

Quick Base Release Notes

2013

There were nine Quick Base product releases in 2013:

Date	Highlights
January 13th	Report groups
February 24th	Report groups improvements, permissions improvements
March 24th	Manage reports page, print app home pages
May 12th	Dynamic filters
June 9th	<i>File missing</i>
July 21st	<i>File missing</i>
October 6th	International number, currency, and date formats
October 27th	QB Exchange, new app home pages, address fields, map reports
December 13th	Edit apps shared to QB Exchange, manage billing acct improvements

January 2013 Release Notes [\[return to top\]](#)

Happy New Year! This document describes the January 13, 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 QuickBase 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 both QuickBase and New QuickBase for the January release.

Export User Information

Now you can export your QuickBase users. This functionality is available from the Manage Billing Account page, on the Users with Access tab, the Deny tab, or (for Enterprise accounts) the realm Directory tab. There are four export options – copy to clipboard, export to CSV, export to Excel, or printed user data.

Transfer Email Ownership

We've added the ability to transfer ownership of multiple emails at a time. This functionality is available both from the list of emails for a single table, and from the list of all emails in an app available from the Manage notifications, subscriptions, and reminders page (described in the release notes for the December 2012 release).

Mobile QuickBase Changes

We've added some features to mobile QuickBase.

- The Keep me signed in link now appears on the mobile sign in screen.
- We've updated the mobile site with "New QuickBase" terminology.
- When you're adding a new record, tap the Save and New button to save your changes and add another record.
- A list of reports recently viewed on a mobile device is shown when you're looking at the list of reports for a table.

Other Enhancements

Issue ID	Description
QBE006105	Email reminders can be set to remind more than 99 days in the future.
QBE007695	Admins are only emailed when changes are actually made to plans or packs, instead of whenever the page is viewed.

QBE007768	You can create an email from the app-level email management page.
QBE007829	<i>(mobile)</i> Performance has been improved on form rule updates.
QBE007885	The * required notation has been removed from the bottom of Edit forms.
QBE007949	Treatment of cached user data has been improved.

What's New in **New QuickBase**?

Note: If your billing account has access to New QuickBase (see image below), this section is for you.

The screenshot shows the QuickBase user interface. At the top, there's a navigation bar with 'My Apps' selected. Below it, a search bar and a '+ New App' button are visible. A table lists the following apps:

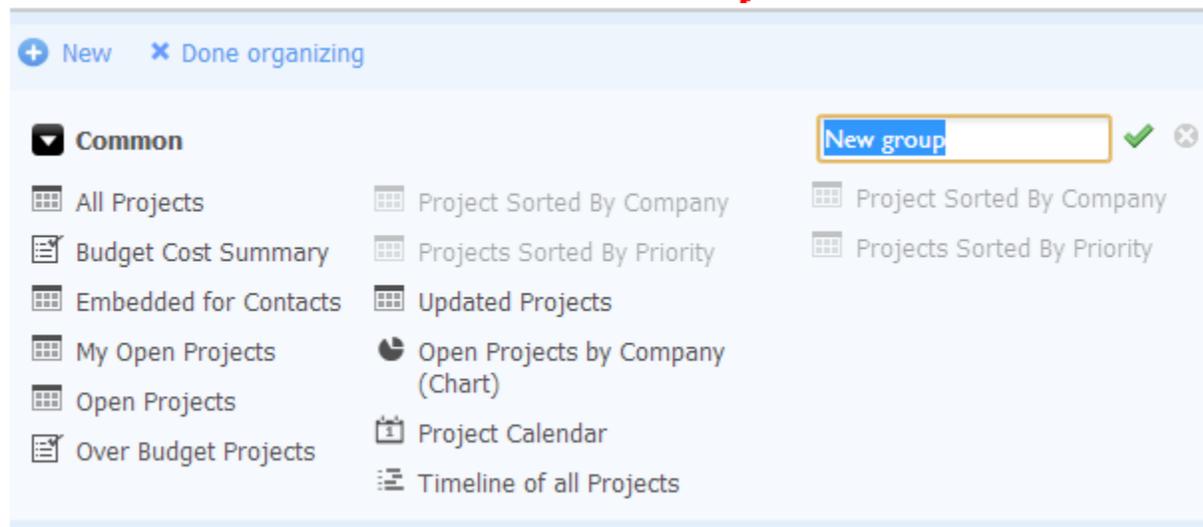
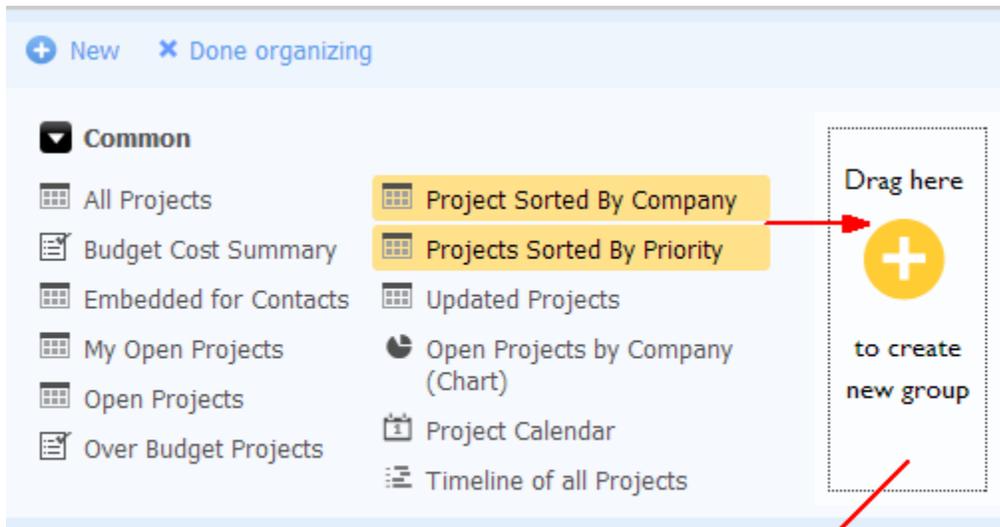
App Name	Activity	Last Visited	Category	Manager
Project Manager Plus		Today		sshearin
Manage Your Sales Team		Dec. 21, 2012		sshearin
Customer Projects and Time Manager		Dec. 21, 2012		sshearin

On the right side, there are sections for 'Account Admin' (with a 'Manage my billing account' link) and 'Community' (with a search box).

Reports Management

We know many of our customers wanted the capability to manage and organize their QuickBase reports (over 350 votes on UserVoice!), and now it's here. If your account has upgraded to the New QuickBase, you'll see an Organize button in the reports panel. Click the button to begin organizing your reports – drag and drop them into groups, rearrange groups, rearrange reports within groups, and more.

