

## GoldMine Version 6.70.41114 for Windows 98/Me/2000/XP/2003

### WHAT'S NEW

#### GENERAL

New: Users can now enter double-byte characters (Chinese) into GoldMine fields.

NOTE: E-mail messages containing double-byte characters may not display correctly.

New: **GoldMine Lookup Wizard** helps users build SQL queries for advanced searches using query-by-example principles. Accessible via **Lookup >> SQL Queries >> Build**.

New: Ability to search for records based on defined Record Types. Accessible via **Record Type** Lookup value in **Contact Search Center Power Search Mode** or Record Type field name value in **Filter build tab**.

New: **SIP** based, integrated **SoftPhone** allows users to dial contacts, receive and transfer calls, and automatically open complete a call window. Accessible via new main menu selection **Contact >> Dial Phone >> Launch SoftPhone**.

NOTE: SoftPhone connection parameters are configured via **SoftPhone/SIP Settings** window accessible via **Edit >> Preferences >> Telephony >> Advanced**.

New: **SMS/Text messaging** capabilities allow users to send text messages to SMS/text enabled mobile phone numbers. Sent messages can be recorded in History with custom reference, activity and result code values. Accessible via new main menu selection **Contact >> Send SMS Message**.

NOTE: Currently supports major U.S. wireless providers only, and requires predefined Internet settings. Additional providers can be added via `GM.INI` settings, as follows:

[SMS]

Providers=ATT,Cellcom (where *ATT* and *Cellcom* each represent a supported provider)

[SMS\_ATT]

ShortName=ATT (identifier stored in number's corresponding *Ext* field, 6 char max.)

LongName=ATT Wireless (Provider drop down option)

Email=my.att.com (Provider's domain)

Maxlength=125 (Maximum message length)

#### OPPORTUNITY/PROJECT MANAGEMENT

New: Ability to automatically adjust dates on cascading Opportunity tasks.

#### PALM/VISOR/POCKET PC and OUTLOOK

New: Added support for Palm OS 5.0 devices and Palm OS driven SmartPhones.

New: User-based Palm synchronization options. Must login as a master rights user to define settings.

New: Option to restrict a user's ability to modify Palm synchronization settings independent of their ability to synchronize their device.

New: Option to restrict a user's ability to synchronize from GoldMine to Palm device.

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New: Option to restrict a user's ability to synchronize contact information with Palm device.

New: Option to restrict a user's ability to synchronize calendar information with Palm device.

New: Ability to synchronize additional contacts to Palm devices.

New: Palm synchronization calendar options allow users to filter activities based on type, color or activity code, reference value, and Opportunity link status.

## ADVANCED

New: Ability to enable additional GoldMine functionality for iGoldMine configurations. Accessible via `GM.INI` settings:

[ThinClient]

AllowReports=1 (enable Reports Center access)

AllowGlobalReplace=1 (enable Global Replace Wizard access)

AllowDelRecs=1 (enable Delete Records Wizard access)

AllowAPs=1 (enable Automated Process execution and removal)

AllowMergePurge=1 (enable Merge/Purge access)

New: **&RecordType** macro returns the Record Type name of current contact record.

New: **&DefaultRecordType** macro returns the default Record Type name.

New: **HTML2TXT()** xBASE function converts provided HTML string to plain text.

New: Built-in **COM server** integration point allows developers to listen for GoldMine events, read/write GoldMine data, use existing BDE session and numerous additional capabilities.

Please see GoldMine API Documentation for further details (**Will Be Available Soon**)

New: Built-in **XML API** allows developers to integrate with GoldMine systems using standard XML documents. All previous API functions are supported.

Please see GoldMine API Documentation for further details (**Will Be Available Soon**)

New: **UI API** integration point allows developers to more tightly integrate with GoldMine and interact with the current GoldMine session. Developers can dynamically veto windows and replace them with custom windows, populate fields, modify text labels and numerous additional capabilities.

Please see GoldMine API Documentation for further details (**Will Be Available Soon**)

## WHAT'S CHANGED

### GENERAL

Changed: Activity List **Holiday** tab now lists items in chronological order (ITS 37196).

