GoldMine

Version 2017.1 Hot Fix 1a - Release Notes
GoldMine Premium 2017.1.0.384 / GoldMine Connect 2017.1.0.484
Updated June 28, 2017

Please Note
Run the GoldMine Premium 2017.1 installer for a new installation or to upgrade GoldMine Premium Edition 9.0.0 or newer.
  · If you are upgrading from a version of GoldMine prior to 9.0.0, you must first upgrade to version 9.0.0 before upgrading to this version.

Run the GoldMine Connect 2017.1 installer for a new installation or to upgrade GoldMine Connect 2015.1 or newer.
  · If you are upgrading from a version of GoldMine Connect prior to 2015.1, it is necessary to uninstall the existing version of GoldMine Mobile or GoldMine Connect and install GoldMine Connect 2017.1 as a new installation.

It is recommended to clear device/browser cache and restart IIS after an installation/re-installation or upgrade of GoldMine Connect.

What's Fixed in GoldMine 2017.1 HF1a
GoldMine Premium 2017.1.0.384 / GoldMine Connect 2017.1.0.484

Issue	Issue Title
253026	Privilege errors when the Outlook Link is installed although both applications are started as the same user. with the new Outlook Link
253121	Since upgrading to HF1 of the GM Link, An exception is thrown when new emails are auto-linked where this is a Link Exclusion set.

What's New in GoldMine 2017.1 HF1
GoldMine Premium 2017.1.0.377 / GoldMine Connect 2017.1.0.483

GoldMine Premium Edition
  ● If the "Encode E-mails using character set" value is empty in a user's E-mail Options, GoldMine will use "utf-8" as the default character set.

GoldMine Link for Microsoft Outlook
  ● When a contact has been suggested, you can select/click on the contact name or company name (or additional contact name) to open and view the contact record in GoldMine.
  ● When searching for a contact, you can select/click on the name of the contact, company or additional contact to open GoldMine and view the contact record.
  ● When an email message has been linked to an additional contact, selecting/clicking the "View in GoldMine" button will open the contact record in GoldMine and the "Additional Contacts" tab will be in focus, with the additional contact row selected.

What's Changed in GoldMine 2017.1 HF1

GoldMine Premium 2017.1.0.377 / GoldMine Connect 2017.1.0.483

GoldMine Web

- The Custom Screens section within a contact record detail will now display all fields for the selected Custom Screen. The "show more" and "show less" links have been removed.
- Selecting/Clicking any area within the graphical calendar in the ACTIVITIES page will open the schedule activity view with "Appointment" as the default activity type instead of "Call".
- Untimed activities in the "My Activities" section within the HOME page will now display the placeholder "no time".
- A white spacer has been included between the "Recent Opportunities" and "Recent Cases" sections within the HOME page when either or both of these sections are expanded.

What's Fixed in GoldMine 2017.1 HF1

GoldMine Premium 2017.1.0.377 / GoldMine Connect 2017.1.0.483

Issue	Issue Title
156252	Duplicate screen tab names appear when you customize the screen tab names
165979	Cursor not visible in Reference when scheduling activity with IE 9-11 installed
206519	After creating custom tabs, then moving the position of the custom tab, the tab list then duplicates the custom tabs created
215271	When replying to an email, inline images do not show in the reply, the email is changed to content type: css/text
223775	After setting the encoding for sending mail in GoldMine, Exchange shows the proper name of the retrieved email as =?iso 8859-1?B?MQ==?=
230409	Set filter on a tab with a lot of records (e.g. History by Contact), then sort the results by Date will result in a blank window as no record 'match' the criteria
232562	When a contact name has an apostrophe and several e-mail addresses are linked to this contact record trying to add the contact as further recipient to an email will automatically take all related email addresses instead of offering the selection dialog box
234347	Setting custom filters on any grids for example History tab and Pending tab (most likely for many other grids too) for blank values will result in inconsistent and wrong results
237160	Grid filters in Pending/History tab (most likely every where grid filters can be set) will not work consistently when the filter value has an ' (apostrophe)
239832	Image attachments in emails sent from iOS devices adds what appears to be header information to the attachment extension when downloaded into GoldMine
238991	When the message ID contains an apostrophe the email will be downloaded over and over again (Fixed apostrophe, but some other characters might cause the issue
240605	When manually copying an Outlook email to GoldMine from within E-Mail Center, the special characters are changed and corrupted

246648	API Assistance request - customer getting error - Object reference not set to an instance of an object on inserting data and retrieving data via API
249609	Follow-up on RM 214724 - In certain cases - customer recognized only on replies - German characters are still destroyed
250662	Unable to login to Constant Contact via GoldMine to setup or create new Campaigns
252928	Error editing or viewing activities in GM WEB: "server error: error in activity controller action: get activity F2 metadata"
252667	GMWEB - Revoked Opportunities, Activities or Calendar rights will remove tabs in GoldMine Web (ACTIVITIES, OPPORTUNITIES, CASES) but the Home Dashboard shows still My Activities, Recent Opportunities/Cases
252773	Even if the "Save attachments as linked documents" setting is unchecked, the new GoldMine Link for Outlook NOT honoring the setting in Tools>Options>E-Mail>More Options>Retrieval.
252777	A newer version of Microsoft Outlook is needed for the plug-in to be installed. The GoldMine Link for Microsoft Outlook will not be installed"

What's New in GoldMine 2017.1

GoldMine Premium 2017.1.0.326 / GoldMine Connect 2017.1.0.458
All functionalities that have been added after GoldMine 2016.1, including any added in all 2016.1 Hot Fixes.