Note: This feature is only available to accounts and realms that have completed the upgrade to New QuickBase. [Read about the upgrade.](#)

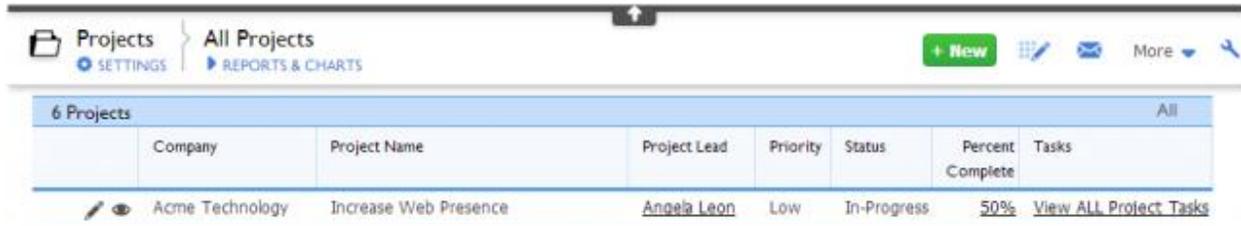


After the January 2013 release, see http://www.quickbase.com/user-assistance/#organizing_reports.html for more information.

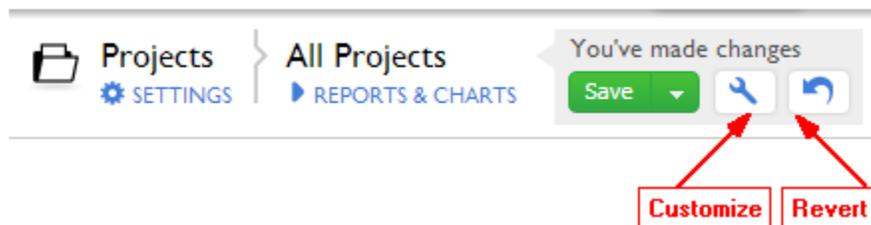
Visual Changes – Responsive Design

With this release, we've introduced a number of changes so that QuickBase is more aware of the size of the device or screen it's displayed on. For example, buttons on the Page bar become icons when the screen is smaller than a certain size.

In response to user feedback about the amount of space taken up by page navigation elements, we have made the Page bar thinner, and the Global bar now scrolls off screen with the Table and App bars. The **Back to top** button is now shown as an arrow at the top of the screen. See image below.



The **Save** report controls that display when you make changes while viewing a report have changed. The Save button and its arrow have been resized for better targeting, and the **Customize** and **Revert** buttons have been transformed into icons.



Also, pinch and zoom functionality now works on tablet devices.

Visual Changes – Higher Contrast

In response to user feedback about colors, fonts, and shading in the New QuickBase, we've made a number of changes.

1. Links and blue icons are now a darker blue.
2. Collapsible section headers are now smaller.
3. When row colorization is applied, View and Edit icons will appear lighter or darker so that they are visible.
4. Group headers in grouped reports are now darker.
5. Page titles on reports, forms, and the My Apps page are now in a larger font.
6. Help icons now appear to the left of the field label.
7. There have been minor changes to ten of the pre-defined colors that you can specify as color names:

Color Name	New Hex Value	Old Hex Value
Beige	#f1ecc9	#f5f5dc
Olive	#8e9b41	#808000

Tan	#d2c29c	#d2b48c
Pink	#ffe7f5	#ffc0cb
Purple	#7b70b6	#800080
Blue	#519ef2	#0000ff
Green	#3dac39	#008000
Yellow	#ffd04a	#ffff00
Orange	#fda302	#ffa500
Red	#d81702	#ff0000

Other Enhancements

Issue ID	Description
QBE007486	The reports panel now loads reports as needed, improving performance for tables with many reports.

What's Fixed in QuickBase?

Note: This section describes issues fixed in both QuickBase and New 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
QBE006087	Emails requesting permission to access an app were sent with a table name instead of the app name. This issue has been resolved.
QBE006170	Including special characters such as & or ^ in a custom permission rule deleted the contents of the custom rule. This issue has been resolved.
QBE006932	<i>(mobile)</i> Entering more than one search term returned no records. This issue has been resolved.
QBE007575	<i>(Internet Explorer 8)</i> The first field shown in the dialog to add a column to a report was not selectable. This issue has been resolved.
QBE007650	When a field that allowed HTML was part of the record picker, the Recents menu showed the HTML tags instead of the field value. This issue has been resolved.
QBE007780	<i>(mobile, iPad)</i> Attempting to select a checkbox when using Grid Edit did not always succeed. This issue has been resolved.
QBE007800	The Change History table on the View Billing History page was ordered by date. It is now in reverse date order, so the most recent changes are shown first.
QBE007809	<i>(mobile)</i> Performance has been improved on conditional dropdown lists.
QBE007831	<i>(mobile, Android)</i> Messages that were displayed due to a form rule were not centered on the page. This issue has been resolved.
QBE007868	Customizing a table report automatically checked the Show summary table based on the grouped tables , which produced an error when saving. This issue has been resolved.

QBE007889	Duration fields with invalid precision caused a server crash. This issue has been resolved.
QBE007923	<i>(mobile)</i> When form rules updated clickable Lookup fields or Formula fields (for example, Formula – Email), the updated fields did not display correctly. This issue has been resolved.

What's Fixed in **New QuickBase**?

Note: If your billing account has access to New QuickBase, this section is for you. This section describes issues fixed in New QuickBase only.

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
QBE007358, QBE007646	The behavior of QuickBase after adding a record has changed: Except in the case of adding a related record, QuickBase will now display the newly added record after saving it. When adding a related record (i.e. adding a child record from a master record or a master record from a child record), QuickBase will continue to return to the original record after saving the related record.
QBE007436	A non-functional Back to top button displayed when scrolling to the bottom of a window with only a Page bar. This issue has been resolved; the button no longer displays.
QBE007573	The New Relationship button in the Page bar was non-functional when no relationships existed for the table. This issue has been resolved.
QBE007688	The Search box shown on the table Home page did not search on all searchable fields. This issue has been resolved.
QBE007716	The realm setting to hide the New app button did not work. This issue has been resolved.

