

# 5.5.4.1000 Release Notes

## Contents

Feature Requests .....	2
Address and Phone Management.....	2
Aptify Framework .....	2
Aptify Web Framework .....	2
Dashboards .....	2
Messaging .....	3
Order Entry/Payments .....	3
Record Management .....	4
SOA Framework .....	4
Viewing System .....	5
Bugs.....	5
Aptify Web Framework.....	5
Aptify Web UI.....	7
Committees Management .....	8
Configuration Migration .....	9
Customer Management .....	9
Dashboards .....	9
Generic Metadata Wizard Infrastructure .....	9
Meeting Management .....	10
Order Entry/Payments .....	10
Record Management .....	10
Search Management.....	11
SOA.....	11
Surveys .....	12
Tablet Support .....	12
Viewing System .....	12

## Feature Requests

### Address and Phone Management

---

#### **16517: Aptify Web: Implement Zip Code/Postal Code Look-up Functionality**

This issue adds support for postal code autopopulation in Aptify Web to match the existing feature in the desktop client.

### Aptify Framework

---

#### **22986: Support for SQL Server 2016 And Office 2016**

Aptify has completed compatibility testing with SQL Server 2016 and Office 2016.

### Aptify Web Framework

---

#### **22310: Aptify Web: Ability to Open a Specified URL in a New Browser Tab from a Dashboard**

A new button type (Open URL) is now available. Specify a URL in the button properties to open any URL, including a view or record from Aptify Web.

#### **23371: Reduce Calls to Server by Packaging UI Parts**

This issue implements a performance update for how Aptify Web retrieves data about UI Parts.

#### **23528: Reduce Calls to Server by Packaging Entity UI Parts**

This issue implements a performance update for how Aptify Web retrieves data about UI Parts for entities.

#### **23650: Add Capability To Display or Hide Images to Message Box**

This issue adds the capability to display or hide images that can be used on different kind of message boxes. For example, warning type messages will have a warning icon. This implementation allows developers to pass in additional parameters so that those images can be hidden if needed.

### Dashboards

---

#### **15106: Support Switching to an Application Dashboard When the Application Is Not in the Folder List**

5.5.4.1000 introduces the Switch Dashboard button type to the Web interface to allow users to switch between dashboards, including dashboards that are tied to an application not currently in the user's applications list. In the desktop, a user must be subscribed to a dashboard's application to load the dashboard. This issue removes that restriction from the web interface so and users can switch between dashboards even if not actively subscribed to a target dashboard's linked application.

**22860: Aptify Web: Add Switch Dashboard Button**

This issue adds support for the Switch Dashboard button in Aptify Web.

**23207: Aptify Web: Switch to Dashboard Functionality Should Not Attempt to Add The Application to the Menu**

In the desktop client, when you click a button that switches dashboards, Aptify attempts to load the application that the dashboard is tied to. That operation is not typically necessary and requires that the user wait for it to finish before proceeding. Therefore, the behavior has changed in the web interface: when a user clicks a Switch Dashboard button, the corresponding application is not loaded in the application menu.

---

**Messaging**

---

**17843: Aptify Web: Support Global and Entity Level Aptify Messaging with UseAptifyMessaging Attribute**

This issue adds support for opening the Aptify Messaging dialog from a field's email icon and supports the standard UseAptifyMessaging entity attributes already in use by the desktop client.

**17947: Aptify Web Bulk Messaging: Implement Support for Message Actions**

This issue implements support for performing message actions in the Bulk Messaging dialog for the Aptify web interface. The most common implementation of this feature is the ability to generate contact logs for messages sent from the system.

---

**Order Entry/Payments**

---

**16069: Aptify Web: Bulk Write Off Wizard Support**

This issue adds support for the Bulk Write Off wizard to Aptify Web.

**16173: Aptify Web: Bulk Order Wizard Support**

This issue adds support for the Bulk Order wizard to Aptify Web.

**23401: Aptify Web: Add Customers to Bulk Order**

This issue adds support for the ability to add customers to Bulk Orders records in Aptify Web.

