Quick Base Release Notes 2016

There were eleven Quick Base product releases in 2016:

Date	Highlights
January 24th	QB Sync for CSV
February 21st	Report List widget, QB Sync for QBO improvements
March 20th	Drilldown reports
May 1st	QB Sync for CSV: multi-field refresh keys
June 12th	Formula fields as dynamic filters, drilldown reports for summary fields
July 17th	User tokens
August 14th	QB Sync for Gmail
September 11th	Webhooks
October 16th	QB Sync for CSV: Multi-file processing, Report List widget improvements
November 13th	Permissions: building without sharing, enforce IP filtering on a realm
December 11th	Admins can update name/email for users in company, export lists of users

January 2016 Release Notes [return to top]

This document describes our January 24, 2016 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).

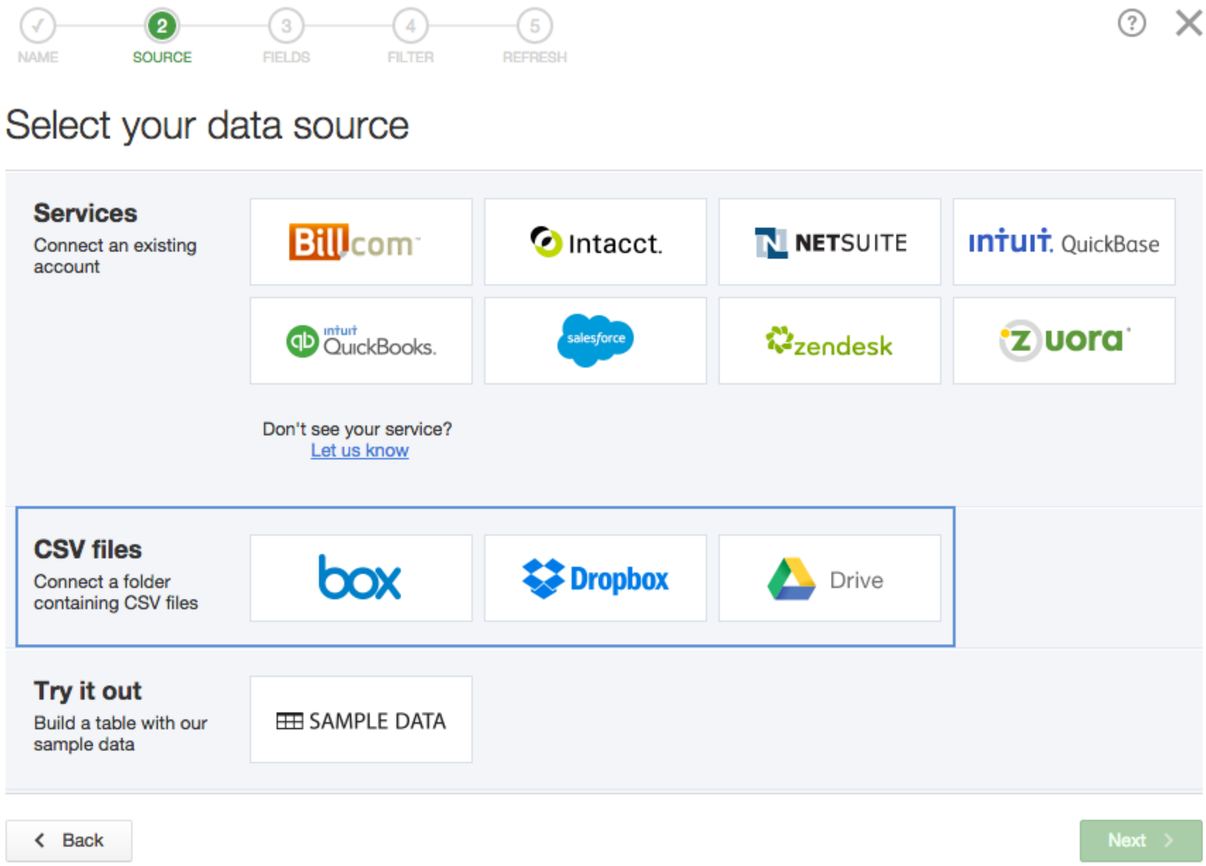
What's New in QuickBase?
This section describes the changes that appear in QuickBase for the January release.

Automatically pull in CSV data using QuickBase Sync for CSV

You can create a connected table in your QuickBase app using CSV data stored in Box, Dropbox, or Google Drive. Any data that you can save in CSV format, from any system, on premise or in the cloud, can automatically refresh in a QuickBase connected table.

If you import business-critical data into your QuickBase app regularly, for example, invoices from an on-premise ERP system, you can automate that process using QuickBase Sync for CSV.

Create a new connected table and connect to a folder containing CSV files in Box, Dropbox, or Google Drive. Drag and drop to select the fields you want to connect, filter the data you bring into QuickBase, and set a schedule to automatically refresh the data.

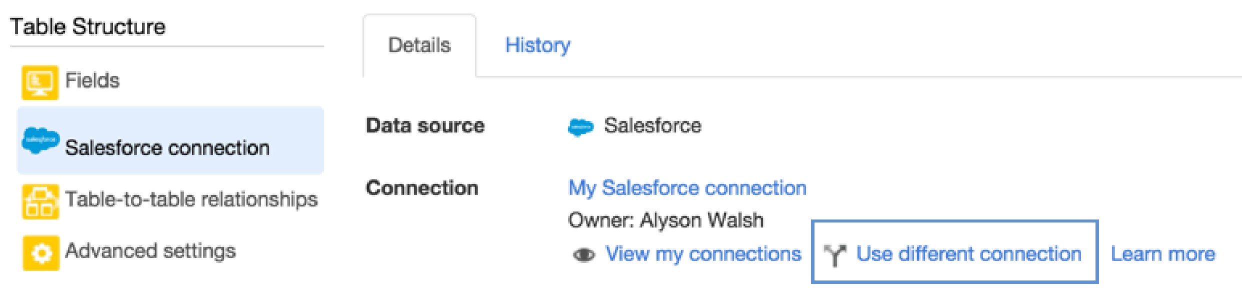


To keep in sync with your latest changes, update the CSV file or put a new CSV file in your connected folder, and then refresh your table. Each time your connected table refreshes, we'll use the most recent CSV file in the folder. (We'll only look at CSV files in your connected folder.)

Change connections when needed

App admins can now switch a connected table to use one of their own connections.
You might want a connected table to use a different connection if the connection owner changes roles, leaves the company, or is not available to change the connection filters or add and remove connected fields from the table. You may also want to switch connections if another connection, with different access privileges, provides the data you need in the connected table.

To change the connection to use one of your own connections, open the connected table **Settings**, select the connection, and click **Use different connection**.



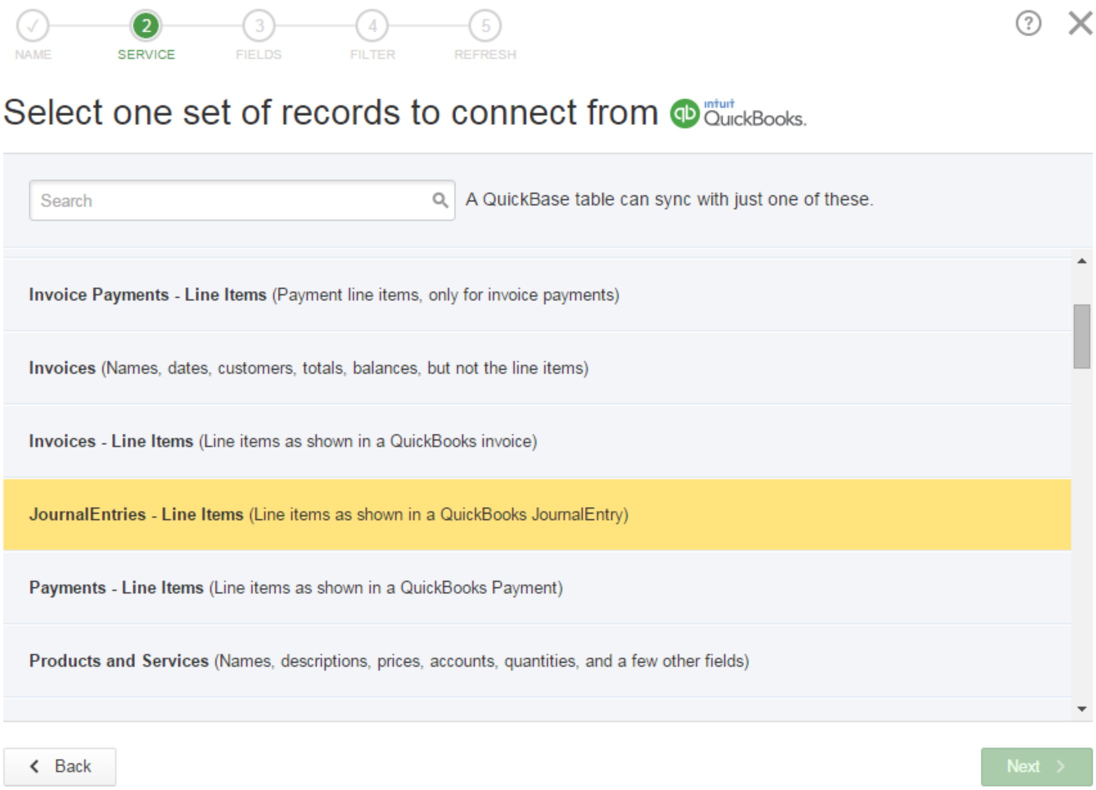
Connect to QuickBooks Online Journal Entries

When connecting to QuickBooks Online, you can select a new optimized data set, **Journal Entries - Line Items**, in which each line item is represented as a separate row of data.

3 journal entries — All

	JournalEntry ID	Journal Date	Journal Number	QuickBooks Line Item	Amount	LinkedTxn	Detail Type	PostingType	Entity Type	Entity ID	Account Name	Account ID	ID for Line
	22	11-10-2015	004	0	$110.00		JournalEntryLineDetail	Debit	Customer	3	Checking	20	22-0
	22	11-10-2015	004	1	$100.00		JournalEntryLineDetail	Credit	Customer	1	Uncategorized Asset	16	22-1
	22	11-10-2015	004	2	$10.00		JournalEntryLineDetail	Credit	Vendor	11	Bank Charges	11	22-2

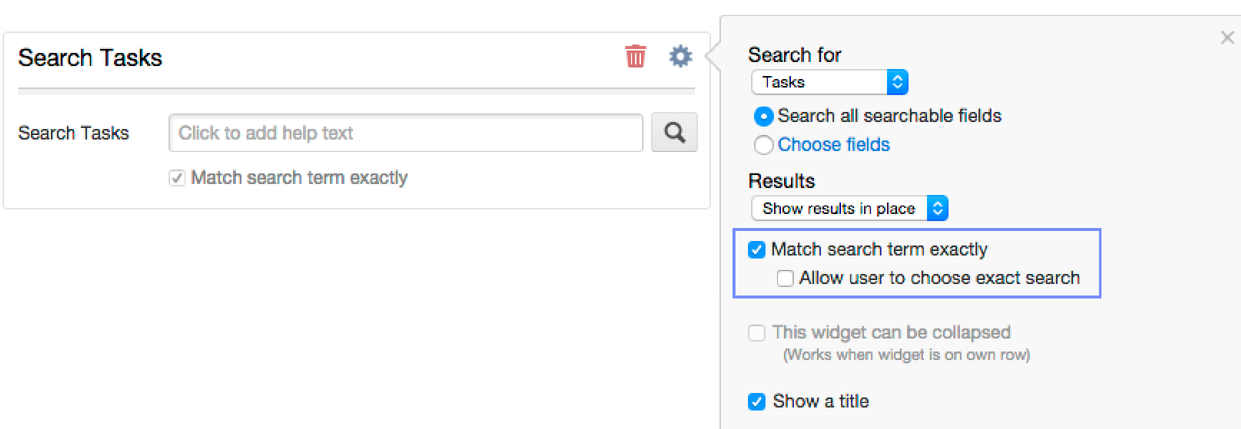
To choose this option, select **Journal Entries - Line Items** from the **Optimized for QuickBase** list.



Improvements to app and table searching

Search widget allows "is equal to" searches

The Search widget can now be configured to match the exact search term entered. App builders may also allow their users to choose whether or not their search should match the exact search term entered.

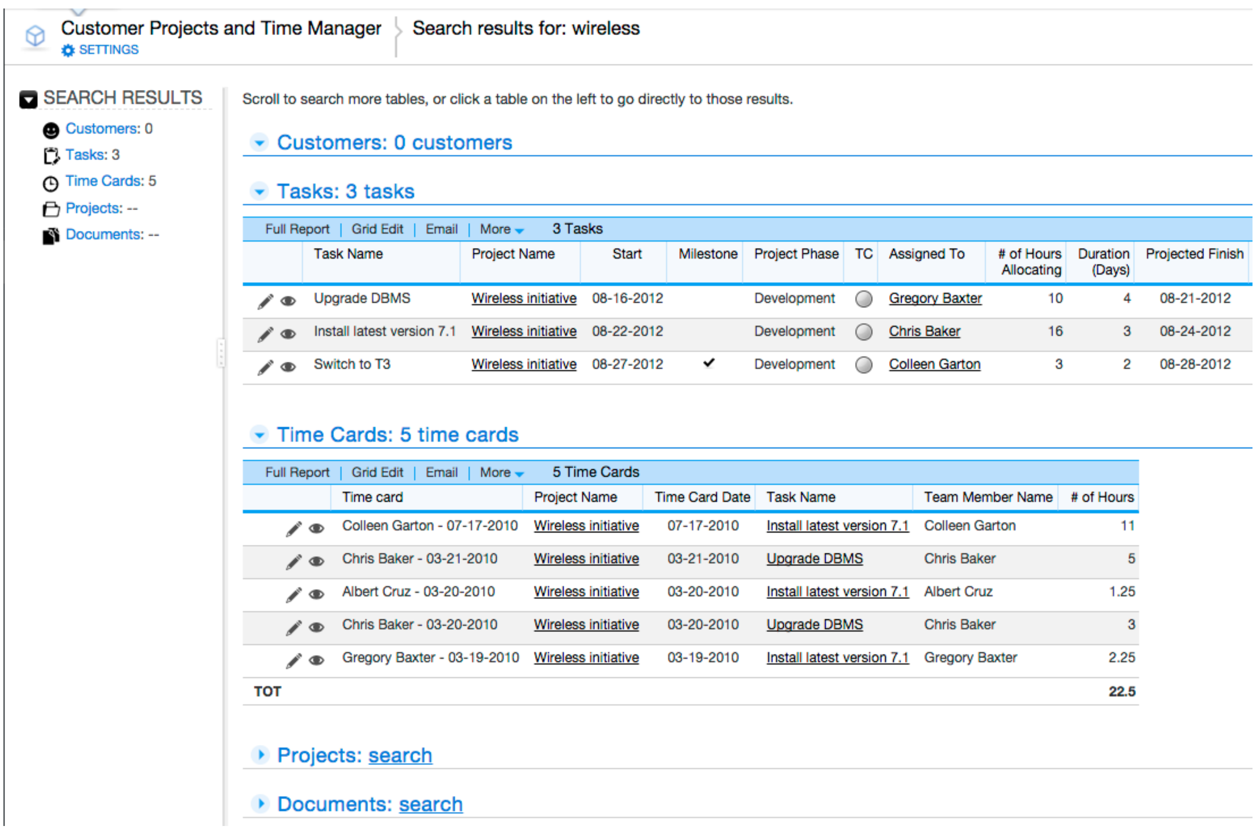


Global app search allows "is equal to" searches

The search functionality available from the **Search** button on the Global bar can now be set to match the exact search term entered. This setting causes the app or table search to be performed with the *is equal to* operator, which is often much faster than the current *contains* search.

Improved global app search experience

Global app search now returns search results incrementally, and the design of the search results page has changed:



You can use the Search Results navigation on the left to go directly to search results for a specific table. Click a table name to search for that table if results aren't already showing. Close a table's section in the results to exclude that table from future app searches.

