GoldMine

Version 2016.1
GoldMine Premium 2016.1.0.147 / GoldMine Connect 2016.1.0.273

Release Notes

Updated May 19, 2016

Note: Run the GoldMine Premium 2016.1 installer for a new installation or to upgrade GoldMine Premium Edition 9.0 or newer. If you are upgrading from a version of GoldMine previous to 9.0.0, you must first upgrade to version 9.0.0 before upgrading to this version. Run the GoldMine Connect 2016.1 installer for a new installation or to upgrade GoldMine Connect 2015.1 or newer. If you are upgrading from a version of GoldMine Connect previous to 2015.1, it is necessary to uninstall the existing version of GoldMine Mobile or GoldMine Connect and install GoldMine Connect 2016.1 as a new installation. It is recommended to clear device/browser cache and to restart IIS after uninstall/reinstall or upgrade of GoldMine Connect.

What's New in GoldMine 2016.1
GoldMine Premium 2016.1.0.147 / GoldMine Connect 2016.1.0.273
Functionality added since GoldMine 2015.2 release; functionality added in monthly 2015.2 hotfixes is included.

GoldMine Web

Cases
- A Cases list is available from the navigation bar or menu. By default the list is filtered to Open Cases for the logged in User. A User can select to view Cases with a different Status or Owner or view all Cases. The Cases list can be sorted by the available columns – Case Number, Type, Subject, Company, Priority, Status, Deadline, or Owner.
- Cases are also available from the new Cases section on the Contact record. From the Cases section, the user can click the View All link to see the Cases List filtered to Cases for the selected Contact.
- Select a Case from the list or section to view or edit information about the Case.
- A Case can be Reassigned or Escalated and an email notification can be sent to the Owner. A Case can be Resolved or Abandoned and an email notification can be sent to the Contact.
- More information is available in Knowledge article 23544. Login at https://support.heatsoftware.com/.

Search
- By clicking the Refine link on the Contacts page, a User can search based on desired criteria for selected default and custom fields seen in GoldMine Web. A User can select fields from the main Contact record fields (the first section of a Contact Record) or from Custom screens (the second section of the Contact Record). A User can select a search operator from a defined list. A desired value can be entered or selected from a list or calendar. A search can be done on a single field or more fields can be added by selecting the plus icon. When the Apply button is selected, the Contact List is updated to show only Contacts that meet all of the selected criteria.
- Filters or Groups created in GoldMine Premium can be selected in the Refine section or overlay to limit the Contact List to only Contacts belonging to the Filter or Group. Search criteria can be applied to the selected Filter or Group to further limit the list of Contacts.
- More information is available in Knowledge article 23545. Login at https://support.heatsoftware.com/.

Additional Contacts
- When a search for Contacts is done from the Search Bar or the Attendee finder for Activities, the user can select Contacts or Additional Contacts to view a list of results matching the value entered.
- From the Additional Contacts search results list, the User can view and sort by Additional Contact, Company, Email address, Phone, and Primary Contact. The user can also schedule an activity for the Additional Contact using the Action icons.
- Additional Contacts can be selected from the Attendee finder when scheduling or completing Activities.
- More information is available in Knowledge article 23546. Login at https://support.heatsoftware.com/.

GoldMine Web (cont'd)

Miscellaneous
- A map pin icon is available on Contact records to open Google Maps with search done for the contact's address.
- A notification is displayed if the User is accessing a Contact Set that is in a database different from GoldMine Base tables.
- Back to results link on Contact record returns user to Contact List on same page, with same filter, and with same order as when Contact was selected.
- Opportunity records have a responsive layout.
- Add History option now available from menu.
  Users can access option to add a call, action, or appointment to history from the global menu without first scheduling the activity.
- Email rule actions 'File' and 'File To' configured in GoldMine Premium are respected when email is retrieved during GoldMine Web login.

