

Project Release Notes

Release 3.5 (May 2021)

What's new

Import from MS Excel

Your users can directly import records from their MS Excel worksheets into the child / grandchild sections of their forms. They can create new records and update existing records.

For instance, in a service order for equipment calibration, technicians can import equipment details from an MS Excel file shared by their customers.

[Read more...](#)

Child section - Hide duplicate records

Eliminate duplicate records from the child sections. Use the newly introduced 'Hide duplicate records' option from the child section's configuration popup in Create, Edit, and View actions.

[Read more...](#)

Multimedia Support for SFDC data source

Multimedia support is now available for apps on Salesforce data source. 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.

Import from MS Excel

Your users can directly import records from their MS Excel worksheets into the child / grandchild sections of their forms. They can create new records and update existing records. For instance, in a service order for equipment calibration, technicians can import equipment details from an MS Excel file shared by their customers.

The import feature is available in all child and grandchild sections of Create, Edit, and Fork actions.

How to import

Your app users on Web client will now see an 'Import records' button (item 1, figure 1); in the child sections of Create, Edit, and Fork actions. Users can open the required MS Excel file by clicking Import records and preview the content before confirming import (figure 2). Only files of type MS Excel appear in the file picker window.

< Back

Calibration

Save

Account info

Account info

Name: ABC Inc Address: 3136, Heritage Road, Tulare, CA 93274

Status: ACTIVE

1 ↑

Import records Clear all filters


CALIBRATION INFO

Import Status	Equipment	Category	Asset#	Status
	filter ×	filter ×	filter ×	filter ×

Figure 1. Importing records from MS Excel

	A	B	C	D	E	F	G
1	Equipment	Category	Asset#	Serial#	Location	Calibration status	
2	Homogenizer	Milk processing plant	TU-MPP-001	9867564534	Tulare	Required	
3	Separator	Milk processing plant	TU-MPP-002	9867564535	Tulare	Required	
4	Batch mixer	Milk processing plant	TU-MPP-003	9867564536	Tulare	Required	
5	Freezer	Milk processing plant	TU-MPP-004	9867564537	Tulare	Required	
6	Pasteuriser	Milk processing plant	TU-MPP-005	9867564538	Tulare	Required	
7	Homogenizer	Milk processing plant	TU-MPP-006	9867564539	Tulare	Required	
8	Separator	Milk processing plant	TU-MPP-007	9867564540	Tulare	Required	
9	Batch mixer	Milk processing plant	TU-MPP-008	9867564541	Tulare	Required	
10	Freezer	Milk processing plant	TU-MPP-009	9867564542	Tulare	Required	
11	Pasteuriser	Milk processing plant	TU-MPP-010	9867564543	Tulare	Required	
12	Homogenizer	Milk processing plant	TU-MPP-011	9867564544	Tulare	Required	
13	Separator	Milk processing plant	TU-MPP-012	9867564545	Tulare	Required	
14	Batch mixer	Milk processing plant	TU-MPP-013	9867564546	Tulare	Required	
15	Freezer	Milk processing plant	TU-MPP-014	9867564547	Tulare	Required	
16	Pasteuriser	Milk processing plant	TU-MPP-015	9867564548	Tulare	Required	
17	Homogenizer	Milk processing plant	TU-MPP-016	9867564549	Tulare	Required	
18	Separator	Milk processing plant	TU-MPP-017	9867564550	Tulare	Required	
19	Batch mixer	Milk processing plant	TU-MPP-018	9867564551	Tulare	Required	
20	Freezer	Milk processing plant	TU-MPP-019	9867564552	Tulare	Required	
21	Pasteuriser	Milk processing plant	TU-MPP-020	9867564553	Tulare	Required	
22							
23							
24							

1



Cancel
Confirm

Figure 2. Previewing file content

Mapping the fields

In the field mapping screen that appears after choosing the import file, users can change the file (fig 3-1), choose a worksheet (fig 3-2) and preview it (fig 3-3), set the header row (fig 3-4), and map the worksheet columns to the section fields (fig 3-7).