Improvements to the Multi-select Text field

Add more choices

App builders can now configure Multi-select Text fields to allow their users to add more items to the dropdown list of choices. The total number of choices shown in the field cannot exceed 50, and each choice must be 40 characters or less in length.

Use values from another table

App builders can now choose to use a list of values from another table to populate the list of choices shown in a Multi-select Text field. In this case, the number of choices shown in the field *can* exceed 50.

Note that app users will not be able to select choices that exceed 40 characters in length, even when they appear in the field.

Changes to wording in field properties

The “shared multiple choice” wording used in the help to describe providing a list of values for a field has been changed to “shared value”. We made this change because you can now use values from another table to provide values to Multi-select Text fields as well as multiple-choice fields.

This wording change affects the **Input type** options shown in the field properties:

- **Multiple-choice** now reads **From list**
- **Multiple-choice from another field** now reads **From another field**

The wording change also affects an Advanced field property:

Shared multiple-choice ☐ This field may be a source for shared multiple-choice lists for other apps

now reads:

Shared values ☐ Values from this field may be a source for dropdown lists in other apps

Improvements to reporting

More field types have <ask the user> filter option

When you choose <*ask the user*> as the value for a field in a report filter, QuickBase prompts the user for a value before running the report. In this release, we’ve added <*ask the user*> as an option for all QuickBase field types used in filters. You’ll still need to use *_ask1_* if you’re filtering on **<some field>**, **<some attached file>**, or **<calculated column>**.

Improvements to emails

View report from Edit Subscription page

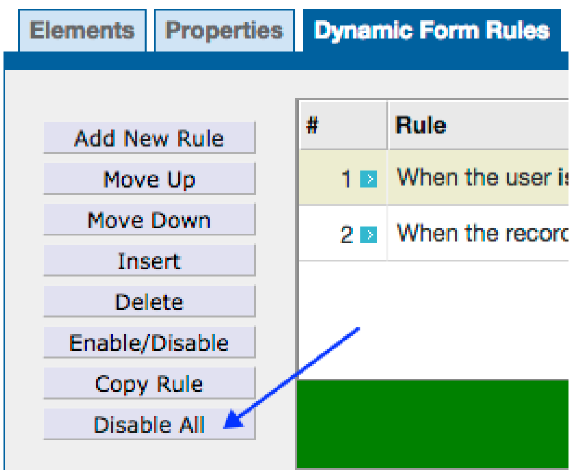
When you edit a subscription, QuickBase now shows an icon ( ) to the right of the report named in the subscription. Click the icon to view the report in a new browser tab.

Linked report name on list of automated emails

There is now a *Details* column on lists of automated emails available through table and app settings. The column contains information on when the emails will be sent. For subscriptions, this column also contains a link to view the report named in the subscription.

Improvements to form rules

The Dynamic Form Rules tab now offers the option to disable or enable all form rules. Click **Disable All** to disable all the form rules. If all form rules are disabled, the button changes to **Enable All**.



Performance bar available to all plans

The Performance Bar is now available to accounts on all QuickBase plans. Read more about this feature: http://www.quickbase.com/user-assistance/#monitoring_performance.html.

Improvements to user management

Email addresses visible to app and account admins

App admins can now see email addresses for users in their apps, even if the user has set a user name. This is also the case for account admins and users with access to apps in that account. (QBE010369)

Editing group properties in Manage Users

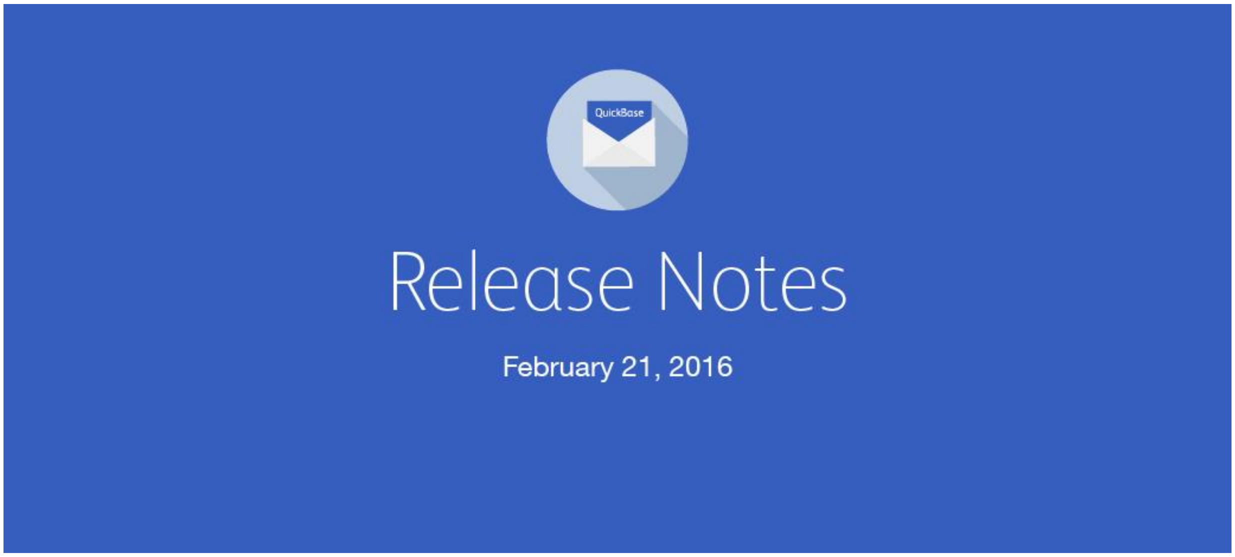
When you edit properties for a group from the list on the Manage Users page, the group properties page now opens in a new browser tab. (QBE010324)

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
QBE008788	After using **Save and Add Another** to create a new child record, a blank new parent record displayed. This issue has been resolved.
QBE010343	Sorting and grouping on a Text Multiple Choice Lookup field in child table did not honor the order set in the master table (**Display choices shown in the order here**). This issue has been resolved.
QBE010346	The More menu on the table home page did not contain a link to **Print** when a Calendar report was defined as the table home page. This issue has been resolved.
QBE010377	When you saved customizations to a report or chart set to be viewed only by certain roles, role settings were cleared and the **Temporarily hide this report** checkbox was selected. This issue has been resolved.
QBE010378	In a bar chart, if the label for the x-axis of a bar was blank (empty), then the user could not click the bar to drill-down into the sub-report. This issue has been resolved.
QBE010384	If a chart using the **Plot axis on a logarithmic scale** option contained invalid log values, for example, 0, then the chart did not display. This issue has been resolved.
QBE010385	The ToFormattedText() function did not display separators after three digits. This function now provides the option to display separators after three or four digits. This issue has been resolved.
QBE010394	In a chart, if some data points were blank, labels would appear on the wrong data point. This issue has been resolved.

February 2016 Release Notes [return to top]

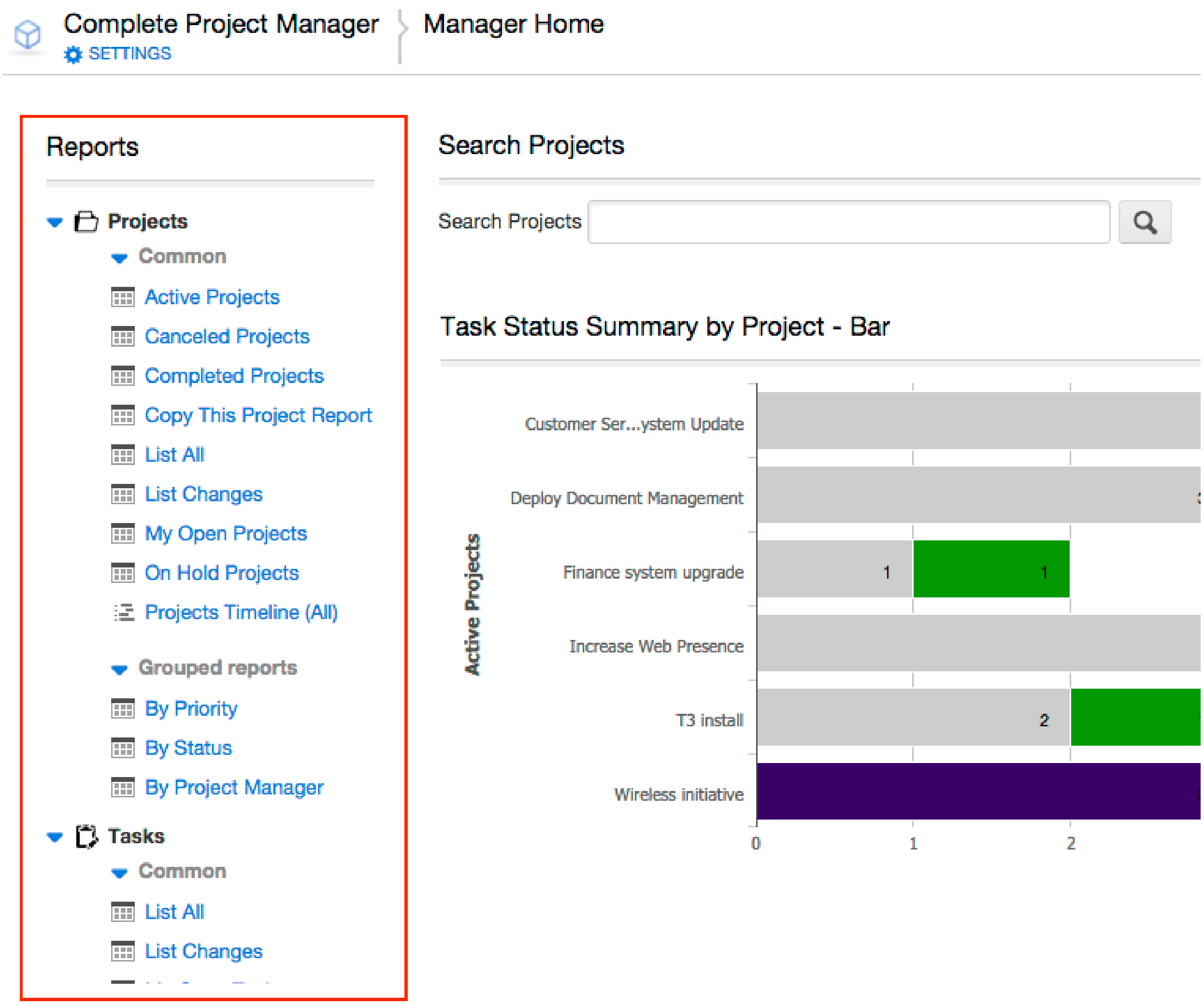


Here's **hoping your** February is full of hearts and flowers. We've been hard at work, making sure it includes some QuickBase love, too. Here's what you'll find in our February 21, 2016 **release.**

If you missed the January release notes, check them out in the new Release Notes area on the QuickBase Blog. Don't forget to subscribe to the blog.

List reports on your app's home page using the new Reports List widget

Now you can include a list of reports and charts on your app's home page. Just drop the **new Reports List widget in the sidebar or body of your app home page to list all the** common reports in the app. The reports are listed by table, and if you've organized your **reports into groups, also by group.**



Learn about the widget at https://www.quickbase.com/user-assistance/#about_reportlist_widgets_app_home_page.html after the release.

Edit records easily using Grid Edit reports

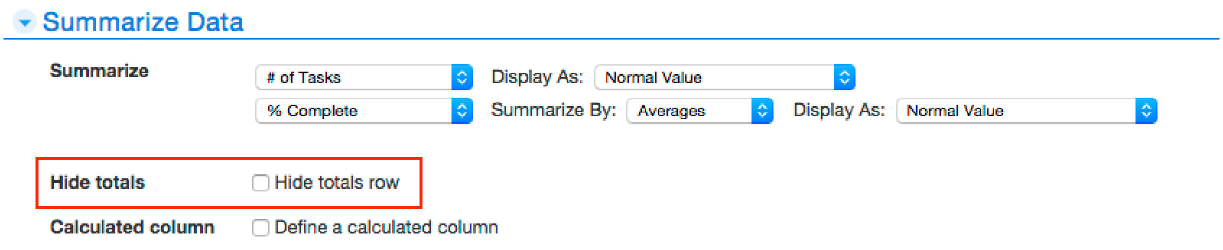
Formula and lookup fields now update dynamically when you edit records using a Grid Edit report.

View deactivated users in a realm

The list of realm users on the Directory tab now contains an Is Deactivated? **column. This column will show a checkmark to indicate users who can no longer log into QuickBase.**

Hide the Totals row in Summary reports

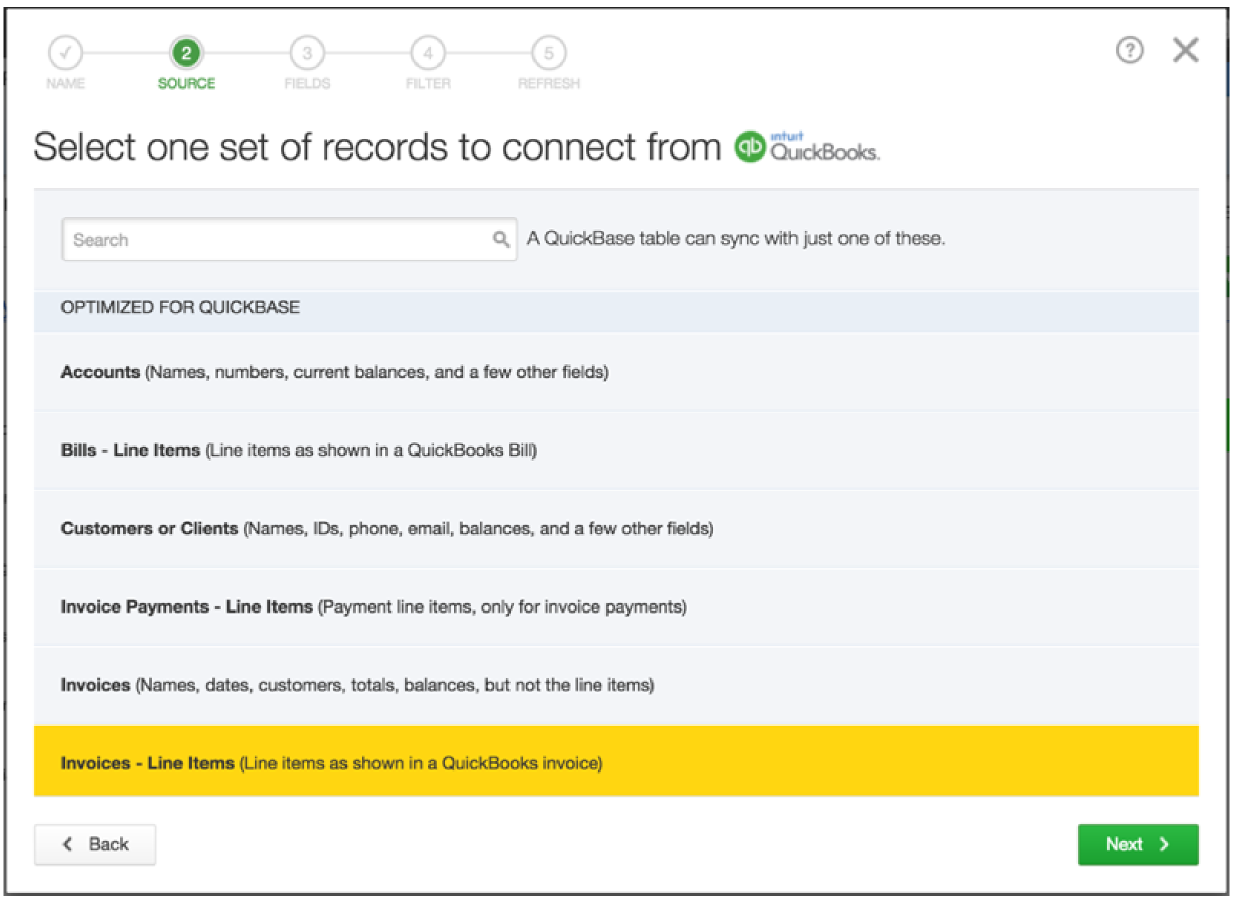
Summary reports now have an option to hide the Totals **row.**