Changed: Users can now include **Holidays** as part of busy time scanning process (ITS 36697).

Changed: E-mail address of additional contact converted to primary contact is now set as primary address by default (ITS 36276).

Changed: **Auto-fill with Primary Address** option is now enabled when editing an additional contact (ITS 37216).

Changed: Resizing contact record window no longer increases width of **Organization Tree** pane.

Changed: **Document Name** field on **Linked Document** window now includes an F2 Lookup List.

Changed: **User groups** can no longer be named '**all/(all)**' (ITS 36149).

Changed: **Zip code validation** options are now available via custom **New Record** windows.

Changed: **Zip code validation** options are now available for **additional contacts**.

Changed: Product registration is automatically performed for new installs, upgrades, and/or bumps.

Changed: **Auto-register** option removed from license/registration wizard.

Changed: **Tools >> System Performance** menu option has been removed.

Changed: **Modem** preferences tab name changed to **Telephony**.

Changed: **My GoldMine** now supports Macromedia Flash objects.

Changed: **My GoldMine** copyright notice reflects current year (ITS 37569).

#### **E-MAIL**

Changed: HTML Messages sent to CompuServe recipients are no longer converted to plain text (ITS 37173).

Changed: Alarm notes forwarded to a pager are now converted to plain text.

Changed: E-mail Center **Inbox** and **subfolders** automatically refresh based on user-defined time interval. Default refresh interval is 2 minutes. Time interval can be modified via <GMUserName>.INI setting:

[Internet]

FolderRefreshInterval=*nnnn* (where *nnnn* represents the number of milliseconds to wait between refreshes)

Minimum value is 60000 (1 minute).

#### **REPORTS**

Changed: **Insert >> Data Field** option now displays custom label names for **Opportunity/Project Manager** selections.

Changed: **Insert >> Data Field** option now displays custom label names for **Contact2** selections.

#### **AUTOMATED PROCESSES**

Changed: Users can now attach an Automated Process from **GoldMine Occasion Alarm** prompt.

#### **OPPORTUNITY/PROJECT MANAGEMENT**

Changed: Option to disable **Opportunity/Project Wizard** will now disable prompt permanently.

Changed: **Pending** and **History** tabs are no longer accessible via **Template** view (ITS 36026).

#### **SYNCHRONIZATION**

Changed: Saving an e-mail template with an attachment automatically updates date and time stamp of attachment to current date and time.

Changed: Transfer set creation process now only includes one instance of a linked document.

Changed: Internet connection process now detects server using methods less prone to problems due to firewall or configuration issues (ITS 38220).

Changed: Query optimization designed to improve site processing performance (Requires re-index of **GMTLOG** and **CONTTLOG** tables).

Changed: Synching of **Filed** e-mail messages can only be performed for user names that exist within the system.

#### **ADVANCED**

Changed: Custom **New Record** windows now enforce existing **LOOKUP.INI** rules when record is added to database.

Changed: **ContLast** index key now sorts contact list based on **LastName** and **Contact** values.

Changed: **ContName** index key now sorts contact list based on **Contact** and **Company** values.

Changed: **ContComp** index key now sorts contact list based on **Company** and **Contact** values.

Changed: **ContPhon** index key now sorts contact list based on **Phone** and **Contact** values.

Changed: Administrators are now prompted to re-index **CONTTLOG** files to leverage optimization enhancements when opening an un-optimized Contact Set (ITS 37420).

Changed: Added **RSS 2.0** support to **My GoldMine**.

Changed: **HTTPSTR()** xBASE function now encodes all non-letter or digit characters with new option. Ex.: `httpstr(contact1->accountno,1)`

Changed: **API** now supports **Microsoft .NET** development environments such as VB.NET, C#, etc.

#### **WHAT'S FIXED**

##### **GENERAL**

Fixed: IPF when selecting an additional contact within **Contact Search Center** if the additional contact was linked to a curtailed record (ITS 36887).

Fixed: Issue where Merge/Purging multiple tagged records resulted in loss of history information (ITS 37115).

Fixed: Adding a duplicate e-mail address via the **E-mail** field on upper part of contact record did not alert user that it was a duplicate (ITS 23712).

