



Release Notes

November 12, 2017

November 2017 Release Notes

QUICK BASE NEWS

Nov 2, 2017 | 13 Min Read

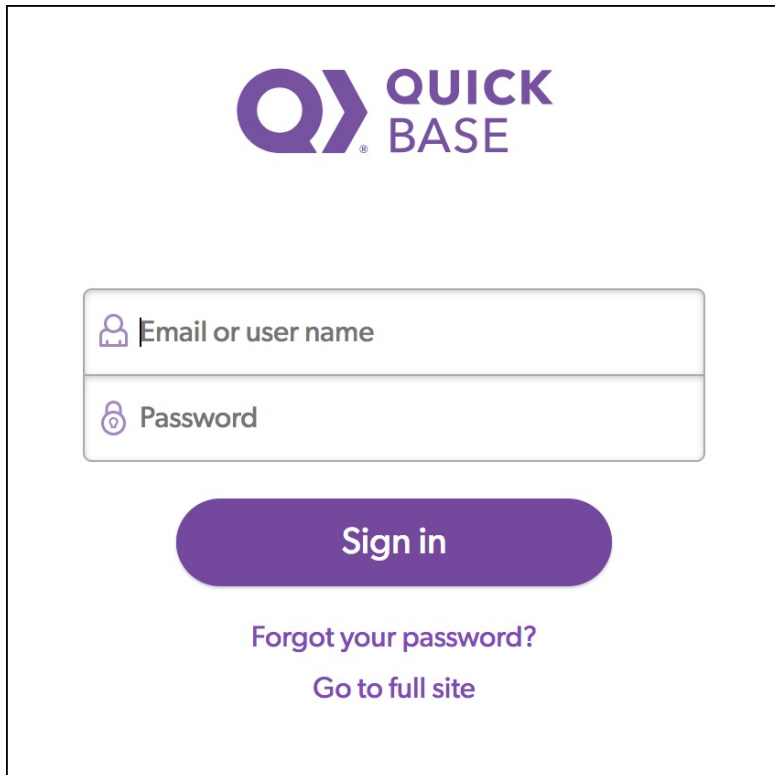
The November release of Quick Base is here to simplify getting your work done. The mobile experience has been revamped with a new user interface and the availability of calendar reports. You can now email report subscriptions as an attached PDF or CSV file. Create a waterfall chart with your financial data. Filtering options for custom permissions, table imports, and summary fields are more flexible. Read on for more or download these release notes in [Word format](#).