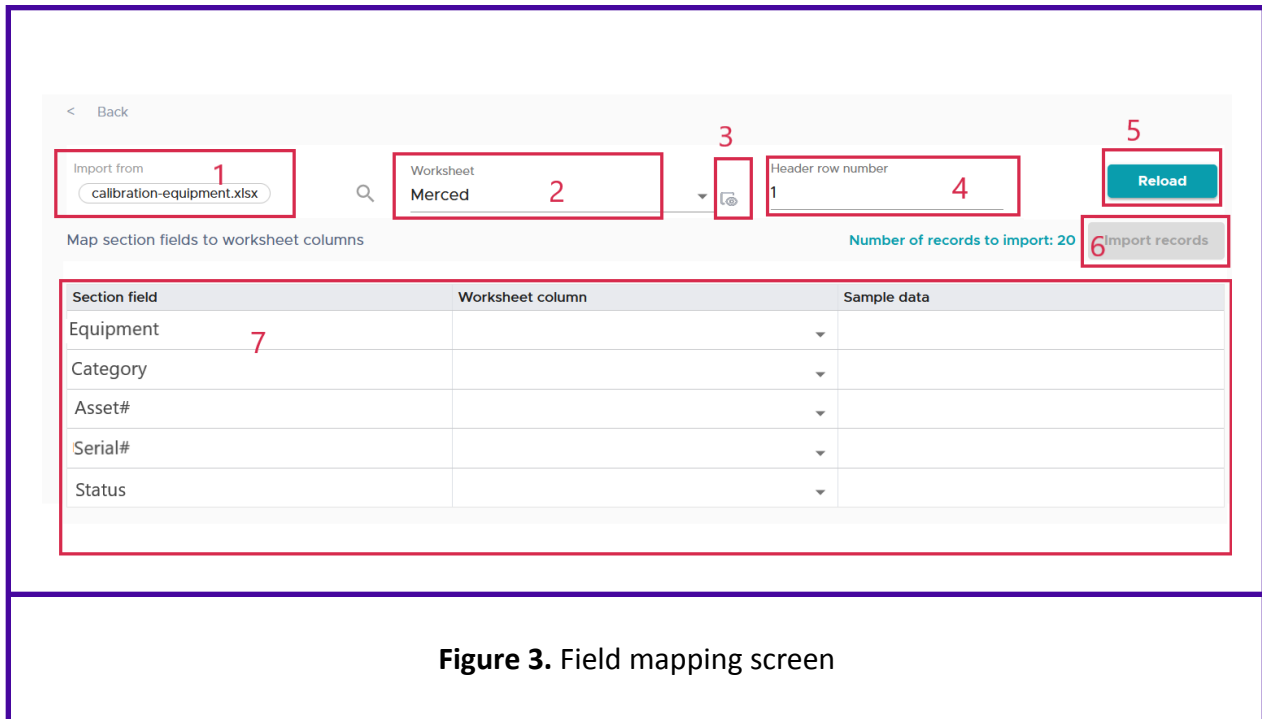


Figure 3. Field mapping screen

The mapping table (fig 3-7) comprises three columns - Section field, Worksheet columns, and Sample data.

- **Section field:** All the fields from the child section are auto-populated under this column (fig 4-1).
- **Worksheet column:** Columns from the worksheet appear in this column. Users may change the column name from the available drop-down(fig 4-2).
- **Sample data:** Field values from the first data row in the worksheet appear under this column after field mapping is done (fig 4-3).

If the users choose a different file or worksheet for import, the configured values, including the mapping, are reset. Users can preview the worksheet's content using the eye icon (fig 3-3). By default, the first row is set as the header row. Users can set a different row number for the header row.

Clicking Reload populates the field names from the worksheet under the Worksheet column, and the number of records available for import appears in the mapping section.

