Release notes: ClearView CRM 2.11.7

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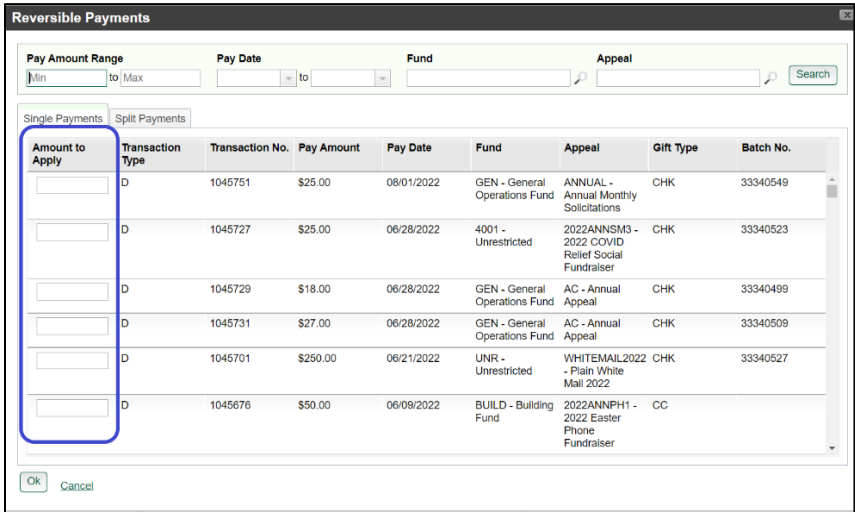- Client Success contact information

Highlights

Of note in this release of ClearView CRM:

Partial payment reversals - Organizations can now partially reverse most payments within Batch. For qualifying payments that are associated with credit cards processed through Stripe, partial reversals will generate a partial refund to the cardholder.

A partial reversal of a payment transaction, when posted, will result in the original payment transaction being split into two payment transactions whose sum is equal to the original payment amount. Additionally, the payment reversal record that is created will only be linked to the newly created split record where the pay amount is equal to the amount entered in the Amount to Apply field as shown below.

When a user selects the PYR transaction type in batch, they are prompted to select a payment to reverse.

- To completely reverse a payment transaction, click on the desired payment and click OK.
- To partially reverse a payment transaction, enter the reversal amount in the Amount to Apply field on the appropriate row and click OK.

NOTE: Partial reversals are only available for non-split payments that were not made via payment processing at all (ie cash or check) or made via Stripe payment processing.

Familiar Name has been added to Duplicate Check criteria – organizations can now include a prospect's familiar name in duplicate check criteria sets.

If the Usage field for Familiar is set to "In Combination", ClearView will inspect the Familiar Name AND the First Name field for the number of characters defined in the Apply column.

If the Usage field for Familiar is set to "Stand Alone", ClearView will only inspect the Familiar Name field for the number of characters defined in the Apply column.

NOTE: If the Apply column is left blank, ClearView CRM will inspect the entire field value.

Full list of completed work

New features

Reference no.	Description
CV-7625	A new field, Reversal Reason, can be made available to the Batch Detail and Payment View/Add/Edit (VAE) screen. **NOTE:** In Batch Detail, the field is only available for entry of the transaction being entered is a reversal (PYR).
CV-8653	A new panel of List Manager Queries is now available to add to dashboards, a 'List Manager Lists' panel already exists.
CV-19921	Some payments are now eligible for partial reversal and, if associated with a Stripe credit card or Stripe ACH, partial refund.

Improved features

Reference no.	Description
CV-8516	Familiar name can now be added to a Duplicate Criteria definition.
CV-9591	The Recently Viewed list now updates when a new prospect is added.
CV-9963	The error presented when a user attempts to delete a batch template that is in use has been improved.
CV-19930	The 'Pledges' label in the batch header grid has been changed to be more reflective of the transactions included in the count; it now says 'Reversals and Receivables'.
CV-19949	The Prospect Preferences 'Add' button label has been updated to 'Add Preference'.

Fixes

Reference no.	Description
CV-8618	An issue that was preventing the Action and Opportunity shared status/stage field from being updated in Table Maintenance when it was part of more than one LOV context has been fixed.
CV-9976	In Mailing Segmentation and Selection, the Mailing Table field now clears if a user attempts to use a template which stores a mailing table that the user does not have access to.
CV-19971	Links can now be added as attachments without invoking virus scan.
CV-19976	The performance of premiums data tables has been improved.

Setup notes and core donor database version

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

ClearView 2.11.7 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):

- Core i5 processor
- 4GB of RAM
- 1280x1024 desktop resolution
- Chrome or Firefox browser
- Reliable internet connection

Client Services contact information

If you have questions, please contact Client Services:

support@softrek.com
800.442.9211