Connect to more QuickBooks Online data

Create connected tables that bring in more of your QuickBooks Online data, optimized for use with QuickBase. The Invoices – Line Items **data set now includes 8 more fields, including Customer ID. Customer ID is useful when building relationships among tables connected to QuickBooks, like Invoices and Customers.**

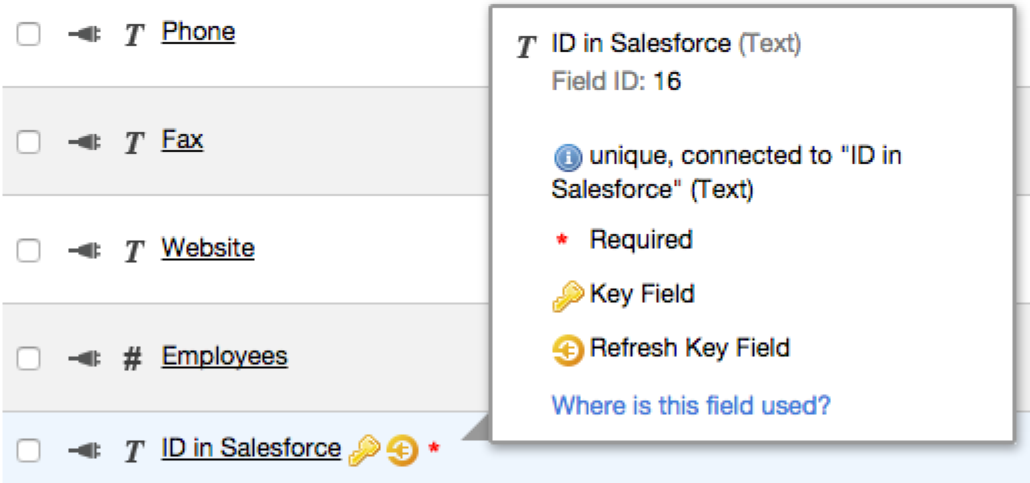
Select Invoices – Line Items **when creating a** new connected table**.**



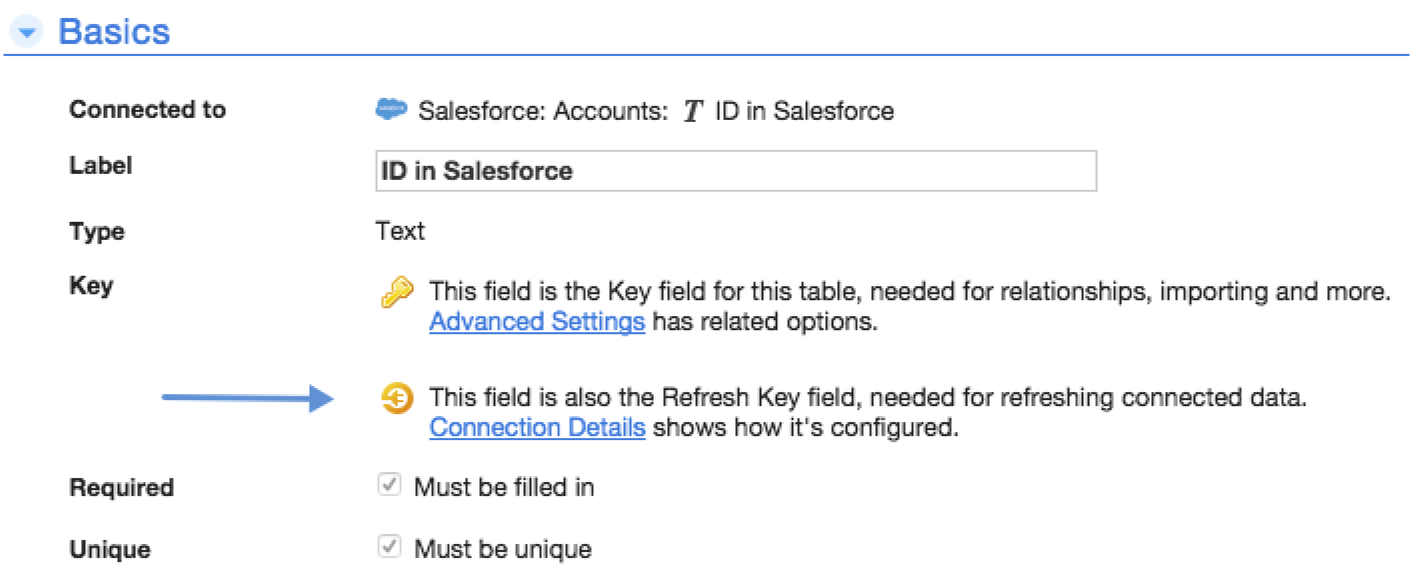
If you already have a connected table that uses Invoices – Line Items as its source, create a new connection to take advantage of this update.

Easily identify the Refresh Key field for a connected table

The Refresh Key field for a connected table now displays with this icon on the Field Properties page.



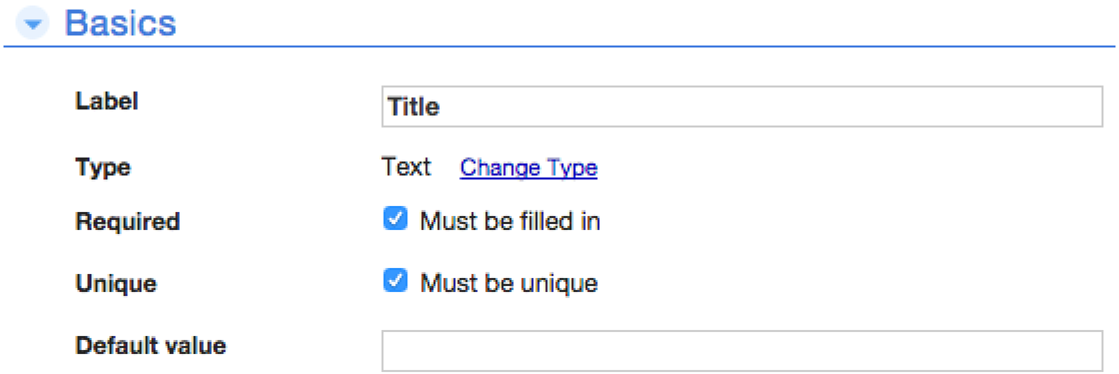
We've also included a description of the Refresh Key. (It's typically the **same as the Key field for a table.)**



Simplified wording for Unique and Required field properties

We changed the wording of the `Unique` **and** `Required` **checkboxes on the Field Properties page. The checkbox for** `Required` **now reads** `Must be filled in`**, while the checkbox**

for Unique **now reads** Must be unique**.**



What's Fixed in QuickBase?

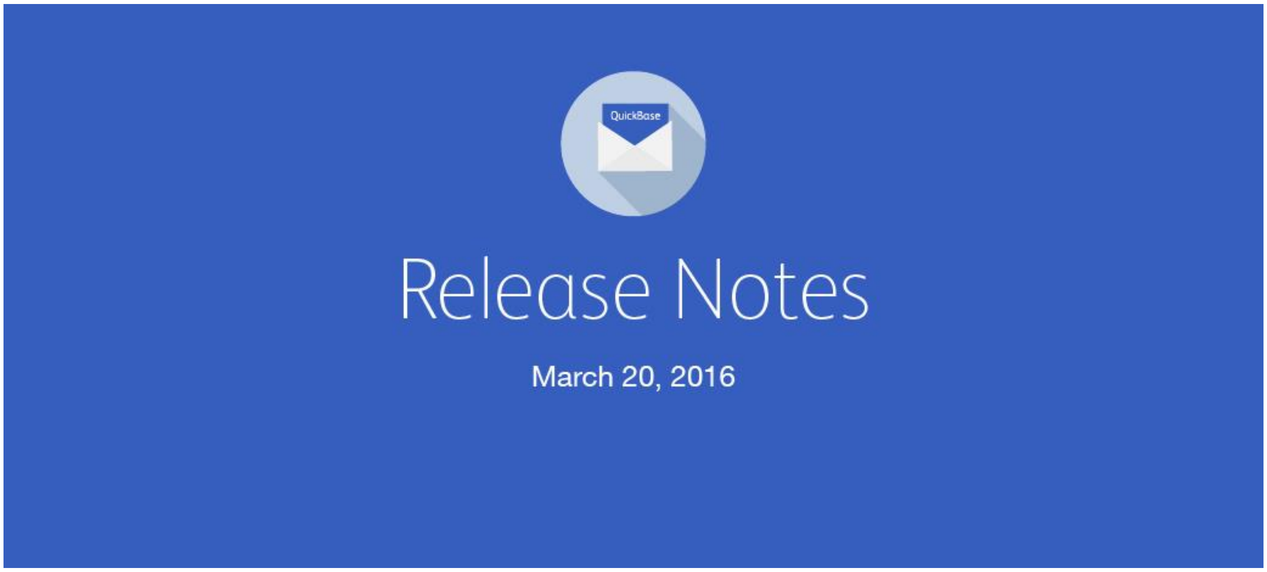
We continue to focus on quality. Here are the issues we fixed this month.

Issue ID	Description
QBE002156	Actions based on a change to a file attachment field were not accurately triggered when a document was reserved by another user. This issue has been resolved.
QBE006020	When an admin modified a notification owned by a user who no longer had access to the app, the **Notify Whom** field defaulted to the previous owner of the notification. This issue has been resolved.
QBE010300	When included in an embedded editable report, Text Multiple Choice fields were not editable if **Log the edits to this field, and show them on forms** was selected. This issue has been resolved.
QBE010340	After making a change to a personal chart created by another user, save was required before displaying the changed chart. This issue has been resolved.
QBE010367	When a Grid Edit/embedded editable report was opened, contained one record, and the user did not have access to Add Records to the table, a scroll bar was unnecessarily added. This issue has been resolved.
QBE010406	Placeholder users displayed in red and did not appear in the Manage Users page. This issue has been resolved.
QBE010408	In *Mobile only* — If an Address field was defined as a lookup field in a child table, it did not display when adding a record. This issue has been resolved.

Issue ID	Description
QBE010425	If a Search widget on an app home page was not properly configured, the home page could not be saved. This issue has been resolved.
QBE010429	In Internet Explorer 11 only, scrolling was not available when viewing Search results. This issue has been resolved.

Do you have an idea for improving QuickBase? Please share your suggestions by clicking the orange `feedback` tab on the My Apps page, or visiting the Customer Feedback for Intuit QuickBase forum (http://quickbase.uservoice.com).

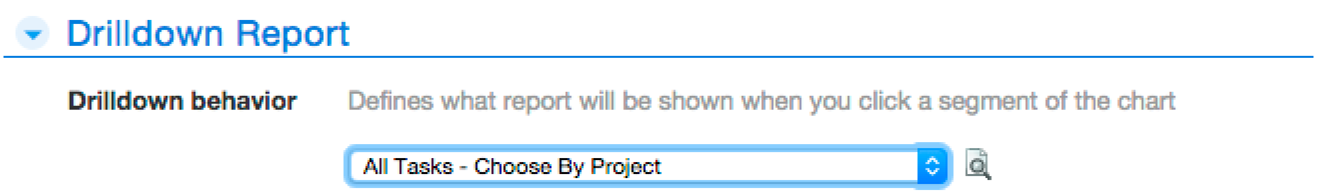
March 2016 Release Notes [return to top]



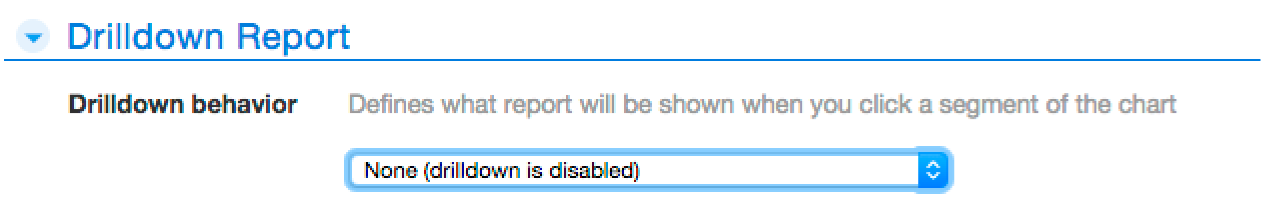
No patch of lucky four leaf clovers or a pot o' gold here, but you're sure to work some magic **using our March 20, 2016 release.**

Specify a report for chart and summary drilldowns

With this release, you can specify which report is used when clicking through to a specific set of information from chart and summary reports. Previously, only the default report was used to show this information.



You can also disable drilldown from a chart or summary report by choosing not to specify a report.

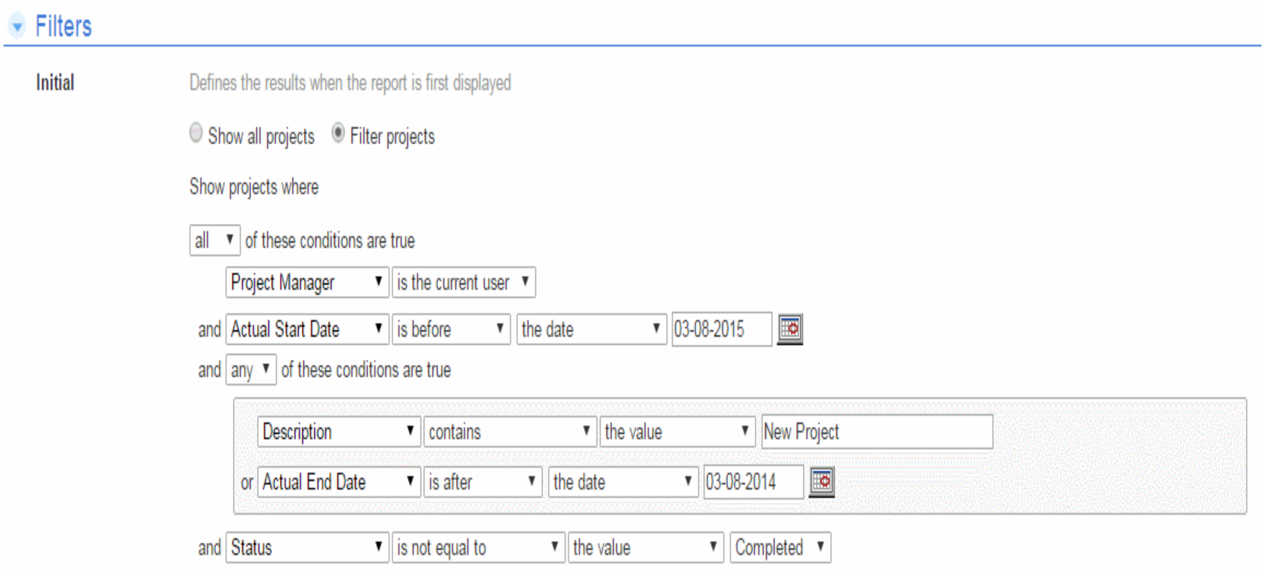


Reports specified in this way are indicated by a drilldown icon on report lists in app and table settings. If the report is deleted, the chart or summary report it was used for will revert to using the default report for drilldown.

Re-arrange filter criteria

Now you can re-arrange filter criteria while editing reports, notifications, and reminders, and on Advanced Search forms. Since QuickBase processes filter criteria sequentially, this can improve performance, especially for complicated queries on large data sets. For best performance, order the criteria to filter out the largest number of records first.

Click the blue highlight on a filter row to select it, then use the controls on the left to move the row up or down in the list of filter criteria.