GoldMine Web

Home
A new default landing page after logging in with the following sections:

My Activities
- Displays a snapshot of upcoming timed activities, starting from the time at which the user is logged into web.
- Select the "Go to Activities" to view more activities on the existing Activities page.

My Pending Emails
- Displays a snapshot of pending emails.
- Select the "View More" to view more emails in a new My Pending Emails page.

Recent Contacts
- Displays a snapshot of recently viewed contacts.

Recent Opportunities
- Displays a snapshot of recently viewed opportunities.

Recent Cases
- Displays a snapshot of recently viewed cases.

My Pending Emails
A new page containing a tabular view of pending emails for the logged in user.

- Accessed from either the "My Pending Emails" section in the Home page or through the global menu at the top right of the browser, next to the GoldMine User ID.

Cases
- The Pending and History activities associated with a case are accessible from the detailed view of a Case.
- View and create Notes - both "Case Notes" and "Resolution Notes" (PE equivalent of the notes in the "Notes" and "Resolution" tabs).

Links
- From the detailed view of a Contact record, users can now add a linked document stored in a cloud drive (eg. One Drive, Dropbox or Box etc) or shared network path to a contact by including a valid URL or UNC path to a shared drive.

Miscellaneous
- Schedule a follow-up activity when completing an activity. Notes and other information are carried over to the follow up activity.
- User-specific settings that are applicable to GoldMine Web within the "Access" and "Menu" tabs in PE's Tools → Users' Settings… → <USER> are now reflected on web.
- Contact record curtaining and ownership specified in PE are observed on web.
- F2 look-up validation settings in PE are observed for Pending and History activities on web.
- "Back to results" link added to the Opportunity details and Case details pages.
- A "View All" link has been added to the Opportunities section in the detailed view of a Contact record.

GoldMine Link for Microsoft Outlook
A new Outlook add-in for linking email messages to GoldMine contacts.

Link Email / Unlink Email
- The "Link Email" button in the toolbar enables the user to link email messages, search a contact, or create a contact.
    - If the email address matches a GoldMine contact, it will be suggested.
    - Use "Search GoldMine" to search for a contact in GoldMine to link email messages.
    - Use "Create Contact" to create a new contact in GoldMine and link the email messages.
- When an email message is linked, it will be filed to the contact's History tab.
- The "Unlink Email" toolbar button enables the user to unlink email messages.

View Contact in GoldMine
- The "View in GoldMine" button in the toolbar enables viewing the contact in GoldMine.

Settings
- The "Settings" toolbar button enables the user to set up or update GoldMine Link, enable/disable automatic linking, configure Outlook folders, specify linking exclusions and set up Outlook synchronization.
- Settings for each user may also be configured from PE by a master user by going to Tools → Configure → GoldMine Link Outlook Settings…

Synchronization
- Select the "Start/Stop Sync" button in the toolbar to start or stop Outlook synchronization with GoldMine.

Address Book
- The GoldMine address book is added to the list of "Other Address Book Types" in Outlook upon installation of GoldMine Link.

Environment Table Settings

- A new flag - "forceUTF8ForOutgoingEmail" - for enabling the use the charset "UTF-8" when sending emails through the Email Center. This flag takes a value of "0" or "1". When set to "1", the charset used for sending emails will be "UTF-8". It does not matter what charset is specified in PE.
- The TLog query for synchronization has been refactored and optimized for performance improvements in release 2017.1. A new flag - "UseOptimizedCalDefTLogsQuery" - is introduced to enable GoldMine administrators to turn off this optimization, if needed. This flag can be set to "0" to turn off the TLog query optimization.

What's Changed in GoldMine 2017.1
GoldMine Premium 2017.1.0.326 / GoldMine Connect 2017.1.0.458
Changes made after GoldMine 2016.1, including the changes from all 2016.1 Hot Fixes.

GoldMine Web
- The Contacts, Opportunities and Cases lists for mid- to small- sized screens are mobile responsive. These lists are now displayed in a card format rather than tabular format for these screens.
- The "Activities" page graphical calendar is hidden by default on small screens. Select the calendar icon to display or hide the calendar.
- The "Activities" page Tasks and To-Dos are collapsed by default for all screen sizes.
- When searching for Cases or Opportunities, the default result of the search is Status: All and Owner: All.
- The Contact record "Cases" section displays all Cases for the selected Contact.
- All links to GoldMine Mobile will now be redirected to GoldMine Web.

GoldMine Premium Edition

- "Include items from the local windows index" and "Include items from remote Windows index" in Universal Search's "Documents" tab are now disabled by default.

