



# Release Notes

August 20, 2017

## August 2017 Release Notes

QUICK BASE NEWS

Aug 10, 2017 | 13 Min Read

August is here and many of us are on the move, so we're rolling out options to save you time, improve the mobile user experience, and add some color to your tabbed forms.

### Improve the mobile experience by setting default forms

Mobile users appreciate shorter forms that focus on key data points. Now app builders can choose which forms mobile users view by default, enabling builders to specify short forms for mobile use.

To add this setting, select **SETTINGS** from a table home page, then select **Forms**.

Open the **Set how different roles use these forms** section, and then select which form you want your mobile users to see, based on their role, in the new column

### **View/Edit/Add Form (Mobile).**



## Streamline mobile users' workflow with override settings for reports

Improve efficiency by providing your mobile users with focused reports to view and edit. You can ensure your mobile users see these reports, with mobile-friendly forms, by overriding role settings.

For example, you may have a table that supports multiple stages of a process, including an approvals stage. You could create a report that's filtered to show only the requests that haven't been approved yet and provides key information. Then, you could specify an override of role settings so that mobile users see the form you select when viewing and editing individual records from that report.

To ensure your mobile users have a report and form that works best for them, click **SETTINGS** from the table home page and select **Forms**. Click **Override role settings by report** and select the form you want your mobile users to see under the new **Mobile** column.

▼ **Override role settings by report**  
 Override role settings when any user chooses to view or edit a record from a specific report

Report	View/Edit Form (Full Site)	Grid Edit (Full Site)	Mobile
List All	Use role settings	Use role settings	Form2
List Changes	Use role settings	Use role settings	Use role settings

## Add tabs to your form and choose colors for each one

We have an update to our new tabs feature, to let you choose a different color for each tab on your form.

By adding tabs to a form, you can focus attention and organize workflow. Tabs are particularly helpful for long forms that enable complex business processes. With the August release, you can also specify a color for each tab.

To add tabs to your form and choose a color, enter the settings for a form and choose **Tab** as a form element. In the tab properties, you can specify the tab label and select **Set Tab Color**, as shown below:


**Tab Properties**

**Tab Label:**

**Tab Color:**

Set tab color [Revert to default color](#)

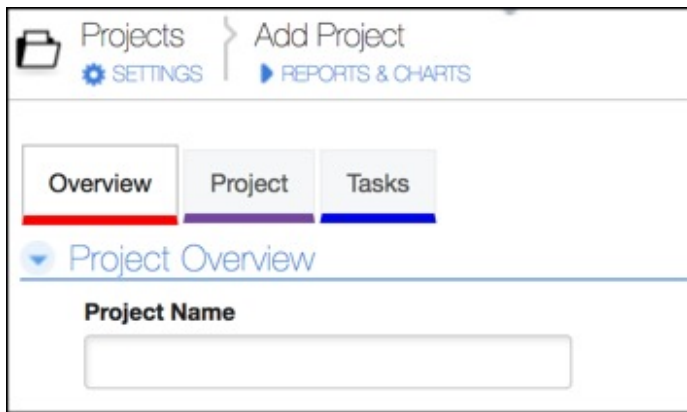
Mobile users can acc



The color picker shows a large color selection area on the left, a vertical color bar in the center, and a panel on the right with the following values:

- R: 245
- G: 247
- B: 249
- H: 210
- S: 1.60842
- B: 97.6470
- #: f5f7f9

The color for each tab appears as an underline:



## Quick Base University

The Quick Base University eLearning library is included with your subscription! We recently added these new courses to our offering:


- [New Orientation Series](#) - We have updated Orientation with a great series of videos created by our UX team. Orientation includes hands-on training to create a simple contact manager app.
- [Account Admin Overview](#) - This series of courses is designed to help you manage your billing account and its applications.
- [Account Admin Functional Hands-on Training](#) - This course provides hands-on functional training for key account admin functionality.
- [Record Archiving and Snapshotting](#) - This course presents, step-by-step, how to automatically archive data into a separate reporting app for faster app performance and how to set up daily data record snapshots to facilitate reporting on trends over time.