QBE007733	<p>(<i>Internet Explorer 8</i>) Forms with labels on the left displayed on the same row did not show any space between the first field's data and the second field's label. This issue has been resolved.</p>
QBE007879	<p>Forms with many fields that had field help caused scrolling performance issues. This issue has been resolved.</p>
QBE007936	<p>Reports that have no Sort or group on other columns selection but do have the Show summary table based on the grouped tables field checked will be modified to remove the check. (See QBE007868, above, for a description of the issue that caused the error.)</p>

February 2013 Release Notes [\[return to top\]](#)

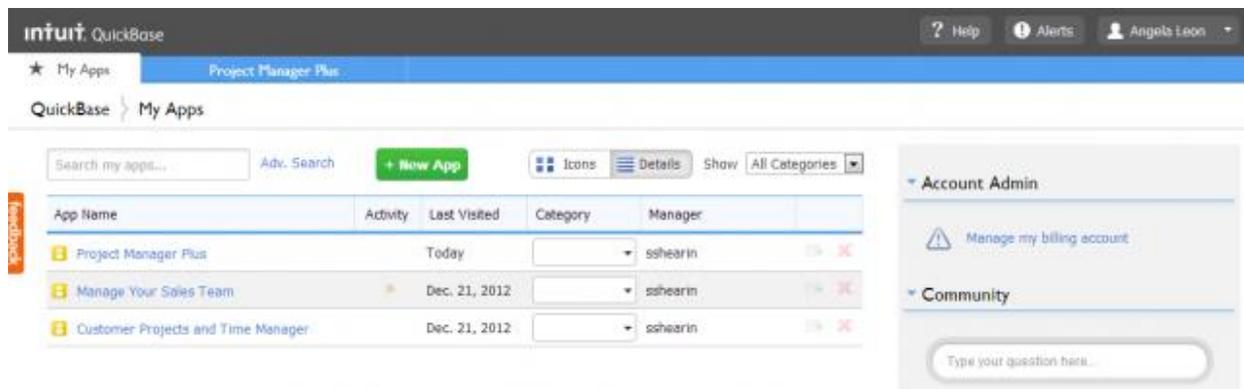
What's New in QuickBase?

This section describes the changes that appear in both QuickBase and New QuickBase for the February release.

- The Roles setting Hide "Customize this Report" link on reports has been changed to Hide UI for creating or customizing reports.
- (QBE008074) On the mobile site, text sections on a form now show the entire section, instead of only showing the first two lines.

What's New in **New QuickBase**?

Note: If your billing account has access to New QuickBase (see image below), this section is for you.



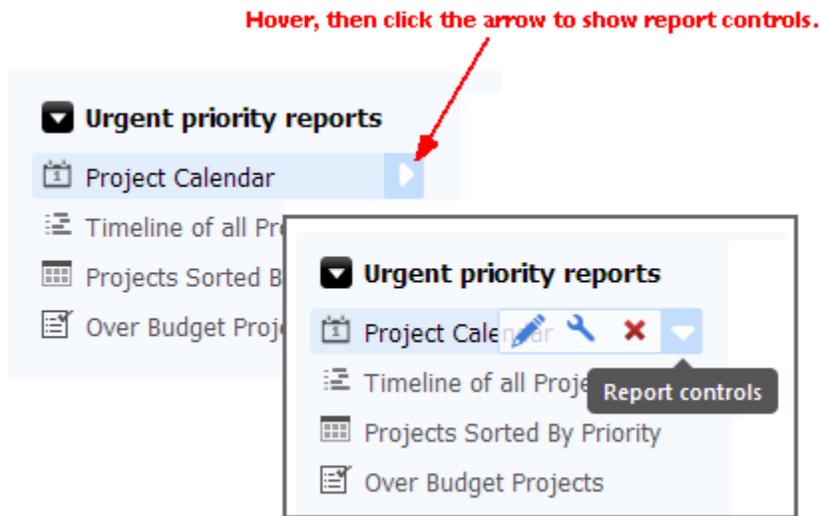
Roles Improvements

- The Roles setting Hide "Customize this Report" link on reports has been changed to Hide UI for creating or customizing reports. This option now also hides the New and Organize controls on the reports panel.
- There is a new Roles setting called Hide personal settings link, which will hide the My personal settings in <app> menu option in the User dropdown. This setting prevents users in that role from creating personal reports and emails.
- If you display a report from a hidden table, the Page bar links to that table and to REPORTS & CHARTS are now disabled.

Reports management improvements

Note: Reports management is only available to accounts and realms that have completed the upgrade to New QuickBase. Read about the upgrade.

- When you create a report, you can now specify an existing group to put the new report into. When editing, and the Report Builder displays the group for a report.
- You can now rename, delete, or customize a report while organizing them in the reports panel.



What's Fixed in QuickBase?

Note: This section describes issues fixed in both QuickBase and New 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
QBE007572	The Add New Fields dialog can now add 12 fields at a time instead of 10.
QBE007645	Selecting the Show a 'totals' row in reports checkbox for an Email field did not appear to be saved, even though it was. This issue has been resolved.

QBE007665	<p>(Internet Explorer 10/Windows 8) Attempting to add records using the JavaScript API failed with an error mentioning XPathEvaluator. This issue has been resolved.</p>
QBE007669	<p>(mobile) Email notifications from QuickBase showed an incorrect timestamp when the email was retrieved using POP3 or IMAP and viewed on an iOS device. This issue has been resolved.</p>
QBE007772	<p>QuickBase records retrieved using API_GetRecordAsHTML no longer showed embedded reports. This issue has been resolved.</p>
QBE007802	<p>The subject of a QuickBase invitation was different for registered and unregistered users. This issue has been resolved.</p>
QBE007888	<p>The default file format when exporting was set to XML, not CSV. This issue has been resolved.</p>
QBE007900	<p>The Application Statistics page showed the total size of all attached files for the entire app for each table. This issue has been resolved.</p>
QBE007914	<p>(mobile) Attempting to view a record from a report with an "ask the user" filter redisplayed the filter. This issue has been resolved.</p>
QBE007915	<p>Adding or editing a phone number using Grid Edit when the field is configured to show an extension resulted in an incorrect number being displayed. This issue has been resolved.</p>
QBE007940	<p>Custom branding applied to the QuickBase header or footer was not saved. This issue has been resolved.</p>
QBE007944	<p>QuickBase returned an error when attempting to open a file with a name containing "{_". This issue has been resolved.</p>
QBE007945	<p>When viewing a report, users in roles without delete permissions could still see the More > Delete these records menu option shown on the Page bar. This issue has been resolved.</p>

QBE008038	When editing an app Home page to show a report, the list of reports shown was not alphabetized. This issue has been resolved.
QBE008046	When displaying the list of reports to set report access for a role, the reports shown were not alphabetized. This issue has been resolved.
QBE008058	Actions on the Manage Users page in an app with many users would take a very long time. This issue has been resolved.
QBE008063	<i>(mobile)</i> If a form did not include a reference or reference proxy field, calls to <code>API_GenAddRecordForm</code> displayed lookup fields while adding the new record, but did not save them. This issue has been resolved.
QBE008070	<i>(mobile)</i> Form rules for a table would fail if the records in the table were accessed by a user in a role with custom Modify Record rights. This issue has been resolved.

What's Fixed in **New QuickBase**?

Note: If your billing account has access to New QuickBase, this section is for you. This section describes issues fixed in New QuickBase only.

