

QuickBase Release Notes: October 27, 2013

Introduction

This page describes our October 27, 2013 QuickBase release.

Do you have an idea for improving QuickBase? You can share your suggestions by either clicking the orange **feedback** tab on the My Apps page, or visiting the Customer Feedback for Intuit QuickBase forum (<http://quickbase.uservoice.com>).

What's New in QuickBase?

This section describes the changes that appear in QuickBase for the October 27 release.

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See What's Fixed in QuickBase? on page 9 for a list of issues fixed in this release.

QuickBase Exchange

QuickBase Exchange is a source of pre-built QuickBase apps made by other users like you. It gives you access to other QuickBase app builders' expertise, and helps you achieve a fully-functional app much faster than you could if you built it from scratch. You can access QuickBase Exchange using the sidebar on the My Apps page.

App Name	Activity	Last Visited	Category	Manager
Sales Management Portal		Today		aleon
Sales & Projects Lifecycle Portal		Never		kcopeland
My Expense Log		Today		aleon
IT Ticket Help Desk		Today		aleon
GetLunch		Oct. 7		aleon
Event Planner All-in-One		Today		aleon

On the sidebar, click the **QuickBase Exchange** header, **Free apps for you** link, or the **Apps downloaded** link to go directly to QuickBase Exchange.

QuickBase Exchange

intuit 19 apps match your search Sort by Most Popular

Categories: All, Customer Support (4), Human Resources (1), Information Technology (3), Knowledge Management (2), Legal (1), Other (1), Professional Services (1), Project Management (6), Sales (6), Team Management (4)

- Out of the Office Tracker** (Intuit, 23-SEP-13, 19 downloads, 4 stars)
- Sales Management Portal** (Intuit, 13 downloads, 4 stars)
- Sales & Projects Lifecycle Portal** (Intuit, 23-SEP-13, 11 downloads, 4 stars)
- Order Management Portal** (Intuit, 23-SEP-13, 11 downloads, 4 stars)
- Project Management Portal** (Intuit, 23-SEP-13, 9 downloads, 4 stars)
- Support Customers** (Intuit, 23-SEP-13, 8 downloads, 4 stars)

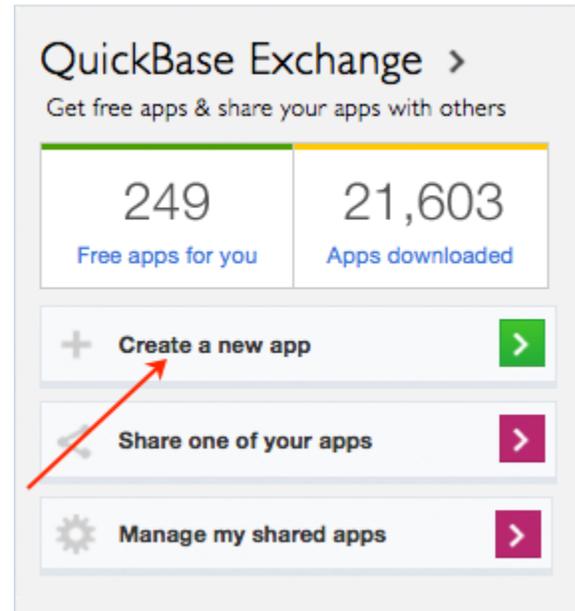
Finding apps

Use the controls on the page to search for a QuickBase app that's similar to the solution you're seeking, then get the app that's most useful to you. Any app you get from the Exchange is fully customizable, so you can make any changes you need to suit your specific workflow and processes. Apps from the Exchange are free, too!

Creating apps

The process of creating an app has changed:

- The **New app** button has been removed from the top of the My Apps page, and replaced by the **Create a new app** button on the QuickBase Exchange sidebar.
- When you click the **Create a new app** button or the **New App** tab, you're prompted to find an app in QuickBase Exchange rather than choosing a template to create an app.
- When you find an app you like, click the **Get this app** button to copy the app to your account and begin working on it.