**23402: Aptify Web: Edit or Delete Customers Already Present in Bulk Order**

This issue adds support for the ability to edit or delete existing customers from Bulk Orders records in Aptify Web.

**23404: Aptify Web: Add support for Horizontal and Vertical scrollbar on Customer Tab of Bulk Order Form**

This issue adjusts the vertical and horizontal scrollbars that can appear on a Bulk Orders record's Customers tab in Aptify Web.

**23481: Aptify Web: Ability to Add Product to All Customers in Bulk Order**

This issue adds support for the ability to add a product to an existing Bulk Orders record and have that new product apply to all existing Bulk Order Customers in Aptify Web.

**23482: Aptify Web: Ability to Edit and Delete Product Detail in Bulk Order**

This issue adds support for editing and deleting products from a Bulk Orders record.

---

**Record Management**

---

**15533: Attachment Count Does Not Display**

A count that shows the number of attachments now appears.

---

**SOA Framework**

---

**23230: Improvements to GetRecord Endpoint: Record Names and Eliminating Sub-Type Record Version Number**

This issue includes updates to the GetRecord SOA endpoint that eliminates the retrieval of unnecessary information, which should improve the overall performance of the endpoint.

**23358: SOA controller routes should support greedy path parts**

This issue adds new developer options to SOA Controller Routes. Developers can now identify greedy path parts to define an arbitrary route for their controllers and parse it themselves. This issue adds a new `IsGreedy` field in the Controller Routes sub-type entity. Note that a path cannot be both literal and greedy. Also, for a given controller, only the last route specified in the sub-type can be marked as greedy.

**23364: ImageField controller support for delete, update. Refactoring for extensibility.**

This issue updates the ImageField controller for Aptify SOA to support update and delete operations. The controller now supports the following http methods: DELETE, POST, PUT, PATCH. DELETE will null out the requested field. POST, PUT and PATCH all update the existing field. Data can be specified in two ways, and both ways require the content-type header to be specified. If the content-type header is plain/text, then the body of the HTTP message should be URL that is resolvable from Aptify Services. Services will retrieve the content from that location and set the field with the data. If the content-type header starts with 'image/', then Services will use the body of the request as the binary value for the field.

---

## Viewing System

---

### **16166: Aptify Web: ELV In Place Edit is not supported for Top-Level Entities**

5.5.4.1000 includes a partial implementation of In Place Editing for top-level entities. *Please note that this feature is not ready for use in 5.5.4.1000.*

### **18181: Aptify Web: Add Support for Proximity Wizard Implementation**

This issue adds the proximity search wizard to the View Properties dialog to match the desktop client feature.

### **18927: Aptify Web: Delete record from ELV which do not have any dependency**

You can now delete records from a view using the delete button on the View toolbar. Note that this is only applicable for records without dependencies to other records. If a record you are trying to delete is linked to other records, then the delete operation will fail.

## Bugs

---

### Aptify Web Framework

---

#### **19688: Aptify Web: Filter Rule UI Should Support Date Keywords**

Filter rules support typing in the date keywords: NOW, GETDATE(), and TODAY to create filter rules that are based on the current date.

#### **23073: Records Can Be Edited After Reloading Page Without Clicking In Place Edit Button**

Currently in the Aptify web interface, there is an issue where when a user reloads a page, sub-type in place editing is used for editing a record, without having clicked the In Place Editing button. This issue updates a JavaScript file to ensure that in sub-type place editing can only be used when the In Place Editing button is clicked.

#### **23445: Aptify Web: Long File Type Fields are not Rendered Correctly**

With Aptify 5.5.4, the Upload button does not appear for multi-line text fields (with Extended Type set to File) in Aptify Web. This issue updates the multi-line text field component so the Upload button now appears if applicable.

#### **22000: Find Dialog doesn't return any results in Entity Base View Field on Views Dialog's Advanced > Configuration**

With 5.5.4, the Find dialog that opens from the view properties dialog's Base View field does not return any information the first time you click on it. This issue resolves this behavior so the appropriate information appears as expected.

