

# GoldMine Corporate Edition

## Version 7.5

### Release Notes

Updated August 15, 2008

#### **WHAT'S ENHANCED IN GOLDMINE CORPORATE EDITION 7.5**

**Support for Microsoft Office 2003 and 2007** enables integration with the latest versions of Microsoft Word, Excel, and Outlook. Also, the Word and Excel links now are optional components of the main GoldMine installation, rather than being installed separately.

Support for **Windows Vista** as an end-user operating system.

Support for **Microsoft SQL Server 2005 Service Pack 2 (SP2)**.

Support for **Windows Server 2003 R2, Service Pack 2 (SP2)**.

Secure **SSL connections** now are supported in the E-mail Center. To configure an SSL connection, go to Edit > Preferences > E-mail.

The **IMAP** protocol now is supported in the E-mail Center, providing more security and better interoperability with other e-mail clients. To configure an IMAP e-mail account, go to Edit > Preferences > E-mail.

The E-mail Center now supports integrated Windows authentication using **NTLM**. With this feature, e-mail access can be set up without entering or updating the password in GoldMine. To configure this option, go to Edit > Preferences > E-Mail.

**E-mail Center performance can be configured** with the following settings:

1. (New) When messages are deleted in the E-mail Center, they are not immediately deleted from the server until the connection is closed. This behavior provides the fastest performance but can cause deleted messages to reappear as duplicates in some scenarios. If this problem appears, the following <UserName>.INI setting can be used:

[Internet]  
PopImmediateDelete=1 (closes server connection after each message is deleted)

The default value for this setting is 0, which keeps the connection open after deleting a message.

2. (New) GoldMine automatically sends periodic messages ("no-ops") to the e-mail server to keep the connection open for fast response time. By default these messages occur every 10 seconds.

Some e-mail servers require more frequent messages to maintain the connection. To change the frequency of these messages, use the following <UserName>.INI setting:

[Internet]  
PopNoopTimer=*nnnn* (where *nnnn* is the number of seconds between messages)

3. GoldMine automatically disconnects from the e-mail server if it has no related activity for 10 minutes, by default. This is useful, for example, when using both the Online and Auto-retrieve options with an e-mail server that permits only one connection. To change the time delay before automatically disconnecting, use the following <UserName>.INI setting:

[Internet]  
PopIdle= *nnnn* (where *nnnn* is the number of minutes until disconnect)

**Synchronization and database rehosting performance** has been enhanced, especially when using the Firebird database.

**The 2 GB size limit has been removed** for synchronization transfer sets and installation files for one-button synchronization.

**Concurrent GoldSync connections are queued** to improve reliability. As users connect to a GoldSync server, they automatically are placed in a queue, up to the number of users established in the Number of Connections screen within GoldSync configuration. If simultaneous processing of concurrent connections is required instead of queuing, please contact your Solutions Partner or FrontRange Support Services for recommendations and instructions.

An updated **ZIP code database for the United States** is available through the QuickStart Wizard.

### **WHAT'S FIXED IN GOLDMINE CORPORATE EDITION 7.5.1**

<b>ID #</b>	<b>Issue Description</b>
78347	When a record in the CONTACT1 table with no ACCOUNTNO is deleted, activities become unlinked from their related contacts
75956	Data Update Conflict Message appears when Note is added to contact record

Note: GoldMine Corporate Edition 7.5.1 also provides the fixes and enhancements included with GoldMine Premium Edition 7.5.0, listed below.

### **WHAT'S FIXED IN GOLDMINE CORPORATE EDITION 7.5.0**

<b>ID #</b>	<b>Issue Description</b>
73324	Branch To Event dropdown is empty during creation process if AP track contains Preemptive Event
71735	Error when creating installation file for one-button synchronization using database with large MAILBOX table
71700	Out of memory error while installing file for one-button synchronization

