

# GoldMine Premium Edition

## Version 8.0.3

### Release Notes

Updated July 16, 2008

#### **WHAT'S ENHANCED IN GOLDMINE PREMIUM EDITION 8.0.3**

A configuration setting is now available for the default record type used when creating new records. To view or change this setting, go to Tools > Configure > Record Types and double-click on Record Type Rules. The setting is available when using Field value-based rules, and appears in the radio button labeled "**Record type for new contacts**".

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

#### **WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 8.0.3**

Note: GoldMine Premium Edition 8.0.3 also provides the fixes and enhancements included with GoldMine Premium Edition 8.0.2, listed below.

<b>ID #</b>	<b>Issue Description</b>
75786	Hot key for Schedule a Follow-up does not check box in Complete Activity screen
75442	Open relationship tree causes performance issues when searching contacts AP Print Form prints for incorrect contact and contact record window defaults back to
74723	contact list
74385	QuickStart Wizard application error on zip code import
74184	When Syncing with Outlook, cal reference field data is duplicated
74022	Notes lost after clicking on recent contact during edit Automated Process Event Print Form prints form for incorrect contact and duplicates
73954	history
73853	Manual linking of e-mails in Outlook is slow
73756	Elapsed Time trigger ignored in Automated Process Edit of sequential order of Automated Process Events causes failure of AP to process
73556	correctly Branch To Event dropdown is empty during creation process if AP track contains
73323	Preemptive Event
73308	Industry Template installer aborts
72577	E-mail address not found if Linkacct = NULL in CONTSUPP
72249	DDE buffer too small for heavy note use
71113	Memory Leak Caused By Relationships Tab Automated Process does not trigger all events and sequential order of events is not
69941	respected
69133	When adding an influencer to opportunity, contact record jumps to a random contact

- 65854 Last contact viewed is not maintained between sessions if it was not in first 500 by sort order
- 64948 Recorded Macros cannot be run from the command line
- 64898 Cannot drag and drop activities to month calendar controls
- 64425 Danish characters are no longer visible after upgrading to GMPE
- 62937 New Company & Contact copies Key1 field from current contact
- 62337 Snooze options hidden
- 61155 Cannot open all links if there are over 1000
- 58938 Process Monitor window intrusive
- 23048 Incorrect sort order for Outlook messages

## **WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 8.0.2**

Note: GoldMine Premium Edition 8.0.2 also provides the fixes and enhancements included with GoldMine Premium Edition 8.0.1, listed below.

<b>ID #</b>	<b>Issue Description</b>
69630	TLogs have invalid SyncStamp values
69056	Recently Viewed list is not limited when using Firebird database
68587	Contact Record Statistics shows inaccurate sales data
68583	Delegate to User(s) causes characters to be deleted from the selected users list
68511	Telemarketing Scripts corrupted while editing
67831	Full Name with apostrophe incorrectly displayed in Notes tab
67697	Special chars in Notes vanish when upgrading from GMCE to GMPE
67633	MS SQL 2000 Spanish or German causes error in Case module
67563	Upgrade from dbase to GMPE failed due to fewer licenses
67509	lookup.ini erroneously populates date field
67287	Grouping cases by Due Date does not function correctly
67279	Drag and drop Attachments, no graphic shows until you add an attachment with attachment button
	Non-Master uses cannot convert additional contact to primary ones in Case Management but can on the contact record under the contacts tab
67141	Management but can on the contact record under the contacts tab
67017	Username.INI file expands on upgraded system with customized task bar
	dBASE expressions in the calendar do not show the Contact1 data if there is an unlinked calendar item present
66426	
66384	After upgrade from GMCE to GMPE, added toolbar icon does not remain
66279	Tab content scrolling causes contact records scrolling
	GoldMine automatically searches entire DB when a blank field is selected to launch the search centre
66059	
65895	Time Clock not populated
65873	Slow performance in refresh of Recently Viewed list in iGoldMine due to list length
65814	Toolbar customizations are not maintained after Switch User
65632	mouse wheel in notes (when reaching end of notes) it scrolls to another record
65123	Error appears when scheduling activity with Greek regional settings
65113	search center -- columns that are part of the contact2 table, searching grinds to a halt
	With iGoldMine, tabs do not disappear when closed and titles do not get removed from the window drop down
64859	
64719	Schedule button on contact record intermittently works with large database
64016	New Record Layout must be manually refreshed when creating a new record
63849	Extended detail tab does not refresh when scrolling through records

