

Release notes: ClearView CRM 2.11.4

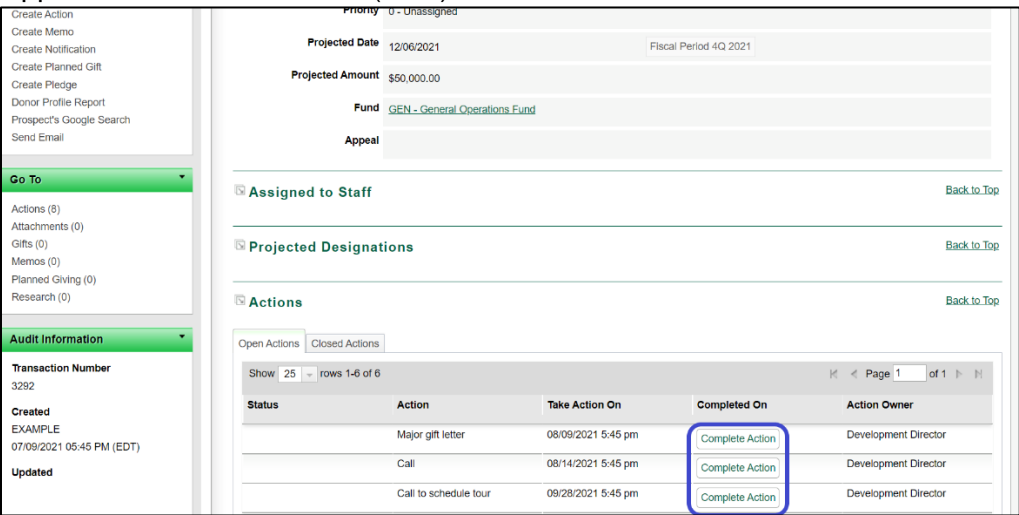
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Highlights

ClearView CRM release 2.11.4 delivers a mix of new features, enhancements and fixes designed to improve user experience. Of note in this release:

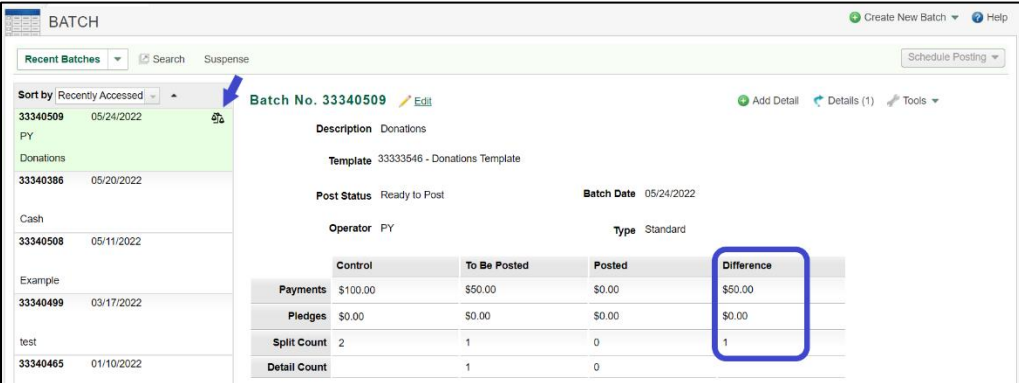
- Users can now complete an action associated with an Opportunity from within the Opportunities View/Add/Edit (VAE) screen.



The screenshot shows the 'Actions' section of the Opportunities View/Add/Edit (VAE) screen. The 'Actions' table has the following data:

Status	Action	Take Action On	Completed On	Action Owner
	Major gift letter	08/09/2021 5:45 pm	Complete Action	Development Director
	Call	08/14/2021 5:45 pm	Complete Action	Development Director
	Call to schedule tour	09/28/2021 5:45 pm	Complete Action	Development Director

- An icon now appears next to any batch that is not in balance.