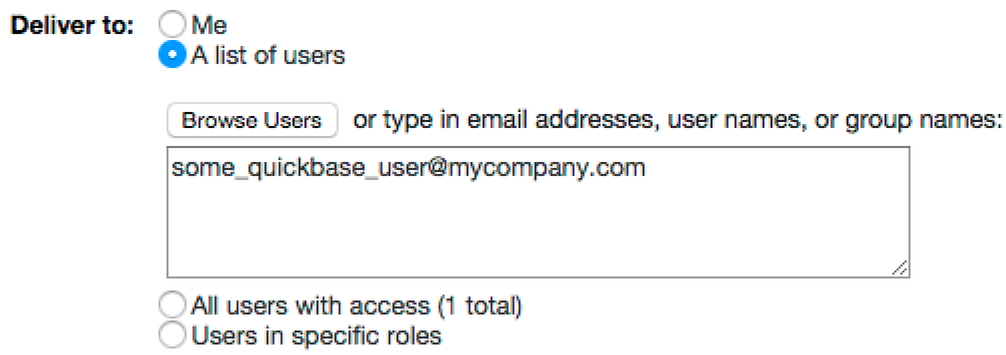


Filter rows may be moved up and down only within their level of indentation. It is also possible to select an entire filter set and move the set up or down.

Click the selection highlight or use any of the controls on the right side of the filter row to de-select it.

Send subscriptions to a list of users

Now you can send report subscriptions to a specific list of QuickBase users. Just choose to deliver the subscription to A list of users**, and fill in a list of email addresses, user names, or group names.**



In addition, the Select Roles **option is now called** Users in specific roles **to improve the readability of the section.**

Email file attachments more easily

There is a new field property for file attachment fields: Allow open access**. Select this checkbox to allow non-QuickBase users to access files in that file attachment field from a QuickBase link. Deselect the checkbox to remove open access – all links will once again require signing in to QuickBase before viewing the file.**

Notify previous app manager when an app is transferred

When an app is transferred to another app manager, both the new app manager and the previous app manager are notified of the change. An alert email is sent to the previous app manager when the new app manager accepts the transfer.

Improved Sync for CSV file processing

Sync for CSV now reads carriage returns and line feeds in column names within a CSV file and replaces them with spaces in a connected table. Blank rows in a CSV file (rows that are completely empty) do not display in a connected table.

Reports saved as spreadsheet include column name changes

If you have used the Column Properties dialog to change a column name on a report, that setting will be respected when you save the report as a spreadsheet.

Note that the original field name still appears when you export the table.

Changes to default dynamic filters

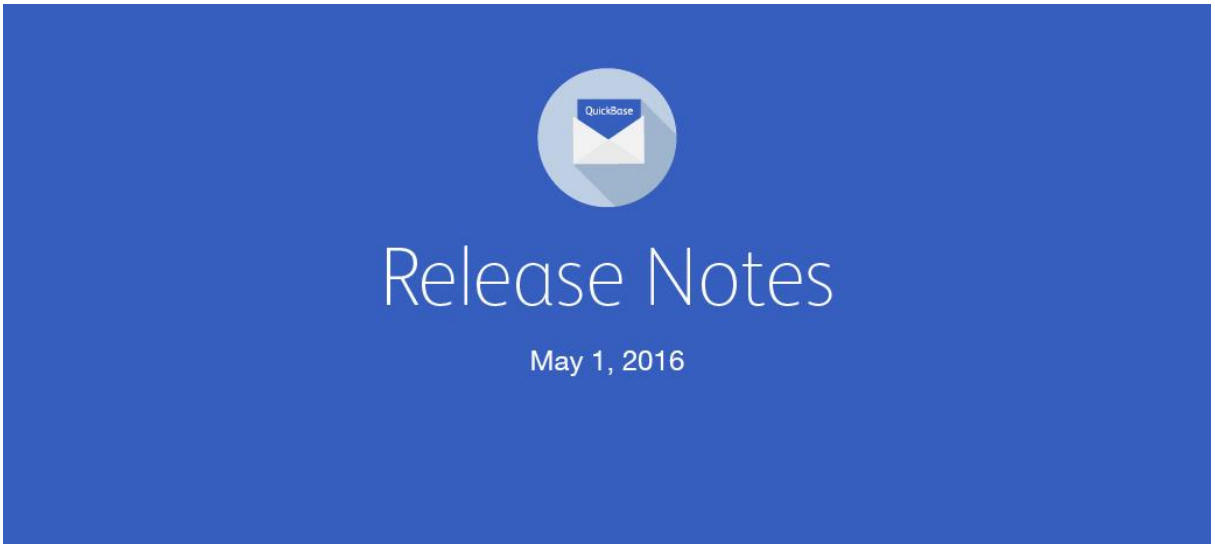
If you have chosen Set automatically **for the default dynamic filter behavior, the first five filterable fields will be used as default dynamic filters for all users. If a user does not have access to one or more of those filterable fields, it will not be available as a dynamic filter on reports they view.**

Fixed issues

We've also fixed these issues:

Issue ID	Description
QBE10440	If you listed 50 choices in a Multi-select Text field options list, an error displayed indicating that more than 50 choices were specified. This issue has been resolved.
QBE10453	If an Address field was set to be Read Only on a form and it was the target within a form rule, then the Address field was editable. This issue has been resolved.
QBE10457	When QuickSearch results included a button to add a child record, clicking the button and saving a new child record returned a code page. This issue has been resolved.
QBE10467	Clicking a link in a summary report displayed a filtered table report, but the option to customize the report was not available. This issue has been resolved.
QBE10490	Extra icons appeared on the right side of the Share With a New User dialog. This issue has been resolved.

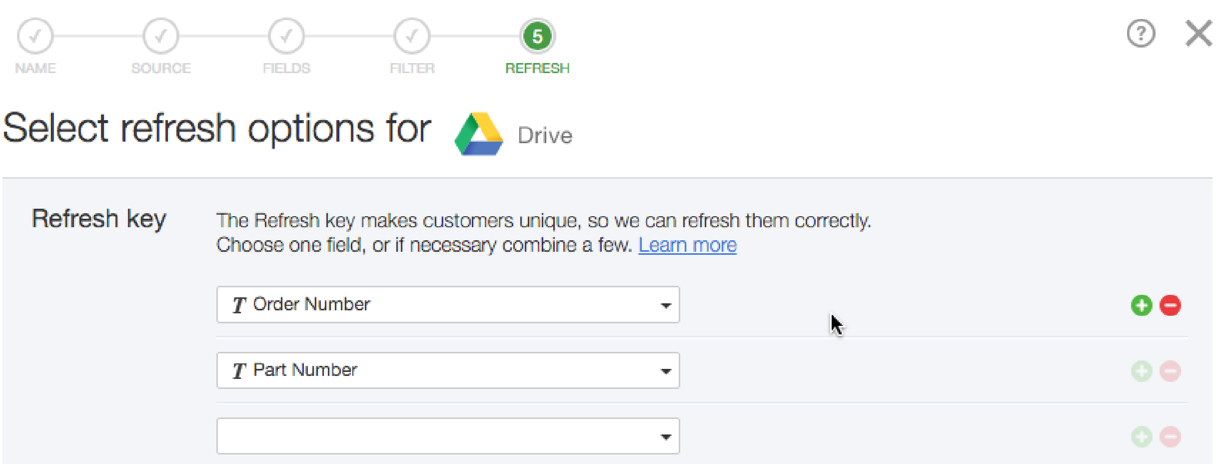
May 2016 Release Notes [return to top]



The merry month of May is full of good things — Mother's Day, Maypoles, Cinco de **Mayo. And not least, a brand new release of QuickBase!**

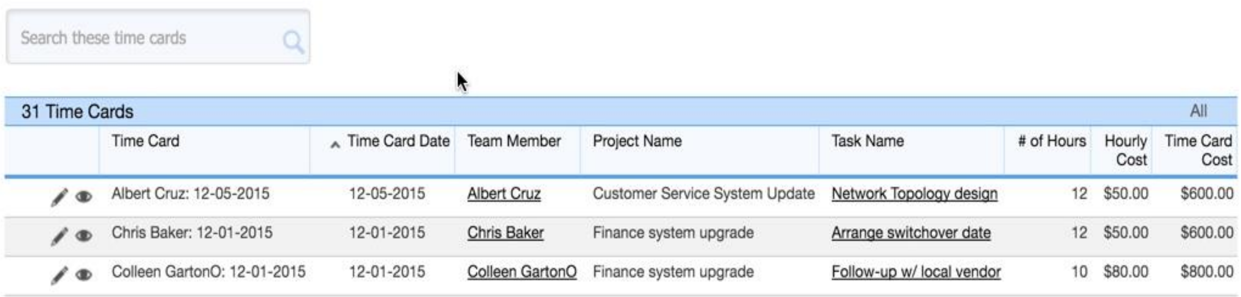
Create multi-field refresh keys for CSV-connected tables

Typically, when you sync to a CSV table, you select a single field as the Refresh Key. With this release, you can combine up to three additional fields, if necessary, to create a unique refresh key.



QuickSearch searches only fields displayed in a table report

With this release, searching in a table report using the search box will now search only **the fields displayed in the report, instead of searching through all the fields in your table.**



What’s Fixed in QuickBase?

Here’s what we fixed this month.

ID	Issue
none	If a CSV file contained null characters, QuickBase failed when it refreshed a connected table. With this release, the refresh ignores the null characters and works correctly.
none	We’ve enhanced two QuickBooks Online data sources — “Purchase Orders – Line Items” and “Bill – Line Items”, to make it easier to create relationships with other QuickBooks Online connected tables.
QBE010511	We’ve updated the account transfer process so that if the app is transferred by an account admin, the previous app manager receives an email alert.

June 2016 Release Notes [[return to top]]

The lazy days of summer are fast approaching! Before you dash to the beach to catch some rays, two tips. First, don't forget your sun screen! Second, take a few minutes to learn about **the great features and fixes that are coming your way in our June release.**

Formula fields can be used as dynamic filters

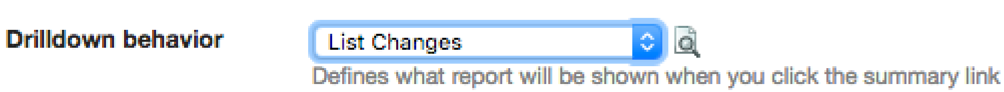
Suppose your Project Status is determined by a formula field (say, Date) and you want to filter
a report dynamically with this field. Previously, you couldn't use a formula field as a dynamic **filter, but now you can. With this update, if you can use a field as a dynamic filter, you can use a formula field of the same type as a dynamic filter.**

This has been a highly requested feature on our customer feedback forum and we're **excited to deliver it to you with this release.**

Choose a custom drilldown report for numeric summary fields

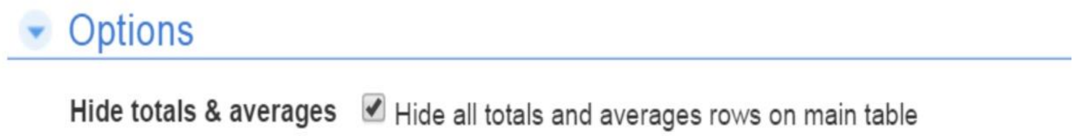
You can now choose a report or chart to show when a user drills down on a numeric summary field. Let's say you have a summary field in a form that displays the total number **of hours of tasks remaining on a project. When a user clicks the summary field, a pie chart could open to show those hours grouped by assigned team member.**

You'll find the Drilldown behavior **option on the Properties settings page for the numeric summary field.**



Option to hide totals and average rows in reports

Sometimes you want to display a report without **a Totals and Average footer even though some of the fields in the report have properties that call for totals and averages to be displayed. This option** — available on the report's Settings page — **overrides those property settings and will not display them.**



API updates

- API_GETSCHEMA **When you invoke API_GETSCHEMA on a table dbid, the call always returns the key field ID (key_fid) and individual record names.**
- API_GrantedDBs **will have a new parameter (realmAppsOnly) which, when set to** "true," will return **only the apps in the realm the call is being made against. We expect this change to be released in a patch in a week or so and will update the release notes at that time.**

Connect to more QuickBooks Online data

Create connected tables that bring in more of your QuickBooks Online data, optimized for use with QuickBase.
The Invoices **–** Line Items **data set now includes 9 more fields:**

- **Payment Account Name**
- **Payment Account ID**
- **Reference ID (aka EntityRefValue)**
- **Class ID**
- **Item Name (Item-based expenses)**
- **Item ID (Item-based expenses)**
- **Unit Price (Item-based expenses)**
- **Quantity (Item-based expenses)**
- **Account ID (Account-based expenses)**

Changed behavior for printing or saving timeline reports

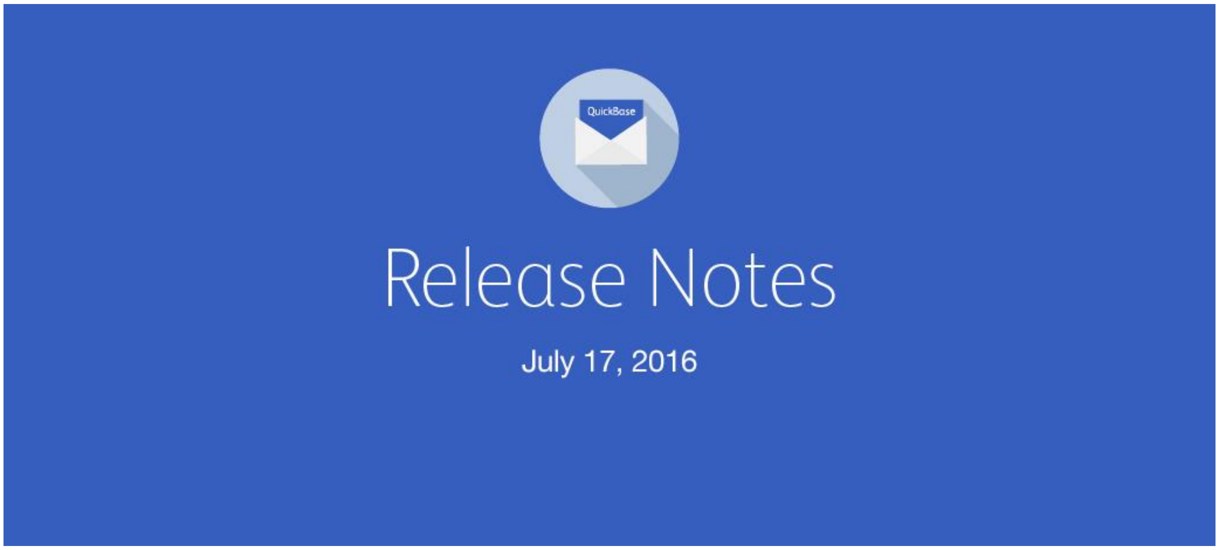
If one user displays a report, and then another user adds a new record that would also be displayed in the first user's report, when the first user prints or saves the report as a CSV **file, the report will not contain the newly added record.**

What's Fixed in QuickBase?

Here's what we fixed this month.

ID	Issue
QBE008224	Adding a form rule that made particular fields required may also put a red asterisk next to text sections on the form (not fields) where the text element’s id matched the id of the required field. This issue has been resolved.
QBE008857	When a timeline report used a resolution of Week/Day, the bars of the report were shifted to the left by one day. This issue has been resolved.
QBE009555	When dynamic filters on a table’s home page was turned off and there was no search box enabled for users, the search box would re-appear after you edited a record from the table home page. This issue has been resolved.
QBE009702	(*Internet Explorer 11*) Using the Text widget to upload an image or create a hyperlink caused the browser to freeze. This issue has been resolved.
QBE009851	Depending on the field type of the first element on a form, the form’s focus was applied inconsistently. This issue has been resolved.
QBE010407	When an app home page report was displayed in full window mode, the horizontal scroll bar was not shown. This issue has been resolved.
QBE010526	Using the Search box above a report searched all fields in the table. Now it will only search the fields shown in the report.
QBE010569	Editing a URL link or button on an app home page that contained some special characters caused the browser to freeze and consume excessive memory. This issue has been resolved.
QBE010578	For a table home page showing a filtered report, the filters were applied inconsistently on returning to the report after drilling down into records. This issue has been resolved.
QBE010582	When a QuickBase shortcut was added to the home screen from the mobile site, the shortcut’s icon was Intuit-branded. This issue has been resolved.
QBE010530	Previously, when inviting users to an app through the Import Users functionality from the Manage Users page, there was no way to customize the subject of the invitation that would be sent. You can now customize the subject of the invitation for existing users similar to inviting them directly from the Manage Users page.