GoldMine Premium

- The GoldMine Administrator can control the default values for Date and Time or User in the Complete Activity window by inserting entries into the ENVIRONMENT table
  - o Settings are per system; when added the setting applies for all users of current system.
  - o Settings do not sync; apply separately for Sites and Undocked users.
  - o Settings are applied per activity type:
    Appointment –A, Event –E, Call –C, Next Action –T, Other Action –O, Sale –S
  - o Detailed information regarding adding settings is available in the Knowledgebase. Login at https://support.heatsoftware.com/.
    - ▪ KM 21915 > useOriginalDateInComplete
      Default Date/Time when completing non-recurring or single instance of a recurring activity
    - ▪ KM 21916 > useOriginalUserInComplete
      Default User when completing non-recurring or single instance of a recurring activity
    - ▪ KM 21944 > useOriginalDateCompleteRecurrence
      Default Date/Time when completing all Pending instances of a recurring activity
    - ▪ KM 22468 > useOriginalUserCompleteRecurrence
      Default User when completing all Pending instances of a recurring activity or default date/time and user when completing multi-user and/or multi-contact activity

- GoldMine Plus for Microsoft Outlook has been refactored for enhanced maintainability and predictability by limiting connection concurrency. See KM 22121 for further information. Login at https://support.heatsoftware.com/.

What's Changed in GoldMine 2016.1
GoldMine Premium 2016.1.0.147 / GoldMine Connect 2016.1.0.273
Changes made since the GoldMine 2015.2 release; changes made in monthly 2015.2 hotfixes are included.

GoldMine Web
- Activity type "Event" is now labeled "Appointment"
  All Appointments and Events are labeled Appointment in GoldMine Web. This does not impact the label, activity type or reporting in GoldMine Premium.
  - o If an Appointment is scheduled or completed with a start and end date and time in GoldMine Web, it is treated as an Appointment in GoldMine Premium
  - o If an Appointment is scheduled or completed for All day in GoldMine Web, it is treated as an Event in GoldMine Premium
  NOTE: Clear browser cache after upgrade to see this change
- Status filter for Opportunities list is now a dropdown on small screens
- For new installs of GoldMine Connect or re-installs where the GMMobileAppPool does not exist in IIS, the Application Pool timeout setting is now set to 30 minutes by default.

What's Fixed in GoldMine 2016.1

GoldMine Premium 2016.1.0.147 / GoldMine Connect 2016.1.0.273
Issues addressed since the 2015.2 release; issues addressed in monthly 2015.2 hotfixes are included.

Issue	Issue Title
133120	Completed activities complete against the current user not the user the activity was scheduled for
214214	Completing recurring appointments complete with current date and not the date scheduled while this works for single appointments
218728	Performance issue for non-master users when opening activity list or on editing or completing an activity with the activity list opened when records are owned/curtained and there are many activities scheduled for that user
229128	Documentation: Help > Admin Guide > Data Maintenance and Management > Understanding GoldMine Data Files > Rec Types
229819	[GMWeb] Include Additional Contacts in the Search field for Contacts/Companies
229862	[GMWeb] Feature request for enhanced Search capabilities in GoldMine Web - several operators for example "Begins with" and by any C1 and C2 fields
231243	[GMWEB] The ability to completely hide curtained records on contact list and search results so that a full list is shown on every available page
232812	Web Import is creating a Duplicate Contact2 records when updating an existing record.
233484	Auto complete for F2 Lookup values leads in several fields to apply also the // description value instead only the real F2 Lookup value
233594	Error, Failed to Create Contact, due to the initial INSERT statement for new records taking over only some fields, causing the LOOKUP.INI already triggering on wrong values.
233709	Disconnect of GoldMine Plus for Microsoft Outlook. GMOUTLOOKLOG.txt message: Couldn't open the database from GM Configuration. System.Data.SqlClient.SqlException: Login failed for user 'sa'.
233805	Not responding mode and severe performance issues when opening the Activity list and the desired activities do have a lot and very long or certain kind of notes.
233888	Not responding mode and severe performance issues when opening the Calendar and completed activities a lot and very long or certain kind of notes.
234029	Ability to keep the scheduled time when completing Activities, either by having an additional user interface check box to take current date/time or by system default setting in system configuration/GM.INI how GoldMine system should handle this
234041	Automated Processes attached to a new record after being created by Web Import will skip events and stop at this point
234050	[GMWEB] - Allow for scheduling (and completion) of ACTIVITIES of additional contacts
234247	[GMWEB] <sessionState timeout="30"></sessionState> setting in web.config file is not respected when greater than the default value of 30
234531	Outlook Integration disconnects/freezes/hangs sporadically - When this happens the Outlook Log file show suddenly prior the disconnect a change in the connection string
234650	[GMWEB] Server Error - An error has occurred on the server. Please contact your system administrator. when accessing GoldMine Web due to a missing Record Type 'Other'
234686	[GMWEB] Creation of new contact records not possible when the Website field is not on the default primary view
234711	[GMWEB] The fast file of e-mail does not work from the activity list