**22819: Hotfix Port: Auth required is not working when user is move from online to Offline state.**

This issue is a port of a hotfix issue from a 5.5.3 hotfix that improves the system's behavior when switching between online and offline modes.

**22849: Hotfix Port: Multiple Pending changes not working for second time click on some records**

This issue is a port of a hotfix issue from a 5.5.3 hotfix that improves the system's behavior when switching between online and offline modes.

**23019: Hotfix Port: Pending Changes are not Syncing properly if browse is close or crashed unexpectedly.**

This issue is a port of a hotfix issue from a 5.5.3 hotfix that improves the system's behavior when switching between online and offline modes.

**23021: Aptify Web: Online/Offline Functionality Not Working When Session Left Idle Over 1 Hour**

This issue improves the system's behavior when switching between online and offline modes.

**23096: Cannot clear a Person's Address by setting the AddressID to -1 in JavaScript**

With Aptify 5.5.4, when a developer sets an embedded AddressID to -1 on a Persons record, the system does not clear the address as expected. This issue updates the Javascript code so setting an AddressID to -1 clears the address.

**23141: Aptify Web: Aptify web get automatically Offline and On-line Inconsistently**

This issue improves the system's behavior when switching between online and offline modes.

**23138: Aptify Web: On the payment record on the details tab-> payment type are overlapped**

With 5.5.4, the fields on the payment information control may overlap on certain systems. This issue resolves that behavior.

**23234: Aptify May Shift Upwards That Causes The Quick Search Bar To Disappear**

With Aptify 5.5.4, the web interface may shift upwards after loading a view from the Favorites list and selecting a row in that view. This issue resolves that behavior.

**23241: Hotfix Port: Port Updates for Online/Offline Mode Support**

This issue is a port of a hotfix issue from a 5.5.3 hotfix that improves the system's behavior when switching between online and offline modes

**23250: Aptify Web: Improve UI Part Versions Query**

This issue updates the logic used to retrieve UI Part Version information.

**23312: Aptify Web: Add Support to Sort Records Within Sub Type Grid**

You can now sort records within sub-type grids (assuming that the form template part has the AllowSort property set to 1).

**23410: Aptify Web: Need mechanism to know the precise file upload path for "File" type fields**

When a user uploads a file in the web interface, the file is added to the web server's Uploads folder (identified in the AptifyServicesAPI application's Web.config), and a GUID is added to the beginning of the file name. While this prevents duplicates, it makes it difficult to identify the uploaded file. This issue updates the File field type to display the full path and file name for the uploaded file.

---

**Aptify Web UI**

---

**16133: Aptify Web: Scroll Bar May Not Appear on a Calendar View**

With 5.5.4, a scrollbar may not appear when working with a calendar view. This has been resolved.

**17067: Aptify Web: Drill Down ELV Toolbar Should Follow The UI Standard For Toolbars**

With 5.5.4, if you drill down to a list view from a chart view, the toolbar icons are not correct in the list view drill down. This is resolved and the drill down list view icons are the same as a regular list view's.

**21856: Prompt View drop down should be wider**

This issue increases the field size for prompt view field in Aptify Web.

**22937: Aptify Web: Drop down for Group by on chart view is shown as text field for first time**

Currently in the Aptify web interface, there is an issue where when a user creates a Chart view, in the Grouping > Primary Grouping tab, the Group By field displays as a text field the first time the tab is opened. This field should be a drop-down list. The field displays correctly in subsequent viewings. This issue updates a JavaScript file to ensure that the Group By field always displays as a drop-down list.

**23145: Hotfix Port: Multiple pending changes folder list is moved out of box if list is big.**

This issue is a port of a hotfix issue from a 5.5.3 hotfix that improves the system's behavior when switching between online and offline modes.

**23164: Aptify Web: Image is getting cropped on New person record**

With 5.5.4, photos added to a Persons record may be cropped incorrectly and leave white space at the bottom of the photo area. This issue is now resolved.

**23208: Display Default Icon Within View Filters When Service Specific Icon Is Not Defined**

With 5.5.4, no icon appears in the filter dialog for services without an icon. This issue adds a default icon to those situations.

