

## ClearView 2.6.6 technical release notes

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### Release highlights

The following are some highlights from the work that we completed for this release:

#### Run as user feature: new Switch Back convenience

The **User** administration **Run as user** feature allows you to run as another ClearView user to confirm configuration and security settings. We made it easier for you to drop run-as access with the new **Switch Back** option, found in the **user menu**.

The screenshot shows the ClearView CRM interface. At the top, the user menu is open, displaying options: Settings, Help, About Us, Switch Back (highlighted with a green bar and an orange arrow), and Logout. The main dashboard area shows 'CLEARVIEW ALPHA HOME DASHBOARD' with a 'Giving - Gift Summaries' widget and an 'Action Reminders' widget. The 'Giving - Gift Summaries' widget compares 'This Year' and 'Previous Year' data for Total Donations, Number of Gifts, and Average Gift. The 'Action Reminders' widget shows a calendar for Tuesday, April 19, 2016, with a table of upcoming actions.

Take Action On	Full Name	Action	Owner
04/19/2016 10:00 AM	Flipper	Meeting - There	Tasha M. Salski (9, TREK)
04/19/2016 11:30 AM	Stephens, Mrs. Samantha	Tour	Tasha M. Salski (9, TREK)
04/19/2016 03:00 PM	Keebler, Mr. Ernest J.	Phone Call	Tasha M. Salski (9, TREK)
04/19/2016 04:45 PM	Partridge, Mrs. Shirley	Personal Email Correspondence	Tasha M. Salski (9, TREK)

#### Main navigation menu improved to better handle full menus

For users that have many options included in your **main navigation menu**, we improved the menu's styling. You will notice that options no longer wrap around, but instead condense into a **More** drop-down menu.

The screenshot shows the ClearView CRM interface with the main navigation menu. The 'More' dropdown menu is open, showing options: Utilities, Operational Tools, and Political Outreach. An orange arrow points to the 'More' dropdown menu.

# Full list of completed work

## Updates

Reference No.	Description
• CV-6706	The ClearView <b>main navigation menu</b> has been improved to condense wrap-around items into a <b>More</b> drop-down menu.
• CV-6445	Performance improvements have been made to syncing the <b>Business Intelligence</b> reports repository with ClearView.
• CV-6616	The administrative <b>Data Table View</b> configuration table can now be sorted by <b>Name</b> .
• CV-6703	<b>Prospect Search</b> and <b>Retrieve Prospect to Create Opportunity</b> search features now default <b>Search Options</b> according to relevant <b>User Option</b> settings.
• CV-6534	The administrative <b>Run as this user feature</b> now allows you to <b>Switch Back</b> to the user you previously were, without having to log out and log back in.
• CV-6722	The ClearView CRM login screen has been updated with new images and content.

## Fixes

Reference No.	Description
• CV-6003	Solicitor fields now correctly auto-populate when a solicitor code is in lowercase letters.
• CV-6297	The text box on the administrative <b>Custom Content Definition</b> screen now renders properly.
• CV-6604	Payment delete permission is no longer required to recreate a pledge schedule.
• CV-5478	The password expiration warning now disappears after the password is updated.
• CV-6726	The administrative <b>Data Table Custom Views</b> tab was corrected to properly render the text box. (Released in the 2.6.6.1 patch.)

## Setup notes for installed clients

Using functionality associated with the administrative feature **Opportunity VAE Stage Change Rules** (CV-6489) and/or **Lookup Group Configuration** (CV-6490) requires a database update. At minimum, core donor database version 4.7.3.2 is required to use those updates.

Installed clients can contact Client Services with any inquiries regarding upgrading ClearView and JasperReports: support@softrek.com or 1.800.442.9211.

## Core donor database version

This version of ClearView utilizes core donor database version 4.7.3.1, with select features requiring 4.7.3.2. Cloud clients automatically receive the most recent ClearView deployment, and are contacted by Client Services to schedule an upgrade to the latest core donor database version as needed. For self-hosted clients, this version of ClearView cannot be installed until your database has been upgraded to at least core donor database version 4.7.3.1 or, ideally, 4.7.3.2 to leverage all features.

This version of ClearView also requires a minimum PledgeMaker schema version 4.7.3.1, with select features requiring 4.7.3.2. Additionally, ClearView 2.0+ requires Oracle Database version 11g. This version of ClearView also requires Java 7 (JDK 1.7) to be installed on the server it is running on.

## 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 users the best possible experience.

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

- Internet Explorer 9+
- Firefox 8+
- Chrome 15+

Previous versions of Internet Explorer, Firefox and Chrome, as well as the Safari browser, have not been tested and are not officially supported. We recommend you use the latest version of any supported browser.

## Client Services contact information

If you have any questions, please contact our support team:

- **Phone:** 716.691.2800 or 1.800.442.9211
- **Email:** support@softrek.com
- **Fax:** 716.691.2828
- **Address:**

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