

# Project Release Notes

Release 2.6 (June 2020)

# What's New

## Reports and Charts

Users can create and run reports and charts on any Appify Flex objects for business data analysis, share the reports with other users, interactively filter and sort report records, and download reports in Microsoft Excel format.

Web Client users can also use dynamic filters to generate reports based on information specific to their context such as the user's current date, time, location, etc. They can share reports with a group of users in any profile by selecting the required profile and search for reports by category.

[Read more...](#)

## Global Search

Web Client Users can now perform a general keyword-based search on any Appify Flex objects in addition to Predefined Searches. Search is automatically enabled for the Title field on all objects in Appify Flex. You can then quickly extend or reduce the Search scope.

[Read more...](#)

## Email and App Notifications

The latest business updates now available at the fingertips of your users! You can help your users stay on top of things by notifying through email and app messages about important updates to their business records.

[Read more...](#)

## Data Management

Transfer your data between Appify Flex and CSV/Microsoft Excel file in just a few clicks!

- Export Data from multiple Appify Flex objects to a single Microsoft Excel file
- Import/Update Data to create/update records in Appify Flex objects from CSV/Microsoft Excel file data

[Read more...](#)

## Rich Text Formatting

Users can now apply styles, font colors, font sizes, indentation amongst other formats to create rich text content in all Text Areas.

[Read more...](#)

## Sorted Line Items

Web Client users can sort line items for View and Edit actions and bring the most relevant/important items to the top of the list. They can also generate output documents with neatly sorted columns. You can enable sorting for selected fields, allow nested sorting up to 3 levels, and make the feature available to your users.

[Read more...](#)

## New Audit Fields

New audit fields Created User, Modified User, Created Time, and Modified Time fields introduced on all Flex objects. These fields replace the existing audit fields ActivityStamp Id, ActivityStamp Info, and Created ActivityStamp Id.

[Read more...](#)

## New Features in Android App

The following features are now available on Appify for Android App:

- Inventory support for Transfer, Accept, Consume, and Adjust actions
- 'Hide When' and 'Auto Navigate' settings in Action Flows

- Automatic creation and update of lines in Edit actions
- SSO support for Remote Data Source connection
- Create/edit line items in views based on the availability of Create/Edit buttons on the screen
- Connect and directly store data from the app to any of the supported remote data sources

# Reports and Charts

## Overview

Reports and Charts give you a consolidated view of your data stored in Appify Flex. The support for dynamic filters using Appify literals, sharing of public reports with users and profiles, and categorization of reports make it easy for you to analyze and view your business data in easy-to-understand formats and share the insights gained with others.

Web Client users can use Appify literals to create dynamic filters in reports. When such reports are run, the literals in the dynamic filters are replaced with data specific to the runtime context. Reports specific to the current date, current time, and logged-in user are examples of such dynamic reports.

Users can group reports into specific categories at the time of creating/editing the reports. Categorization helps locate related reports quickly while searching. Users can share their public reports with individual users and with one or more profiles.

Reports and Charts are available on Web Client, iPad app, iPhone app, and Android app. Dynamic Filters are available on Web Client.

## Creating Reports

Users can access Reports for Appify Flex objects by clicking the reports icon in the left pane. On this page, they can view all the reports grouped by object, with an option to list only private or public reports. They can search for any report or create a new report. The list also provides clickable icons for each report to edit, share with other users, or delete it.

In the create / edit report page, users can add a filter, select/specify a category, specify a date range for the records to be retrieved based on any Date field, configure a

Pie/Bar/Column/Line Chart, make the report private or public, and share the report with the required users.

### Dynamic Filters in Reports

Users can create reports with dynamic filters by using certain special keywords referred to as 'literals'. A literal serves as a placeholder that is replaced with the value specific to the user's context when the user runs the report.

For example, a field technician can create a report to list all the work orders assigned to him, by using a filter with the literal `#{CURRENT_USER}` as follows:

Assigned To Equal `#{current_user}`

In the Reports > Create New/Edit Report > Add/Edit Filter page, users can select the field & operator and then type the literal with which the field value is to be matched.