- 63832 UI for label customization is broken in Opportunity Management
- 63620 Ability to change the number of recent items within user options
- 63485 GM crashes if you try to complete non-existent activity
- 63345 Changing menu format allows you access to disabled items
- 63180 Users not in alphabetical order in Activities User dropdown
- 63146 Text in the Notes tab overlap when HTML\_CAL\_NOTES=0 is set in the GM.ini
- 62922 Case mask configuration prevents pending/history from being linked to case
- 62903 Cannot schedule call when South African regional settings are used
- 62583 Adding high tab order to user-defined field in upper part of contact record (above tabs) causes field to disappear
- 62290 Unable to save email attachments in bulk
- 61867 Cannot disable Zip code validation for additional contacts
- 61834 GM hangs during recently viewed contact list refresh
- 61633 Scrolling through the end of GM+View tab causes contact record to scroll
- 61550 Adding a sort to an existing group populates member data incorrectly
- 61473 Data entry corrupted after switching record types
- 61428 Zoom shows incorrect record when filter is active
- 61333 Incorrect column headings in History tab when contact name is shown
- 61130 Category, Origin, and Offering cannot be added as columns for Service List
- 60929 Note in Case is saved when switching to another Windows application
- 60903 Complete Event dialog appears when using command button to Schedule Event
- 60799 Context menus not accessible via Application Key
- 60719 Case task does not appear on Pending tab of contact
- 60718 To-Do date appears as 12/30/1899 in Pending tab
- 60716 Case task does not appear in calendar
- 60694 Non-Master users cannot search on E-Mail address
- 60671 Case tasks are not displayed in Calendar
- 60531 GoldMine - Filters and Groups - Calls scheduled to a group of users are displaying on the same line of time
- 60260 Contact Search Center does not retain column widths
- 60153 New Message -> Email TO selection from additional contacts is ignored -> always primary contact selected
- 60028 Visual defects in highlighted calendar view tab
- 59753 Using scheduled e-mail local menu adds duplicated menu items
- 59519 "Empty Trash when closing E-mail Center" option ineffective
- 59490 Assign focus to first text field
- 59356 Missing option to Edit notes
- 58816 Non-master user doesn't have access to some Leads options
- 57693 Toolbar changes are not retained when exiting via Switch User
- 56051 Activities become inactive in alert window
- 53168 Any GoldMine report pulling data from Notes Tab shows notes as html code
- 47018 E-mail window needs attachment bar with icons

### **WHAT'S ENHANCED IN GOLDMINE PREMIUM EDITION 8.0.1**

Note: GoldMine Premium Edition 8.0.1 also provides the enhancements included with GoldMine Premium Edition 8.0.0, listed below.

**Support for Microsoft Office 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.

**Enhanced Account Rollup** provides a clearer picture of the activities associated with an account, by including the name of each contact within the Pending and History tabs. To enable this feature, go to Tools>Options>Record and check "Show contact name on activity tabs". To see an account rollup for a particular record, go to the Relationships tab, select a section of an organization, and click Rollup.

The process of **unlinking and relinking email messages** has been improved to reduce errors which previously caused users to accidentally remove email addresses from contact records.

The **One-button Installer** now supports installation directly to a **Microsoft SQL Server 2005 Express** database.

GoldMine Premium Edition now supports **Microsoft SQL Server 2005 Service Pack 2 (SP2)**.

GoldMine Premium Edition now supports **Windows Server 2003 R2, Service Pack 2 (SP2)**.

