

Release notes: ClearView CRM 2.11.8

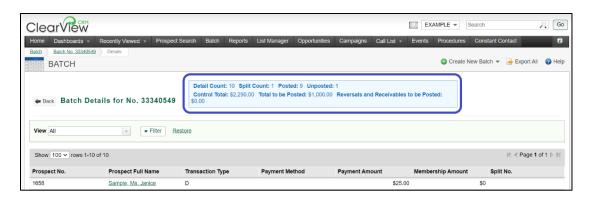
Contents

- Full list of completed work
- Setup notes and core donor database version
- Workstation requirements and supported browsers
- Client Success contact information

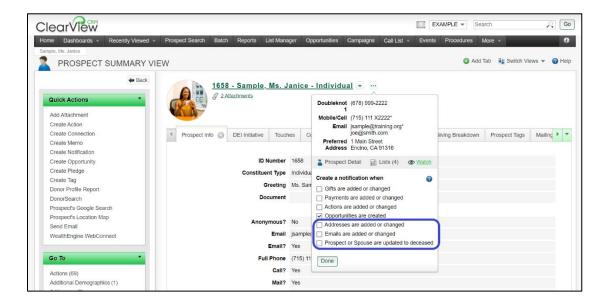
Highlights

ClearView 2.11.8 contains several enhancements and fixes designed to improve user experience. Of note in this release:

Additional metrics are provided in the blue summary box on the Batch Details screen.



Users can now watch for additional constituent events.



Full list of completed work

New features

Reference no. Description

Improved features

Reference no.	Description
CV-8007	The Appointments section of the Committee VAE can now be removed or added in VAE Configuration.
CV-8844	Users can now subscribe to be notified when a prospect's address or email is added or changed. Watch a prospect by adding them to your Watch List using List Manager, or subscribe directly from a Prospect record.
CV-8846	Users can now subscribe to be notified when a prospect or a prospect's spouse is marked deceased. Watch a prospect by adding them to your Watch List using List Manager, or subscribe directly from a Prospect record.
CV-9576	The calendar widget has been updated with the ability to jump to 'today's date'.
CV-9961	Admin users are now able to view and work with other users' private List Manager queries and lists. Use the new Filter at the top of the Lists and Queries tabs to toggle between 'My Lists', 'Public Lists' and 'Private Lists'.
CV-19973	The blue box that appears across the top of batch details now includes the current count (BATCH.CURRCOUNT) that indicates the number of main transactions (not the number of details, which includes splits).

Fixes

Reference no.	Description
CV-9945	An issue that was preventing user from hitting 'Enter' to invoke a new line in Prospect Add text fields has been fixed.
CV-19968	A prospect's birth year can now be added to the Planned Giving Beneficiary data table.
CV-19972	The behavior of the Payment Method field in batch has been improved to work when the field is required and a transaction that does not require a payment method is created (ex. a pledge or payment reversal).
CV-19997	An issue introduced by a Chrome browser update that was making the 'Run' button difficult to click has been fixed.
CV-20006	An issue that was preventing Events Go To menu counts from displaying when the event code had a period (.) in it has been fixed.

An issue that was causing audit dates to display incorrectly in a Safari browser has been fixed.

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 2.11.8 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