Sharing apps

If you have an app that you've designed and are particularly pleased with, we encourage you to share it to the Exchange. Why share your app in this way? Here are some reasons:

- Get recognition for your app building skills
- Promote your business
- Help other app builders
- Solicit feedback on your app so you can make it better

We've made it easy to share your apps. Just click a button, and QuickBase makes a copy of your app without data or users that you can prepare specifically for sharing. Those preparations include making changes such as removing organization-specific names and references, adding descriptions for tables and reports, adding sample data, and perhaps creating eye-catching Home pages using the new drag-and-drop widgets available in this release.

When you're finished preparing your app, enter information about it and yourself, and submit the app. Just like that, you're part of the Exchange community!

CLONE PREP **PROMOTE** SUBMIT

Promote your app

Your app's name* 26 characters remaining
Event Planner All-in-One

Your app's description* 1780 characters remaining
This app helps you run small-to-medium size events while keeping all the details straight. Let volunteers and attendees sign up right from the app's home page. Track sessions, logistics, committee action items, and more.

Categories for your app*
General Knowledge Management Non-Profit

Descriptive tags, separated by commas* 8 tags remaining
event planning, logistics, attendees, participants

Screenshots and documents that show how your app works [Examples](#)
Acceptable file types are GIF, JPG, PNG, and PDF.

event_home.png add_session.png add_attendee.png committees.png

Save as draft and come back later **NEXT** >

This is how your app will appear in QuickBase Exchange

Event Planner All-in-One
Angela Leon

★★★★★

This app helps you run small-to-medium size events while keeping all the details straight. Let ...

Get this app Details

Rating and reviewing apps

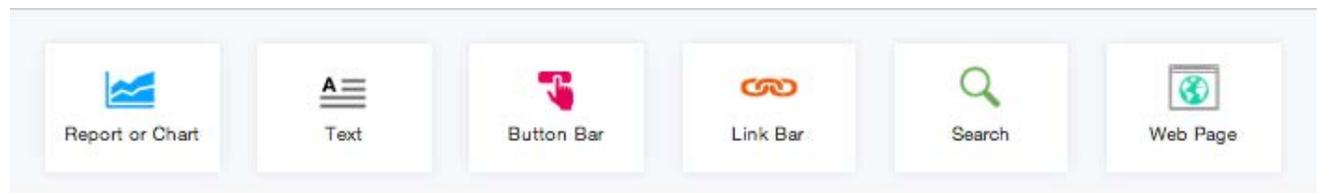
Once you've found an app you like, your feedback in the form of reviews and ratings helps the app contributors improve their apps, and it helps visitors to QuickBase Exchange make decisions about whether the apps they're seeing are good choices for them. All the ratings and reviews on the Exchange are provided by people who have used the apps they're commenting on.

Drag & Drop App Home Pages

We've completely redesigned how you create app Home pages. You can now create an app Home page using draggable *widgets*. Using the widgets provided, you can create beautiful and functional app Home pages with minimal effort:



There are six kinds of widgets available:



- **Report or Chart** – Display a report or chart you've created in the current app. You can display up to nine reports on a single app Home page.
- **Text** – Add formatted text (such as announcements, instructions or reminders) or images (such as a company logo) to app Home pages.
- **Button Bar** – Insert one or more buttons that perform actions, such as opening a web page or creating a new record, when clicked.
- **Link Bar** – Insert one or more links that perform actions, such as opening a web page or creating a new record, when clicked.
- **Search** – Insert one or more fields that can be used to search tables in the app.
- **Web Page** – Embed a web page accessible with HTTPS only (such as incident trackers or mail clients) into an iframe on your Home page.

Note: Some web pages have been deliberately coded so that they break out of iframes. As this behavior could be very disruptive, please test the behavior of any web page you intend to embed using the Web Page widget.