### **WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 8.0.1**

<b>ID #</b>	<b>Issue Description</b>
60694	Non-Master users cannot search on E-Mail address
60026	Monthly calendar does not refresh to show dates in bold after scheduling
60012	Zip Code validation cannot be disabled for additional contacts
60003	Resolved Cases filters show incorrect data
59948	Message encoding failed when using email template with attachments
59891	Label color changes not shown on screen
59862	Case list searches for Subject and Description are Begins With instead of Contains
59744	GMPE truncates emails with special characters
59690	Cases deleted by user without deletion rights
59689	Distribution list refresh when member added
59636	Special characters vanish in Notes after saving
59613	Record Type Rules not recognized where Field value based rules exceed 32 rules
59584	Ampersands are doubled when 'Force Valid Input' is in place
59488	Cursor is not visible in the 'To-do:' field
59352	Pound Sterling (£) and Euro (€) lost in Notes
59271	GM freezes when scrolling recent items during refresh
59186	Note is corrupted with unwanted HTML tags
59177	E-mail attachments hidden by long file names
59169	E-mails deleted from e-mail center without being written in database
59155	Wrong case reassigned for new case created from Cases tab
59129	Record Type Settings screen text truncated
59101	Cannot schedule call when New Zealand regional settings are used
58964	Split button in Relationships tab works incorrectly
58962	Incorrect search parameter appears when looking up contact for Relationships tab
58958	No indicator for allocated screen positions in screen design
58955	Screen designer moves field incorrectly
58935	Sort by column in opportunity manager list does not work on all columns

58934 Sorting projects in grid does not update Gantt chart  
58927 It is impossible to merge mail to several contacts from Search Center  
58830 Process monitor always pops up  
58811 Notes don't contain Username and Date if using Global Replace  
58777 Name changes when selecting additional contact in new case workflow  
58773 Exception when running report against an activated relationship tree section  
58771 Ability to change contact assigned to case  
58690 Reference field is too small in Complete dialog  
58670 Default tabs should include Opportunities, Projects, and Cases  
58558 Cannot remove permission to Delete Contact  
58551 Calendar Publish actions do not work  
58531 User name not displayed in Owner field for Cases  
58529 Cannot enter seconds in activity duration by hand  
58513 Case is not deleted if contact record is deleted  
58415 Digits are handled wrong in filters  
58386 Opportunities created without using wizard do not contain contact and company  
58332 Horizontal divider position always reset  
58247 Upgrading firebird database from GMCE 7.0.4 SP generates two error messages  
58097 Right Click in F2 time lookup does not activate dropdown  
58004 GM exits tabbed mode after merge/purge records  
57858 Cannot select contacts in the search center using keyboard  
57855 Add menu item: Assign a Process  
57845 Macro buttons not available  
57829 Activity List date filter is not indicated  
57816 Mail merge without GISMO leads to errors  
57793 impossible to create OBS profile for large db  
57779 Auto Fill Doesn't Work On Reference Line In Schedule Dialog  
57712 Links are not sorted properly  
57710 'Rehost Failed!' error message is generated during the creation of new database  
57694 Upgraded notes tab entries are in reverse order  
57638 Macros do not work on Vista  
57633 Activity List: Edit and Complete buttons don't work  
57609 Incorrect email address populated when clicked from Relationships tab  
57490 Wrong refresh of Org Chart window changing view to tabbed  
57484 Close by double clicking on relationships separator doesn't work  
57483 Wrong default contact in the forecasted sale window in Oppty wizard  
57427 Cannot complete multi-user activity if prompt is suppressed  
57426 Case number includes date only in US format  
57424 Deadlines shown on Case list do not respect regional setting  
57411 GoldSync status window does not open from system tray  
57409 Cannot add a contact to Relationship using contact lookup  
57408 Wrong creation of new organization in Relationships.  
57391 GM Acrobat Link requires .NET Framework 1.1 on Vista  
57359 Cannot tag records in the member's list section of 'Filters and Groups' dialog box  
57347 Unable to create Oppty for the target record without wizard  
57344 Auto-Update resources window is corrupted  
57339 WordPad documents are not displayed in LFC  
57332 GM crashes during merging records  
57298 Crash when adding tasks to Case with UK regional settings applied  
57282 Users not in alphabetical order in Calendar