Updated November 8, 2017

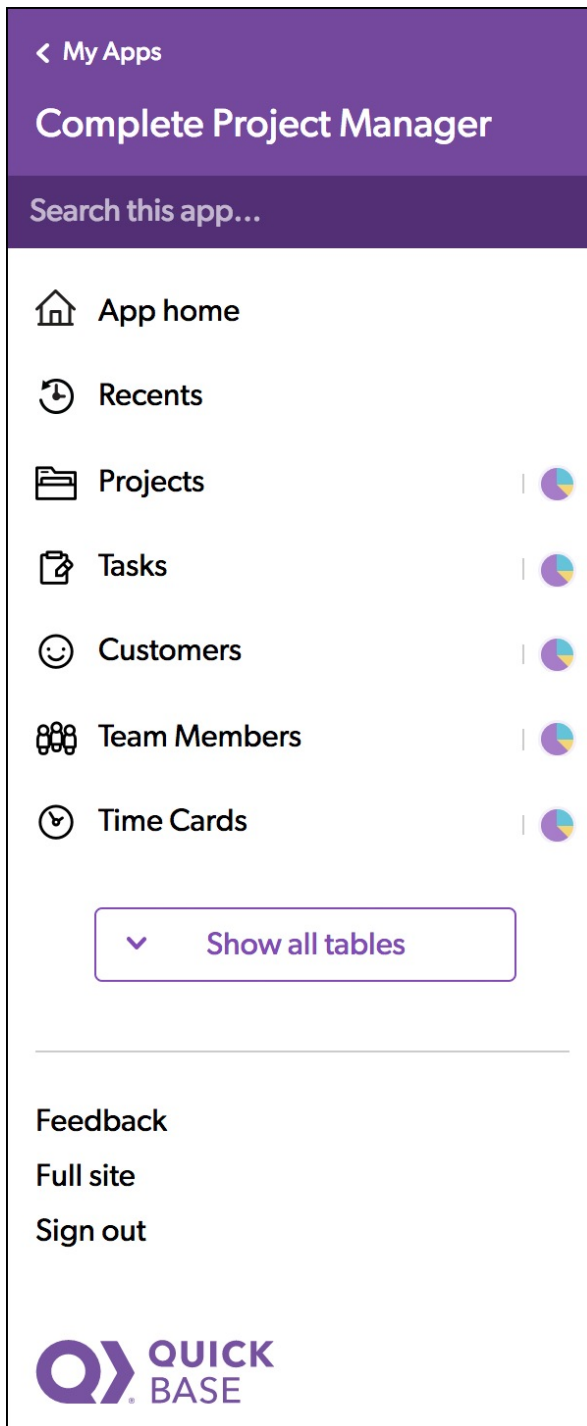
New mobile experience

Quick Base mobile has a whole new look and feel to provide better legibility, more consistency, and improved usability.

Sign-in screen

The image shows a mobile sign-in screen for Quick Base. At the top is the Quick Base logo, which consists of a stylized 'Q' icon followed by the text 'QUICK BASE'. Below the logo are two input fields stacked vertically. The first field has a person icon and the placeholder text 'Email or user name'. The second field has a lock icon and the placeholder text 'Password'. Below these fields is a large, rounded purple button with the text 'Sign in' in white. Underneath the button are two links: 'Forgot your password?' and 'Go to full site', both in a smaller purple font.

App navigation



Mobile calendar reports

Calendar reports are now available on mobile.

Calendar Report						
Day	Week	Month		November 2017		Today
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30	31	1	2	3	4	5
Deploy Document Management						
6	7	8	9	10	11	12
Deploy Document Management						
13	14	15	16	17	18	19
Deploy Document Management						
20	21	22	23	24	25	26
Server Upgrades						
27	28	29	30	1	2	3
Server Upgrades						

Report subscriptions now include PDF and CSV email options

When creating or updating a report subscription, you can now choose to email the report as an attached PDF or CSV file.

Email Options

From Address

☐ basedevnotify@quickbase.com

☐ The application manager (currently: @quickbase.com)

☒

Subject

Assets by Status report

Custom Message
(optional)

Here is the daily report of assets by status in PDF format.

Report format:

☐ Text inline in email

☒ PDF

☐ CSV

New waterfall chart type

Now you can choose a waterfall chart type for reporting your data. A waterfall can be useful to illustrate the cumulative effect of changing data, typically to show financial changes due to positive and negative values.

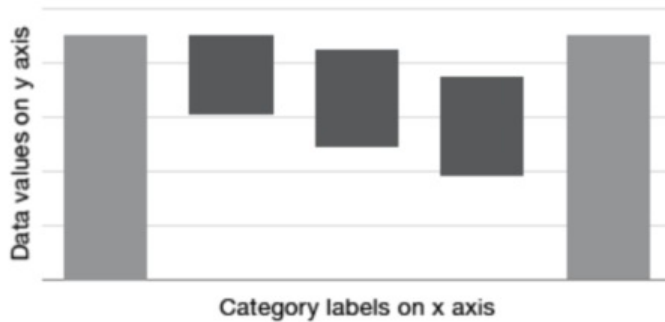
The sample below shows the settings to create or update a waterfall chart:

Chart Details

Type

Waterfall

[Learn more about chart types](#)