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
QBE007403	Pressing Cancel while in Grid Edit mode sometimes did not return to the expected location. This issue has been resolved.
QBE007601	When editing a form, moving fields up and down also caused the cursor to jump to the top of the list. This issue has been resolved.
QBE007718	On Condensed spacing, the information icon that indicates field-level help overlapped the text on a text field. This issue has been resolved; the icon now appears to the left of the field name.

QBE007734	After upgrading to the New QuickBase, realm administrators previewing the custom sign-in page saw the old-style QuickBase sign in page. This issue has been resolved.
QBE007813	The role settings to hide the UI for App & table settings and for Users did not hide those UI elements. This issue has been resolved.
QBE007839	On the Forms list, if you overrode the Grid Edit role settings for a particular report to <Standard Behavior> , then customized the report, the setting reverted to Use role settings . This issue has been resolved.
QBE007855	<i>(Internet Explorer)</i> Clicking the Support Center link in the Help panel would open the Support Center in a separate window, which would immediately minimize itself. This issue has been resolved.
QBE007876	Email notifications with custom messages using %recData% did not show the changed fields in red on modified records. This issue has been resolved.
QBE007887	If the user viewing a report or a record was in a role that had been set up to hide all tables in the UI, the Home button disappeared from the Table bar as well. This issue has been resolved.
QBE008014	<i>(Internet Explorer 8 and 9)</i> If a checkbox field appearing in a child table as a lookup field was shown using a form rule, its label did not display when the field did. This issue has been resolved.
QBE008016	<i>(Safari/Mac OS X)</i> The Drag here to create a new group area moved when the user attempted to create a new group. This issue has been resolved.
QBE008019	<i>(Internet Explorer 8)</i> Attempting to view the list of users for an app showed the Manage Users page with a blank list of users. This issue has been resolved.
QBE008021	The standard QuickBase Participant role only allowed View access for new tables. This issue has been resolved.
QBE008037	Adding a child record without saving the master record resulted in being redirected (after saving both the master and the child record) to a blank form to add a new master

	record instead of to the saved master record with its newly-added child record. This issue has been resolved.
QBE008039	The App bar is clipped vertically when the user is in a role that can manage users but not see any tables in the Table bar. This issue has been resolved.
QBE008043	The list of personal reports in the reports panel overlapped the list of common reports. This issue has been resolved.
QBE008053	<i>(Mozilla Firefox)</i> Printing a form with an embedded report to PDF caused a large blank section prior to the report. This issue has been resolved.
QBE008055	Saving a child record created using an Add Record link on a record shown on a filtered table Home page produced an error, but the child record was saved correctly. This issue has been resolved; the error no longer appears.
QBE008057	The lists shown in the ACCOUNTS & REALMS link on the My Apps page had overlapping columns. This issue has been resolved.
QBE008119	<i>(upgrade)</i> Some users in accounts that upgraded to the New QuickBase were not receiving subscriptions and notifications because they were marked "Unverified" in the new account URL. This issue has been resolved.

March 2013 Release Notes [\[return to top\]](#)

What's New in QuickBase?

This section describes the changes that appear in both QuickBase and New QuickBase for the February release.

Improvements in Role-based User Interface Control

QuickBase now provides role-based control over emailing and printing QuickBase data. Using the per-table controls shown when editing a role (on the User Interface tab), you can disable printing and email controls in QuickBase. Note that these controls do not prevent the user from emailing or printing QuickBase data using other programs.

Menu & Table Display

Hide UI for: App & table settings Users Recents Search Help Test as another role

Table Name	Hide in Table Bar	Hide Add Button/Links	Hide Multi-record Options	Hide Email Buttons/Links	Hide Print Links
All Tables	<input checked="" type="checkbox"/>				
Contacts	<input checked="" type="checkbox"/>				
Projects	<input checked="" type="checkbox"/>				
Tasks	<input checked="" type="checkbox"/>				

Checking Hide Email Buttons/Links for a table will hide the **Email** button on records, as well as the **Email** menu on reports, embedded reports, and search results. In New QuickBase, it will hide the **Email** link on the Page bar, the **More > New notification** menu option on records, and the **More > New subscription** menu option on reports and embedded reports and QuickBase search results.

Checking Hide Print Links for a table will hide the **Customize > Print this page** menu option, as well as the various options to print records, reports, embedded reports and search results. In New QuickBase it will also hide the **Print this page** link in the Page bar on the app Home page.

Improvements in Importing Users

When importing users into apps without a default role, QuickBase now prompts for a role.

Project Manager Plus **SETTINGS** } Manage Users } Import Users Next > Cancel

Enter the email addresses of users to add to this app. Separate them by a comma, a semi-colon or a carriage return.

Email addresses:

Assign each the role: Select a role ▾

Import From a File...

List All Reports

QuickBase now offers the ability for an app administrator to manage all reports (common and personal) in the app in a single location. The Manage Reports page is accessed by clicking **Customize > Application**, going to the Management tab, and clicking Manage Reports. In New QuickBase, the page is accessed from the app settings page – click **App management**, then **Manage Reports**.

Project Manager Plus Settings **App management** } Manage Reports + New report or chart

[EXIT SETTINGS](#)

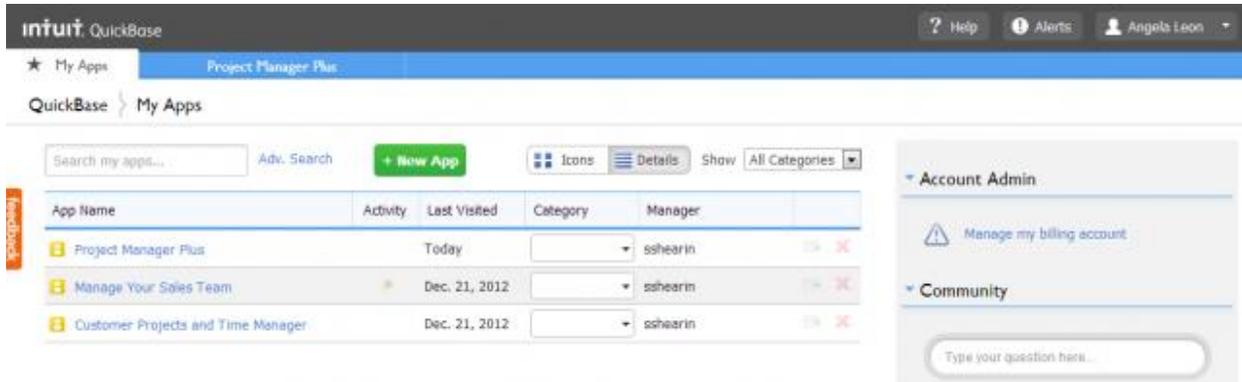
✕ Delete 62 Reports						
	Table	Name	Type	Last Used	Owner (for personal)	
<input type="checkbox"/>	Projects	Projects Sorted By Priority	Table			✕
<input type="checkbox"/>	Projects	Timeline of all Projects	Timeline	Today		✕
<input checked="" type="checkbox"/>	Projects	Updated Projects	Table			✕
<input type="checkbox"/>	Projects	Embedded for Contacts	Table	Feb. 26		✕
<input type="checkbox"/>	Projects	All Projects	Table	June 11, 2012		
<input type="checkbox"/>	Resources	By Department	Table			✕
<input checked="" type="checkbox"/>	Resources	All Resources	Table	May 16, 2012		
<input type="checkbox"/>	Resources	By Function (Pie chart)	Chart			✕

Confirm Security Answer

When you set or enter the answer to your security question, you are now required to enter the answer, and then enter it again to confirm. This feature prevents inadvertent errors when entering the answer to your security question.