Fixed: iCalendar display issue when viewing published events.

Fixed: iCalendar (.ics) file import failure (ITS 36751).

Fixed: iCalendar publishing issue where activities were published an hour off from actual scheduled time (ITS 34380).

Fixed: Issue where multiple users simultaneously scheduling activities to a contact group caused a **BLOB not opened** error message and SQL lock (Applies to MS-SQL only).

Fixed: Issue where deleting a recurring activity would cause the system to hang (ITS 37864).

Fixed: Display issue where changing the sort on **Activity List** window caused listing to become blank (ITS 36935).

Fixed: Display issue where editing an item in Activity List window caused list to become blank (ITS 36936).

Fixed: **Calendar** display anomaly when using a **period** as the date and time delimiter (ITS 38139).

Fixed: **Calendar** issue where attempting to view another user's calendar would erroneously display **You do not have security access to this option** message multiple times (ITS 37198).

Fixed: Issue where opening the graphical Calendar on a system using a Chinese version of Windows caused the application to stop responding.

Fixed: IPF when scheduling an activity for multiple users from the **Outline** tab of graphical **calendar** (ITS 38079).

Fixed: Issue where **undo** functionality was not consistently applied while editing a contact record (ITS 37774).

Fixed: Issue where fields/data of previously used Record Type definition were incorrectly displayed (ITS 37421).

Fixed: Issue where contact record fields could not be edited if the contact was selected via the SQL query result list (ITS 35361).

Fixed: Issue where non-master users were unable to view an **Organization Tree** if it included a secondary contact with a **Merge Code** value (ITS 37629).

Fixed: Issue where converting an additional contact to a primary contact and automatically adding it to an **Organization Tree** did not include the contact's **title** (ITS 38151).

Fixed: Display anomaly where displaying the **Organization Tree** on a record incorrectly displayed the Organization Tree of the background contact (ITS 36720).

Fixed: Minor display issue with **Schedule >> Forecasted Sale** icon (ITS 37559).

Fixed: Scrolling anomaly on **SQL Query** tab.

Fixed: **Filter previewing** issue where sort order of preview list could not be changed (Applies to MS-SQL only, ITS 33255).

Fixed: Issue where querying a phone field required the use of the parentheses for the area code value (ITS 37612).

Fixed: Issue where querying the **Key5** field for numeric values not beginning with 1 did not yield any results (ITS 37456).

Fixed: Lookup issue where querying the **Key5** field for numeric values not beginning with 1 did not yield any results (ITS 37456).

Fixed: Issue where clicking the **Find contact** toolbar icon while the **Contact Search Center** window was minimized did not restore the window's size (ITS 38057).

Fixed: Anomaly where **Cautionary Notification** window was displayed unexpectedly (ITS 37712).

Fixed: Anomaly where the incorrect **Fax template** was used if merge process was initiated from

**Contacts** tab (ITS 36571).

Fixed: Linking problem where **Link to Doc** option did not link merged document to contact (ITS 28517).

Fixed: Merging issue where **Contact2** data was not merged to Word template if a filter was applied (Applies to MS-SQL only; ITS 37494).

Fixed: Issue that allowed users to enter invalid data in a **valid input** only field by launching **Synchronization Wizard** (ITS 35788).

Fixed: Issue where **expression fields** were blanked out if the expression became invalid (ITS 28955).

### **E-MAIL**

Fixed: Issue where creating a contact from a **Sent** e-mail message resulted in a contact record with the **sender's** information instead of the recipient's (ITS 38127).

Fixed: Issue where sending an HTML e-mail template to multiple contacts could generate the error **Message encoding failed! Please make sure there is enough disk space and that the temp directory is not full.** (ITS 37534).

Fixed: Issue where unlinking an e-mail message would always unlink the e-mail address (ITS 38131).

Fixed: Rendering issue where **HTML signature files** were displayed as plain text although composed message was HTML (ITS 38088).

Fixed: Issue where toggling between HTML editor mode and message preview mode inadvertently modified inserted macros (ITS 35232).

Fixed: **<<NOAUTOQUOTETEXT>>** Macro, allows users to omit quoted text on an e-mail template (ITS 28709).