July 2016 Release Notes [[return to top]]



Hope everyone had a sparkling 4th of July! We're continuing the fireworks **with the July** release of QuickBase. This month we're rolling out features and fixes geared to **make advanced builders even more productive.**

User Tokens

Now you can create your own user tokens in QuickBase and use them to run APIs and automation. Many API calls that use a ticket today can instead take a new parameter called `usertoken`**. You can still use the ticket method if you prefer. The new parameter can** be used with any API that doesn't post to a db/main URL, and also with API_GrantedDBs. **User tokens offer an array of benefits, including:**

- **Greater convenience, because user tokens are pre-generated,** and don't require a **call to** `API_Authenticate`**.**
- **SAML/LDAP customers can use QuickBase APIs without creating a robot user or Gmail user. With user tokens, now SAML users can create a token and use the API as themselves.**
- If you're a QuickBase Solution **Provider, you can add user tokens to your scripts that** won't expire, so you won't have to find and fix authentication**-error scripts for your customers.**
- **Enhanced security:**
    - The scope of action is limited to just the apps you've assigned the user token **to.**
    - **You can easily unassign a token from an app.**
    - The user token can't be used to authenticate to the user interface (e.g., in **URLs).**
    - **You can see when a user token was last used.**
    - **You can deactivate a token temporarily to debug a call or even quickly delete the user token** if you suspect your app's security has been compromised.

Example

Here’s an example of an API call using a ticket:

```
<qdbapi>
<udata>mydata</udata>
<ticket>auth_ticket</ticket>
<apptoken>app_token</apptoken>
<field fid=”8”>party at Lindisfarne</field>
<field fid="9">dress in style of the epoch</field>
<field fid="10">lindisfarne island</field>
</qdbapi>
```

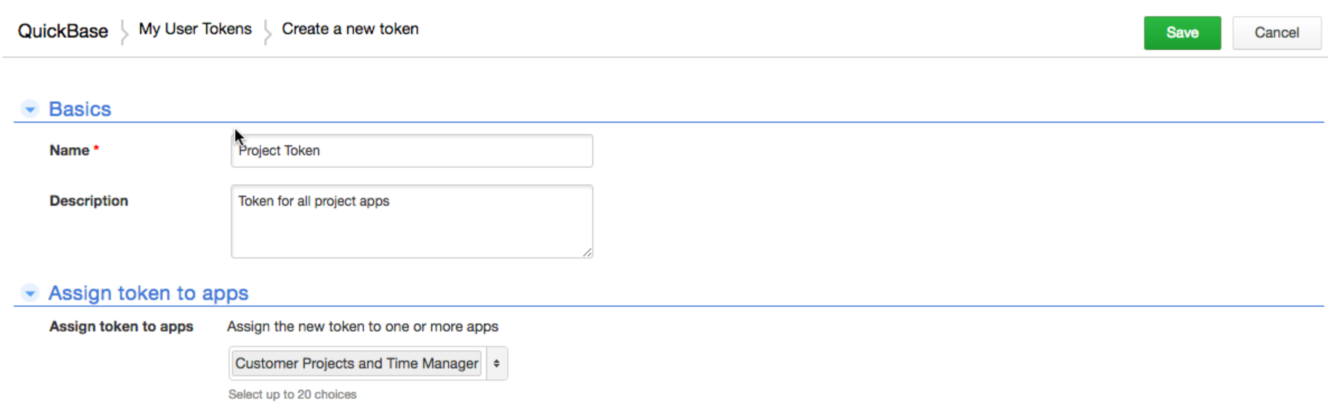
Here’s the equivalent action replacing the ticket with a **user token:**

```
<qdbapi>
<udata>mydata</udata>
<usertoken>user_token</usertoken>
<apptoken>app_token</apptoken>
<field fid=”8”>party at Lindisfarne</field>
<field fid="9">dress in style of the epoch</field>
<field fid="10">lindisfarne island</field>
</qdbapi>
```

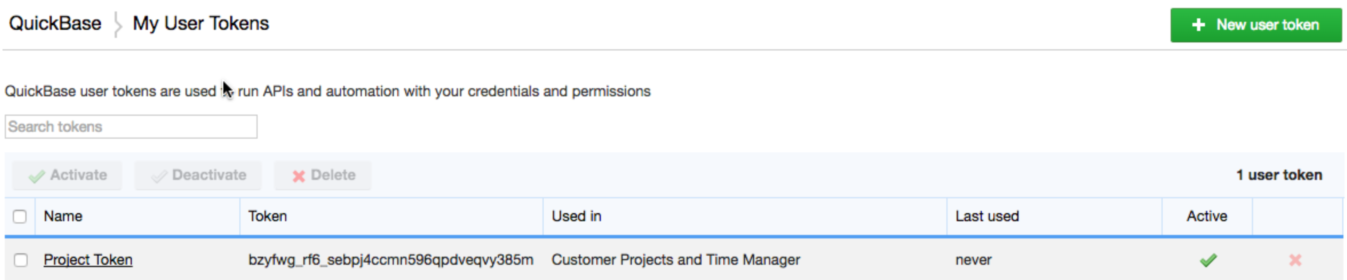
How to create a user token

To create a user token, click the user dropdown on the global bar, then choose My preferences**. Under My User Information, click the link for** Manage my user tokens**. Then click the** New user token **button.**

In the Basics section, enter a Name **and a** Description **for your token. In the** Assign token to apps **section, use the dropdown to select which apps you want to assign this token to. You can assign a token to as many as 20 apps.**



When you click Save, **the new token appears in the list of user tokens. API calls containing this user token can now interact with an application.**



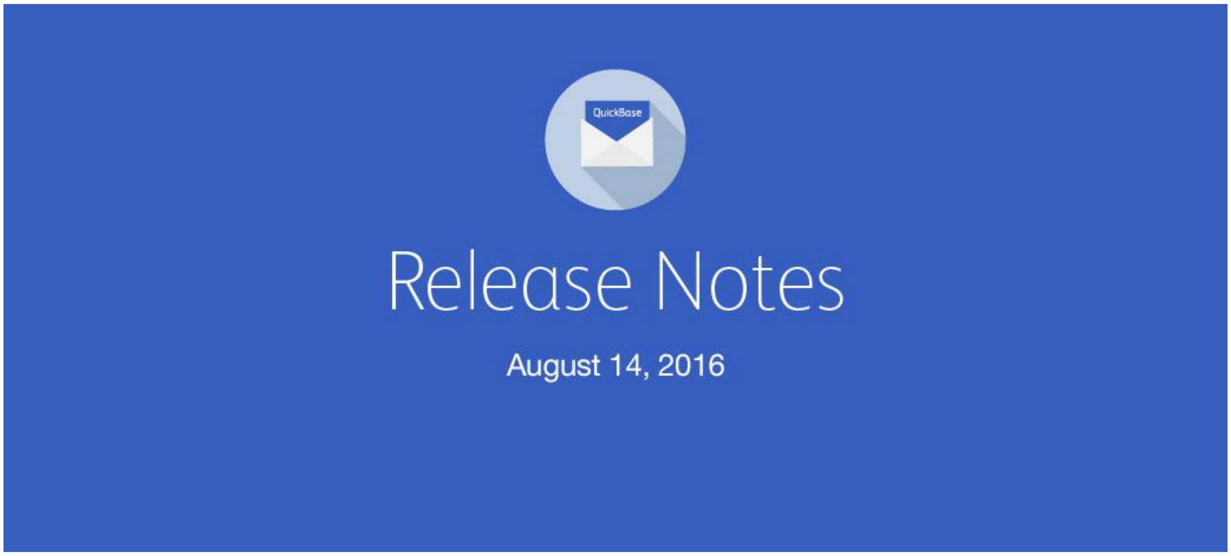
What's fixed in QuickBase?

Here's what we fixed this month.

ID	Issue
QBE003937	There was no easy way to remove placeholders from the Manage Users page in an application. If there are placeholder users in the Manage Users list, a **Remove Placeholders** button will now show on the page to remove them.
QBE005154	In certain cases, importing data into user fields resulted in placeholders that displayed the value *???* in the Manage Users page. This issue has been resolved.
QBE010264	When adding a Text element to a form, the **Help** icon for the **HTML (Limited)** checkbox displayed a help topic with incorrect styling. This issue has been resolved.
QBE010272	When printing an app home page in landscape mode, the printout still appeared in portrait mode. Reports and charts appeared compressed and were often not readable. This issue has been resolved.
QBE010423	When signed into QuickBase with certain mobile devices running iOS, and using the full site, lists of reports and emails were condensed, making it difficult to read the contents of a column. This issue has been resolved.
QBE010590	Exporting the realm directory in **CSV** or **Excel** format will now include the contents of the **Is Deactivated** column.
QBE010600	QuickBase API calls returned an HTTP status of 200 even if there was an API error. This made it difficult for webhooks, scripts, and third-party integrations to determine whether the call was actually successful. There is a new header (X_QUICKBASE_RETURN_HTTP_ERROR) that, if used (and has a value of *on*, *true*, *yes*, *y*, or *1)* will properly return a status of 400 for requests with errors.

ID	Issue
	This issue has been resolved.
QBE010608	If API_ChangeUserRole was used to change the app manager’s role to another role with Full Administration permissions, the call failed with the error: “Error code 114 Manager cannot be removed from the administrator role.” This issue has been resolved.

August 2016 Release Notes [return to top]

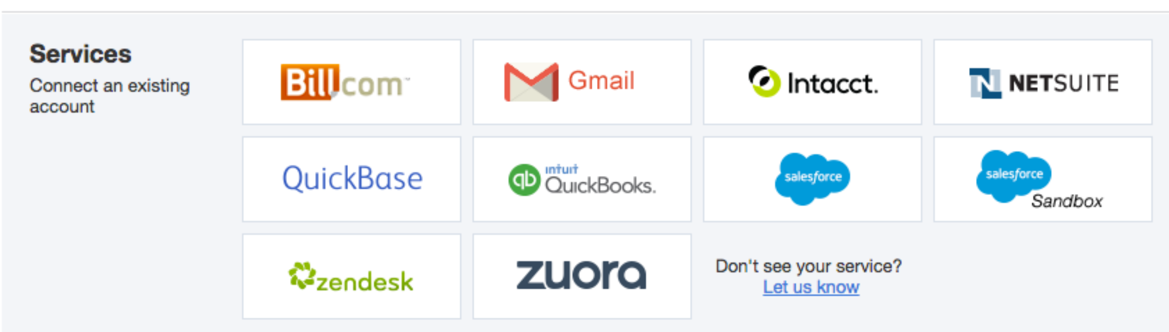


The blazing heat of August is upon us up here in the northeast, but that hasn't slowed down **the hard-**working QuickBase team! This month we're adding Gmail as a new data source for **connected tables. Plus, as usual, some fixes requested by our customers.**

Bring Gmail messages into QuickBase automatically

Integrating critical business data into your QuickBase apps lets you automate your workflows and keep your tables up-to-date with the freshest data for improved visibility. With this release, you can now automatically import email messages from a select Gmail account into a new connected table in QuickBase. QuickBase Sync for Gmail, the latest offering in the QuickBase Sync native integration capability, imports the email messages as records.

You might use this feature to log customer communication for later reference or tracking purposes (for example in a sales or customer service team), or collect leads or requests (in a marketing team). No matter the use, you'll save time and reduce the errors that can a**rise from manually copying and pasting messages.**



You start by creating a new table and connecting it to a data source, just like you do for any other data source. If you've never created a connected table before, just follow these instructions**.**

We've provided you with two queries optimized for QuickBase. These are:

- Inbox Summary by Conversation – **imports a Gmail conversation in a QuickBase table**
- Inbox with Forwards – extracts the customer's email address from the body of a **forwarded email and imports it in a QuickBase table**

Let's take a look at each of these.

Inbox with Forwards

Let's say your **team wants to log customer emails in their QuickBase app. To track them in a central location, a team member can forward these emails to a central Gmail account and a QuickBase admin can set up a connection to this Gmail account.**

Typically, the email address most useful to you is the customer's email address, but this **address is buried in the body of the forwarded message. So, QuickBase provides two fields that bring the email addresses you care most about into your QuickBase table. In our example:**

- **OriginalFrom — This is the email address of the customer.**
- **OriginalTo — This is the email address of the sales rep who received the message.**

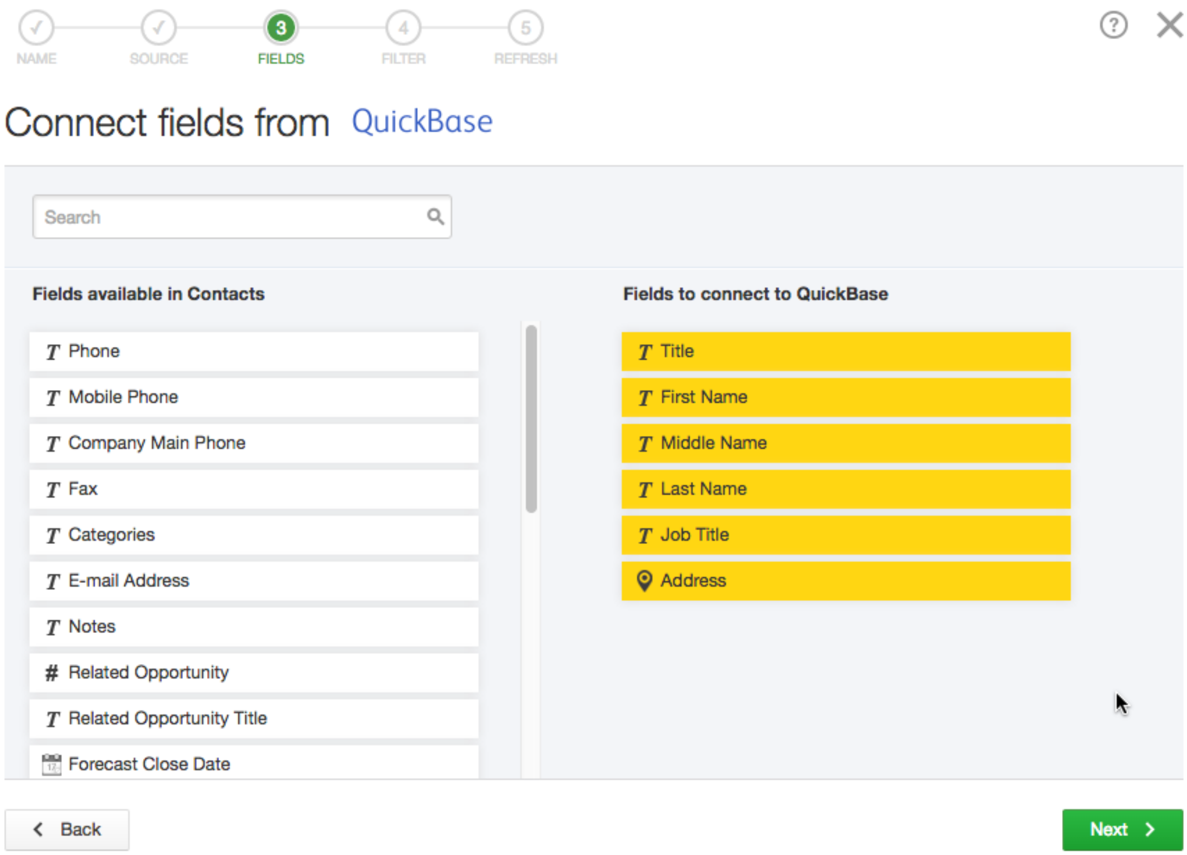
When setting up your connected table, select these fields and QuickBase will extract the customer's email address from the body **of the email and make it available as its own field in your QuickBase table.**

Inbox Summary by Conversation

If you prefer your connected table to not have a record for each email message, we offer this query, which only brings in the last email message in a conversation, or message thread, which includes all the messages in the entire conversation.