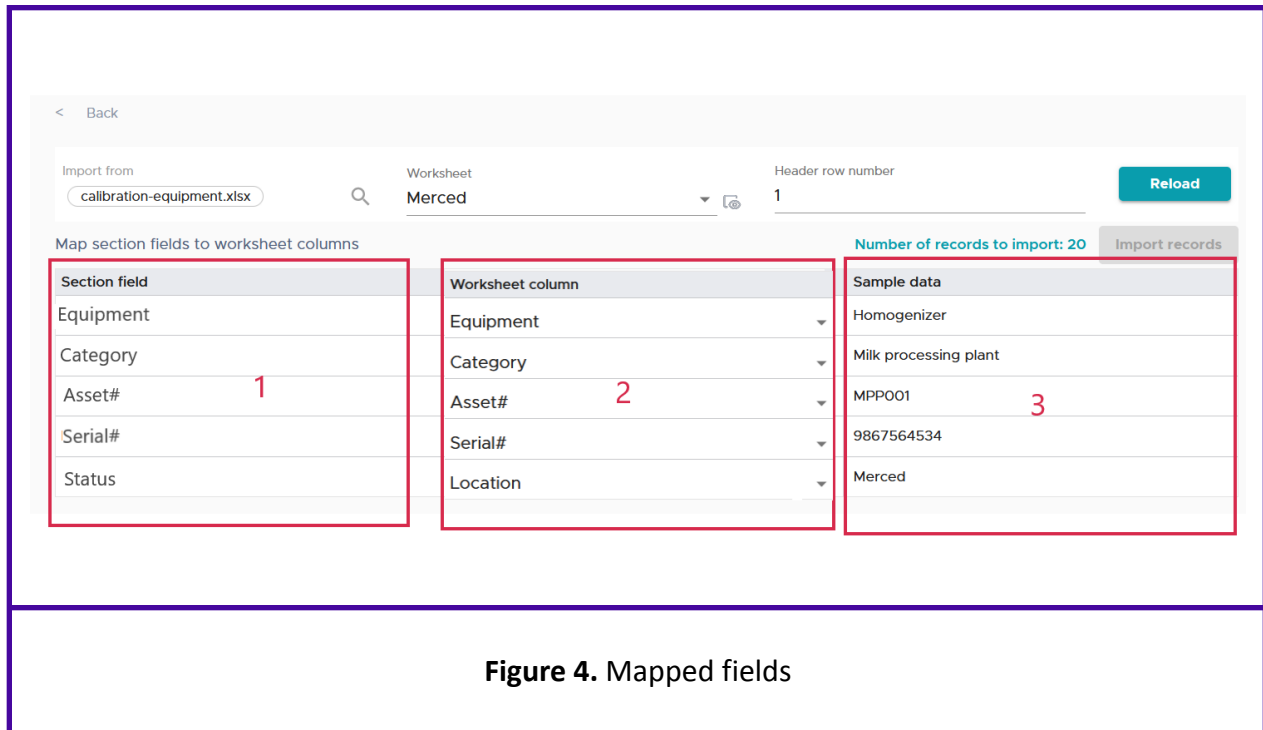


Figure 4. Mapped fields

It is not necessary to map all the section fields. Worksheet column can be mapped to more than one section field if needed.

Auto mapping

Where possible, the app automatically maps worksheet columns to the section fields based on the following conditions:

- Worksheet column title exactly matches the section field's display name or API name
- Worksheet column title matches any word in the section fields display name or field API.
 - For example, if the worksheet column name is Calibration and the field display name is Steamer calibration, it is a match.

- If there are any saved field mappings for the same combination of object fields and worksheet columns
 - For example, while importing equipment records, if users map the equipment object's field Manufacturer to worksheet column Mfg, it is saved after a successful import and will automatically be mapped the next time the same field and column combination is available

Matching precedence

All matches are case insensitive. The precedence for auto-matching is as follows:

1. Match using saved mapping
2. Partial match
3. Exact match

Manual mapping

Alternatively, users can also choose the worksheet column name from the drop-down and map it to the section field.

The app saves all manual mapping made by any app user after each successful import. It uses the object label and the API name to store the mapping. The saved map is then used to auto-map the fields during import.

Sample data

After mapping a field, a sample from the worksheet appears under the Sample data column. The app loads the chosen column's field value from the first row after the header row.

If the worksheet's field is empty for the chosen column, the sample data column is blank.

Importing records

To start importing records, after mapping the fields, users can click Import records. All the rows below the header row till the first empty row are imported.