You can use different combinations of these widgets to create a Home page for each of the roles in your app -- to focus your users' attention on what is most important to *them*.

Your Home page can contain up to three widgets beside each other, as well as a sidebar on the left side of the page. There is no limit to the total number of widgets that you can place on the page.

To add a widget to your app Home page, drag it from the Widget Gallery (shown above) onto the app Home page. As you drag the widget onto the app Home page, you'll see green guidelines appear on the page to indicate where the widget would appear if you dropped it. When you've decided on a location, drop the widget to place it on the page. After you drop the widget, a Settings dialog displays so you can configure the widget immediately.

To delete a widget from the app Home page, click the Delete () icon at the top of the widget.

What will happen to my existing app Home pages?

Your existing app Home pages will continue to work. They will be shown with a type of **Home Page (Old)** on the Pages list. You can still edit them, but only in the ways you could before (that is, you can't add the new widgets to them). You'll need to create a new app Home page to take advantage of the new functionality. We encourage you to experiment and see how easy it is to re-create your Home pages using the new widgets.

Address Fields and Map Reports

Address Fields

QuickBase has a new field type – the *Address* field. This field contains a set of subfields to store address data: street address (two fields), city, state/region, country, and postal code. Rather than adding several separate fields into tables to hold address information, you can add just one Address field, which tracks all of that data.

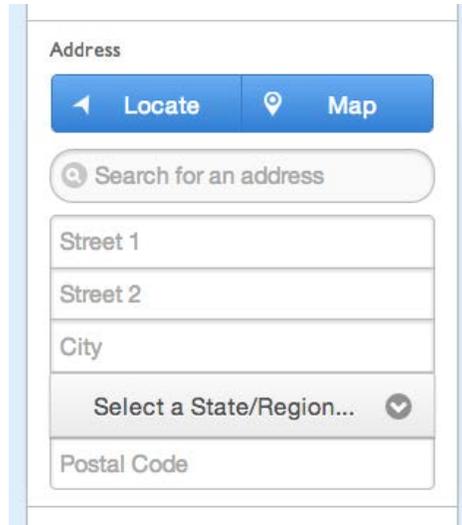
Address

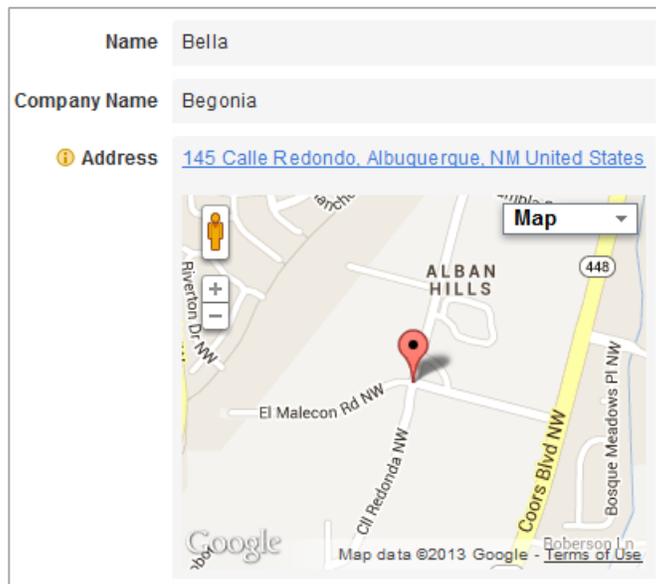
An advantage of the new field type is that it has a built-in search field. The search field provides a way to speed up and validate entry of address data. When you're entering an address, start typing it into the search field, and a Google Maps API will provide a list of addresses to choose from. When you choose an address from the list, QuickBase populates the subfields automatically.

When you enter an address on a mobile device, you can tap the **Locate** button to enter the address of your current location using your device's GPS. Tap the **Map** button will open your device's map app to show the address you're entering.

