Project Release Notes

Release 2.8 (August 2020)

What's New

Rich Docs Enhancements

Users can generate Rich Docs in MS Word format. On Web Client, they can preview, download, email, or save it as an Attachment. When emailed, if the attachment size exceeds 25 MB, it is sent as a downloadable link.

You can set the Type to MS Word and enable Rich Doc Preview for Sign Actions. You can also customize the size and position of image placeholders and resize column width for tables in your templates from Appify Template Designer.

[Read more…](#)

Multimedia Support

Users can add pictures, audio clips, and video clips to records from Create, Edit, View, Fork, and Sign actions. They can preview multimedia content in View actions.

Three new Field Types - Picture, Audio, and Video are available in Flex objects. You can now include multimedia fields in Create, Edit, View, Fork, and Sign actions. You can also insert Picture fields in Rich Docs templates.

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Multiple Templates in Auto-line Create

You can now configure multiple templates in Auto Line Create rules, each template with its own field default values. It enables automatic creation of different line records. For

example, based on a Work Order type, line records for Parts, Labor, and Expenses can be created using different defaults.

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Clone Child Records

App users can clone a record along with all its child records in View action. iOS and Android users can clone any child record in Create, Edit, and Fork Actions.

[Read more…](#)

Support for Salesforce Files

If you use Salesforce as a data source, you can now enable 'Files' as the Attachments Type for SFDC on Appify. With this, the files uploaded by your users will be available as Salesforce Files on SFDC.
Read more…

Expression Builder Enhancements

In addition to entering values, you can now choose object fields, including fields from first-level Reference objects, in the Right-Hand side of any expression. This feature is available in all Studio screens that support Expression Builder such as, screens for filter criteria, formula, and validation rules.

Web Client users can use this feature to configure expressions in Reports and List Personalization.

New Features in Android App

- Inline Create/Edit Records: Users can create and edit child records directly in the Lines section of View actions

- <u>Refresh View:</u> Users will always see the most current data in Record View

Rich Docs Enhancements

Users can now generate documents in MS Word format. Web Client users can preview the rendered document, save it an Attachment to the record, download it, and send it as an email attachment to other users. The attachments are compressed and sent over, in case of large documents, the link to the file location is sent instead of attaching the file.

MS Word as Rich Doc Type

To set MS Word as the format for generated documents, Choose MS Word from the Document Type settings in the required template from the Sign actions page. The Type is set to PDF by default.

> *For security reasons, the option to set MS Word as the Rich Doc Type is available only if the sign action does not include a signature field.*
>
> *After setting the type to MS Word, if you add any signature field to the sign action, the setting will automatically revert the Type to PDF.*

When users generate documents for Sign actions, it is automatically rendered in MS Word if the Document Type for the template is set to MS Word.

Preview

Web Client users can preview the generated Rich Docs before finalizing it.

To allow preview of generated documents, check Preview Documents on the Sign action's Configure Recipients page.

In preview mode, users can download the generated document to the local device. They can save it as an attachment to the record, and send it as an email attachment to other

users. They can select recipients from the list of related users and also directly enter other email IDs of users not listed.

When sending the email, documents that are more than 25 MB in size are compressed before attaching it to the email. If the file size exceeds 25 MB after compression, to avoid running into email size restrictions, a link to the location from where the document can be downloaded is sent instead of the attachment.

Formatting Templates

When you insert an image field in Appify Template Designer, it automatically adds an image placeholder. You can adjust its height and width to accommodate the image uploaded by the user. In the generated document, images are compressed and scaled to fit within the boundary defined by its placeholder while maintaining image quality.

You can also adjust the column width of the inserted table.

Known Limitations

- In Sign action, if merge fields are added to the Email body or Subject in Recipients Configuration, when the generated Rich Doc is sent to the users by email, the email message will contain field tags instead of the field value.
- Table data will not render correctly in the generated document if the table does not have a header row in the template. As a workaround, add a header row manually in the template

Multimedia Support

App users can add multimedia content in the form of pictures, audio, and video files to their business records and generate output documents that include pictures they add to their business records. They can preview and play multimedia content in View actions.

Users on Web Client can preview multimedia fields in Create, Edit, Fork, and Sign actions too.

Supporting Multimedia Fields

Three new field types - Audio, Picture, and Video - are available for storing multimedia content on Flex object.

Add it to your Flex objects and include it in Create, Edit, View, Fork, and Sign actions. The permitted maximum file size for multimedia fields is 10 MB for Pictures and 25 MB for Audio and Video.

Adding Multimedia Content

App users can upload content to multimedia fields by clicking the image placeholder and selecting the required image, video, or audio file on their device.

On mobile devices, files added by the user are compressed before uploading. If the size of the compressed file exceeds the file size limit defined for the field (10 MB for Pictures and 25 MB for Audio and Video), upload fails with 'file size limit exceeded' error message.

Users can view the uploaded multimedia content as thumbnails. Hovering on the thumbnail will show the delete icon, clicking it will remove the multimedia content from the field after seeking confirmation.