**23219: Hotfix Port: Check Box is Not Working Properly in Sub-Type View**

Currently in the Aptify web interface, there is an issue where when there are multiple check boxes in a Sub-Type view, and a user selects a check box without clicking on the row, it will work as expected, but if the user clicks slightly outside of the check box, that row is selected and all other selected check boxes are cleared. This issue updates a JavaScript file to ensure that in this scenario, the selection of check boxes works as expected.

**23237: Aptify Web: Remove Scroll bar From Delete Confirmation Message Box**

In 5.5.4, a delete confirmation message may have an unnecessary scrollbar. This issue removes that scrollbar.

**23398: Chart View Toolbar UI Distorted for Chart Views**

With 5.5.4, the chart view toolbar may not render properly for prompt views. This issue resolves that problem with the interface.

**23422: Aptify Web: Buttons on the Customer tab should be consistent with other Buttons style.**

This issue adjusts the button images on the Bulk Orders record's Customers tab to match other button styles.

**Committees Management**

---

**18354: Aptify Web: Cannot Save CommitteeTermMember Edits from Persons Form**

Currently in the Aptify web interface, there is an issue where when a user attempts to modify the Committee Term Member information from a Persons record, the changes are not saved in the Committee Term Member record and an exception is thrown. This issue updates a JavaScript file and object to ensure that in this scenario, the edits can be saved as expected.

**23190: Aptify Web: Validation Messages do not Display Properly for Committees Terms**

Currently in the Aptify web interface, there is an issue where when a user fails to enter required information for committee terms, the validation messages that are displayed in the Desktop client are not displayed. This issue updates the associated process flow to ensure that in this scenario, the validation messages appear as expected.



---

## Configuration Migration

---

### **23420: Hotfix Port: Process Flow Actions, Input Properties duplicate after Unpacking for Existing Process Flows**

This issue resolves a problem where duplicate metadata may be added to the system when unpacking process flows using the Configuration Migration utility.

---

## Customer Management

---

### **23436: Aptify Web: Correct Contact Log Link is not Deleted**

Currently in the Aptify web interface, there is an issue where when a user is deleting a link that is not the first link from a Contact Log with several links configured, the first link is deleted. This issue updates a JavaScript file to ensure that in this scenario, the correct Contact Log link is deleted.

---

## Dashboards

---

### **23211: Switch Dashboard: Update the Error Message When User Does Not Have Permission to an Application**

This release introduces in the web interface a Switch Dashboard button that enables users to change from one dashboard to another dashboard, including dashboards that are tied to an application not currently in the user's applications list (see related issue 15106). An error message is issued when a user selects a dashboard for an application that they do not have permission to access. This feature updates four JavaScript files in the Aptify Web framework to provide the ability to switch between dashboards.

### **23259: Aptify Web: Hierarchical Sub-View Records Not Shown on Dashboard**

Currently in the Aptify web interface, there is an issue where dashboards do not display sub-view records created from a view's Hierarchy tab. This issue updates a JavaScript file to ensure that the sub-view records display as expected.

---

## Generic Metadata Wizard Infrastructure

---

### **18960: Aptify Web: Wizards Do Not Function For Prompt View Until Records Are Selected**

Currently in the Aptify web interface, there is an issue where view-based wizards (e.g., Subscription Renewal, Add Persons to Campaign, Add Persons to Committee as Members) can only be run within a Prompt view when records in the view are selected first. This issue updates the wizard infrastructure so that all current results for a prompt view are processed by a wizard when no records are selected within that view.

## Meeting Management

---

### **20522: New Meeting Wizard: New Meeting Does Not Open After the Wizard Finishes When Option Is Selected**

In Aptify 5.5.4, there is an issue where when the New Meeting wizard is run and the Open the New Meeting after it has been created option is selected, the new Meeting record is not opening. This issue updates the wizard so that the new Meeting record opens as expected.

Messaging

### **18254: Aptify Web: Attachment Functionality not Supported for Messaging**

Currently in the Aptify web interface, there is an issue where when a user creates a message using the Aptify Messaging tool, files cannot be added to the Attachments tab. This issue updates a CS and a JavaScript file to ensure that in this scenario, attachments can be added to a message as expected.

