Project Release Notes

Release 4.8 (August 2022)

What's New

Offline 2.0 support

Updating business data on mobile apps just got simpler! With the launch of Offline 2.0 Support, when your app users update and save their business data, it is directly saved to the central system making it instantly available globally. They have the option to save their changes as a draft when they go offline.

The new Drafts feature and improvements to the save experience make the transition between online and offline modes seamless, quick, and robust.

Read more...

Enhancements

Following enhancements are available in this release:

- **Field calculations**: Ability to add formulas in field calculations for incrementing and decrementing Date and DateTime fields using Number fields.
- **Child section**: Ability to rearrange columns, customize import fields, and bulk clear field values across multiple rows in bulk edit mode on the Web client.

- **Lookup**: Grid view option in all clients to see more records on the screen and Studio settings to turn off field labels and limit the number of fields included in the search result.

  Read more...

Offline 2.0 support for mobile apps

Updating business data on mobile apps just got simpler! With the launch of Offline 2.0 Support, when your app users update and save their business data, it is directly saved to the central system making it instantly available globally.

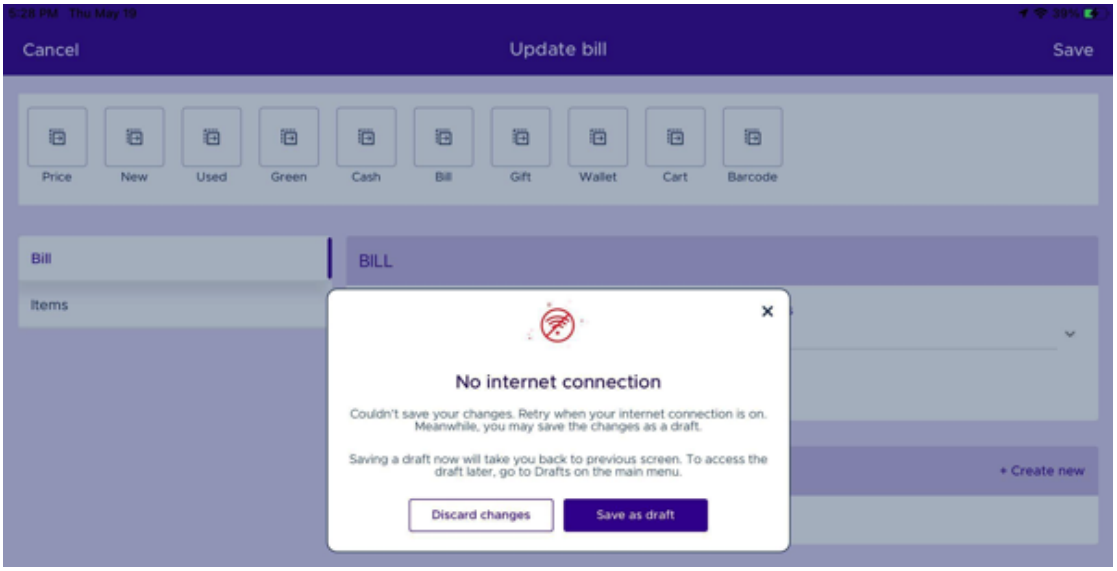
In the event of any network connectivity issues, they now have the option to save the changes locally as drafts. All they have to do is click Save as draft when prompted. The new Drafts feature, along with the improvements to the save experience, make the transition between online and offline modes seamless, quick, and robust.

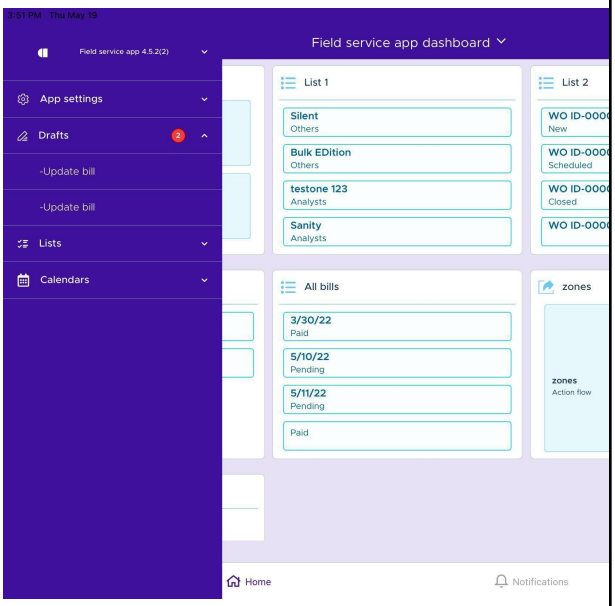
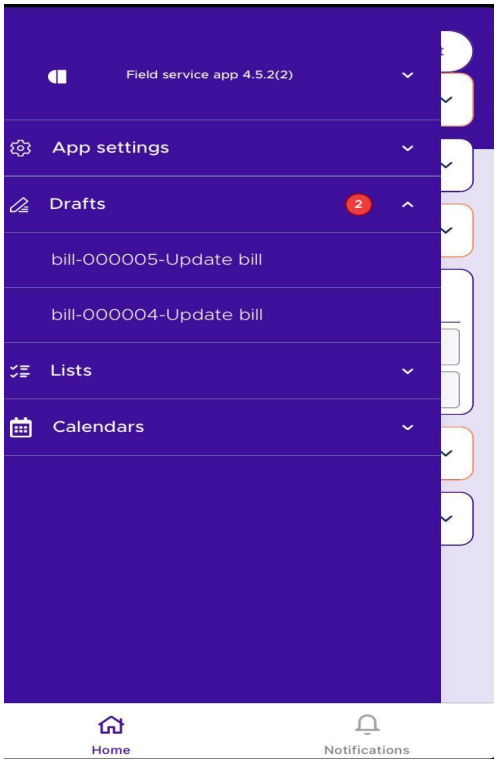
Drafts are supported in Create, Edit, Fork, Checklist, and Sign actions on all mobile devices. Let's explore these features below.