The screenshot shows the BATCH screen for Batch No. 33340509. The batch is in 'Ready to Post' status. The 'Difference' column in the summary table is highlighted, showing a value of \$50.00.

	Control	To Be Posted	Posted	Difference
Payments	\$100.00	\$50.00	\$0.00	\$50.00
Pledges	\$0.00	\$0.00	\$0.00	\$0.00
Split Count	2	1	0	1
Detail Count		1	0	

- Users are now able to data enter and/or upload costs associated with Appeals.

The screenshot shows the 'APPEAL COSTS' form in the ClearView CRM. The form is titled 'TEST_APPEAL - Test Appeal Code'. It features a 'Save' button and a 'Cancel' button at the top left. The main form area contains several input fields: 'Appeal' (with a dropdown menu), 'Cost of materials', 'Cost of printing', 'Cost of postage', 'Cost of staff', 'Cost of other items', 'Cost of names', 'Quantity mailed', and 'Quantity of names bought'. At the bottom right, there is a 'Unit' field and a 'Query' button.

Full list of completed work

New features

Reference no. Description

- | | |
|---------|---|
| CV-7853 | Batch has been improved with an icon that shows in the list when a batch is unbalanced. |
| CV-8611 | A table to associate costs with appeals is now available. |

NOTE: This new option can be added to the Appeals View/Add/Edit (VAE) as a Quick Action and a Go To option by your ClearView administrator.

Improved features

Reference no. Description

- | | |
|---------|---|
| CV-7363 | The 'Complete' button has been added to the Opportunities Action grid. |
| CV-8223 | The export of Tags from Table Maintenance now includes the Category. |
| CV-8262 | Breadcrumb navigation, between viewing a prospect and a sub-table, has been improved. |
| CV-8457 | Date fields in batch have been improved to work with the <alt+d> hot key which auto-populates the field with the current date. |
| CV-9028 | Address, Phone and Email type have been added to the Prospect Info box. |
| CV-9041 | The following fields are now available to add to the Connections data table:
TIMESTAMP, UPDATE_DATE, USERID_ADD, USERID_CHANGE, UNITID, USERNUMBER1. |

CV-9045	The Inventory Management data table has been improved with Status and Price Range filters.
CV-9046	The Custom Content Definitions table has been improved with filters and more explicit type values (Dashboard, Prospect and Campaign).
CV-9050	Appeals Add has been improved with a 'Create Another' checkbox; when checked, on save, the user is immediately presented with the add page again.
CV-9052	Administrative users can now navigate from Procedures to Procedure Library Administration and back.
CV-9053	Administrative users can now navigate from Reports to Reports Library Administration and back.
CV-9060	Stripe payment processing error messaging has been improved.
CV-9062	Batch Payment Method entry has been improved with type ahead action.

Fixes

Reference no.	Description
CV-7472	The List Manager Deceased field has been moved to the General section under Prospect, and the default has been changed from 'Any' to 'No'.
CV-8029	Entry of Tags in the Call List module has been improved.
CV-9042	Prospect Search no longer fails if a prospect's spouse cannot be viewed due to virtual private database (VPD, aka FGA) settings.
CV-9068	Fields that were recently made available to add to the Payment VAE are now able to be set to allow change after a payment has been sent to accounting. These fields include: USERCODE7, USERCODE8, USERCODE9, USERDATE1, USERDATE2, USERDATE3, USERFLAG2, USERFLAG3, USERNUMBER2, USERNUMBER3, USERTEXT2, USERTEXT3, EXTERNAL_ID, EXTERNAL_SOURCE, REV_REASON.
CV-9069	The Batch View/Add/Edit (VAE) screen notify party widget has been fixed to honor the 'auto-populate with tributee connections' setting.
CV-9070	When associating EFT information with a Lifetime Pledge on the Gift VAE, the transaction type now saves as 'LP'; it had been saving as 'P'.

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 2.11.4 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