71205 Automated process elapsed time trigger is ignored

66849 All groups displayed when selecting (public) while adding to a contact group from search center

65700 Sales script question numbers are corrupted when adding a number above 99

65341 Message encoding failed when using e-mail template with attachments

64641 TRIM expression evaluates as True if there is no data

64547 Attachments are stored but not displayed on some e-mail messages

64364 Line breaks are removed when spell checker corrects first word in paragraph

63977 Influencer will appear twice following sync if added at server and at remote

63668 Merge / Purge shows the wrong records when using prompt before merging

63635 Long history notes truncated on Contact Profile (Detailed) and History & Pending Report

63241 New Contact Alert and New Contact AP not working in Web Import

63238 Error when inserting accented characters using XML API Writedetail call

62945 Incorrect ratio shown in Leads Analysis total line

62587 Forecast Quotas are wrong if more than 8 digits needed

62522 Linking e-mail to additional contact creates duplicate e-mail address and overwrites previous e-mail address

62256 Pending and e-mail are retrieved only if contact set open during sync

62241 Crash when trying to print report with another minimized print window open

62239 Crash when clicking the Complete button without selecting an activity

62066 GoldSync service generates multiple messages in Windows Event Log

62063 Expressions in the calendar do not show Contact1 data if there is an unlinked calendar item present

62060 FILTERS field updates are added to TLog without field changes

62059 REPORT32 field updates are added to TLog without field changes

61879 Details tab not updated correctly after starting GoldSync processes

61822 Special characters not displayed correctly in e-mails from Lotus Notes

61815 Days are not displayed in quota analysis date range

61731 Cancel operation does not work when a draft e-mail is open and user switches database

61653 Deleting contact deletes Mailbox and linked CAL/HIST record at remote

61651 E-mail message records retained after contact deletion do not sync

61634 E-mail address and E-mail merge code data issue with secondary contacts when duplicate e-mail addresses are enabled

61554 Send Request with <activity> to: option when scheduling an activity does not work

61518 Lookup.ini erroneously populates date field with today's date

61515 Cannot add new detail on custom tab if detail name exceeds 20 characters

61364 Contact Search Center does not return all records for non-master user belonging to a user group with a single quote in the name

61357 Calendar Report does not print phone numbers for scheduled calls

61182 Cannot scroll down through days in month control in day view

61151 dBASE expressions cannot be used to clear a date field

61055 Invalid SQL query causes loss of database connection

60827 Russian characters aren't displayed after upgrade from GM 6.5

60755 Opportunities do not sync if GoldSync as service was configured using a contact set code other than the contact set code the remote is using

60287 Non-Master user is unable to delete multi-user scheduled activities if they do not have delete rights

60270 Contact Record Statistics shows inaccurate sales data

60265 Filters containing "not equal to" criteria do match null values  
60097 Impossible to login to GM using Firebird and shortcut install  
59991 Notes field will not accept an import of greater than 50 characters  
59819 'Database Operation error' occurs while generating Graphical Analysis report  
59754 Sort by Date on Details tab sorts by User Name  
59629 Forced logout UI is unclear  
59541 GoldMine GPFs when user without Schedule menu access tries to schedule from the Contact Search Centre  
58810 Crash during Global Replace on Notes using a filter  
58511 Notes are not synchronizing  
58385 Completed Calls SQL Query returns 0 results  
58371 Global replace on a user-defined date field generates incorrect values  
58123 E-mail merge performance degradation  
58014 Importing notes with more than 75 characters gets truncated  
58013 Cannot use phone number for duplicate checking in new record type  
58012 When multiple linked activities are edited, the Updated time is not changed  
57758 Contact -> Write -> Letter doesn't create a history entry  
57589 E-mail merging/queuing speed degradation compared to 6.7  
57567 E-mail are not retrieved correctly unless Windows-1251 encoding was used  
57563 Group based on History Items against all Users returns no records  
57401 When running a crystal report from GoldMine the parameter values are ignored if run against the current contact record  
57230 Merging visible records drops notes from the non-surviving record  
57222 Field security not applied when users tab from field to field  
57218 Export wizard does not use the sort order defined in filter  
57188 Open Org Chart causes performance issues when searching contacts  
57172 Opportunity Title over 33 characters is truncated after saving  
57170 Create Duplicate Record does not copy Web Site  
57157 Clicking "Delegate to User(s)" causes characters to be deleted from the selected users list  
57156 Account roll-up does not work for Opportunities and Projects  
57155 Field mappings not saved in Outlook Sync profiles  
57118 Printer name of 53 characters generates error message about 59 character limit  
56829 Euro sign in e-mail not recognized  
56645 Cannot update time on activity scheduled for multiple users and multiple contacts  
56621 No Scheduling Conflict error when activity conflicts with recurring item  
56574 E-mails for secondary contact not populating the To: field when selected  
56403 Forced logout UI is unclear  
55889 AP Update Field action uses wrong field  
55886 Some applications can't be started from Lookup.ini  
55817 To-Do marked as Private can be opened by other users  
55738 GoldSync process can be uninstalled before it has been stopped  
55705 SQL query truncated  
55697 Occasions are not showing up  
55237 Undocked users in License Manager are not sorted by Username  
55121 There is no way to restart GoldSync process  
54848 Completing an e-mail from the Complete Menu can cause the "Cal record is missing or corrupt" error message  
54835 No members are added when selecting All Users option in creating a group