Save Drafts

When mobile app users can't save their changes to their centralized data store due to network issues, they are prompted to save their changes locally as a draft. Mobile app users can access the drafts in the draft home section under the newly introduced Drafts menu on the left navigation bar. The latest draft of a record is retained, while older drafts will be automatically discarded.

Save as draft prompt on iPad

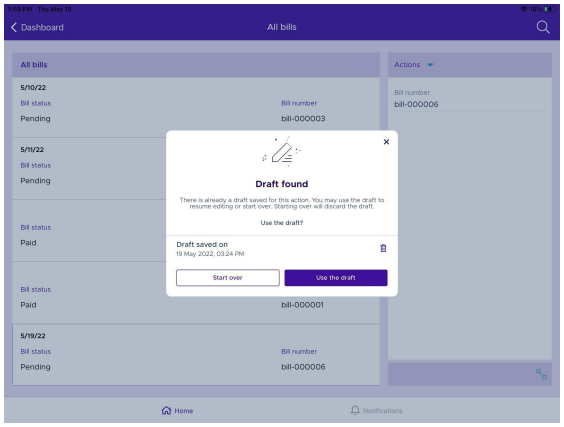
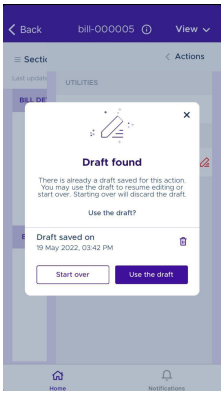


Drafts menu on iPad	Drafts menu on iPhone
	

Edit Drafts

Mobile app users can open any draft for editing by tapping it from the drafts home. The draft opens from the action where they initially saved it. A draft icon on the action menu of the view action indicates the draft status of the record. On launching the action, users have two options:

- Start over: Discard the draft, and return the record to its previous state.
- Use the draft: Resume editing the draft and save it.

Drafts in view action on iPad	Drafts in view action on iPhone
	

Discard Drafts

Users can discard drafts from drafts home in one of the following ways:

- Discard individual drafts by swiping left and tapping Delete
- Discard one or more drafts by selecting and tapping Discard selected
- Discard all drafts by tapping Discard all

Utilities in Drafts

The following utilities are available on the drafts home page:

- Search for drafts by title, date, and action.
- Sort drafts on creation time or the action name.
- Filter drafts by the object they belong to by using the filter icon on the search bar.
- Switch between list view and card view.

Note: Drafts are not synced to the centralized data store as part of the automatic data sync. They are saved only when users click *Save* from the action screen.

Enhancements

Child section

Ability to rearrange columns

Users can rearrange columns in the child and grandchild sections to their preference in the following ways:

- Drag and drop the columns directly from the child section
- Use the Rearrange columns button to view all the column names on a panel and arrange them. Refer to the video clip on the left.

Note: Rearranging columns in child and grandchild sections is supported in the Web client only.

Ability to bulk clear field values

In bulk edit mode, app users can quickly select one or more rows and use the *Clear values* option in the bulk edit placeholder row at the top.

Note: **Note**:

- The *Clear values* option does not apply to Boolean fields.
- LOV columns can be cleared using the *None* option from the dropdown.

Ability to select import fields

When the users open the worksheet for importing, only automatically mapped fields are displayed in the mapping table now. Web client users can select the fields for import as follows:

- **Include fields**: They can optionally select and map additional fields from the worksheet.

- **Exclude fields**: They can exclude automatically mapped fields by deleting the row from the mappings table.

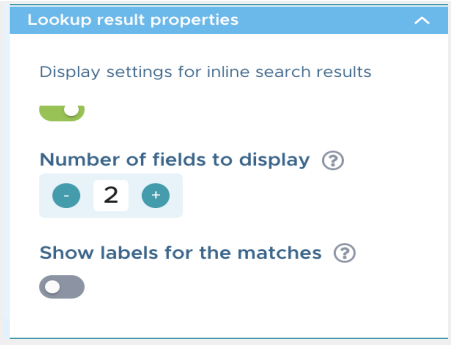
The post-import email notification is sent for successful imports too. The attachment includes all successfully imported records.