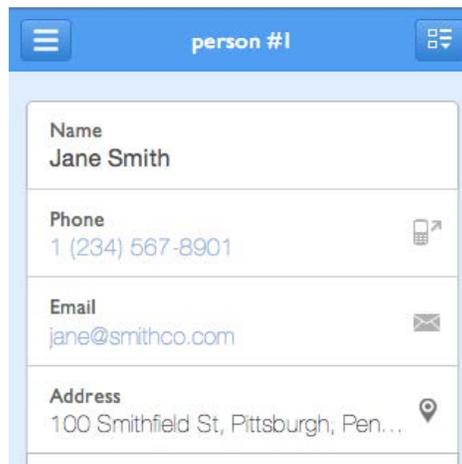


A mobile address entry form titled "Address". At the top, there are two blue buttons: "Locate" with a left-pointing arrow and "Map" with a location pin icon. Below these is a search bar with a magnifying glass icon and the text "Search for an address". The form contains several input fields: "Street 1", "Street 2", "City", a dropdown menu labeled "Select a State/Region...", and "Postal Code".

When you view a record with an Address field in the full site, the address will appear as a link, with a map showing its location. Click the link, and Google Maps will display the address location in another browser tab.



On the mobile site, the address isn't displayed as a link, but tapping it will open your device's map app.



A mobile record view for "person #1". The record details are as follows:

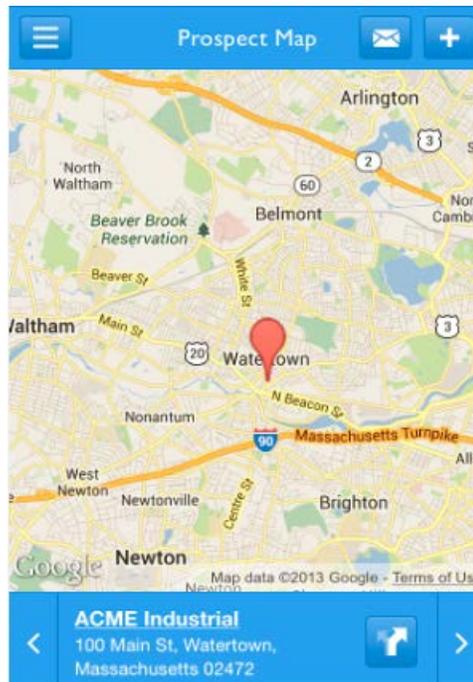
Name	Jane Smith
Phone	1 (234) 567-8901
Email	jane@smithco.com
Address	100 Smithfield St, Pittsburgh, Pen...

Map Reports

QuickBase has a new report type – the Map report, which uses data from an Address field to display a set of up to 100 addresses as pins on a map. Hovering or clicking on a pin shows a popup with basic information about that record, as well as links to edit the record, view the record, and get directions to that location. The information displayed in the popup can be changed as part of customizing the report.



When viewing a Map report on a mobile phone, tapping on a pin will focus the map on that address and show the record details in a panel at the bottom of the browser window. Tap the details shown to view the record. Tap the Directions icon to get directions through your device's map app. Tap the right and left arrow buttons to page through the available records for the Map report.



Email Enhancements

We've been listening to user requests, and this release contains several much-requested enhancements to our automated emails:

- There are new search and filter controls on the lists of automated emails available from the Table Settings page, the My Personal Settings page, and the App Management page. These controls make it easier to find existing emails.
- There is a **Send Test Email** button on the Page bar when editing reminder and subscription emails. After saving your changes, use this button to send a test reminder or subscription to its recipients. Test emails are sent after three minutes.
- You can now:
 - Email timeline reports.
 - Rename *all* emails, not just notifications. To do so, edit the email, and fill in the new name in the **Reminder Name** or **Subscription Name** field.
 - Choose who the email will be sent from – for all emails, not just notifications.
 - Choose which day of the month subscriptions are sent on (previously all monthly subscriptions were sent on the first day of the month).
 - Select multiple roles to send subscriptions to (previously you were limited to one role).