### **REPORTS**

Fixed: Issue where certain date preferences were not retained for **Completed Sales by User** report (ITS 38363).

Fixed: Sorting issue where ordering data based on a **Contact2** field yielded empty results (ITS 36718).

Fixed: Selecting **Output to >> Printer** within **Reports Center** window resulted in error message (ITS 37308, 37309, 37310).

Fixed: Display issue where printing a single page report to the window yielded a blank page (ITS 37822).

Fixed: Security anomaly which allowed non-master users to print **Pending** and/or **History** data linked to partially or fully curtailed records (ITS 36715).

**IMPORTANT:** All Contact1/Contact2 data from partially/fully curtailed records will also be suppressed.

### **AUTOMATED PROCESSES**

Fixed: Issue where assigned user for **Literature Request** scheduled activity could not be defined (ITS 36492).

Fixed: **Invalid Field Name** error message when using **&EmailAddress** macro within a **dBASE Condition** trigger (ITS 38422).

#### **OPPORTUNITY/PROJECT MANAGEMENT**

Fixed: Display issue where deleted **Opportunities/Projects** were not removed for filter results listing (ITS 37206).

Fixed: Display issue where decimal values were not displayed on **Opptys** tab of contact record (ITS 38128).

Fixed: Display issue where decimal values were not displayed on **Forecast** column of **Prods/Svcs** tab (ITS 38128).

Fixed: Spelling correction on **Opportunity/Project Manager Customizations Properties** window.

Fixed: Issue where users were prompted to rebuild database every time the Opportunity/Project Manager field properties were accessed (ITS 36658).

Fixed: Issue where rebuilding altered the numeric values of numeric custom fields (ITS 37203).

Fixed: Issue where display order of custom fields was not retained (ITS 37199).

Fixed: Issue where users were not able to add an **Influencer** which did not include a company value (ITS 31359).

Fixed: Anomaly where attempting to unlink a **Forecasted Sale** from an Opportunity did not unlink it (ITS 37331).

Fixed: IPF when completing a **Forecasted Sale** linked to an opportunity if the Opportunity Manager was not open (ITS 38034).

#### **SYNCHRONIZATION**

Fixed: Issue where **Unable to access hash table...** error messages were generated at sporadic times during site processing.

Fixed: Issue where site processing would randomly cause server to abruptly halt and exit.

Fixed: Issue where data did not consistently synchronize amongst systems.

Fixed: Sporadic issue where **CONTACT1** or **CONTACT2** records were duplicated upon synchronization.

Fixed: Sporadic issue where **CONTACT2** records were orphaned.

Fixed: Intermittent '**Cannot create DelLogs**' error message during transfer set retrieval (ITS 37626).

Fixed: Data retrieval failure after '**Cannot create DelLogs**' error message (ITS 37627).

Fixed: Data retrieval issue where the **ContTlog SyncStamp** value for the **Contact1->Notes** field was unexpectedly updated to current date and time (ITS 38421).

#### **ADVANCED**

Fixed: Issue where importing web site values longer than 35 characters resulted in a blank reference field (ITS 29332).

Fixed: Issue where attempting to delete an **SQL import profile** failed (ITS 37441).

Fixed: Issue where **Quota Analysis** information exported via **Output to >> Excel** included extraneous blank spaces (ITS 37396).

Fixed: Issue where e-mail address value of newly created contacts did not trigger [OnNewRun] **LOOKUP.INI** rules (ITS 37732).

Fixed: Issue where adding or editing an e-mail address or web site value did not trigger [OnNewRun]/[OnEditRun] **LOOKUP.INI** rules (ITS 37713).

Fixed: Database rebuild issue that caused **Invalid column name** error message (ITS 38100).

Fixed: Anomaly where an extra carriage return was inserted after the **Zip Code** value when using the **&NameTitleAddress** macro (ITS 37256).

Fixed: Issue where **GMW\_LoadBDE** API function failed and returned error message **-2** if **SysDir** entry did not have a trailing slash.

Fixed: Issue where **GMW\_UnLoadBDE** API function worked incorrectly when used multiple times.