Address fields can be used in QuickBase-connected tables

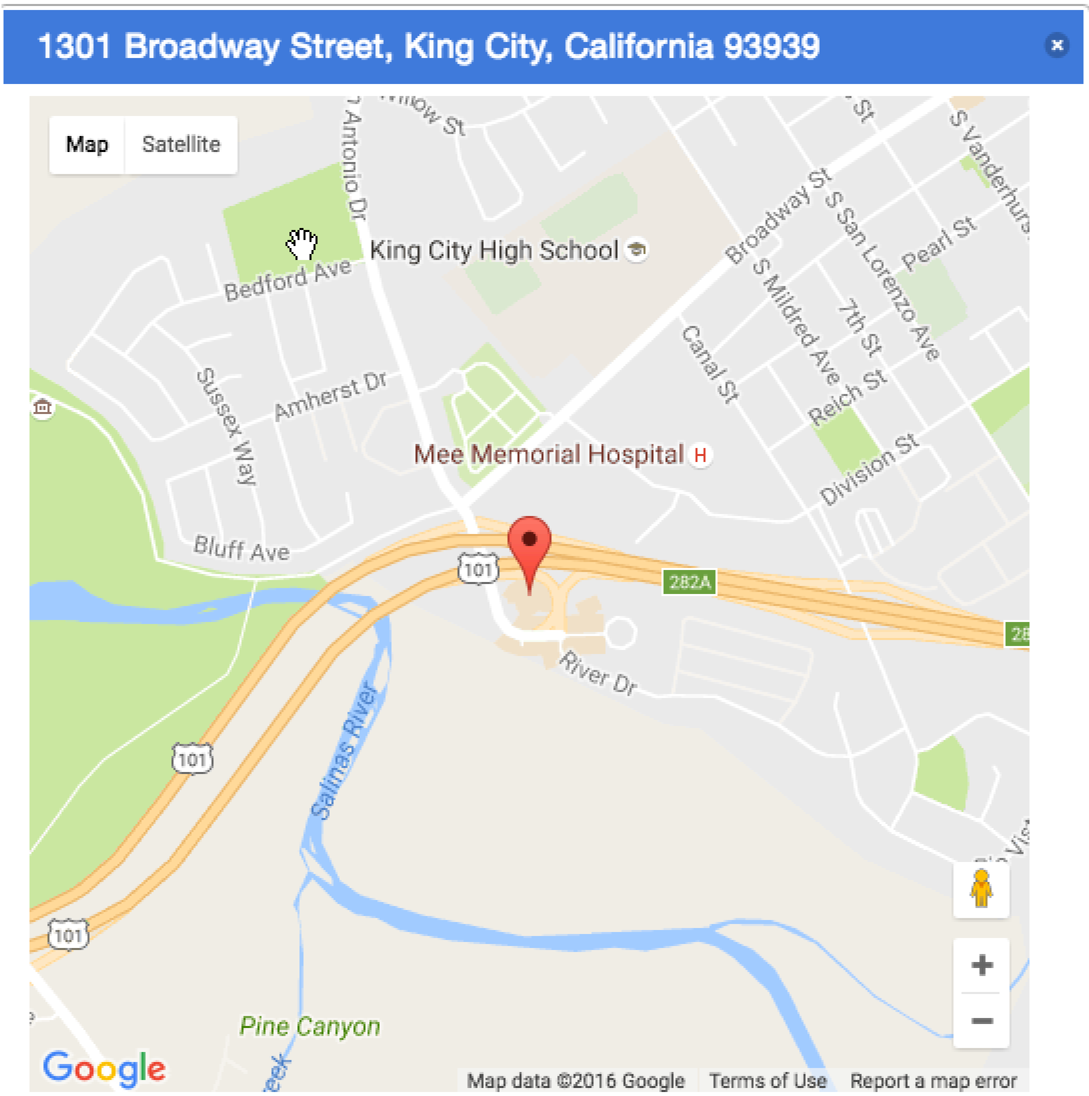
You asked for it, and we're happy to deliver! **Now you can import** Address fields **when you set up a connection for QuickBase-to-QuickBase tables. Just create a connected table,** and if your table contains an Address field, you'll see it in the list.



After you connect the table, you can view the Address fields in your table. Click an address to see its associated map. Enjoy!

10 Contacts — All

	Contact	Status	Phone	Mobile	Address	Email	Territory	Next Step
	John Mitchell		(255) 222-5555 x252	(452) 555-2525	1301 Broadway Street, King City, California 93939		West	
	Mary Smith		(424) 429-4244		61 Broadway Apt # 225, New York, New York 10006	msmith@mailinator.com	East	
	Jane Marsh		(452) 444-3333		100 Pine Road, Philadephia, Pennsylvania		East	
	Steve Tyler		(310) 989-7645		750 Median Way, Atlanta, Georgia		South	
	Jared Spieler		4 (225) 321-2325 x343	(124) 565-3322	150 35th Street, Oak Brook, Illinois 60515	jspieler@mailinator.com		
	Erin Manwit		(452) 222-5555 x353		2533 S. Gladstone Street, Aurora, Illinois			
	Tom Smith	Qualified lead			100 First Street			
	Maria Conterra	New lead			100 First Street, Cambridge, Maine 03253			
	Tom Petrinot	Qualified lead	(402) 552-1234	(593) 827-1234	100 2nd Street, Cambridge, Massachusetts	tpetrino@mailinator.com		
NEW	Kelly Cook	Qualified lead	4 (352) 223-5553		27 School Street, Boston, Massachusetts 02201	kcook@gmail.com		Call contact

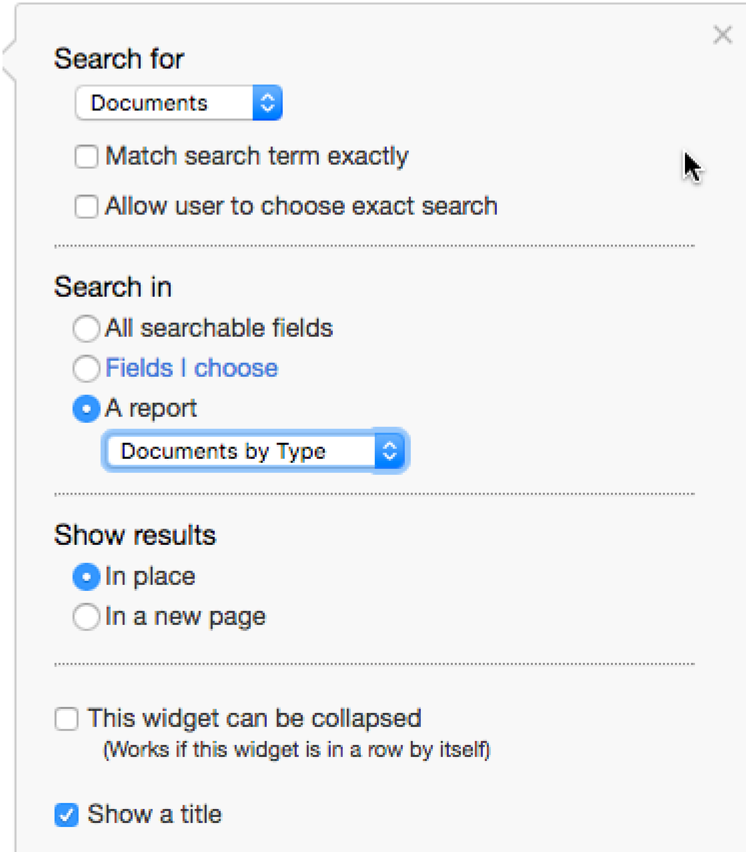


Search widgets can search reports

Search widgets allow you to search your data right from the app home page. Now you can configure the search widget to search table reports. When you set up a search widget, in the Search in **section, click** A report **and select the report you want users to search. So now, say, if you want to let your users search only open opportunities instead of all opportunities, now you can specify the appropriate report to be searched.**

Note that:

- **You can only select Common reports.**
- You can't search reports with an <ask the user> **filter condition set.**
- **The search looks** only **at fields actually displayed in the report.**

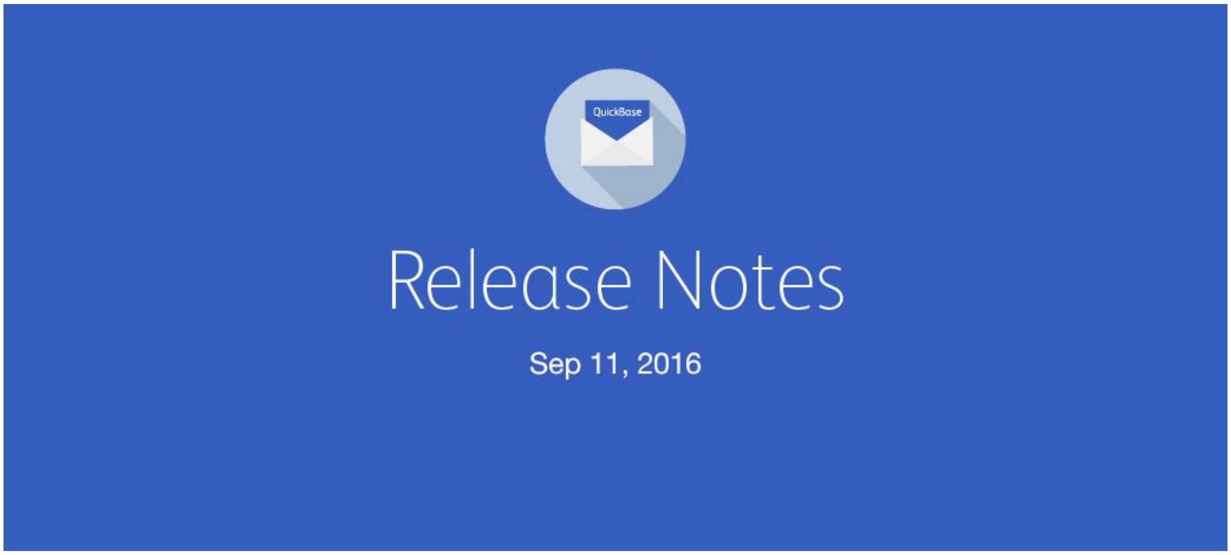


What's fixed in QuickBase?

Here's what we fixed this month.

ID	Issue
QBE009311	Hiding a table in the Table bar for a role disabled Advanced Search for that table and role. This issue has been resolved.
QBE010311	(mobile site only) When viewing a parent record, a user with a role that did not have modify permissions for the parent table couldn't see the icon to add a child record. This issue has been resolved.
QBE010650	(mobile site only) Form rules that changed a Date/Time field to the current date and time did not respect the application's time zone setting, if it was set to a different time zone than the mobile device used to access the site. This issue has been resolved.

September 2016 Release Notes [return to top]



It's September, and we're celebrating the last few weeks of summer by **rolling out another release with an assortment of fixes to improve your QuickBase experience.** Plus, we're **unveiling QuickBase webhooks, a new workflow feature geared to developers and other technically adept builders.**

Automate workflows with QuickBase webhooks

QuickBase webhooks help streamline workflows by triggering actions in real time across external systems or QuickBase apps when data is added, modified, or deleted in QuickBase.

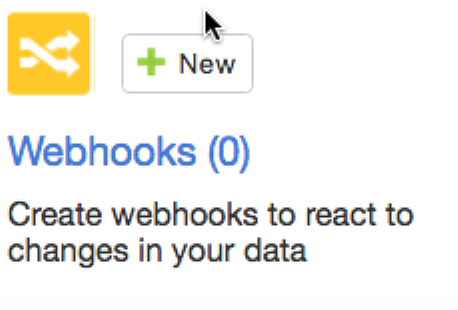
Webhooks are available for the Premier, Platform, and Unlimited plans.

Note: **Webhooks are designed for developers and technically savvy builders.** QuickBase *support can't help debug your webhooks, especially when used with third*-party apps. That said, you don't have to be a full**-stack developer to create useful webhooks.**

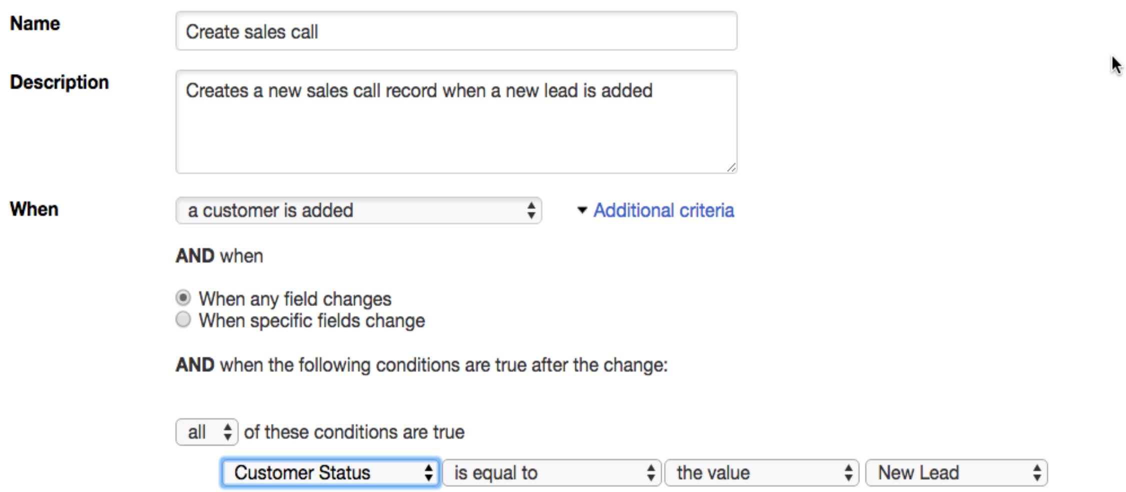
Here are just a few examples of what you can accomplish with webhooks:

- **Kick off a Workato workflow**
- **Create a Slack notification when a status field changes**
- **Initiate QuickBase actions as part of a triggered workflow**
- And so on … we're sure you'll find lots of ways to unleash the po**wer of webhooks!**

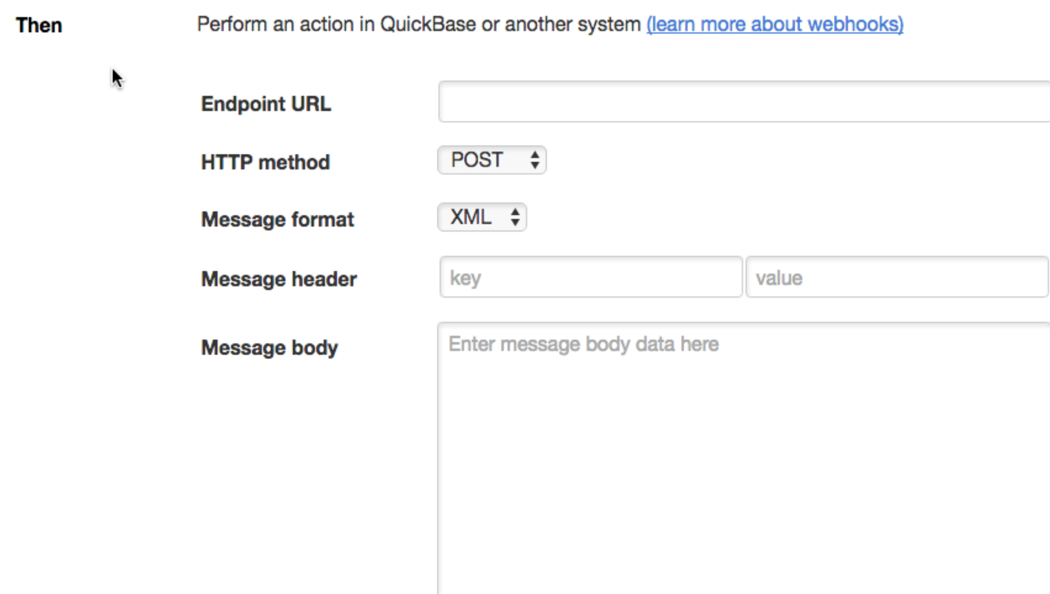
Step 1 — **If you are an Application Manager or have an Admin role, you can create and** manage webhooks. To get started, open a table's SETTINGS page and click **the** New **button in the Webhooks section.**



Step 2 — **Create a trigger for the event that you want to fire the webhook. In the example** below, the trigger would fire when a new customer is added with a status of "New Lead." If you've used QuickBase notifications before, this screen should look pretty familiar.