Note: Successfully imported records are not included in the attachment if it exceeds 25 MB.

Lookup Fields

Customize the result display for inline search

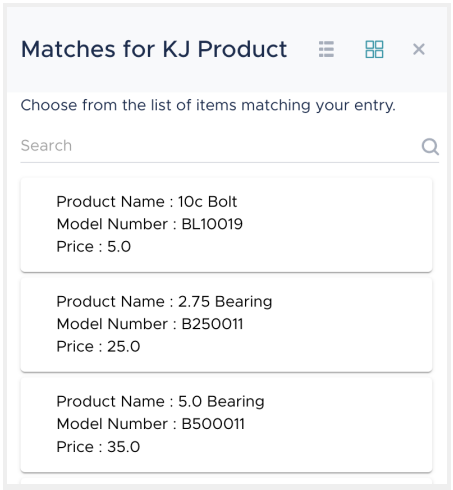
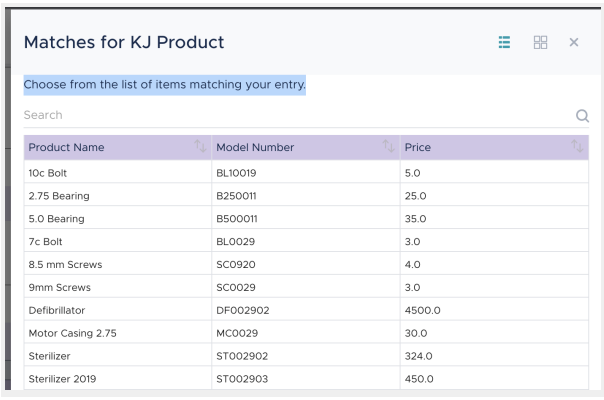
Inline search properties



You can limit the number of fields that appear in the inline search result and turn off the labels to optimize the display area. For example, if you have set five search fields for the lookup, you can limit that to only two for inline search.

Note: Inline lookup customization is available in the header, child, and grandchild sections of Create, Edit, and Fork actions.

Grid view for lookup search results

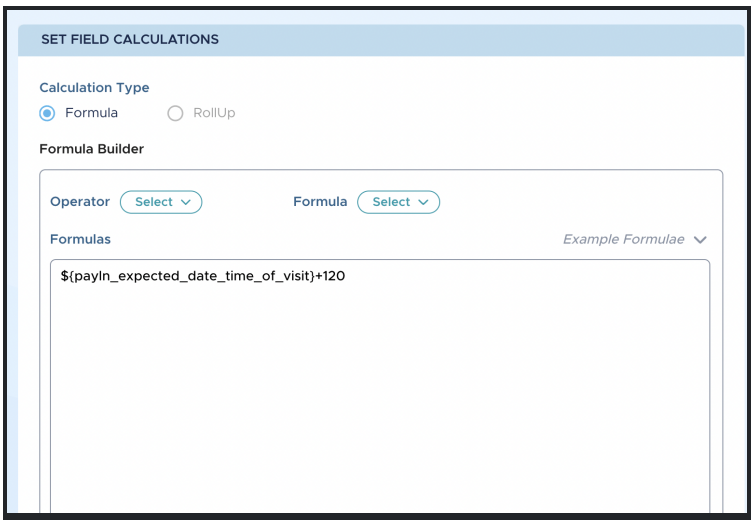
Card view	Grid view
	

Users on the Web client now have the option to view lookup search results in a tabular format by using the grid icon to switch to the grid view to see the lookup search results in tabular format.

The most recent view selected automatically applies to all the lookup fields on the form and is preserved till they switch again.

Field calculations

Using Number fields to increment date and time value



You can now use Number fields in field calculation formulas to increment or decrement Date and DateTime values automatically.

For example, you can automatically set the ETA for a service order by adding the estimated duration (START_DATE + ESTIMATE = END_DATE)

- **Date fields**: Adding a Number field to a Date field increments the days.
    - For example: August 22, 2022 + 1 = August 23, 2022.
- **DateTime fields**: Adding a Number field to a DateTime field increments the minutes.
    - For Example: August 22, 2022 8:30 PM + 65 = August 22, 2022 9:35 PM. Use the minus operator to decrement.

Note:

- Field calculation ignores the fractional part of the Number field containing a decimal value. See the examples below:
    - Date field: August 22, 2022 + 1.9 = August 23, 2022
    - DateTime field: August 22, 2022 8:30 PM + 1.9 = August 22, 2022 9:30 PM
- Fields calculations for incrementing or decrementing date and time values are supported in the following places:
    - Header sections of Create, Edit, and Fork actions.
    - Child section of Create, Edit, and Fork actions in the Web client.