

## Release notes: ClearView CRM 2.11.3

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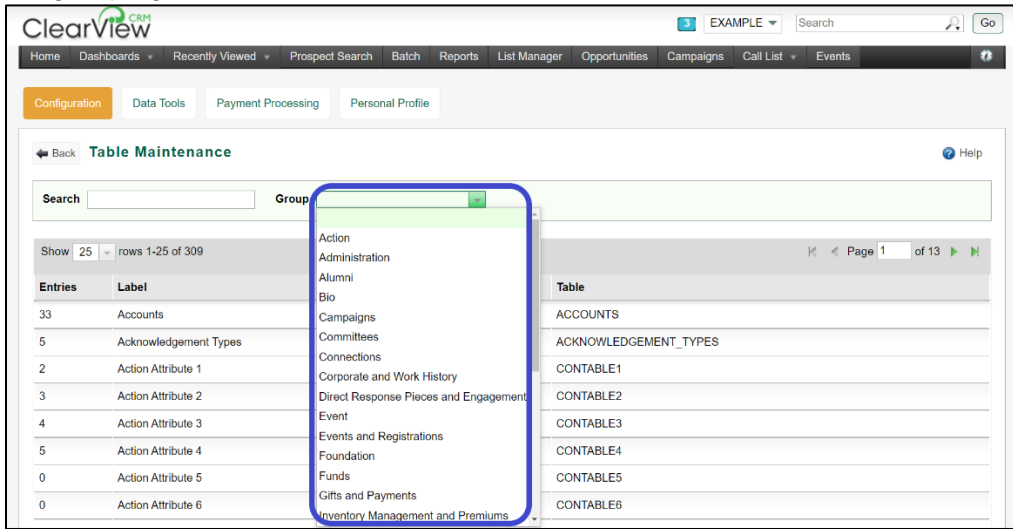
### Highlights

ClearView CRM release 2.11.3 contains several enhancements designed to improve user experience along with a few brand new features. They include:

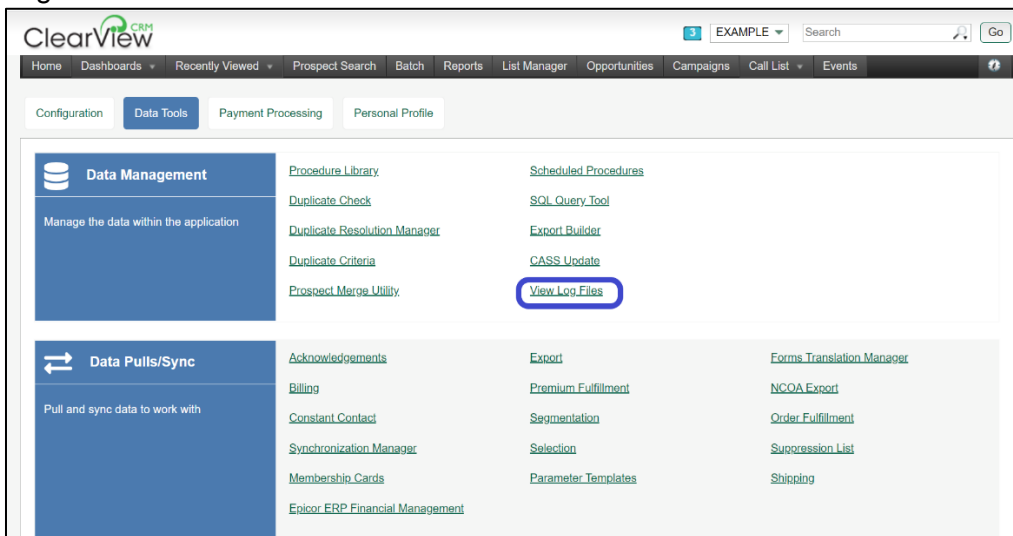
- Organizations can now capture and display marketing insights for a variety of transactions within ClearView.



- Code tables within Administration > Table Maintenance are now categorized by feature set groupings for easier location.



- Log files can now be viewed from within ClearView.



## Full list of completed work

## New features

### Reference no. Description

CV-7466 Maximum character length now appears in the Table Maintenance field when adding a new code.

CV-8818 Table Maintenance tables can now be searched by group.

Groups include: Actions, Administration, Alumni, Bio, Campaigns, Committees, Connections, Corporate and Employment, Events and Registrations, Foundation, Funds, Gifts and Payments, Inventory and Premiums, Mail and Engagement,

Memberships, Opportunities, Orders, Planned Gifts, Political Activities, Projects, Prospects, Recognitions, Research, Subscriptions, Ticketing, Tags, Units and Volunteers.

**NOTE:** A code table can appear in more than one group.

CV-8945 Log files can now be viewed within the ClearView application.

**NOTE:** The feature is available in Administration > Data Tools in the Data Management section.

**NOTE:** This feature is initially only available to the database owner account. It will be made available to other user accounts in a subsequent release.

CV-9035 A new table, MARKET\_INSIGHTS, has been added to the core donor database. Market Insights data can be added to ClearView via an API call or populated using a Data Definition.

A Market Insights display-only block of fields is available to be added to several record types. They include: GIFT, PAYMENT, ACTION, RESEARCH, POLITICAL ACTIVITY, REGISTRATION, PLANNED GIFT and OPPORTUNITY.

**NOTE:** To add the Marketing Insights data block, navigate to the appropriate VAE Configuration page, drag the Market Insights entry from the list of Available Fields to the desired location on the VAE, and click on Save VAE Config.

**NOTE:** Only one MARKET\_INSIGHTS row per transaction is allowed.

## Improved features

Reference no.	Description
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CV-7624	The Premium Items LOV has been improved to also return results for premiums even when the item is not in stock.
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CV-7692	The Event Fees data table has been improved add the Fee Group description.
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CV-7999	Prospect Search has been improved to retain the page when you navigate back to search results using the in-application 'Back' arrow.
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CV-8180	When creating a new Action Code in Table Maintenance, the Foreground/Background field now defaults to 'foreground'.
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CV-8590	On the Connections View/Add/Edit (VAE) screen, inline edit of a relationship code is no longer available if you switch to a relationship code that is reciprocal.
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**NOTE:** Changing a reciprocal relationship now requires deleting and re-creating the connection.

CV-8602	The Notes feature has been improved to better handle notes associated with Opportunities.
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- CV-9016 The Batch Range inputs on Pledge Acknowledgements, Payment Acknowledgements and Honor/Memorial Notifications no longer include a comma in their formatting.
- CV-9036 Labels has been improved to also allow for record-type based labels for the CPRONOUN field.  
**NOTE:** To change these labels, navigate to Administration -> Configuration tab -> Labels and search for 'CPRONOUN'.
- CV-9038 The design of the Actions' 'Complete' button has been improved. It is now labeled 'Complete Action' and changes color when the user's cursor passes over it.
- CV-9039 When creating a Data Definition, if Duplicate Check checkbox is checked (Duplicate Check = 'Y'), a Duplicate Criteria set must be provided.

## Fixes

### Reference no. Description

- CV-8862 The Inventory Management Items data table filters now respect organization-defined labels.
- CV-8896 The NCOA Import procedure has been improved so that the required fields appear for mapping when a new definition is started. These fields include: ADDRESSID, IDNUMBER, NCOA\_CODE and NEW\_STREET.

## 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](mailto:support@softrek.com)

## Core donor database version

ClearView 2.11.3 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