57278 Case notes do not respect HTML\_Cal\_Notes setting  
57205 Implement linked document mover feature  
57194 Useless Record field on Summary tab  
57138 Inaccessible opptys available to limited access user  
56877 Checkbox "Use GM as Explorer e-mail client" is not saved  
56810 Adding Contact to the Distribution list causes GM to drop out of tab mode  
56800 Cannot link email message from unknown address  
56780 Active oppty and project tasks appear in month tab in calendar as completed  
56688 SQL query creation error in CSC  
56620 Expanded detail data not displayed on the custom tab unless label is given  
56590 When editing Lit Request, Cover Letter label is corrupted  
56524 Incorrect keyboard focus after double-click on label with CSC open  
56278 Case attachments can only be opened, not saved  
56258 Cannot Go To Contact from Project when using secondary contact set  
56197 Prioritized activities displayed as 00:00  
56194 Label not changed for Prioritized activity  
56138 Incorrect default value for Stage in opportunity or project template  
56126 No keyboard navigation in search dialog accessed from Schedule dialog  
55860 Contact List does not refresh contact data when edited  
55821 Create new contact option is unavailable in project wizard  
55566 My Contacts window can't be maximized  
55537 Incorrect refresh of column set in contacts list.  
55212 Adding Contact to Distribution list drops out of tab mode  
55180 Contact Search criteria field missing focus  
55155 Impossible to add multiple contacts from search center  
55146 Incorrect list of groups when adding new member  
55143 Impossible to see recently viewed contacts if GM is not maximized  
55095 Various truncations in tab labels  
55069 It is impossible to send Email to several contacts in CSC  
54911 View corrupted when removing an active contact tab  
54774 Analysis don't have tabbed view  
54758 Schedule button in the Service Center doesn't work properly  
54708 Service Center does not properly exit 'More Options' mode  
54686 No action on Task Double Click  
54559 Calendar refresh required to display created task  
54542 Default layout causes calendar to be truncated on Vista  
54473 E-mail template has attachments displayed in body  
54215 History tab in service center shows empty references  
54015 Wrong focus behavior in contacts list and CSC  
53860 Priority assignment for activities is not shown in schedule dialog  
53713 Incorrect cloning of campaigns  
53709 Only one of selected contacts adds to opened campaign  
53363 "Case number" cutoff in case summary  
49228 "Organizational Tree" report with Current Contact doesn't work  
49144 "Reference" field in "schedule call" in Campaign manager has not cursor  
41857 Some fields cannot be reached by Tab key in Contact Search Center  
23084 Cannot Undo edits in email message

## **WHAT'S NEW IN GOLDMINE PREMIUM EDITION 8.0.0**

**New user interface style** provides a modern look and feel, making GoldMine Premium Edition easier to learn and use.

**Customer service module** enables tracking, resolution, and reporting of customer service cases involving GoldMine contacts.

**Tabbed view** provides quick navigation between open windows in GoldMine and uses the available space on screen more effectively. To start the tabbed view, maximize any open window.

A **context-sensitive pane** in the upper left corner of the screen provides different features, depending on which part of the application is currently in use.

A **search box** is always present in the upper left corner of the GoldMine window, for faster access to contacts.

The **Contact List view** includes preview panes for quick navigation to detailed information on a selected set of contacts.

**Auto-complete** capability improves speed and accuracy in field data entry and in adding recipients to an email message.

**Tip of the day** helps users learn about the features of GoldMine.

## **WHAT'S ENHANCED IN GOLDMINE PREMIUM EDITION 8.0.0**

**Grids** have been enhanced to provide additional grouping, sorting, and filtering capabilities throughout GoldMine Premium Edition.

**Left navigation bar** allows direct access to major features of GoldMine. Buttons from the task bar in previous GoldMine versions are now available as buttons on a customized toolbar.

The **contact record display** has been redesigned, to remove the 'quadrants' from previous versions of GoldMine and to enable more customizability.

**Partial Record Curtaining** now can be used to display custom fields in first four rows of the contact record to users without ownership rights to the record.

**Contact record tabs** now can be reordered, and more of them can be displayed on screen at once.

The **GoldMine menu system** has been reorganized to be more logical and consistent. For those who prefer the previous menu structure, a "classic" view is available as an option.

The **Contact Search Center** has an improved interface for building complex searches.

The **Org Chart** has been redesigned and now is placed within the Relationships tab.

Support for simultaneous **alarms** has been improved, so all alarms are displayed within a single screen.

**Notes** in a contact record are now stored independently, to support multiple notes more effectively.

The **database rehosting wizard** has been redesigned for simplicity.

**Additional calendar options** have been added to make it easy to display the company name on activities in the calendar. To view or change this setting, go to Tools >> Options >> Calendar tab >> More Options.

An **e-mail message** now can be sent to a contact by right-clicking on an activity in the calendar or on a topic in the knowledge base.

### **WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 8.0.0**

When forwarding an email that has cc: recipients, the previous cc: recipients are now displayed in the forwarded message.

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