For a list of supported literals in report filters, refer to the [Literals and Operators](#) section.

### Sharing Reports

Users can share their public reports with one or more individual users and/or profiles to make it available for them to run the reports.

When a report is shared with a profile, it will automatically be available to any new users added to the profile. Similarly, when any user is removed from the profile, the access to the report will be automatically revoked.

Users can share any report with profiles by selecting the required users/profiles from the Users/Profiles tab of the Share Reports pane.

### Categorizing Reports

Users can group their reports by adding category tags, and use these tags to search for reports by category. The category name is case insensitive.

For example, users can categorize all reports related to Warranty by adding WARRANTY as the category tag. They can then search for all reports under the warranty category by providing WARRANTY as the keyword in the Search field for reports.

### Running Reports

Users can run any report from the reports page by clicking the title of the required report. They can interactively sort report records, share the report that is of type Public with other users, and download it in Microsoft Excel format.

# Global Search

## Overview

Global Search provides your users with the ability to perform free-range searches on business data stored in Appify Flex, without having to supply any object or field information explicitly. It can be used in addition to or in the place of Predefined Searches.

Global Search is enabled by default for the Title field on all objects in Appify Flex. When a Title field is changed, the search status for the field is automatically changed. You can expand the scope of the search by enabling Global Search for additional fields.

The Global Search feature is available on Web Client, iPad app, iPhone app, and Android app.

## Adding Search Fields

You can expand the scope of search by enabling additional search fields from the Fields configuration page for the required object. Global Search is supported for fields of type TEXT and only.

## Performing Search

Users can access the feature implicitly by typing a keyword in the search text box at the top right and clicking the search icon. Global searches and search results are listed in the same way the Predefined Searches are displayed.

## Known Limitations

- Only a single keyword without embedded white spaces is supported
- At least one predefined search needs to be selected to enable Global Search



- Including reference fields in search results-view customization is not supported
- Deletion of records by clicking the delete icon in the search results page is not supported
- Global Search is enabled by default for any newly added Text field. Disable it if you do not want the field to be searchable
- Predefined Searches do not get executed when Select All is enabled. As a workaround, uncheck the Select All checkbox and select each predefined search individually

# Email and App Notifications

## Overview

This feature enables you to notify your users of updates related to business opportunities, upcoming service maintenance, availability of parts, etc. You can create rules that will run every time a new record is created or existing records are updated in Appify Flex.

For example, you can configure a rule to notify your technician when a work order is assigned to him. Another example would be notifying your customer when an invoice is generated for a completed work order.

## Setting up Notification

You can configure notifications for Appify Flex objects in Appify Setup > Save Actions page.

This page lists all the configured save actions and enables you to search for any specific action. You can create a new action rule or edit an existing rule in which filter criteria can be configured which will be triggered when a record is created and/or updated.

## Creating Email Notification

Under the Email Notification section, you can include a subject and body for the email content with data from your records and add users and/or email ids as recipients.

## Creating App Notification

Under the App Notification section, you can create the message to be sent to your users, customize it with data from your records, and select recipients from the list.

## Receiving Notification

Your users will receive an email or app notification with the message you configured, whenever a record is created and/or updated and it satisfies the configured save action rule criteria. App notification is available on iPad and iPhone apps.

#### Known Limitations

- Date literals are not supported in email subject and body
- App Notifications are not supported for the following scenarios:
  - configured rule has a filter criteria which evaluates to Null
  - The data update involves changes to Date values only
- In some scenarios, users may receive more than one notification for the same update
- It is not possible to view the updated record by tapping the notification message in the device

# Data Management

## Overview

The scope of this feature includes transferring data between files and Appify Flex objects. You can export data from multiple Appify Flex objects to a Microsoft Excel file. You can import or update data from your CSV or Microsoft Excel file to an Appify Flex object.

For example, if your business process involves your executives submitting their expense report in Microsoft Excel format, you can import the expense data from the file into Appify Flex objects and make it available on the Appify app for further processing.

You can access this feature on Appify Setup > Data Management page. This page also shows the history of exports, imports, and updates.