For example, in a worksheet containing 100 records with the header on the 1st row and an empty 51st row, only 49 records are imported - starting from the 2nd row till the 50th row.

Copy fields

If you have configured copy fields for any reference field in the child section, they will be copied as part of the import process.

Mandatory fields

All mandatory fields are identified and marked based on the child / grandchild section field properties. Importing records is allowed when all mandatory fields are mapped.

After import, if any mandatory field values are null, the error is indicated with an error message in the Import status column, and the field is marked.

Duplicate fields

The import process checks for the uniqueness of fields and records according to the child object configuration. It marks the duplicates by setting the import status to Duplicate for the imported record.

Users have to resolve all the duplicates before they can save the imported records. The duplicate check is performed each time users delete / update rows marked as duplicate.

For example, suppose there are 50 records in a child section. Users then import 100 new records, of which 20 are duplicates. These 20 new records are marked as duplicates and re-evaluated when users resolve them.

The duplicate check is for newly created records only.

Updating records

Users can import data from MS Excel files to update existing child / grandchild records in Edit actions.

The import file should include the turboid to update existing records in the child / grandchild section. Also, the users should map the turboid field between the worksheet and the child section, and their values should match for updating records.

New records

In the context of importing records in Edit action, a record is considered new under the following conditions:

- The turboid value is null for the record in the worksheet
- No matching child record found for the turboid in the worksheet

Import status

After a successful import, the status of each imported record appears under the Import status column in the child section. The status message and required user action, if any, are listed in the table below:

Status message	User action
Successful	All good. No action is required.
Duplicate	Resolve duplicates and save
Invalid field value	A mandatory field is blank. Fill and save.

Support info

Supported clients	Web client
Supported data sources	Flex

Child section - Hide duplicate records

Filter out duplicate records from the child sections. Use the newly introduced 'Hide duplicate records' option from the child section's configuration popup in Create, Edit, and View actions.