## Order Entry/Payments

---

### **23147: Aptify Web: Unable to Set Quantity to 0 in Order**

This issue is a hotfix port to address a client configuration scenario where an order line has a quantity of 0.

### **23369: Aptify Web: Order Data Not Shown in Correct Columns in Exported Excel File**

Currently in the Aptify web interface, there is an issue where when a user exports a view of orders to Excel, any blank fields in the view do not appear in the correct column in the exported Excel file. This issue updates a JavaScript file to ensure that in this scenario, the fields in Excel exports of order data appear as expected.

### **23605: Aptify Web: Orderline Record Should Retain Badge Company Name and Badge Title**

Currently in the Aptify web interface, there is an issue where when a user is placing a Meeting order for a member that does not have a company linked to their record, and when they enter a Badge Company Name or Badge Title and ship the order and reopen the order again, the Badge details are no longer in the Order. This issue can also be replicated with a person that has a company link. This issue updates a JavaScript file to ensure that the Order record saves the Badge details as expected. This is supported for both taken and shipped orders.

## Record Management

---

### **21942: Aptify Web: Cannot Add Attachments To a Sub-Type Record**

Currently in the Aptify web interface, there is an issue where when a user adds an attachment to a Sub-Type record, and the record is saved and closed, the attachment is not in the record. This issue adds the attachment functionality to Sub-Types and additional Generic Entity (GE) object and updates a stored procedure to ensure that attachments can be added as expected.

**22948: Aptify Web: Favorite Groups are not Sorted Correctly Based on Rank**

Currently in the Aptify web interface, there is an issue where when a user displays a list of client-created ranked favorite groups, the groups are not displayed in rank order. This issue updates a JavaScript file to ensure that the favorite groups are displayed in rank order.

**Search Management**

---

**23059: Aptify Web: No Loading Indicator When Initiating a Search**

In the Aptify 5.5.4 web interface, the search indicator was removed from the Search functionality. This is an issue when a user searches a data set that takes several seconds to process, as there is no indication that the system is performing the search. This issue updates three CSS files to ensure that in this scenario, an indicator appears while the search results are processed.

**SOA**

---

**22775: Employee Linked To SOA User Used In Business Logic Instead of Logged In User's Employee**

In some cases, the SOA user's employee data may be used in place of the logged in user's. This issue resolves that behavior so that the correct information is used for the logged in user.

**23047: Controller routes do not respect RCF 3986**

This issue updates the set of characters supported by Aptify SOA controllers.

**23049: Services will error if an authentication provider does not provide a status code**

With Aptify 5.5.4, in some cases Aptify services may throw an 'object reference not set to an instance of an object' error if an authentication provider does not provide a status code. This issue updates the services framework to properly handle those situations.

**23050: Service Application Entity field lookups are case sensitive**

This issue updates the services framework so that field lookups are case insensitive.

**23051: Field level restrictions are not being enforced during updates from the JS API**

This issue resolves a problem with the EntityBatchCreateUpdate SOA controller.

**23304: SignalR could report as offline even though a valid token is passed**

This issue improves the system's behavior when switching between online and offline modes.

**23363: SOA improve some error messages**

This issue tracks improvements to error messaging within the services framework.

---

## Surveys

---

### **23271: Aptify Web: Missing Accordion and Other Elements in Surveys Panel View Form**

Currently in the Aptify web interface, there is an issue where when a user opens the Surveys Panel View, the left hand side of the form is missing, resulting in the structure of the survey not being visible. This issue updates the survey functionality so that the Surveys Panel View is displayed as expected.

---

## Tablet Support

---

### **22281: Hotfix port: Scrollbars on grid views are not working correctly.**

This issue improves the usability of list views on an iPad by supporting a more intuitive scroll behavior.

### **22848: Hotfix Port: iPad: On Ipad save is not working for HTML text area.**

This issue is a hotfix port from a 5.5.3 issue to improve system behavior while working with HTML fields on an iPad.