Reports Management Enhancement

The Manage Reports page available from **App Settings > App Management** now contains a column showing the number of times a report has been used. This includes actions like opening the report, embedding it in a form or report, or emailing it.

What's Fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. All QuickBase releases include bug fixes from previous releases.

Issue ID	Description
QBE005307	When an append-only Text field was set to read-only on a form, and form rules were used to update the field, it showed duplicate entries. This issue has been resolved.
QBE007631	When a Calendar field appeared on a form, some elements on the page would interfere with the display of the date picker widget. This issue has been resolved.
QBE007732	When an append-only Text field was set to read-only on a form using a form rule, the field appeared empty in Edit mode. This issue has been resolved.

Issue ID	Description
QBE007902	Append-only Text fields did not respect the Width of input box property, and showed these fields at varying widths depending on the field contents. This issue has been resolved.
QBE008586	Bar charts did not correctly encode field names containing single or double quotes. This issue has been resolved.
QBE008603	For some roles in an app, users in the role would see a JSON error when they attempted to organize reports. This issue has been resolved.
QBE008610	Deleting a field used in a custom dynamic filter or custom column in a report caused the Customize this Report command to produce a JavaScript error. This issue has been resolved.
QBE008613	Selecting, then deselecting a dynamic filter on a report filtered using <ask the user> sometimes caused the report to save those changes to the filter criteria. This issue has been resolved.
QBE008633	Reports that display dynamic filters take up entire screen width even when there is only one column of data in the report. This issue has been resolved.
QBE008670	Formula - URL buttons on forms have been changed so that the entire button is clickable.
QBE008724	Removing a user from an app then immediately adding a new user caused the invitation to be directed to the wrong user. The new user also did not appear until QuickBase refreshed the page. This issue has been resolved.
QBE008725	Lookup fields displayed on a form in Edit mode with Regular or Condensed spacing were vertically misaligned with their labels. This issue has been resolved.
QBE008744	Roles that set Modify Records for a table to <i>None</i> still allowed access to the Grid Edit button in reports. This issue has been resolved; the button no longer appears in this case.
QBE008755	Notifications that were supposed to be sent based on a Date field occurring during a time period (the <i>is during</i> condition) were not sent. This issue has been resolved.
QBE008756	Table home pages allowed access to the More > Change reporting defaults command for users who were in a role with Basic Access to an app and a Custom Access rule for fields that resulted in no records being visible. This issue has been resolved.
QBE008797	The online help incorrectly stated that one was not able to create cross-app relationships in a sandbox app. This issue has been resolved.
QBE008822	Displaying the Fields list caused performance issues in tables with many formula fields containing complex formulas. This issue has been resolved.
QBE008900	The word <i>extension</i> was misspelled in the Phone Number field properties. This issue has been resolved.
QBE008916	<i>(Internet Explorer 8)</i> An error message would display repeatedly when one attempted to access the Users with Access tab on the Manage Billing Account page. This issue has been resolved.

Issue ID	Description
QBE008928	Calendar reports did not display any records when the app-level date format property was set to <i>DD-MM-YYYY</i> or <i>DD-MM-YY</i> . This issue has been resolved.
QBE008929	Table reports with few columns displayed them with unnecessary width. This issue has been resolved.
QBE008939	<i>(Mozilla Firefox)</i> The Last Accessed Date column on the Users with Access tab did not sort properly. This issue has been resolved.
QBE008943	<i>(Internet Explorer 8)</i> Lists of roles on the Manage Users page showed multiple entries for <i>undefined</i> . This issue has been resolved.

Known Issue

The following issue has not been addressed:

Issue ID	Description
QBE008407	When field values containing accented characters are chosen as dynamic filters, no results are returned, and accented characters are not displayed correctly until the page is refreshed.