## Exporting Data

Exporting data from one or more Appify Flex objects involves creating data sets by adding one sheet per object, adding conditions to filter the data, and selecting required fields. You can review the data sets and edit / delete them as needed, before starting the export. Once the export job is completed, the generated Microsoft Excel file emailed to your email Id.

## Importing Data

Import data into Appify Flex by uploading the required CSV or Microsoft Excel file. Data from each sheet of your Microsoft Excel file is treated as a separate object, you can import it to an existing or a new Appify Flex object by adding/mapping the field names, field types, and skipping fields that are not required.

## Updating Data

To update existing data in Appify Flex with data from your CVS or Microsoft Excel file, your file data must include a field named 'Turbold' with valid Appify IDs values. You can update records in Appify Flex by uploading the data from the file, selecting the required object and fields to be updated, and skipping fields that are not required.

Track the progress of your import, export, or update job on the job history panel. Clicking the job entry brings up the status pane, which includes an option to cancel the job if it is in progress or download the generated file if the job is completed.

### Known Limitations

Import Data: If you import the data to a new object, the field size of any configure Text Area fields will be set to 16 KB by default. You can change the size later by editing the field from Appify Setup > Objects > Fields page.

# Rich Text Formatting

## Overview

Your users can now avail from a variety of text formatting options that they can use to format and display aesthetically pleasing text content. The Rich Text feature is available to your users on Web Client, iPad app, iPhone app, and Android app.

## Enabling Rich Text

Rich Text formatting is disabled by default and is supported in fields of type TEXTAREA only. You can enable it in the required field's configuration pane. The length of the text is limited to 16 KB by default and can be changed to 32 KB or 64 KB.

## Editing/Viewing Rich Text

Your users can apply any of the following formats to their text content in all TEXTAREA fields, (indicated by a roughened bottom-right corner) when they invoke any edit action:

- Redo, undo
- Bold, italics, underline, strikethrough
- Background and Font color
- Alignment, paragraph, headers, bullets

When users view any record, they will see formatted text in all TEXTAREA fields.

## Known Limitations

- Rendering of formatted text in the output document is not supported
- Copying formatted text from TEXTAREA to the TEXT field via a Fork action or Field Association rule is not supported

# Sorted Line Items

## Overview

This feature enables you to define sort fields for the records displayed in the Lines section for View, Edit, and Sign-in actions by default. Your users can change the sort order while using the apps or the Web Client.

## Defining Sort Fields

You can select up to three sort fields from the newly introduced tab 'Sort Filter' in the Configuration for Child pop-up for the Lines section of View, Edit, and Sign-in actions.

## User Experience

Users will see the records in the Lines section sorted in ascending order by default. Users can toggle the sort order between ascending and descending for any sort field.

# New Audit Fields

## Overview

New audit fields Created User, Modified User, Created Time, and Modified Time fields are introduced on all Flex objects and are available for use in designing Actions, templates, and filters.

These fields will replace the existing audit fields ActivityStamp Id, ActivityStamp Info, and Created ActivityStamp Id, till such time, the audit information will be available in both sets of fields

## Deprecation

Access to ActivityStamp Id, ActivityStamp Info, and Created ActivityStamp Id fields will be removed in a future release. If you are using these fields in any actions, view, lists, or reports, you will have to replace them appropriately with Created User, Modified User, Created Time, or Modified Time fields.



# Literals and Operators

## Literals in Report Filters

The table given below lists all the literals supported in Report Filters. These literals are to be used in conjunction with the operators listed below. The literals are case insensitive. For example, `#{TODAY}` is the same as `#{today}`.