54697 GoldMine can be launched twice simultaneously  
54620 Opportunity Wizard allows Start Date to exceed Close Date  
54396 Run instruction breaks XML type WebImport  
54118 Crystal Reports use wrong data source  
54074 Retrieval of WebImport e-mail containing duplicate e-mail address hangs system  
53909 Log Changes in History setting is not respected when change is made to a NULL or empty field  
53882 Sync service ignores Send Filter when &RecordType macro is used  
53844 Report Sorts settings are ignored running Crystal report  
53833 Runtime error accessing report sort properties  
53788 Search by details in Build SQL Query does not work with long details  
53684 Unnecessary TLogs remain in database, although corresponding source record already was removed  
53683 Scheduled activity time is incorrect when alarms are on by default  
53590 Sales Scripts are corrupted after editing the question numbers  
53438 Document is merged to the current GoldMine contact instead of the one specified in literature request  
53434 AP set to 1000 days goes to incorrect date  
53427 Unlinked e-mail that is linked when replying causes endless loop  
53425 Activities notes are duplicated under pending tab  
53423 Digital signed e-mails not decoded  
53417 Queries on history built by Query builder, not returning correct data on unscheduled calls  
53378 Cannot activate a Group and a Filter at the same time  
53308 Performance issues during synchronization with Firebird demo db  
52708 Execute immediately ignored when added from another process  
52696 Opportunity record not updated with sale date change  
52648 Custom Field view unavailable until restart  
52647 Customizations missing with One Button Sync install  
52115 XML type WebImport record created with inserted note  
52113 CREATEON/CREATEAT fields unpopulated with XML WebImport  
51633 Screen Design mode retained between user sessions  
51496 Leads analysis does not show any completed sales information  
51456 Time and resource usage increase rehosting data to MSSQL  
51365 Opportunity Manager custom Field are limited to 60 characters via the UI  
51043 Impossible to save any word documents if template folder is indicated incorrectly in gm.ini  
50314 The SQL query builder truncates the value to 20 characters  
50089 The list of Reports of the Contact Report Category (in Print Report dialog box) is not visible  
49768 When e-mail contains a period preceded and followed by a space, message is truncated  
49640 Cannot rehost selected tables  
49482 Building a group based on scheduled activities does not add members  
49445 History tab does not show the most recent history, if the display limit is active  
49102 E-mail inaccessible after delete  
47200 Queued doc deletions do not sync  
46975 No warning for blank username in initial setup  
46380 Plain text signature file loses carriage returns when using HTML e-mail  
46377 InfoCenter export to RTF does not convert HTML tags

46325 "Contacts with calendar activities from:" option does not sync any data to Outlook from GoldMine

46281 Unable to open lead table error on Firebird database

46246 API: DB\_QuickSeek function does not work in XML API

46244 API: DB\_Search function does not work in XML API

46234 API: DB\_Range function does not work

45959 Predial.ini strips area code from non-local number and breaks TAPI dial

45919 Forecasted sale for decimal amounts are not reflected in Sales Analysis

45918 Negative number corrupts formula to calculate Forecast (Potn) and Forecast Diff. amount and Forecast Diff. percentage

45796 Application error occurs when entering data into required fields using F2 lookup

45760 Industry template installer does not delete F2 Lookups

45654 API: Seek function always returns '2'

45579 API: ReadSchedulePrefs function does not work

45470 API: WriteCalendarPrefs does not update some parameters

45467 Subset of accessible records NOT returned with Search

45262 GM+View template updates do not synchronize if user's calendar not included in transfer set

44718 One Button synchronization updates the currently open database

44575 Printing filtered records failed

44473 File NOT found error when selecting Maximizer Import

44403 Project and Opportunity non-forecast activities are not completed in wrap up

44198 Impossible to delete opportunity without deleting the related contact

44197 Incorrect calculation of resulted stats of opportunity after closing all its forecasts

44097 Extended sync times retrieving large transfer sets

43994 Key Field Label Name assignments in QuickStart Wizard do not stick

43974 Inactive alias displayed as blank lines

43431 Changing an alias name is losing DB connection info

42783 Word closes without prompt to save document

42478 Update wording in Database Alias Manager for new functionality

42445 Saving draft emails in Outlook prompts for a save location when the Word link is installed and Word is the default e-mail editor