### **23067: Hotfix Port: Ipad: Active button event fire twice from IPad.**

This issue is a hotfix port from a 5.5.3 hotfix. It resolves a problem for button clicks on an iPad.

### **23325: iPad: Scroll-bar is not working for hierarchical view that has been added as a tab on a form.**

This issue improves usability on an iPad to allow scrolling within view hierarchies.

---

## Viewing System

---

### **18060: Aptify web: Sub View Generates an Error for a Hierarchical View**

With 5.5.4, a list view with a hierarchy may fail to load in Aptify Web if a sub view is specified for that hierarchy. This issue resolves that behavior and the sub view loads as expected.

### **18269: Aptify Web: View Filters Performance Delay: Support ViewFiltersSuggestedValueLists Entity Attribute for View Filters**

Currently in the Aptify web interface, there is an issue in environments with large entities, where loading the values list for these entities can be subject to a significant delay, and a second delay can occur after loading the values list, when two or more characters are added to the Value area. This issue updates the Aptify Web interface to respect two Viewing System attributes (GlobalViewFiltersSuggestedValueList and ViewFiltersSuggestedValueList) that work together to control the values list.

**20756: Aptify Web: Filter Value Should Get Selected When Entered**

Currently in the Aptify web interface, there is an issue with Aptify view properties, where when a user adds a filter value that is not in the drop-down list, that value does not get selected if the user clicks outside the list box. This issue updates a JavaScript file to ensure that in this scenario, the value is selected as expected.

**20758: Aptify Web: View Filters UI Should Support Date Keywords**

View Filters support typing in the date keywords: NOW, GETDATE(), and TODAY to create filters that are based on the current date.

**21842: Aptify Web: View Filters Are Ignored When Drilling Down Into A Chart View**

Currently in the Aptify web interface, there is an issue where when a user drills down in records in a chart view, the drill down view does not filter records based on the group or section that was drilled down in addition to the filters applied at view level. This issue updates Aptify to ensure that in this scenario, the drill down view filters as expected.

**22130: Hotfix Port: View Fails to Load for Proximity Search when certain Distance is entered From Postal Code**

With 5.5.4, there is a situation where a proximity search may fail. This is resolved.

**22331: Aptify Web: View May Become Unresponsive When Working With Records within the View**

With Aptify 5.5.4, in some cases a prompt view may no longer return results after working with it for some time. Or a view won't page to a new page. This problem is now resolved.

**22726: Prompt wizard on view is not working for Date field**

With 5.5.4, the prompt wizard may not open when you click the button on a view filter that uses a date. This is resolved.

**22779: Aptify Web: Manual Column Resize Settings are not Used the Second Time View is Loaded**

With Aptify 5.5.4, in some cases a view does not retain resized column widths when the view is loaded at a later date. This issue resolves this problem so that new column widths are retained as expected when a user resizes columns in a view.

**22979: Aptify Web: List View Field List Does Not Load for Large Entities**

Currently in the Aptify web interface, there is an issue where when a user attempts to open the Fields tab in a new view within an entity with a large number of records, the loading indicator appears, the screen locks, and the field list does not load. This issue updates Aptify so the field list loads as expected.

**23140: Aptify Web: Performance Issue Occurs When Setting Filter Values for All View Types**

Currently in the Aptify web interface, there is an issue where the application does not respond when setting filter values for any view type in environments with more than eight active users active. This issue updates a JavaScript file to optimize the loading and binding of large data at the client side and bind data on demand.

**23186: Pivot Grid: Measures on Numeric and Decimal field are not working**

With 5.5.4, a user cannot create a pivot grid measure for numeric or decimal fields. This issue resolves that situation.

**23195: Aptify Web: view fields are not displayed in view properties when all 'Available fields' are moved to 'selected fields'**

With 5.5.4, the fields in the View Dialog's Fields list may disappear after moving all of the fields. This is resolved.

**23430: Aptify Web: Mouse interaction is not working for specific areas**

Working with View Filters in 5.5.4 required selecting a value from the list before tabbing out of the field, which is not intuitive. This issue resolves that behavior to improve the user experience when defining view filters.