What's New in **New QuickBase**?

Note: If your billing account has access to New QuickBase (see image below), this section is for you.



- Formula – URL fields can now be shown as buttons on forms and reports.

Display

Link text

Leave empty to use the URL as the link text

Options

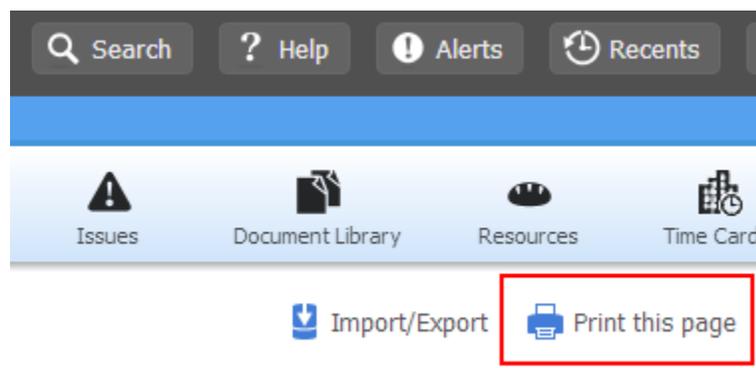
- Don't show 'http://' when showing the URL
- Display as a button on forms
- Open Target in New Window

Value display

- Display in bold
- Display without wrapping

- The app now remembers the last page accessed for eight hours instead of forever. After eight hours, clicking the app in the App bar will display the app Home page.

- The **Print this Page** link now appears in the Page bar on the app Home page.



What's Fixed in QuickBase?

Note: This section describes issues fixed in both QuickBase and New 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
QBE005564	Setting the maximum height on an embedded report caused the width of the report to be set incorrectly. This issue has been resolved.
QBE006026	The Field Usage list did not include an item for a User or List-User field listed in the Notify Whom section of an email notification. This issue has been resolved.
QBE006151	(<i>Internet Explorer 8 and 9</i>) Configuring the Copy Master and Detail Records command failed with a JavaScript error. This issue has been resolved.
QBE007551	Blank form elements inserted between existing form elements caused blank spaces to appear when viewing, editing, and printing records. This issue has been resolved.
QBE007781	Numeric fields were left-aligned when a report was emailed. This issue has been resolved.
QBE007948	Embedded reports with column heading overrides displayed the original field names as headings (instead of the overrides) when the report was included on an Add form. This issue has been resolved.

QBE007958	The Usage tab indicated that fields in a detail table with the Add this field to all new reports property selected were used in a summary field's matching criteria. This issue has been resolved; the incorrect usage items are no longer shown.
QBE008065	When viewing the QuickBase full site on a mobile device, using pinch and zoom would freeze the left-hand columns of a report. This issue has been resolved; the columns no longer freeze.
QBE008106	Some groups were shown as Denied when they were not. This issue has been resolved.
QBE008130	The Usage tab did not show the email notification name when a field was used in a notification. This issue has been resolved.
QBE008136	Conditional dropdown fields did not populate correctly when they relied on derived (read-only) fields. This issue has been resolved.
QBE008149	The Width of input box property had no effect on Text – Multiple-choice fields, and has been removed from the properties listed for them.
QBE008170	<i>(not for New QuickBase)</i> Summary reports displayed on an app Home page stretched to the width of the page instead of retaining the size indicated by column widths. This issue has been resolved.

What's Fixed in **New QuickBase**?

Note: If your billing account has access to New QuickBase, this section is for you. This section describes issues fixed in New QuickBase only.

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
QBE007656	When the ifv parameter was appended to a QuickBase URL, only the Global bar was hidden. The App bar and the Page bar remained visible. This issue has been resolved.
QBE007697	<i>(Internet Explorer 10)</i> When attempting to add a new user, the dialog box did not disappear after clicking the Add button. This issue has been resolved.
QBE007698	<i>(Internet Explorer 10)</i> When attempting to add new fields, the dialog box did not disappear after clicking the Add button. This issue has been resolved.
QBE007723, QBE007898	When viewing an embedded report, some fields did not expand properly, so the report did not expand to fill the entire screen width. These issues have been resolved.
QBE007883	The Next/Return/Previous controls on forms sometimes overlapped the form's contents when the browser window was resized. This issue has been resolved.
QBE007930	Printing a one-page report printed a second, blank page. This issue has been resolved.
QBE007941	If an embedded report is in a collapsible section on a form, and that form element has a maximum height set, collapsing and expanding the section caused the report to render incorrectly. This issue has been resolved.
QBE007997	Text fields containing long strings of text with no spaces wrapped improperly when displayed on a form. This issue has been resolved.
QBE008004	Fields were displayed out of vertical alignment with their labels when the fields were derived or read-only, and appeared in a form section set to display labels to the left of the data. This issue has been resolved.

QBE008023	Saving a form in the Form Builder navigated back to the previous page, which was not always the desired behavior. An Apply Changes button has been added to the Page bar. This button saves the form without leaving the Form Builder.
QBE008094	After creating new fields in a table containing many fields, the Add new fields to forms dialog displayed off-screen. This issue has been resolved.

May 2013 Release Notes [\[return to top\]](#)

This page describes our May 12, 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 QuickBase page, or visiting the Customer Feedback for Intuit QuickBase forum (<http://quickbase.uservoice.com>).

Congratulations to our QuickBase users – nearly everyone has completed the upgrade to the New QuickBase!

What's New in QuickBase?

This section describes the changes that appear in both QuickBase and New QuickBase for the May release.

Dynamic filters available for reports

Charting improvements

Reports management improvements

Default report settings improvements

New: Favorite reports

Search improvements

New: Faster access to New Record command

Table Home Page improvements

App management improvements

Enterprise: Reset security question & answer

October 6, 2013 Release Notes [\[return to top\]](#)

This page describes our October 6, 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 QuickBase page, or visiting the Intuit QuickBase forum for Customer Feedback (<http://quickbase.uservoice.com>).

What's New in QuickBase?

This section describes the changes that appear in QuickBase for the October 6 release.