Type	Literal	Description	Supported Operators
User	<code>#{CURRENT_USER}</code>	Full name of the logged-in user.	Equal, Not Equal
User	<code>#{LOGGEDINUSER}</code>	The Turbold value associated with the current user's record.	Equal, Not Equal
Day	<code>#{TODAY}</code>	Duration of 24 hours. Starts at 12:00:00 AM on the current day.	Equal, Less, Less or Equal, Greater, Greater or Equal
Day	<code>#{TODAY_-_N:n}</code>	Duration of 24 hours. Starts at 12:00:00 AM n days before the current day.	Equal, Less, Less or Equal, Greater, Greater or Equal
Day	<code>#{TODAY+_N:n}</code>	Duration of 24 hours. Starts at 12:00:00 AM n days after the current day.	Equal, Less, Less or Equal, Greater, Greater or Equal
Range of days	<code>#{LAST_N_DAYS:n}</code>	Duration of n days. Starts at 12:00:00 AM n days before the current day and continues up to the current time. The range includes the current day.	Equal, Less, Less or Equal, Greater, Greater or Equal

Range of days	<code>\${NEXT_N_DAYS:n}</code>	Duration of n days. Starts at 12:00:00 AM on the current day and continues for n days. The range includes the current day.	Equal, Less, Less or Equal, Greater, Greater or Equal
Week	<code>\${CURRENT_WEEK}</code>	Duration of 7 days. Starts at 12:00:00 AM on the first Sunday of the current week and continues till Saturday.	Equal, Less, Less or Equal, Greater, Greater or Equal
Range of weeks	<code>\${LAST_N_WEEKS:n}</code>	Duration of n weeks. Starts at 12:00:00 AM on the Sunday of the week that started n weeks before the current week, and continues up to 11:59 PM on the Saturday of the week before the current week.	Equal, Less, Less or Equal, Greater, Greater or Equal
Range of weeks	<code>\${NEXT_N_WEEKS:n}</code>	Duration of n weeks. Starts at 12:00:00 AM on the Sunday of the week after the current week and ends on the Saturday of the nth week.	Equal, Less, Less or Equal, Greater, Greater or Equal
Month	<code>\${CURRENT_MONTH}</code>	Starts at 12:00:00 AM on the first day of the current month and continues for all the days of that month.	Equal, Less, Less or Equal, Greater, Greater or Equal
Range of months	<code>\${LAST_N_MONTHS:n}</code>	Duration of n months. Starts at 12:00:00 AM on the first day of the month that started n	Equal, Less, Less or Equal, Greater, Greater or Equal

		months before the current month and continues up to 11:59 PM on the last day of the month before the current month.	
Range of months	`\${NEXT_N_MONTHS: n}`	Duration of n months. Starts at 12:00:00 AM on the first day of the month after the current month and continues until the end of the nth month.	Equal, Less, Less or Equal, Greater, Greater or Equal

### A Note on Operators in Date Range Literals

The reference date used by the comparison operator in the case of the date literals is a little different as explained below.

The **Equal** operator will consider each date in the given date range for comparison and return all the records that match any date within that range.

The **Less** operator will consider the start date of the given range as the reference date for comparison and return all records that are lesser than that date.

The **Greater** operator will consider the end date of the given range as the reference date for comparison and return all records that are greater than that date.

For example, let us say today is July 6, 2020, and you are tracking service maintenance contracts that are due for renewal. The following scenarios show how to apply date range literals with the comparison operators to generate the required report.

1 Filter contracts that will be due over the next five days (between July 6 and July 11):

RENEWAL DATE **Equal** \${NEXT\_N\_DAYS:5}

2. Filter contracts that will be due after five days (after July 11):

RENEWAL DATE **Greater** \${NEXT\_N\_DAYS:5}

3. Filter contracts that have been due over the last five days (between July 1 and July 6):

RENEWAL DATE **Equal** \${LAST\_N\_DAYS:5}

4. Filter contracts that have been due for more than five days, (before July 1)

RENEWAL DATE **Less** \${LAST\_N\_DAYS:5}

Refer to the start and end date given in the Literals table to know the reference date that will be applicable to the operator being used.