Waterfall Legend

- Negative
- Positive

Category labels on x axis

Expense Date

Group by: Month

Axis label

Data values on y axis

Expense Amount

Summarize by: (summed)

Axis label

Sorting

Sort by

- ☒ Labels - Expense Date
- ☐ Values - Expense Amount (sum)

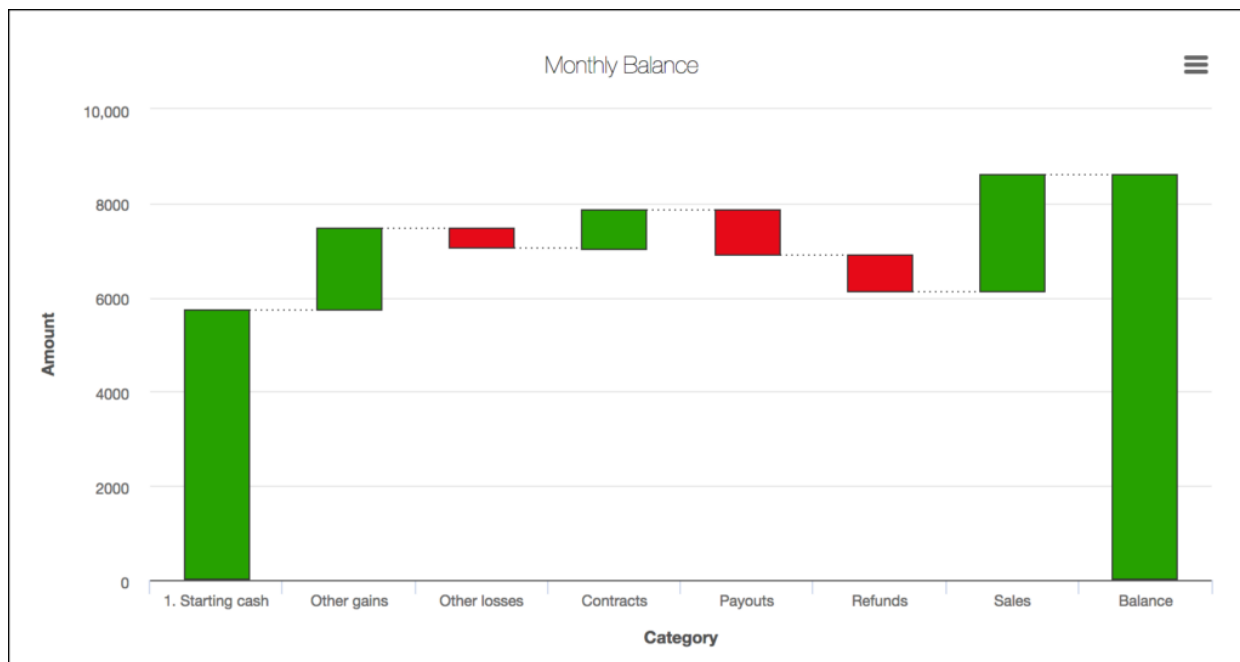
Direction

- ☒ Low to High
- ☐ High to Low

Data labels

☐ Data labels always visible

Here is a sample waterfall chart in Quick Base:



More options to set conditions for custom permissions, table imports, and summary fields

This release adds more condition-building capability to three areas in Quick Base:


- Custom permissions
- Import from table
- Summary fields


You now have more options to add multiple and/any conditions, and to nest conditions.