New number format, currency symbol, and date format settings to support international use of QuickBase.

Changes to the Manage Billing Account page to give account administrators more information about about app and user activity.

Changes to chart display: wider bars on bar charts, and a setting for 3D shading on all chart reports in an app.

New API Guide look and feel, similar to the QuickBase online help.

October 27, 2013 Release Notes [\[return to top\]](#)

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.uservice.com>).

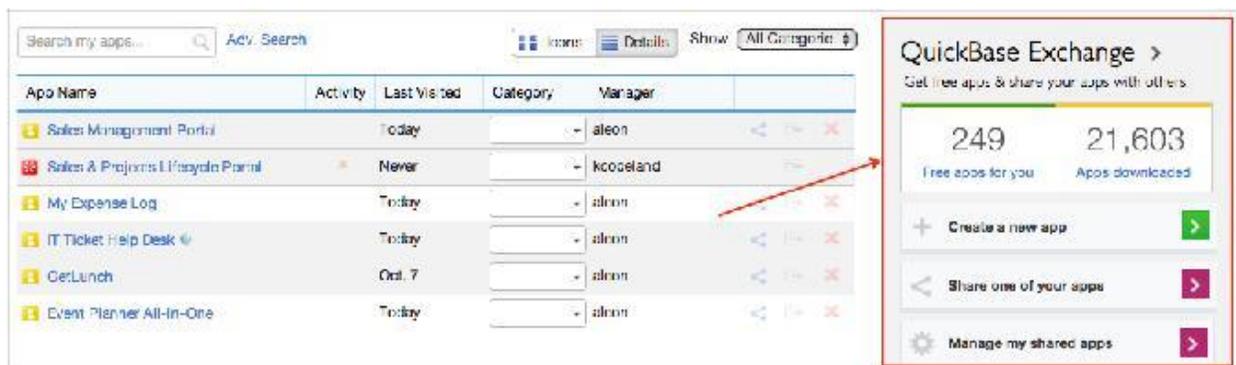
What's New in QuickBase?

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

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



The screenshot shows the QuickBase My Apps page. On the left is a table of installed apps. On the right is a sidebar with the QuickBase Exchange section highlighted by a red box. A red arrow points from the 'Free apps for you' link in the sidebar to the 'Sales & Projects Lifecycle Portal' app in the table.

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

QuickBase Exchange >
Get free apps & share your apps with others

249 Free apps for you 21,603 Apps downloaded

- + Create a new app
- < Share one of your apps
- Manage my shared apps

Finding apps

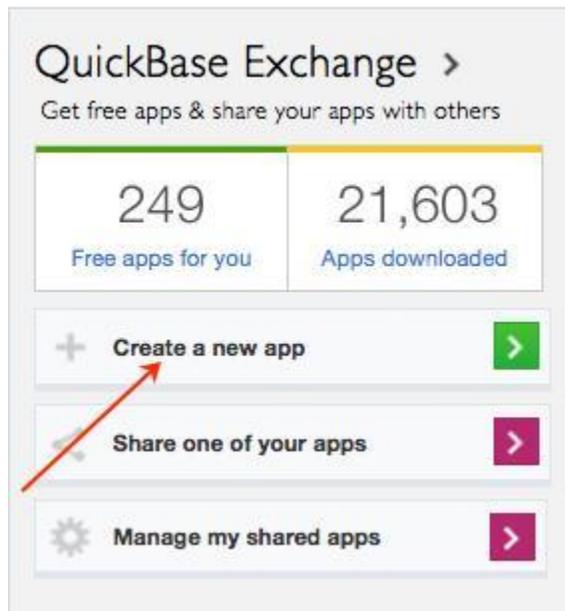
Use the controls on the page to search for a QuickBase app that's similar to the solution you're seeking, then get the app that's most useful to you. Any app you get from the Exchange is fully customizable, so you can make any changes you need to suit your specific workflow and processes. Apps from the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

The screenshot displays the QuickBase Exchange interface. At the top, there is a search bar containing the text "mult" and a magnifying glass icon. To the right of the search bar, it indicates "19 apps match your search" and a "Sort by Most Popular" dropdown menu. On the left side, there is a "Categories" sidebar with a list of categories: All, Customer Support (4), Human Resources (1), Information Technology (8), Knowledge Management (2), Legal (1), Other (7), Professional Services (7), Project Management (3), Sales (5), and Team Management (4). The main area shows a grid of six app cards. Each card includes the app name, a star rating, the number of downloads, a brief description, a row of icons representing app features, and buttons for "Get this app" and "Details".

App Name	Rating	Downloads	Description
Out of the Office Tracker	★★★★☆	14 downloads	This tracks team members who will be out of the office. It has a nice timeline view to help adjust any app...
Sales Management Portal	★★★★☆	13 downloads	Gain visibility and detailed reporting on sales opportunities and sales pipelines with this very robust tool...
Sales & Projects Lifecycle Portal	★★★★☆	11 downloads	Track the lifecycle of projects from new lead, to sales opportunity, project origination, and finally, im...
Order Management Portal	★★★★☆	11 downloads	Create orders consisting of multiple products and/or services for your customers. Manage customer wait...
Project Management Portal	★★★★☆	8 downloads	Manage multiple projects and tasks in one central location. You'll have the visibility you need to get the...
Support Customers	★★★★☆	8 downloads	Organize, prioritize and engage with customers on support requests to ensure accurate and timely response...

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!

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.

The image shows a two-part interface for promoting an app on QuickBase Exchange. The left part is a form titled "Promote your app" with a progress bar at the top showing four steps: CLONE, PREP, PROMOTE (the current step), and SUBMIT. The form fields include:

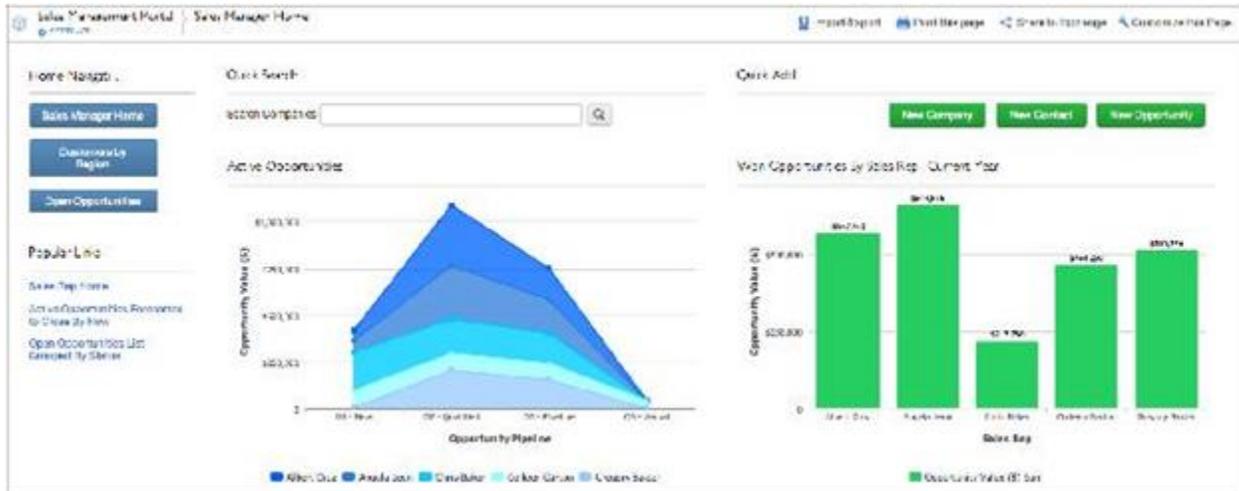
- Your app's name***: "Event Planner All-in-One" (21 characters remaining)
- Your app's description***: "This app helps you run small to medium size events while keeping all the details straight. Let volunteers and attendees sign up right from the app's home page. Track sessions, logistics, committee action items, and more." (1782 characters remaining)
- Categories for your app***: "General", "Knowledge Management", "Non-Profit"
- Descriptive tags, separated by commas***: "event planning, logistics, attendees, participants" (8 tags remaining)
- Screenshots and documents that show how your app works**: A section with a "Examples" link and four image thumbnails labeled "event_home.png", "add_session.png", "add_attendee.png", and "committees.png".

At the bottom of the form are buttons for "Save as draft and come back later" and "NEXT >".

The right part of the image is a preview of how the app will appear in the QuickBase Exchange. It features a purple banner that says "This is how your app will appear in QuickBase Exchange". Below this is a card for the "Event Planner All-in-One" app, which includes a 5-star rating, a truncated description, and icons for various app features. At the bottom of the card are buttons for "Get this app" and "Details".

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.



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

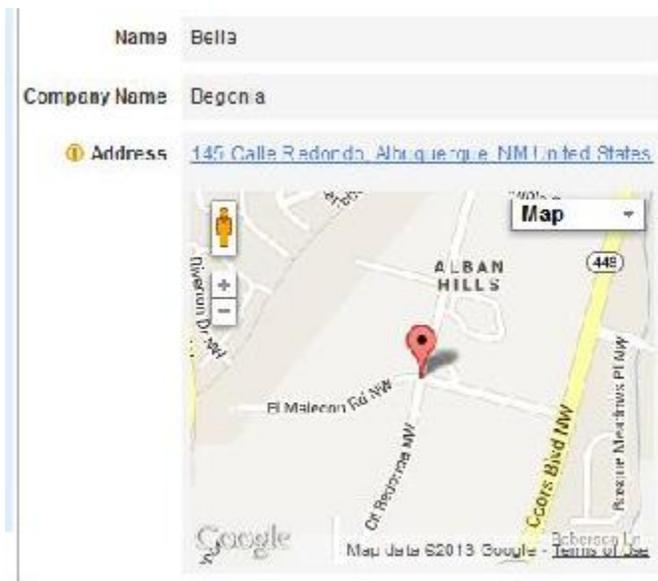
choose an address from the list, QuickBase populates the subfields automatically.

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.

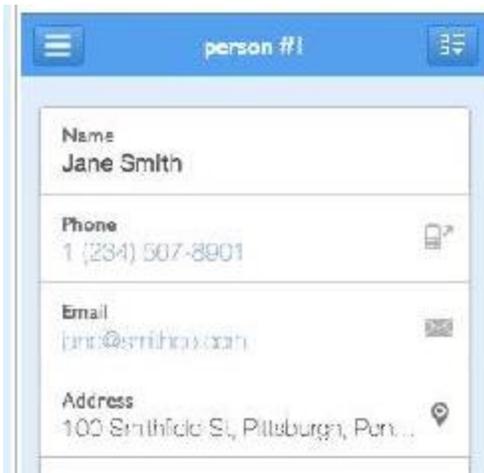


The image shows a mobile interface for entering an address. At the top, there is a blue bar with two buttons: "Locate" (with a location pin icon) and "Map" (with a map icon). Below this is a search bar with a magnifying glass icon and the text "Search for an address". Underneath the search bar are several input fields: "Street 1", "Street 2", "City", "Select a State/Region..." (with a dropdown arrow), 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.

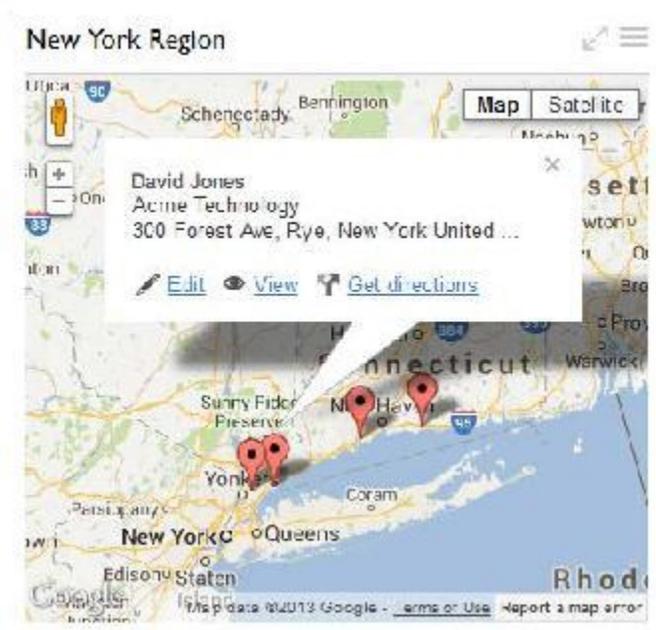


On the mobile site, the address isn't displayed as a link, but tapping it will open your device's map app.



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.
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.

QBE00874	4 Roles that set Modify Records for a table to None 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 is during 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-apprelationships 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 extension was misspelled in the Phone Number field properties. This issue has been resolved.
QBE008916	(Internet Explorer 8) 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.
QBE008928	Calendar reports did not display any records when the app-level date format property was set to DD-MM-YYYY or DD-MM-YY. This issue has been resolved.
QBE008929	Table reports with few columns displayed them with unnecessary width. This issue has been resolved.
QBE008939	(Mozilla Firefox) The Last Accessed Date column on the Users with Access tab did not sort properly. This issue has been resolved.
QBE008943	(Internet Explorer 8) Lists of roles on the Manage Users page showed multiple entries for undefined. This issue has been resolved.

Known Issue

The following issue has not been addressed:

Issue ID	Description
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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.

December 2013 Release Notes [\[return to top\]](#)

This document describes our December 15, 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>).