# Fixed Issues

The following customer issues have been fixed in this release:

Issue ID	Product Area	Issue Description
CD-289	iPad	Action marked as both Silent and Auto Navigate to Next Action does not work as expected. Auto Navigate to Next Action is not honored.
CD-414	Web Client	In Lists, if reference fields were selected for grouping, the resulting records were not getting grouped
CD-421	Studio	Setting fields as mandatory or read-only in Fork Action was not honored.
CD-425	Web Client	Clicking on any View Action configured with Oracle as the remote data source resulted error "Failed to Load Data".
CD-465	Web Client	In the Web Client's user profile drop-down menu, the business name was displayed instead of the logged-in user's name.
CD-471	Studio	In some edit scenarios, any newly created filter was getting overwritten by the existing filter, if one was selected at the time of adding the new filter.
CD-478	Web Client	In Create Action, blank values were not getting copied over for fields that were automatically filled by copying values from other fields.
CD-489	iPhone	No records were displayed in a View, if the filter criteria for the view was based on a field whose value was null.
CD-492	Studio	In the Rollout page, if a component was selected and then deselected by clicking the include and remove icons, the Next button was not getting disabled,

		allowing further navigation even though no component was included for rollout.
CD-496	iPad	If an object had multiple child objects, and if each child had hundreds of fields, the child records did not get displayed in the view.
CD-497	Web Client	Views based on the 'Enable When' criteria were not honored.
CD-499	Reports	The currency symbol was not displayed for currency fields in Reports.
CD-501	Web Client	If an Edit Action page contained any read-only fields of type 'AUTONUMBER', an error message stating 'This Field Cannot Be Blank' was thrown.
CD-506	iPad	A pop-up error message stating 'Malformed Query' was thrown when a record was viewed from the list if the list contained any filter conditions.
CD-509	Android	Navigating to any record from the view caused the app to crash.
CD-514	Android	Expected Action Flows were not displayed for some records.
CD-520	Studio	Validation for duplicate field was missing when the changes to the object was saved.
CD-522	iPad	The 'Related to' field in the Checklist Draft page was showing the parent Id. It now shows the parent title.
CD-523	iPad	While updating any date fields, the selected date and the applied date value would not match if the timezone set in the device is different from that of the app.
CD-524	iPad	Section description text overlapped with checklist buttons in the Checklists page.
CD-528	iPad	Decimal places were displayed in non-decimal NUMBER fields such as Truck or Trailer number fields.

CD-534	iPad	If any location field was configured to display the user's current location, it could cause the app to crash on a slow network where it took a long time to fetch the location coordinates.
CD-537	Android	Configured default values were not getting automatically populated in the create/edit actions when it was opened.
CD-543	Studio	Rollout email notification was not sent if there were duplicate email addresses registered for the user.
CD-544	iPad	Records were not downloaded for a child object, which had a field with the name that matched an Appify keyword.
CD-548	Web Client	If the entered text contained single quotes, it was not retained in Rich Text fields after the edit window was dismissed.
CD-555	Studio	When validation rules that included 'Null' or 'Not Null' condition was not working correctly.
CD-560	Web Client	Changes made Lines section was not getting saved if edited line record had child records.
CD-562	Web Client, iPad	Decimal values were not displayed in Create/Edit Actions for number fields if the value was filled by any field calculation formula.
CD-569	iPhone	It was not possible to copy the text directly from any Text Area fields with the 'one-long-press' gesture. It is now possible. In the case of Rich Text fields, first open the popover and then copy by using the 'one-long-press' gesture.
CD-574	iPad	Line records were not displayed in View Action, when the screen included many reference fields of the same type.
CD-580	Studio	When new fields were added to a Salesforce object and metadata refresh was initiated in Studio, it failed with an error "Cannot Validate User".

CD-581	iPad	It was not possible to clear entered values from date fields. Now there is a 'Clear' button available in all Date and DateTime fields to clear the value.
CD-590	Web Client	It took nearly a minute to display the landing page on the Web Client when switching to web view from studio view soon after performing a rollout.
CD-592	Studio	In Action Flow Designer for Sign Action, the status of 'Auto Navigate to Next Action' flag was not getting saved when it was enabled.
CD-596	Web Client	If the app metadata file was not generated correctly after a rollout, it resulted in the error "Something Went Wrong While Fetching The App"
CD-604	Web Client	The error "Please Rectify Errors to Proceed" was displayed when the edit action if any of the action page contained a field with the name that matched an Appify keyword.