details from one Event to another.



Lastly, release 2.11.2 contains many small scope fixes which improve user experience.

Full list of completed work

New features

Reference no. Description

CV-8619 The ability to copy event components (fee structure, locations, groups, etc.) from another event is now available and accessed from the Tools menu on an event.

CV-8949 Vote and Legislation data can now be loaded via a Data Definition.

CV-9011 The Planned Gift data table has been updated to also show a row for any planned gift where the prospect is a beneficiary. Users are now able to view a planned gift from the beneficiary's prospect record.

NOTE: A new field, PG Record Type, is available to be added to the Planned Gift data table.

CV-9020 SOURCECODE (foreign key to APPEALS) and MARKETING_LINK (4000-character text) columns have been added to several tables in the database.

The Source Code field is available to be added to the Gift, Pledge, Payment, Membership, Registration and Batch Detail data tables and VAEs.

The Marketing Link field is available to be added to Appeals, Mail and Mail Response data tables and VAEs. The fields can be populated using a Data Definition, or by direct entry in the respective VAE.

CV-9021 A new Channel Type field has been added to the Channel Code definition in Table Maintenance.

NOTE: Channel Type is a universal system code. Values include Direct Mail, Email, Phone Call, Social Media, Text and Website.

Improved features

Reference no.	Description
CV-7092	The Registration list of values used to associate a registration with a gift or batch transaction has been improved.
CV-8003	An issue that was causing GENERATIONS code years to appear with commas in Table Maintenance has been fixed.
CV-8122	Data table filters have been improved so the 'expired icon' no longer overlaps the next field.
CV-8884	Users will be prevented from logging in to ClearView if the version they are accessing is not compatible with the database version with which they are authenticating.
CV-8965	Error messages in payment method Denials and Errors have been improved.
CV-8985	The Tax Year field is now available to add to the Batch Detail data table and VAE.
CV-8991	Prospect Summary panel language has been improved.
CV-8996	A new 'Opportunity Next Action Required?' Application Setting has been added. The new setting 'Optional - default to 'Do Not Create Action' will allow an organization to prevent an action from being automatically created when a new opportunity is added. To keep the feature that automatically creates an Action, organizations should use the setting 'Optional - default to 'Create Action'.
CV-9013	The Mail data table Options column has been removed; a new 'Mail Response' column is available to add to all Mail data tables. The new Mail Response column includes a count of Associated Mail Response rows.
CV-9017	Schedule Batch Posting has been improved so it is clear that the procedure will attempt to post all eligible transactions, not just those for which the user may have filtered.
CV-9024	The ability to filter by batch number range has been added to Suspense.
CV-9027	Additional fields (including External ID, External Source, Document Number, Source, Updated By, and Update Date) have been made available to add to the Phone data table.

Fixes

Reference no.	Description
CV-7605	Dashboards now accept an ampersand (&) in the panel name. This does not apply to name changes to existing panels, only newly created panels.
CV-7781	An issue that was preventing the Campaign description from appearing next to a payment's appeal after the payment had been sent to accounting has been fixed.
CV-7978	An issue that was preventing editing of Dashboard -> Configure Panels settings has been fixed.
CV-8169	The unit 'info icon' has been improved so it doesn't overlap with the 'Query' link next to it.
CV-8206	Hover-over boxes have been improved so they do not prevent the user from clicking the pencil icon for in-line edit.
CV-8218	An issue that was causing Table Maintenance exports to mishandle some text fields has been fixed.
CV-8695	Data Definitions with a period (.) in the name are no longer accepted.
CV-8704	Events now accept a period (.) in the event code.
CV-8946	Editing a Batch Detail has been improved so that cancelled changes display consistently.
CV-9012	Mail Response now displays a count next to the link in Go To menus.
CV-9026	The Yahrzeit donation section now correctly displays In Honor/Memory links.
CV-9029	An issue on the Membership VAE that was causing membership expiration date to default to a date in the past in some instances has been fixed.
CV-9030	An issue in the List Manager Lists and Queries grid that was causing blank expiration dates to display as '12/31/1969 07:00 PM' has been fixed.
CV-9032	Prospect dynamic label names have been improved so the proper label displays based on record type.
CV-9033	An issue that was causing the Gift and Pledge VAEs to not always calculate balance correctly has been fixed.

Setup notes

ClearView's Jaspersoft version is 7.5. Previous versions of Jaspersoft are not supported for cloud clients. Contact your account manager with any inquiries: support@softrek.com

Core donor database version

ClearView 2.11.2 requires a minimum core donor database schema version of 4.7.4.0. Additionally, ClearView 2.10+ requires:

- a minimum Oracle Database version 12.1c
- Open Java 13 (JDK 13) installed on the server on which ClearView runs
- Tomcat 9 installed on the server on which ClearView runs
- ojdbc8-12.2.0.1.jar installed on the server on which ClearView runs

Workstation requirements and supported browsers

To obtain the best performance results with ClearView CRM, workstations should have the following specifications (at minimum):

- Intel Core 2 Duo or equivalent
- 2GB of RAM
- 1280x1024 desktop resolution
- Broadband Internet connection (business-level DSL, cable, fiber-optic, etc.)

Having several applications running concurrently in an operating system can negatively affect any software application's performance. Using ClearView CRM on a modern, high-end workstation will mean better, more responsive performance. Using ClearView CRM on an older PC running many applications at the same time will likely result in less-than-optimum performance. Following the above guidelines allows ClearView CRM to offer the best possible experience.

The following browsers are officially tested and supported for use with ClearView CRM: Chrome and Firefox.

Per Microsoft, Internet Explorer 11 is the last major version of Internet Explorer; IE 10 and below have reached end of support. IE 11 will continue receiving security updates and technical support for the lifecycle of the version of Windows on which it is installed. Microsoft will end support for certain operating systems on June 15, 2022. It is now considered a compatibility solution with no support for new web standards. ClearView CRM screens will increasingly render incorrectly in IE11 due to the legacy engine it uses to render web pages. ClearView CRM recommends all clients begin to use Chrome or Edge or Firefox if they are not doing so already before support of Internet Explorer is discontinued. All other browsers have not been tested and are not officially supported.

Client Services contact information

If you have questions, please contact Client Services:

support@softrek.com
800.442.9211