Step 3 – **Configure the action you want to perform in QuickBase or another third-party application.**



For detailed information about configuring webhooks, refer to QuickBase Help in the upcoming release. Just search for "webhooks" in the Index, or look in the "webhooks" **section on the Contents tab.**

What's fixed in QuickBase?

Here's what we fixed this month.

ID	Issue
QBE010703	When creating a connected table, Percent fields in the source data now correctly show as Numeric-Percent fields in QuickBase.
QBE010243	When a user with a role of either "Basic Access" or "Basic Access with Sharing" created a new subscription, and then clicked the **Send Test Email** button, QuickBase displayed an error message. This issue has been resolved.
QBE10260	If an embedded chart was displayed on a form and the legend contained a lot of text, the legend was too large in relation to the chart. This issue has been resolved.
QBE010312	When a user with access to a connected table was in a role with Full Administration access level to an app (but without Edit Field Properties set for that table) clicked the **Refresh Data** button on the connected table, QuickBase displayed an error message. This issue has been resolved.
QBE010570	If you created a new field in the data source for a connected table and then attempted to change the connection to add that field to the connected table, the field would not appear in the **Connect more fields** dialog. If you

ID	Issue
	refreshed the connected table, or logged out and back in to QuickBase, the field *would* appear correctly. This issue has been resolved.
QBE010676	The field **Usage** tab does not show fields used in report filters after “the value in the field” that have not also been included in the list of report columns. This issue has been resolved.
QBE010677	Dynamic filters were not working correctly for charts with negative data values and a logarithmic scale on the y axis. This issue has been resolved.
QBE010686	If you created a connected table with Gmail as the data source, the data refresh sometimes failed with the message: “Could not parse XML input.” This issue has been resolved.
QBE010702	Accessing the Reports & Charts list from Table Settings may cause QuickBase to behave unexpectedly if an orphaned summary field on a master table uses a drilldown report. This issue has been resolved.

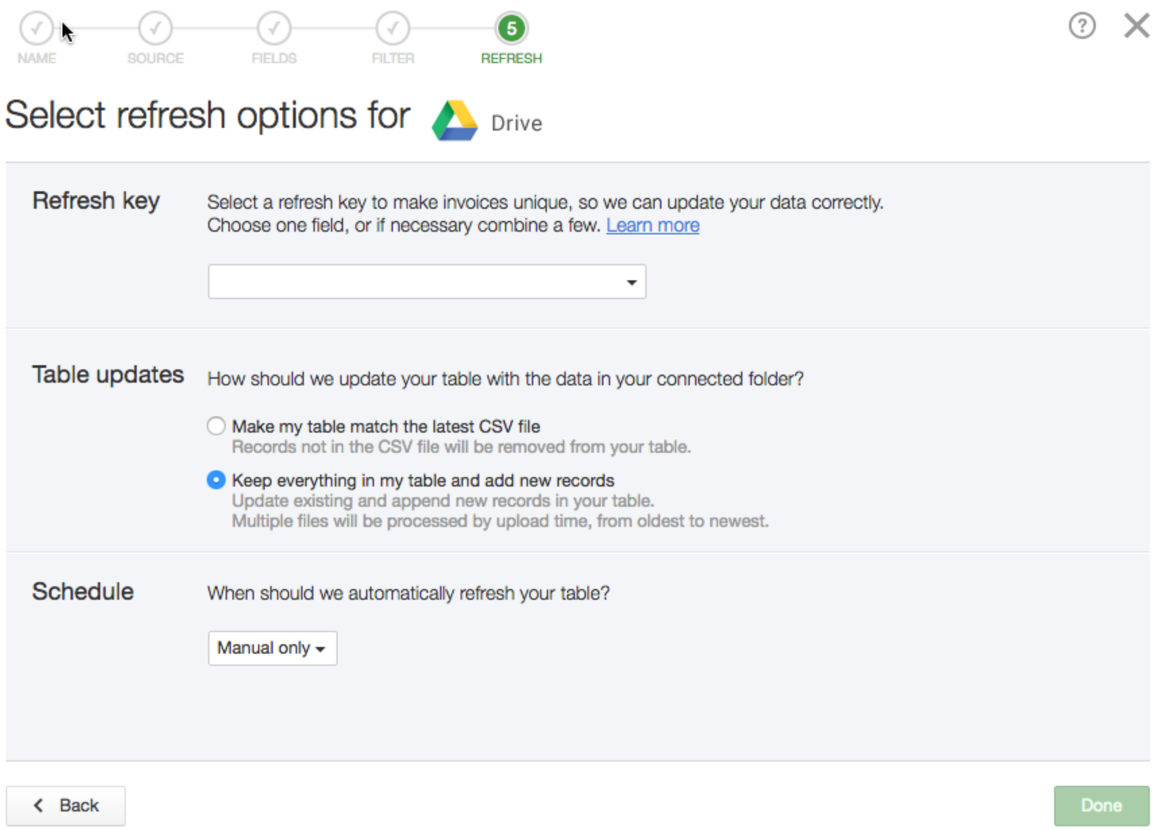
October 2016 Release Notes [return to top]

Summer flew by way too fast and — just like that – October! This month, we're unveiling an **enhancement that lets you process multiple files when you create and refresh a CSV-**connected table. We're also rolling out a useful enhancement to the Reports List widget. And, as usual, we've fixed several issues you pointed out to us.

New CSV-connected tables can now process multiple files during a single sync

For new CSV-connected tables, if you choose the `Keep everything…` table update option, QuickBase will process up to ten files in a single refresh. Whenever your sync directory contains multiple files, they will be processed one at a time, in chronological order, with the oldest updated file processed first.

This enhancement expands the use cases for the Sync for CSV feature. For example, now your team can Sync data from files dropped into your CSV folder from multiple sources, like invoice data from different vendors. Or, suppose your order management system outputs multiple CSV files every hour. With this enhancement, you can ensure each of the files will be synced to your connected table.



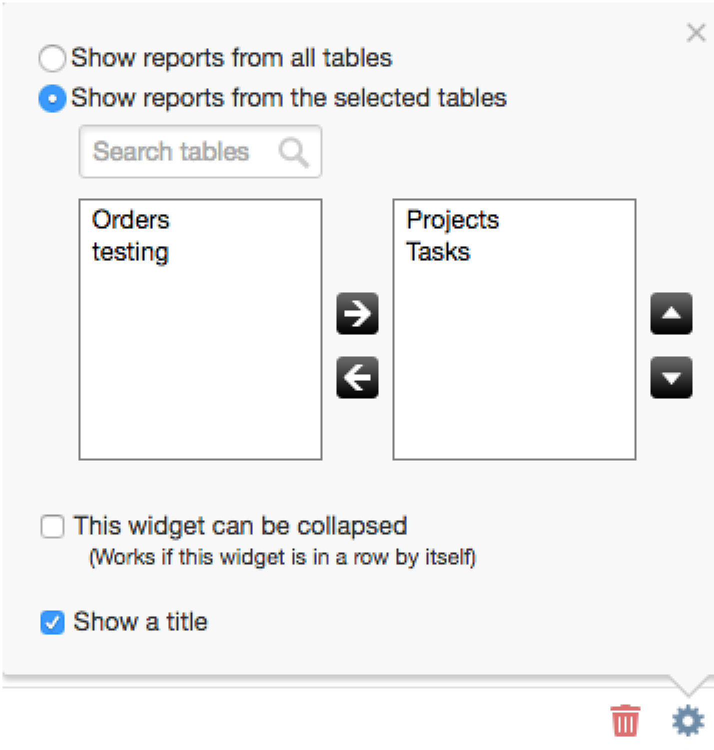
Existing connected tables using the ***Keep everything*** option will not be affected by this update. **In November, all such tables will be converted to the new multiple-file process. If you have CSV-connected tables using the** Keep everything option, we'll send you an **email in the next month describing the process and what you should do to prepare. Stay tuned!**

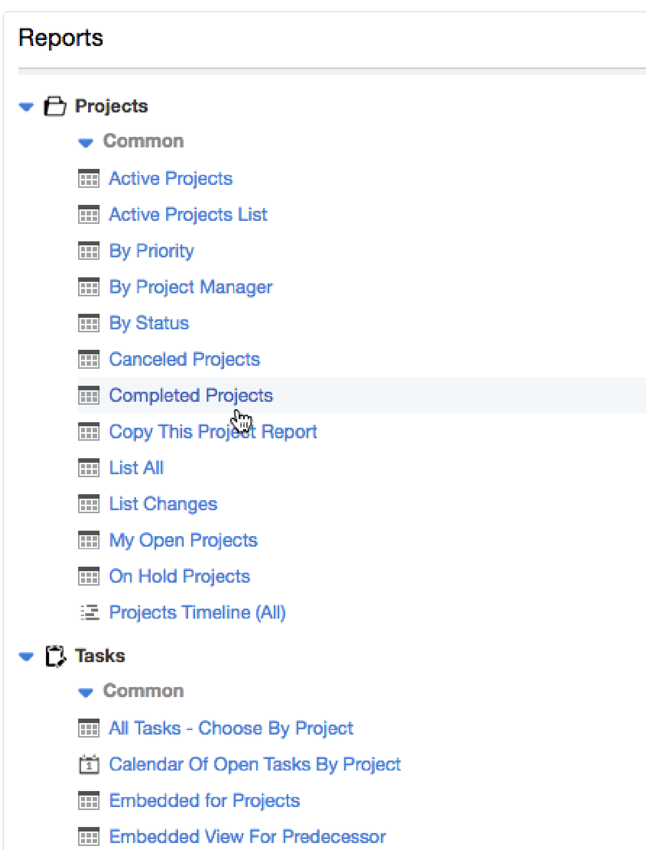
CSV-connected tables using the Make my table match… option are not affected by this change.

Specify which tables are displayed in the Reports List widget

When you use the Reports List widget on your home pages, you can now specify which tables to display reports from. You can show reports from all tables, or just the ones you select. You could, for example, create unique home pages for different user roles and have reports displayed only from tables specific to their role.

In this example, the first image shows the configuration panel for the widget, and the second image shows the widget with reports only from the Tasks and Projects tables.

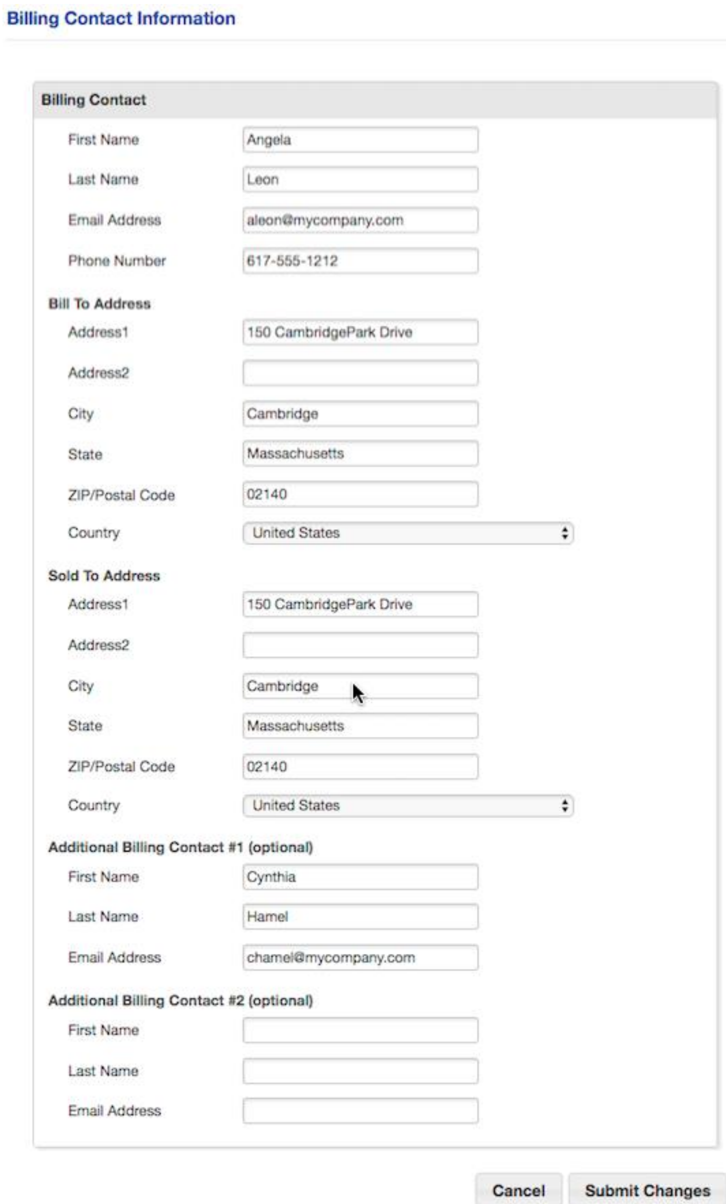

Show reports from all tables
Show reports from the selected tables
Search tables
Orders
testing
Projects
Tasks
This widget can be collapsed
(Works if this widget is in a row by itself)
Show a title


Reports
Projects
Common
Active Projects
Active Projects List
By Priority
By Project Manager
By Status
Canceled Projects
Completed Projects
Copy This Project Report
List All
List Changes
My Open Projects
On Hold Projects
Projects Timeline (All)
Tasks
Common
All Tasks - Choose By Project
Calendar Of Open Tasks By Project
Embedded for Projects
Embedded View For Predecessor

Add additional billing contacts in Account Settings

On the Billing Contact Information page, you can add the name and email address for two additional billing contacts. Any additional contacts you add will get the same email notifications as the primary billing contact. You can also edit the name and phone number of the Primary billing contact here, as well as the Bill To Address and Sold To Address. Access the Billing Contact Information page by clicking Edit Billing Contact **on the Manage Billing Account page.**

Customers on a trial or free plan can still edit the Primary billing contact email from the Account Properties page.



Migration to QuickBase website domain completed

On October 1, we successfully migrated our website domain from quickbase.intuit.com to www.quickbase.com The transition occurred without causing disruption to our customers or prospects. Update your bookmarks and come visit us soon!

What's fixed in QuickBase?

Here's what we fixed this month.

ID	Issue
QBE010208	*(Microsoft Edge only)* The QuickBase user interface was not formatted correctly on many pages. This issue has been resolved.
QBE010705	If you created a report grouped by a Numeric – Percent field, and then selected any grouping method other than **Equal Values**, the range values displayed as decimals instead of percentages. This issue has been resolved.
QBE010851	If you imported a name into a User field, a placeholder user was created, but the value was not added to the associated User field in the record. This issue has been resolved.
QBE010863	When using API_ChangeUserRole to change a user's role, and when the user was already in that role as a member of a group or as a second entry, the group "Everyone on the Internet" was assigned to the role instead of the targeted user. This issue has been resolved.
QBE010873	Under certain conditions, in the Manage Billing Account page, filtering the **Users with Access** tab based on a list of email addresses could return the incorrect number of users. This issue has been resolved.

November 2016 Release Notes [return to top]

November is the month for giving thanks. Here at QuickBase, we're thankful for our loyal customers and app builders! This month we're providing a way to create roles with more flexible permission options. We're also adding an option to **limit access to IP addresses at** the realm level. Finally, we've added links in the product to sign up for QuickBase training.