234960	Web Import emails are not downloaded - "Failed to retrieve message 1" other emails from same account are retrieved ok
235033	[GMWEB] If any GoldMine user has a username with 8 characters and created a linked document opening the Links section in GMWEB results in an error: Server Error An error has occurred on the server. Please contact your system administrator.
235228	Documentation: Connect Install Guide > username "gmmobile" user (page 16 of 20) replaced with "gmconnect" as the rest of the documentation references
235298	Documentation: ReadMe > Limitation of GoldMine Web not being able to handle/display links and attachments from mapped drives
235563	[GMWEB] When the "stage" value of an opportunity is updated, the u_stage field is not updated to reflect the new value.
235643	[GM Web] When you open an activity and then click on an Opportunity to view the details, the Stage information within the details is not correct.
236011	When linking an email from an IMAP account with the Outlook Link, the email will duplicate continuously. This results in duplicate emails in Outlook, on the IMAP server and in GoldMine.
236013	Delete an email in Outlook that has been linked to GoldMine that same email is than duplicated over and over again in Outlook.
236097	Documentation: Help > Admin guide formatting from page 215 - 389 is incorrect, each page has only a single line
237138	When the Outlook Link is installed and running, Outlook stops retrieving IMAP email. A process at the bottom of the Outlook window shows an almost constant "synchronizing inbox" message and progress bar.
237225	Goldmine Plus for Outlook is locking up Outlook, unable to click on data or menus.
237323	Documentation: Help > Admin Guide - Setting Options for the Login Tab - incorrect alias name
238805	[GM Web] Display username in all caps
238904	Documentation: Help > Admin Guide Setting Options for the Email tab Delete attachments when deleting the mail" it does not explain the setting.
240057	Documentation: References to MS SQL 2005 in Universal Search chapter need to be removed or updated to at minimum SQL 2008 as SQL 2005 version is not supported anymore in GoldMine 2015.2
240059	Duplicated emails are created when manually linking an email with Outlook integration which appear as strikethrough messages, eventually they are disappearing again after restarting the machine or other unknown circumstances
240138	[GMWeb] Required fields are not indicated anymore and only when clicking into the field and then trying to leave it blank the user gets aware that this field is required
240143	in addition to RM # 234029 - Auto Update feature from Activity list to respect the new capability to keep the Date/Time from the original scheduled activity
240571	Completing Group or recurring appointments using the Complete menu or button on the Pending tab will not respect any Environment settings to take over date/time or user from Environment table (RM changes # 133120, 214214 and 234029)
240603	After upgrading, when refreshing the activity list it will cause it to go blank, click refresh again and it will then populate
240616	Activity list does not refresh when ShowActvForCurtained=1 is set in the GM.ini
240641	When a different user completes a recurring single user Activity scheduled for a different user, the completing user is taken over

240703	Reverting to user logged on when completing a single or for one user a non-recurring multi-user + multi-contact activity, in addition Date reverts to today and time goes blank after completion (not respecting changes due to # 133120, 214214 and 234029)
241122	The Alarm Time field appears too long when editing a multi-user activity
241444	Documentation: Administration Guide > User Administration > Managing User Security and Access > Users Properties > Forced Logout option > updates needed