The image below shows an in-progress example of creating conditions for a custom permission, based on specific field values:


Custom Permissions for Projects



may view **Projects** where:

any  of these conditions are true

all  of these conditions are true

Status  is equal to  Completed 

and Select a field... 

or Specifications  contains  complete

Save Cancel

Form properties now include option to show Save & close and Cancel buttons

You can choose to have additional Save & close and Cancel buttons appear at the end of forms. A new "Show Save & close and Cancel buttons at the end of this form" setting appears on the Properties tab for each form, for example:

Elements

Properties

Dynamic Form Rules

Form Name:

On my form:

- ☒ Show horizontal rules between sections
- ☐ Show built-in fields
- ☒ Allow field labels to wrap
- ☒ Show Save & close and Cancel buttons at the end of this form
- ☐ Show save & keep working choice

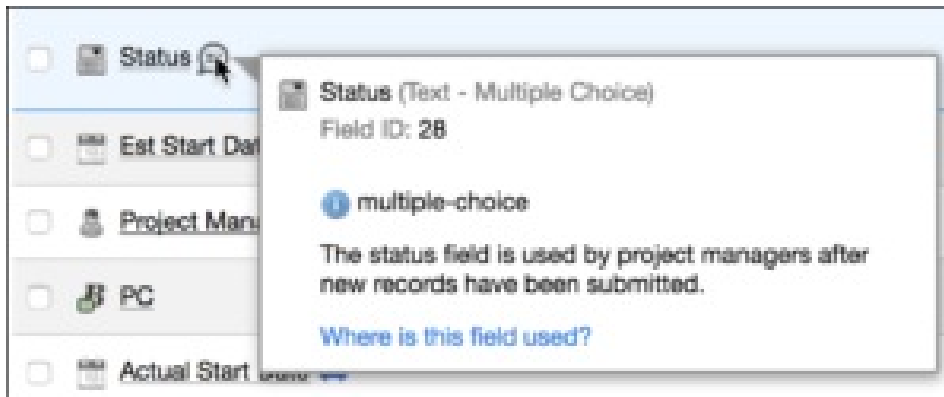
Save & keep working triggers the same email notifications and form rules

When there are embedded reports on the form:

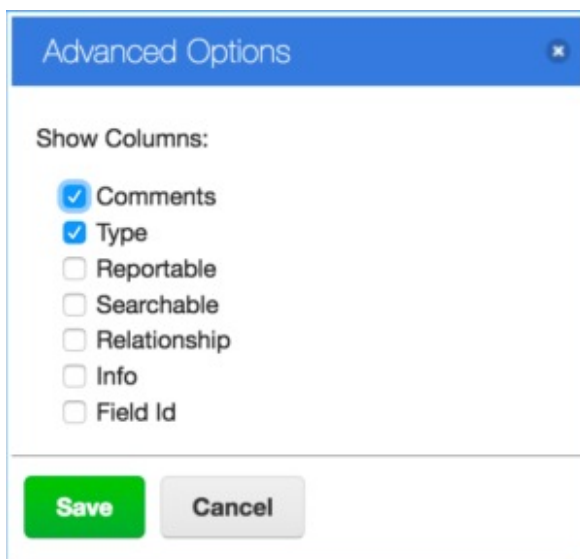
Viewing field comments

Our October 2017 release added a new Comments tab in field settings. App builders can add free-form, plain text comments (up to 500 characters in length) as notes to each field. Adding these comments to each field can let app builders document or notate the purpose of some or all fields.

The November release adds an icon to the fields page, indicating fields that include comments. You can hover over the comments icon to read the comments for each field.



Or, if you want to use a dedicated column to indicate fields with comments, you can edit the Advanced Options for the fields page.



External authentication ID information added to realm Directory tab

To help with troubleshooting authentication issues, the Directory tab now includes a column displaying the external authentication ID for each user.

The new **External Auth ID** column appears on the Directory tab for realms using single sign-on (SSO).

New content added to Quick Base University

We recently added the following new content:

Fundamental Series

[FF02: Quick Base and Database Basics](#)

This review of fundamental database topics will help you understand how Quick Base can streamline and optimize your organization's data.

[FF05: Building an App - Start with Tables and Fields](#)

In this course, you will learn to build a new app from scratch based on the app diagram developed in our new Best Practices series. You'll add tables and fields for and populate records with data.