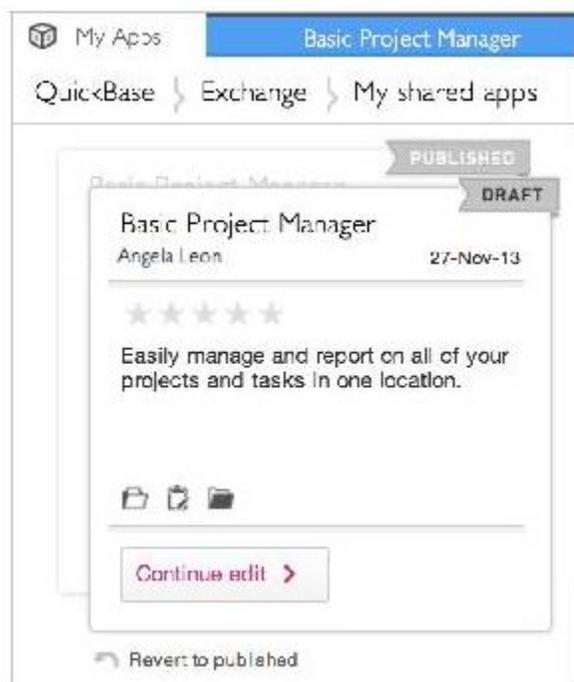
What's New in QuickBase?

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

Changes to QuickBase Exchange

If you have already shared an app to QuickBase Exchange, now you can edit that app and submit the changes to the app curator for review. Your edits can include both changes to the app and changes to the information you entered to promote your app in the Exchange. Just click the **Edit this app** link under the app on the **My shared apps** page to get started.

While you're editing the app, it appears on the **My shared apps** page as shown in the image at the right. If you decide to discard your edits, just click the **Revert to published** link underneath the app.



Changes to Manage Billing Account page

The Summary tab of the **Manage Billing Account** page now gives you more information about your account. The Current Usage section has been renamed Purchased & Used.

Two other usage measures are shown under the table of plan limits & usage:

The screenshot shows the 'Manage Billing Account' page in QuickBase. The 'Summary' tab is selected. The page is divided into several sections:

- Account Info:** Displays account details such as Account Name (Sybil_L_account), Plan (Lab Plan), Billing Contact (a@a.com), Time Zone (Pacific), and various settings like Currency, Number, and Date.
- Purchased & Used:** A table showing usage statistics for the current plan. A red box highlights this section.
- Apps:** Shows 5 apps in production, with a link to view details.
- API Calls:** Shows 987 calls in the past 30 days, with a link to view details.

Plan	Purchased	Used	% Used
Users with access	40	3	7%
App space	820 MB	14.1 MB	1%
Attached file space	610 GB	119 MB	0%

- The **Apps** heading shows the number of apps in your account that are considered to be *in production*. An app is in production if either of the following conditions is true:
 - The app has at least three users.
 - The app uses more than 500KB of app space *and* is more than 90 days old.
- The **API Calls** heading shows how many times information was requested from apps in your account by calls from external programs. The requests could be either QuickBase HTTPS API calls or other calls to QuickBase from external programs or cloud services. Click the **details** link to display a chart showing daily counts of API calls for apps in your account.

The Applications tab name has been shortened to **Apps**, and columns for the new usage measures shown above have been included on this tab. The Last Used column has been renamed Recent Activity.

Other Enhancements

Issue ID	Description
QBE008983	Users who do not have create app permissions in an account can no longer copy groups.
QBE009076	You can now choose a Record ID# field to be searched when configuring a Search widget on an app Home page.

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
QBE001542, QBE001920	When a record was created, QuickBase inserted 12:00 A.M. as the default value for Time Of Day fields. This issue has been resolved.
QBE005939	When grouping by weeks in a cross-tab Summary report, if Duration or Formula – Duration fields contained a negative value, clicking through to show the summarized data displayed no records. This issue has been resolved.
QBE007565	In Date/Time fields, after selecting a date using the calendar widget, the cursor did not remain in the field to allow entering the time. This issue has been resolved.
QBE007702	QuickBase displayed military time entered in a Date/Time field as A.M. until the record was saved. This issue has been resolved.
QBE008389	When a report was grouped on a field (using something other than <i>Equal Values</i>), then sorted on a Text – Multiple-choice field, the second-level sort was not correct. This issue has been resolved.
QBE008400	When a report containing only one record was edited using Grid Edit, the data was obscured by the column headers and the horizontal scrollbar. This issue has been resolved.
QBE008601	Cross-tab Summary reports did not print properly. This issue has been resolved.

Issue ID	Description
QBE008605	Changing pages in a paginated report on a table home page did not position you at the top of the appropriate page. This issue has been resolved.
QBE008633	Reports with dynamic filters displayed using the entire width of the screen. This issue has been resolved.
QBE008665	Sorting a Summary report by anything other than the default caused the display of running totals to be incorrect. This issue has been resolved.
QBE008673	If a search on a report or home page timed out, the correct error text did not display. This issue has been resolved.
QBE008758	Multi-page reports that used the default row shading did not print correctly. This issue has been resolved.
QBE008799	On the reports panel, entering a search term containing only numbers caused display errors. This behavior also prevented reports with numeric-only titles from appearing in search results. This issue has been resolved.
QBE008819	Lengthy column heading overrides could cause a server timeout or crash. This issue has been resolved by limiting the Column heading override field to 300 characters.
QBE008883	The behavior of Date/Time fields when specifying the time period (AM or PM) without a space was not consistent between the QuickBase UI and API. This issue has been resolved.
QBE008942	An error occurred when attempting to email a report from the full site when using an iPhone or iPad. This issue has been resolved.
QBE008958	Reports did not use the table noun to refer to records in the report. This issue has been resolved.
QBE008979	The app-level date format was not used when summarizing on date fields in cross-tabreports, which caused the data shown on click-through to be incorrect. This issue was resolved.
QBE008980	Ask the User reports on table Home pages included icons for adding additional filters. Since you cannot add or remove filters for these reports on table Home pages, the icons have been removed to resolve this issue.
QBE009026	If a field was used in a Search widget, that usage was not shown in the Field Usage list. This issue has been resolved.
QBE009036	The error message indicating that a Date/Time field was required did not include the field name. This issue has been resolved.
QBE009039	Ask the User and Grid Edit reports could not be specified as destinations for links in the Link Bar, Button Bar, or Rich Text widgets. This issue has been resolved.
QBE009051	The date shown when creating a filter on a Date field for <i>yesterday</i> , <i>today</i> or <i>tomorrow</i> was incorrect. This issue has been resolved.
QBE009054	A table report set to show only its summary table did not display when added to a new app Home page. This issue has been resolved.
QBE009057	Numeric fields displayed in the Report widget were left-justified, rather than right-justified. This issue has been resolved.
QBE009080	(Internet Explorer 11) Text in Text – Multi-line fields did not wrap when editing the record. This issue has been resolved.