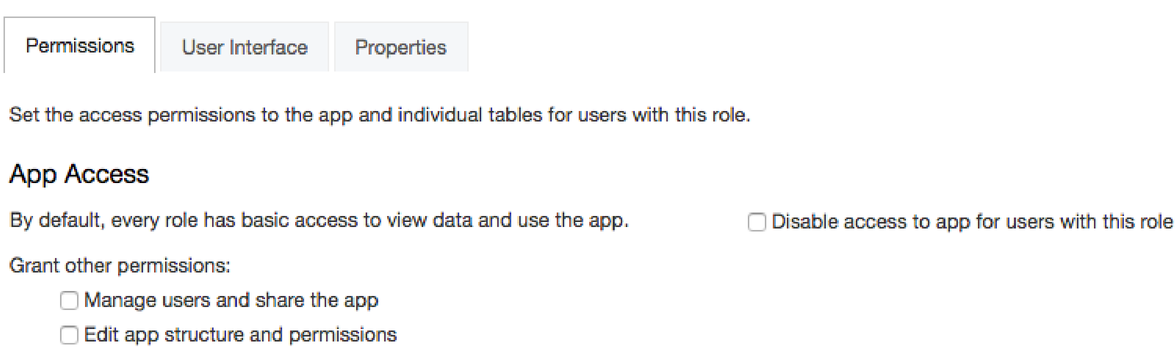
More flexible permissions levels for roles

There are times when you want to allow app builders to edit app structure and permissions but not **have the ability to share apps with users. Perhaps you are approaching the maximum number of users, or maybe you just want more control over who has access to which apps.**

At other times, you may want to let users manage users and share apps but not **edit app structure and permissions.**

This release lets you assign these two permission levels separately, so you can define the precise roles you want.

To access role permission settings, go to the app Home page, click SETTINGS **on the Page bar, then click** Roles**. For each role, you can grant different permission levels by selecting checkboxes in the App Access section on the Permissions tab.**

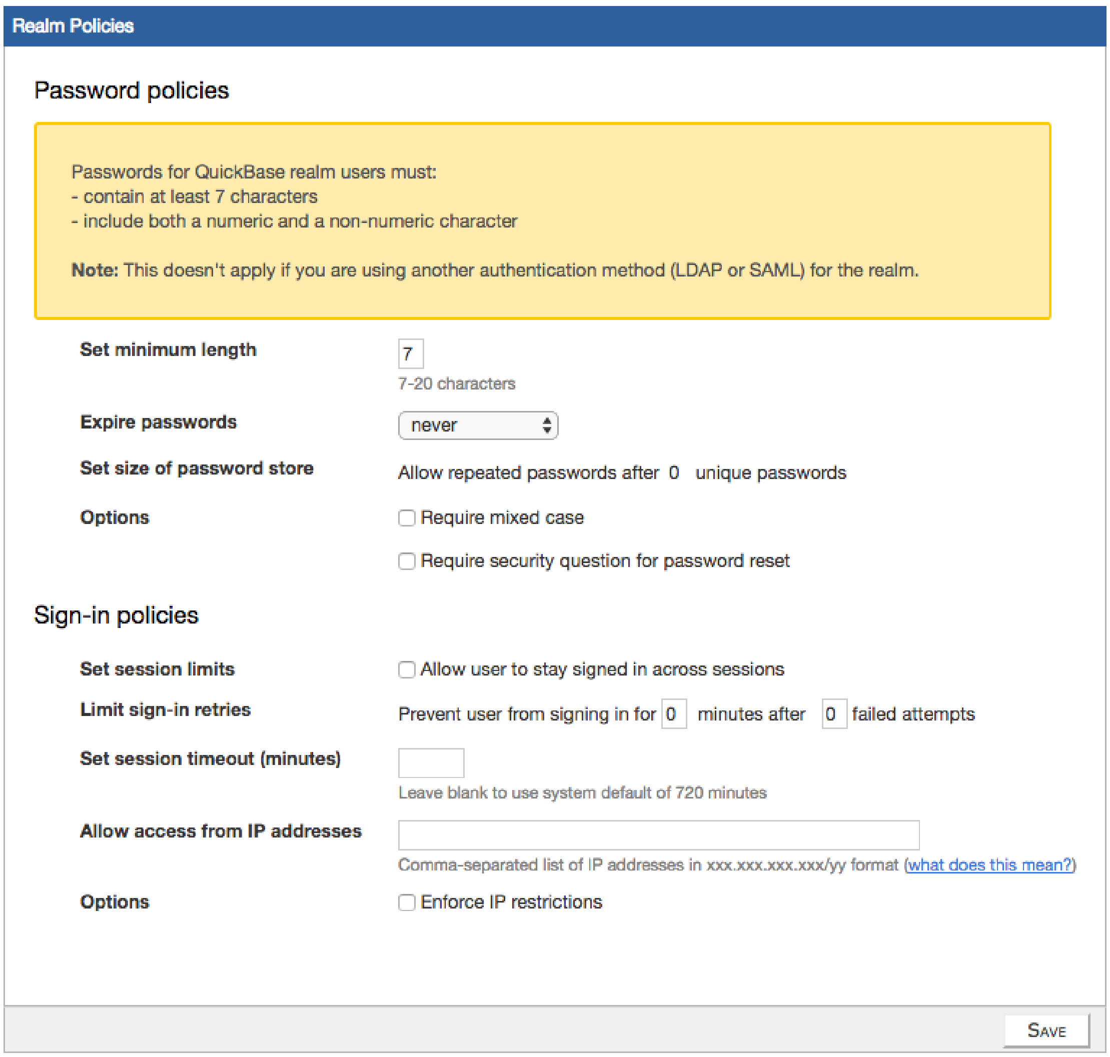


For more details on this feature, search online help in the November release for "Configure **permissions for a role.**"

Enforce IP address filtering at the realm level

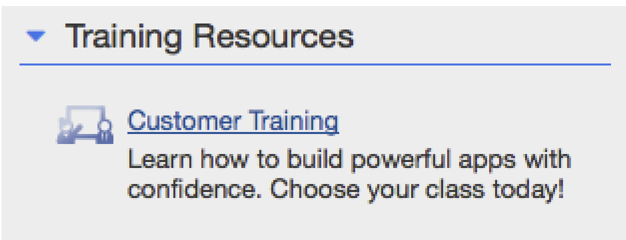
The realm-level setting Allow access from IP addresses **allows a realm admin to list ranges of IP addresses. Another app-level setting allows each app admin to decide whether to restrict access to an app to users whose IP addresses are in those ranges.**

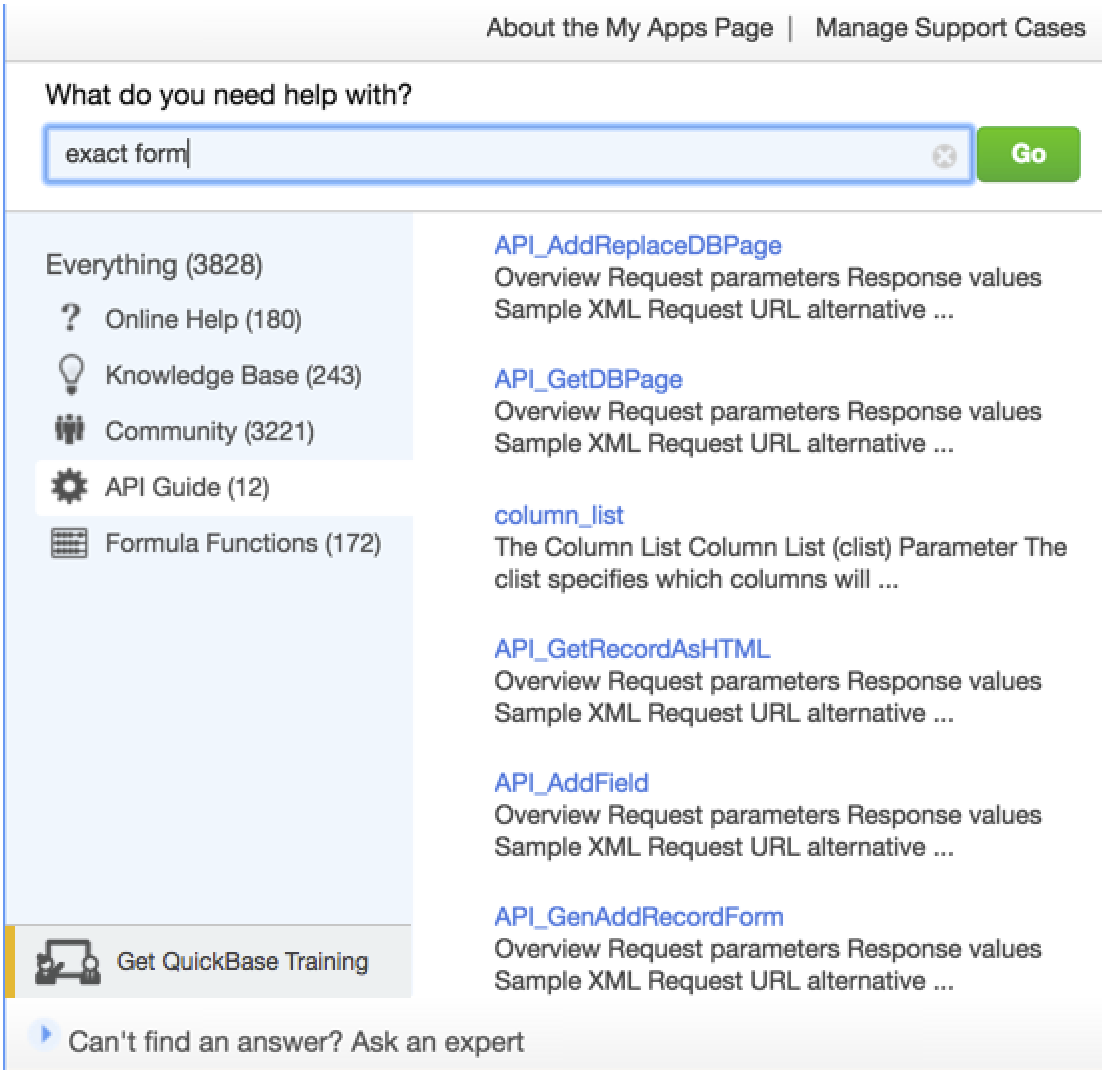
With this release, we've added a new realm**-level setting that allows admins to** limit all apps **in the realm to be accessed** only **from specified IP address ranges, regardless of the state of the app-level setting.**



New Links to QuickBase Training options

Now you can access QuickBase training options directly from QuickBase. We've added **training links to the QuickBase right-side panel and the Help results panel. Just click these links to get more information about in-person classroom training or live online classes.**





What's fixed in QuickBase?

Here's what we fixed this month.

ID	Issue
QBE010371	If you invited groups, domains, or email addresses to an app and assigned them to a role, the number of users reported on the Subscription settings page were incorrect. In some cases, app managers received alerts indicating that the number of subscription recipients exceeded their allowed limit. This issue has been resolved.
QBE010699	For forms that include the following… • A Text field requiring unique values • A Formula – Checkbox field • A dynamic form rule with an "Abort the Save" action preventing the record from being saved if the Formula – Checkbox was selected. …the dynamic form rule failed on a save attempt if the Text field contained a duplicate value *and* the Formula – Checkbox was unchecked. This issue has been resolved.
QBE010912	The Billing History page now shows the history for all plans subscribed to during the account's lifetime. This issue has been resolved.
QBE10913	On the Billing History page, a customer's payment history displayed incorrectly for successful or failed attempts to charge a customer's credit card. The **Date** column displayed the date the invoice was *created* instead of the date the credit card payment was made or attempted. This issue has been resolved.
QBE010931	The Search widget added a default report when no report was specified in the settings. This issue has been resolved.

December 2016 Release Notes [return to top]

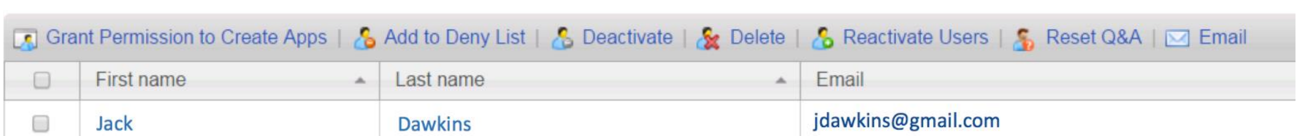
Hard to believe, but December is upon us! We're celebrating the holiday season with a **couple of handy tools for our hard-working admins. Plus, as always, a few fixes for issues** you've reported to us.

Allow account admins to update user info in their company

We're always looking for ways to make life easier for account admins. This month, we're **giving them the ability to update user info such as name, user name, and email for users in their company right from the Manage Billing Account page.**

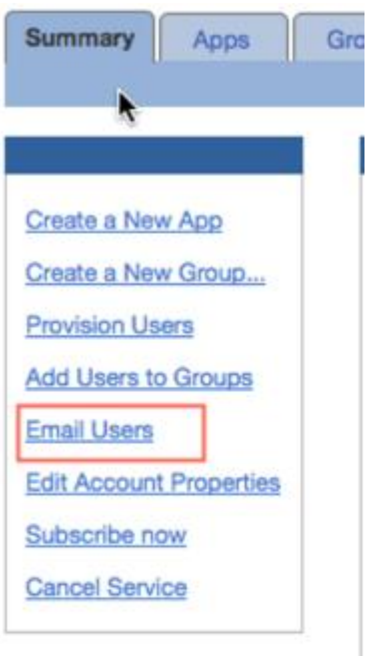
To change a user's info, just click a linked name, email address, or username and update **the info in the** Edit user information **dialog.**

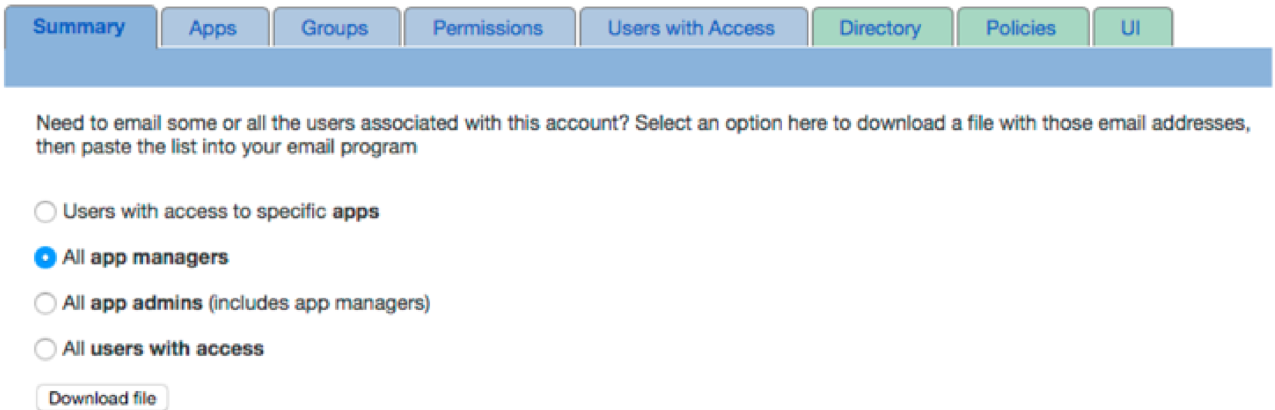
Note: You can't edit user info for accounts that use single sign**-on (that have LDAP/SAML enabl**ed), or for users designated as "not in company". To use this feature, the **account/realm must be tied to the company, and the user that is editing as well as the user** being edited must have an email address that belongs to the company. Names that don't **meet these conditions will not be linked.**



Export lists of user email addresses

If you've ever needed to inform a group of users about important changes to your app, this month we're giving you a fast and easy way to do it. Just click the Email Users **link on the Summary tab on the Manage Billing Account page and then create a list of users based on** the filter you choose, such "All app managers." Then, just download their email addresses **to a text file, which you can paste into your email program.**





What's fixed in QuickBase?

Here's what we fixed this month.

ID	Issue
QBE008448	If you created a customized report to be used as your record picker against a conditional dropdown filtered field, in Grid Edit mode the standard record picker was displayed instead of the customized report picker. This issue has been resolved.
QBE010930	If you changed the key field for a table, in some cases summary fields were not being updated correctly to point to the new reference field. When this occurred the summary fields were removed from the table's relationship. This issue has been resolved.
QBE010946	Using API_SetFieldProperties to update a formula field's formula sometimes resulted in incorrect values. This issue has been resolved.