[FF06: Building an App - Adding Relationships](#)

Relationships are key to managing and reporting your data. In this course we discuss what relationships are and how they work. Then we build a few relationships to see them in action and along the way define some key terms and features.

New Best Practice Series

Our new [Best Practice](#) series guides you through planning, designing, and deploying successful apps. You'll learn how to understand business processes, create a solid project team, design for efficiency, and follow a rock-solid implementation plan.

Coming in December: Quick Base Certification

We're getting ready to launch a new Quick Base Certification program!

- **For app builders:** The Quick Base Certification Program validates your knowledge of the platform, adds credibility to your builder expertise, enhances your business impact, and bolsters your career.
- **For your organization:** The Quick Base Certification Program makes it easier to recruit and develop qualified builders. It ensures that your builders can confidently create effective apps aligned with your business goals, using best practices.

More information coming soon!

Access [eLearning](#) from the MyApps page or directly at <https://university.quickbase.com/>

Also in this release

- When using the formula editor for field properties and report building, long lines automatically wrap to the next line.

- The report settings page now includes a Delete Report link. When customizing an existing report, you can choose to delete the report from the settings page. Also, if the report has any existing subscriptions, a dialog appears confirming the deletion of the report and its subscriptions.
- In App Properties, there is an updated dialog for adding apps used for cross-application relationships.
- The “Send email invitation” link no longer appears when sharing an app with “Everyone on the Internet,” because no email is sent in this case.
- Multi-select field limits increase to 100 choices per field, with a maximum of 60 characters per choice, up from the current 50 choices and 40 characters. When using a field to enter data, selections allowed per field remains the same at 20.

What’s fixed in Quick Base?

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

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

Issue ID	Description
QBE008210	A report with a syntax error in a calculated column could be saved without an error message appearing. This has been fixed so that an error message appears during saving, alerting the user about the syntax error in the calculated column.

QBE011407	If an app name contained an apostrophe, there were issues printing charts correctly when clicking the Print icon. This has been fixed.
QBE011523	An ampersand character in table names appeared as the &amp; character entity in options for notifications and reminders. The ampersand character now appears correctly.
QBE011595	If you used Grid Edit and clicked Save without making any changes, a blank status message would appear. The status message has been corrected to say, "No changes made."
QBE011661	An app with a date format set to DDMMYYYY would have incorrect dates shown in messages for webhooks and actions. This has been fixed.
QBE011663	When using Grid Edit to add records to a table, duration fields with a default value are now saved correctly. Previously the default value was not saved.
QBE011682	The Copy Table link no longer appears for connected tables.
QBE011691	When copying a table, report link fields are now correctly included in the new table.
QBE011735	Fixes an issue where the formula builder was not recognizing a field that uses the character string +/- as the first part of the

field name.

QBE011785

When editing a formula, the contrast highlighting of parentheses and brackets has been improved to be more distinct and legible.

QBE011790

Mobile only. Corrects an issue with the Cancel button not functioning after adding one record and saving via the Save & New button.

QBE011796

If tabbed form included an empty tab (with no elements appearing or hidden) and was set to have information appear above the tabs, the Save & close and Cancel buttons did not display correctly at the end of the empty tab. This has been fixed.

QBE011806

Fixes a display issue with the Save & close and Cancel buttons appearing at the end of forms that use an address field with a section heading.

QBE011810

Focus now returns correctly to the formula editor after choosing a value from the fields and functions drop-down list.

QBE011821

Extraneous line breaks are no longer added to the comments for a field when editing multiple lines.

QBE011822

The size of the formula editor has been adjusted after

accessing the properties of a formula field via Form settings.

QBE011823

Fixes a display issue with Save & close and Cancel buttons on forms with sections set to be collapsed by default.

QBE011858

Resolves an issue displaying the formula editor for field properties and report building.

QBE011861

Mobile only. Corrects a report pagination issue when viewing a table home page, conducting a search, and switching between mobile and full site modes.

Written by
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