In View action, app users can preview the uploaded multimedia content by clicking the thumbnail. Web Client users can preview the content in Create, Edit, View, Fork, and Sign actions too. Users can play the video content using the play controls on the thumbnail and can also view the clip in fullscreen mode.

The following multimedia file formats are supported on all devices:

- Audio: MP3

- Video: JPEG, GIF, PNG

- Picture: MP4, MOV, AVI

If the downloaded format is not supported on the user's device, they will see a message stating "Unsupported Format".

Multiple Templates in Auto-line Create

You can create multiple templates in the Auto Line Create rules. In each template, you can select a Line Section for configuring the rules. For example, based on a Work Order type, line records for Parts, Labor, and Expenses can be created using different defaults.

The configuration to add multiple templates is available in Auto Lines Create for Edit actions and the feature is supported on Web Client.

To create a template for Auto Lines Create rule, choose the required Lines section, enter the name for the template, specify the number of lines to add, assign default values for the required fields. Each Lines Section has its own template. One Lines Section can have more than one template.

Displayed on the left-hand side, are the list of available templates. You can open the template for editing by clicking the template name. Delete the template by clicking the delete icon.

When the user opens the Edit action, the line records with the configured default values are automatically populated.

Clone Records

Users can quickly create new records by cloning existing records. It saves time, effort, and reduces data entry errors. It is particularly useful when the record has a large number of fields, of which the user needs to update only a few.

Cloning, duplicates all the field values from the original record, except for Autonumber and Audit fields. Autonumber field values are generated, and Audit field values are updated as follows:

- Created User: ID of the user who cloned the record

- Created Date: Date of cloning

- Modified User and Modified Time: Blank

Attachments, if any, are not copied to the new record.

iOS, Android, and Web Client users can clone any record along with all the child records in View action, by clicking Clone in the right panel.

iOS and Android users can also clone any child record in Create, Edit, and Fork actions. On iOS, swiping left on the record shows the Clone option and on Android, swiping right shows it.

Support for Salesforce Files

If you use Salesforce (SFDC) as your data source, you now have the option to store user documents as Salesforce Files.

To enable support for Salesforce Files, choose Files as the Attachment Type from the Data Source configuration page for your SFDC data source. The Attachment Type is set to Attachments by default for all SFDC data sources on Appify. Once you switch the Attachments type from Attachments to Files on Appify, it can't be reversed. Attachments option will be disabled.

> ⚠️ Not all SFDC orgs support Files. Enabling Files in Appify for such orgs is not supported and will result in an *"Attachment sync failure"* error on the app when your users access or add files in the app's Attachments section.

Enable Files in SFDC before enabling support for Files in Appify. This transition in SFDC will have an impact on the existing user documents. Any documents your users uploaded as attachments before you enabled Files on SFDC will not be listed in the app's Attachments section.

To address this, you will have to migrate the documents from Attachments to Files in SFDC. Refer to SFDC documentation for information on migration from Attachments to Files.

Fixed Issues

The following customer issues are fixed in this release:

Issue ID	Product Area	Issue Description
CD-426	iPad, iPhone, Android, Web Client	If Copy Fields was enabled for any lookup in In Create action, it showed the record IDs instead of the display field value.
CD-683	Android	In Sign action, the generated Output Document included only the image URL instead of the image itself. This occurred only when the document was generated soon after adding new images on a slow network.
CD-686	Web Client	Deleted records were displayed in Global Search results.
CD-697	iPad	If Create, Edit, or Fork action was executed immediately after viewing the record, lookup fields for which the Copy Fields settings enabled, was not getting automatically populated.
CD-702	Web Client, iPad, iPhone	The Autonumber field was blank in some cases when a newly created record was immediately updated. This occurred when the bandwidth was low.
CD-713	Studio	In the page layout for any action, the menu item Attachments were not getting displayed under Add Section. This problem was observed in the case of objects that were created before configuring the field mapping for Attachments from the Data Source page.

CD-714	Studio	In Data Management, exporting data either resulted in an empty excel sheet or returned an error if the Notification Settings for the Company Profile was empty.
CD-726	iPad, iPhone	If you clicked Record View in any List and then clicked Back, the list showed up empty.
CD-730	Appify Template Designer	Literals were not getting replaced with its value in the generated Output Document.
CD-732	Web Client	In Edit/Create/Fork actions, if any Text Area field was marked as mandatory, it was not marked with a red asterisk when displayed in the app.
CD-737	Android	If the Android app was upgraded to ver 2.8.2, the updated app closed as soon as it was launched. The app had to be reinstalled to fix the problem.
CD-740	Studio	If any error occurred in a Rollout that included updates to Mobile Settings involving Child objects, it caused the screen to become unresponsive.
CD-743	Web Client, iPad	While editing text in Richtext editor of Text Area field, if the area outside the field was clicked before saving the text by clicking the Minimize icon on the right-hand side, it closed the editor and all the updates to the text was lost. Be sure to click the save button for the action screen to save the changes permanently.
CD-750	iPad	If the Attachment Type field was blank, the Appify app became unresponsive soon after signing in.
CD-754	iPad, iPhone	If a newly created record is immediately updated, the changes made to reference fields are lost when the data is refreshed. Update your app to the latest version to fix this issue.