You can access Quick Base University eLearning and Live Training from the right panel on your My Apps page:

In addition, you can access eLearning directly at: <https://university.quickbase.com/>

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## Also in this release

- We've updated our new tabbed forms feature so that, if you leave a form to complete an action or opt to **Save & keep working**, you will return to the tab you were working on last.
- We've made some updates to make our billing processes smoother. New this month, you can purchase on-site training as a one-time purchase through our billing site.

## What's fixed in Quick Base?

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

Issue ID	Description
QBE010550	Drilldown reports now work correctly when the summary or chart report is set as "ask the user."
QBE010998	User fields created through a right-click menu on a form now default to allow you to add new users.

QBE011322	Reference proxy fields with view-only permissions appeared as editable in grid edit mode. This has been fixed.
QBE011340	We fixed a typo in a Quick Base Actions message when the matching fields weren't compatible.
QBE011381	When accessing a conditional drop-down via a mobile browser, the selection choices dialog continued to appear on the screen after a record was selected. This issue has been fixed.
QBE011396	If the key field is set to a field that is not the record ID, it can no longer be deleted from the field properties page or using API_DeleteField.
QBE011401	When adding additional "after the change" criteria to an action that includes a user field, the invalid choice of "is current user" has been removed from the drop-down list.
QBE011405	The From Address for reminders could not be set to the application manager. This has been fixed.
QBE011410	The Last Visited Date on the Users page for an application now displays with a blank value instead of "never" for group members.
QBE011413	We removed the unnecessary <b>Must be unique</b> option from Formula-Checkbox settings.

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QBE011414	Under certain circumstances, saving a report took longer than expected. We fixed this.
QBE011417	Under certain circumstances, when a user edited a Quick Base Action that added a record to another app, the bottom section of the Actions builder page was blank. This issue has been resolved.
QBE011428	Webhooks using an ImportFromCSV API call with a connected table endpoint were not working correctly. This has been fixed.
QBE011433	Saving a report with a duplicate name containing a space after it now triggers an error message.
QBE011455	<b>Edit the field properties for this field</b> is now visible when right-clicking on the last element of a form
QBE011468	If you have a Multi-select field in an editable embedded report on a form, the <b>Add new choice</b> option now works properly.
QBE011470	An action that edits related records would sporadically cause an error when multiple records containing currency fields were updated via grid edit mode. This has been fixed.
QBE011516	If a table used email as a custom key field, an error appeared when creating an action and selecting to add records to that table. This has been fixed.

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QBE011518	We removed the unnecessary command to create a duplicate field for built-in fields such as Date Created and Date Modified.
QBE011527	When customizing the name of a personal report, an error message using the term "common report" could appear rather than the correct term "personal report." This error message has been fixed.
QBE011538	When looking up a formula-URL field from a different table, setting options for button color choices was not working correctly. This has been fixed.
QBE011550	List - User fields created through a right-click menu on a form now default to allow you to create new choices.
QBE011565	Numeric - Rating fields created through a right-click menu on a form now default to having a list of 0-5 as options.
QBE011573	When opening a report, there was a slight delay before the Customize This Report link appeared on the page. This delay has been removed.
QBE011576	If the form option "show save & keep working" is implemented, a change was made to ensure a specified custom form is used rather than switching to a default form for a role.
QBE011582	An action to edit related records causing the message "API



Error Code 2: Invalid Input" now works correctly.

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QBE011586

When a relationship or report link used a percentage value, there was an issue matching records. This issue has been resolved.

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Platform security, billing changes, and back-end tooling are all ongoing commitments and as such, each release may include changes in these areas.

## And in the works...

From time to time, we add a new feature to Quick Base that we are beta testing. This feature is not generally available, but it can be turned on for certain customers who are a good fit for our testing.

Many admins have asked for super user access to apps in their account, either to verify that certain types of data are not being stored, or to make needed changes in the absence of key employees. Super users are realm or account admins who have access to all apps in the realm or account. This month, we're beginning to test this feature. If you're a realm admin on a Platform or Unlimited plan, contact [qbsuperuser.ea@quickbase.com](mailto:qbsuperuser.ea@quickbase.com) if you're interested in early access to this feature.

Realm admins with access to the feature can appoint up to 5 super users. Only realm admins and account admins with full management privileges can be designated as super users. Super users have app manager access to all apps in an account, or if they are realm admins, all apps in every account in the realm.

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