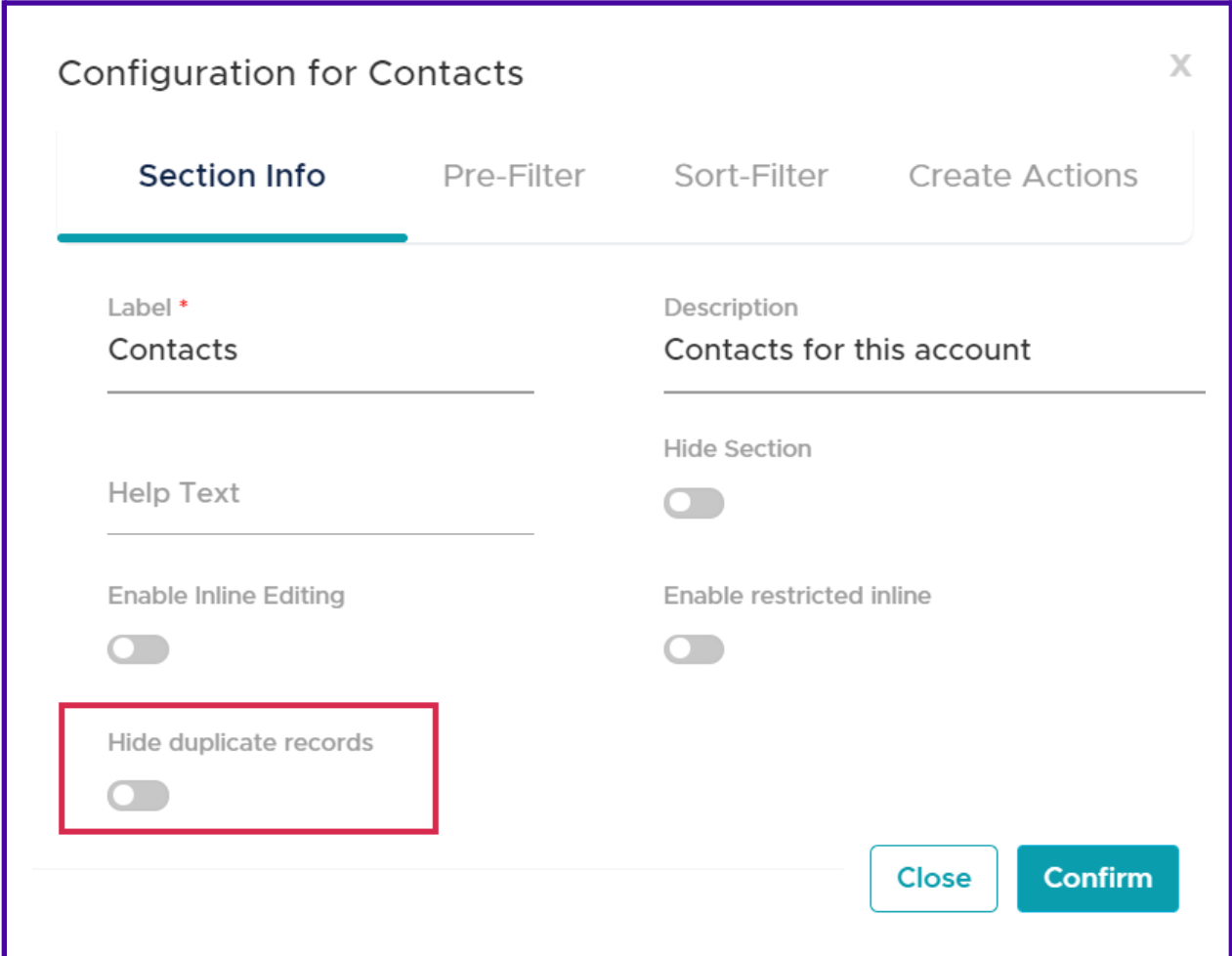


Figure 1. Settings for Hiding duplicate records in the child section

Support info

Supported clients	iPad, iPhone, Android, Web client
Supported data sources	Flex, Oracle, Salesforce

Notes for app users

Only distinct records appear in the child sections on the apps when you enable the 'Hide duplicate records' option for the action.

Known issues

The Hide duplicate records option is not available for child sections in Sign actions. The support will be added in the coming release.

Fixed issues

The following customer issues are fixed in this release:

Issue ID	Product area	Issue description
CD-1388	Web client	Despite enabling the 'Create multiple rows' option for a child section's lookup field, the multi-select lookup panel did not appear on the Edit action screen. This blocked app users from adding multiple lookup values to the child section in one go.
CD-1405	Web client	User information fields in a forked record were blank if you had used the USERINFO literals to set the field associations for the Fork action.
CD-1406	Web client	Configured field association values were not applied in the forked record if the Fork action was marked as silent.
CD-1409	Web client	The global search was not working on the Web client. It did not return any matching records for the search.
CD-1418	Android, iPhone	Auto-populated values were if the default value configured for the field was not a date literal or a date type value.

CD-1429	Web client	Child records newly created in Edit action did not appear in record view.
CD-1461	Web client	In Edit action, app users couldn't save the changes if the action included any field calculations with a filter condition based on a Boolean field.
CD-1488	Web client	Filter criteria based on the <code>#{LOGGEDINUSER}</code> literal was not working.
CD-1493	Web client	In Edit action, newly added child and related grandchild records were not getting created correctly. The child record was duplicated, and the grandchild records were not created.
CD-1496	Web client	While editing a child record, clicking on the search icon in a lookup field resulted in an error.
CD-1532	Android, iPhone, iPad, Web client, Studio	Adding new fields to an object from the Object modeler caused the initial sync on the app to fail even when the app did not use the new fields.
CD-1558	iOS, Web client	Filter criteria applied for auto-updating child lines couldn't be edited.
CD-1561 CD-1563	Android, iPhone	App users couldn't save the changes to the records or sign out of the app if it was opened after being idle for more than two hours.

CD-1565	Android, iPhone	Any email generated by the app was going to the user's Spam folder instead of the Inbox.
CD-1567 CD-1569	Android, iPhone, iPad, Web client, Studio	In newly created user accounts, app users ran into an error message when they tried to reset their password. Dismissing the error message redirected the user away from the password reset screen.
CD-1573	Studio	If you added the 'OR' condition in the subquery of the child section prefilter, it was replaced with 'AND' when you saved the changes.