

ClearView CRM 2.7.6 release notes

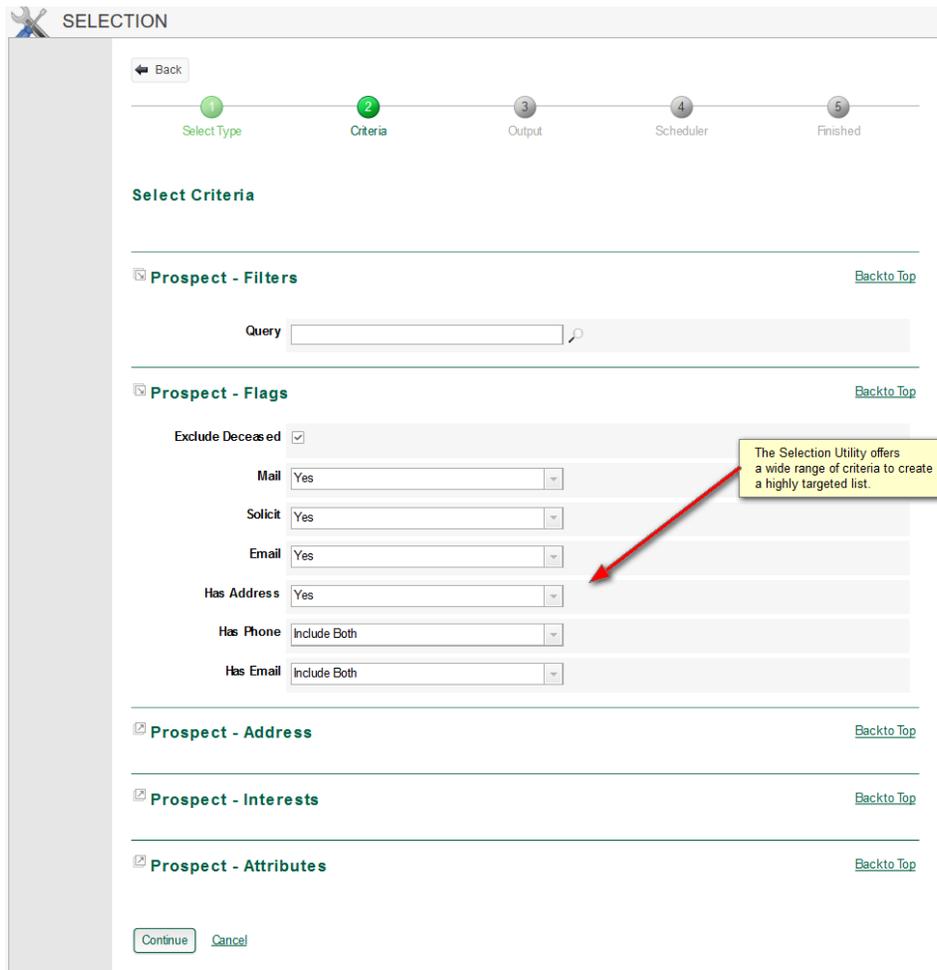
Contents

- Highlights: Selection Utility, auto capitalization option
- Full list of completed work
- Setup notes for installed clients
- Core donor database version
- Workstation requirements and supported browsers
- Client Services contact information

Release highlights

First step of Mailing Segmentation in ClearView

One of the Operational Tools clients have been keenly anticipating in ClearView is partially complete. The Selection Utility, the first step of Mailing Segmentation, is now a ClearView utility. The utility's wizard takes you step-by-step through the process of creating a highly targeted selection of prospects. First, choose from a range of criteria to define the list. Output options let you enter the criteria you want to include for each prospect (e.g., address, greeting, etc.) in the mailing table. You can schedule the selection to run at the appropriate time (recurring, if you like).



Finally, when the scheduler runs the list, the resulting records populate a mailing table of your choice, and you'll receive a notification log file. Contact your organization's ClearView administrator to add Selection to your menu of utilities. You'll need a role permission called "Selection Tools Access."

Save time with auto caps

Little things in data entry can mean a lot. Your organization's ClearView administrator can turn on a feature that automatically capitalizes prospect names and addresses as you enter them into the appropriate fields.

Prospect Name

Salutation	<input type="text"/>
First Name	<input type="text" value="Mary"/>
Middle	<input type="text"/>
Last Name *	<input type="text" value="Newperson"/>

Data you enter in name and address fields can now capitalize automatically, saving time in data entry.

Full list of completed work

New features

Reference no.	Description
CV-6493	Capitalization of prospect names and addresses is now automatic. Please note: SofTrek must turn on this option before your organization can use it.
CV-6855	System-generated prospect notifications can now come from the "system" or a specific user instead of the owner.
CV-6867	Adding attachments to Elements and Expenses in Events is now possible.
CV-6886	The Selection Utility is now available. Find it in ClearView's Utilities menu.

Improved features

Reference no.	Description
CV-5387	When the Greeting field preference on a Prospect record is set to Familiar or Salutation, the field reflects the correct greeting and is not editable. When the preference is set to "None," the field is editable.
CV-6821	Some Table Maintenance columns that were part of Operational Tools (PledgeMaker) are now available in ClearView. More will follow.
CV-6835	The Event Attendance data in the Prospect Summary tab now displays the last five years' activity.
CV-6876	Users can now access Volunteers from Events.
CV-6894	ClearView administrators can now label Registration Solicitor fields differently than the Solicitor field label that is set globally throughout the application.
CV-6904	"Enter" now functions as a keyboard shortcut to save.

Fixes

Reference no.	Description
CV-6890	The Transaction Number field on VAEs where users create a new record are now hidden and, once saved, cannot be edited.

- [CV-6891](#) The Shared Address function now enforces the best practice of creating a new shared address via an existing address or from a prospect record of the shared address owner. The Shared Owner ID# field is no longer editable or usable to create a new shared address.
- [CV-6892](#) The Salutation column included in List Manager “Excel – Fielded” exports now correctly shows the salutation instead of the salutation code.
- [CV-6901](#) Tables and Columns no longer repeat in the data dictionary.

Setup notes for installed clients

ClearView’s system default JasperSoft version is now 6.2. JasperServer 5.6.1 will continue to work with ClearView, however you may need to update your organization’s compatibility setting so that the application works correctly. Contact your account manager if you’re interested in upgrading to Jasper 6.2.1.

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

Core donor database version

ClearView 2.7.6 requires a minimum PledgeMaker schema version of 4.7.3.3. Additionally, ClearView 2.0+ requires Oracle Database version 11g. ClearView 2.7.6 requires Java 7 (JDK 1.7) to be installed on the server on which it 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 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 questions, please contact Client Services:

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