42349 Closed tab is empty by default in Activity list

41686 Launching GM over network on Vista prompts security warning

41614 SQL login user properties do not work

41470 E-mails containing UTF-8 characters are not rendered correctly

40191 Sort order on the pending tab is incorrect

40188 Change of forecasted sale on the opportunity tab does not change corresponding sale on pending tab

40175 If a user has no e-mail templates in the Document Management center, Mailbox contents will display

39506 Import process leaves temporary tables

39192 E-mail record attached to wrong contact record

39191 E-mail record attached to wrong contact record

38895 DBF import aborts if Date fields are included

38687 Cannot export a SQL query from cal that has HTML notes

38264 APP Identifiers in document management center work wrong

37590 Groups not displayed correctly when adding contact to group in Members tab

37554 DBF import skips remaining records if there is no data in company, contact or row

37231 Sync ignores CONTHIST record change  
 36766 Cannot click into a user-defined field that is under a user-defined expression field in the fields tab  
 36651 HTML Signature file shows tags  
 35604 GM is incompatible with MSXML 6.0  
 35356 Reference unchanged with Contact Groups creation  
 35353 Error navigating to merged contact  
 35256 No Contact data with non-defined FILECODE  
 35054 Cannot delete custom opportunity fields after editing them  
 34777 Org charts only show titles for the first member that was added to the org chart  
 34720 Adding Attachments to InfoCenter Documents doesn't work properly  
 34521 Customized field data not retrieved  
 34520 Retrieved custom fields show 'n/a'  
 34271 Wrap-up information not displayed in Opportunity Manager  
 34265 "Reference contains" calendar publishing option doesn't work  
 32828 "Skip read mail" option doesn't work with Microsoft Exchange  
 32208 No indication of which Groups and Filters are activated and which are released  
 31833 GoldMine not recognized by Internet Explorer as default mail client  
 31255 Carriage returns are omitted when pasting text into e-mail message  
 31020 When an activity scheduled with a secondary contact is completed the name disappears from the completed activity on the calendar  
 30421 GoldMine's ZIP files can only create a 2GB max size transfer set file  
 28044 Sync Contact associates Opportunity sale to added influencer  
 27370 GM+Browser does not open web page when enter key is pressed  
 26262 Lookup By preference not respected when creating e-mail  
 25647 Add paste functionality for entering serial numbers  
 25270 Copy/Move Records wizard does not transfer links created by e-mail attachments  
 24711 Clicking "X" button in InfoCenter does not prompt to save modified text  
 22849 Contact Search Center text box does not allow focus change from another window  
 22345 dBase import of records truncates e-mail and web fields  
 21699 Forced out idle time not obeyed  
 17265 Carriage returns are omitted when pasting text into activity notes  
 16555 Age of closed Opportunity is incorrect in Opportunity Mgr  
 16363 Cal record remains on remote after deletion  
 15750 Reports dialog doesn't remember previous selection  
 9325 ITS 18028: GoldSync Max Retries setting is not honored  
 9286 ITS 17411: Scheduled resources are not included in transfer set when a send filter is used  
 9237 ITS 6567: Queued e-mails are sent even if the option is unchecked  
 9170 ITS 32169: Not all records returned in CSC based on MSSQLMaxBrowseRecs setting  
 9023 ITS 23364: Site can get processed by 2 or more different connections  
 8957 ITS 20603: Contact History Report with Notes with large history record only shows 'Notes' information on first page  
 8880 ITS 38175: Incorrect text on New Opportunity dialog  
 8855 ITS 34198: Click on title bar of a background e-mail window causes it to maximize  
 8512 ITS 33287: Incorrect Detail if the Lookup entry of the Detail custom tab is deleted  
 8317 ITS 28928: "Include a Text File" option in HTML e-mail template strips carriage returns  
 8263 ITS 20110: Request a Return Receipt does not stay checked on an E-mail template

- 7919 ITS 28829: Cursor focus stays in Subject line when replying to an e-mail
- 7815 ITS 15082: Industry templates change key fields incorrectly
- 6968 ITS 25114: Zoom should be an available local menu item in the Calendar Month view
- 6698 ITS 29074: Propose new time by GM recipient is corrupted
- 6653 ITS 25878: Importing a contact record disables existing alerts
- 6527 ITS 22491: Recurring Activities do not activate Conflict message
- 6356 ITS 29867: ZERO length field label and value is irretrievable
- 5894 ITS 37464: Cannot import exactly one contact from an ASCII file
- 5893 ITS 37454: Value in selected Update Field is not transferred to surviving record in merge/purge process
- 5786 ITS 34523: Contact2 data in AP Run An Application action, not processed

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