What's Fixed in GoldMine 2017.1
GoldMine Premium 2017.1.0.326 / GoldMine Connect 2017.1.0.458
Issues that were addressed after GoldMine 2016.1. Issues fixed in all 2016.1 Hot Fixes are also included.

205910	Create email on GoldMine internal user on Project's team tab does not create internal email to User but instead creates email to Project's primary contact.
214724	French, German and also Danish characters corrupt in the email header when downloaded into the GoldMine inbox - displays fine online.
213683	Zoom or any interactivity with GM+View Google Maps or Google Directions does not work on IE 10 or IE 11 but works in IE 9 or IE 8.
219439	Google Maps and Google Directions GM+View appear always with message at the top 'It looks like you have enabled Internet Explorer Compatibility View. Google Maps will not work correctly unless this is turned off. Learn how to do this'.
222313	Body of e-mail flickers when replying to an e-mail with certain content - When replying to a HTML formatted email that contains external images, the cursor repeatedly flashes, alternating between the hour glass and pointer.

223091	LinkedIn GM+ View displays incorrectly formatted as the first search result is obscured by the menu items on the webpage.
231331	When creating a recurring activity and editing the start date after creating the recurring series, if not clicking the recurring tab the last date of the recurring series drops off.
232659	GoldMine - Outlook Synchronization will lose/destroy after several changes and synchronizations back and forth German special characters.
233236	(GMWEB) Removing Edit Tab Folders right for a user, makes the user unable to complete activities in GoldMine Web >> Contact's Pending area while this is possible in GMPE on the Contact's Pending tab.
233256	When using Google Maps and Google Directions GM+View a message appears - You seem to be using an unsupported browser. This even re-appears when setting Google Maps to full instead of lite mode.
234712	GMWEB - Calendar date display is not available when first make browser windows smaller and then maximize view again.
234850	[GMWEB] Feature request - Add the schedule a Follow-up option to GoldMine Web.
235067	[GMWEB] Calendar loading with spinning wheel when the user has a lot of pending activities for the specific time frame scheduled >> this makes the activity list on the ACTIVITIES page not responsive, scroll may or may not work appears to hang in the list.
235387	GM+Views for LinkedIn templates are distorted, scrambled, fields are overlapping and there is a lot of white space on the left and right, maybe even message, looks like you're using a browser that's not supported although IE 11 is installed and used.
235709	Cross validated/context depending F2 lookups on OPMGR table: F2 values different in Opportunity's/Project's detail vs. Opportunity's/Project's properties view. Properties view shows no values as it looks for ' ' instead of set values.
235847	Emails (either with certain encoding or from certain mailserver, mailclients) will destroy Special characters (for example GERMAN or FRENCH) within the body - initially reported for PLAIN but also for HTML.
238799	Query times out or sync takes ages when a lot of users are in a GoldMine database, and / or filtered sync settings are used - offending query part seems to be C.USERID IN ('BARBIE','BT','DD','DERY','....,KAREN','KATIE'…).
239349	[GMWEB] When using forced valid input for the STATE F2 Lookup entry that contains comments in format value // comment the entry will not show as valid input in.
240297	(GMWEB) - Discrepancy between security settings in GoldMine Premium Edition and GoldMine Web - e.g. Menu restrictions - Schedule and Complete is not respected in GMWEB, Access restriction Edit Tab folders is only partly respected - GMPE disallows to change.
240618	Google Apps Sync Configuration documentation is outdated and Google Apps has changed many areas and topics - even when trying to document never connects successfully.
241625	(GMWEB) - Responsiveness of Contact list - users on devices may need to know that they can scroll to the right in order to see Phone number - Request for making the list responsive too.
241704	GoldMine column in Outlook no longer shows any box or check mark after upgrading to GMPE

	2016.1.
245599	When a different user completes a recurring single user Activity scheduled for a different user, the completing user is taken over even with the variable added to the Environment table.
245747	Change Request - Change of the Pop-Up message "Are you sure you want to delete all selected alarms?" as this deletes the related activities and not only alarms as the message lets assume.
245827	(GMWEB) Unable to set a date older than today when Adding a history item in GoldMine Web after upgrading to GMPE/GM Connect 2016.1 GA release.
245885	The operation cannot be performed because the message has been changed when manually linking while creating an email in Outlook and then try to send.
246048	Sent Email won't link from Outlook to GoldMine when using the option "Link To: Additional Contact".
246294	Randomly on new contacts created by web import, the AP creates the activity and or history item but does not link it to the new contact.
246404	GMWEB - The Total and Forecast Column in OPPORTUNITIES list is to small and needs be extended.
246648	API Assistance request - customer getting error - Object reference not set to an instance of an object on inserting data and retrieving data via API
246998	Emails sent via GMPE do not include charset in heading if nothing is specified in Tools > Options > Email > More Options > Composing causing decoding to fail.
247471	GMWEB - Email address on partially curtained records visible in the Contact list or Search list in GMWEB.
247588	GMWEB - JSON error when opening ACTIVITIES page - Server Error Cannot deserialize JSON request input parameters.
249075	Google changed the name of Google Apps to G Suite - references in the application should be changed as this is an official product name.
249148	Compatibility Testing with Microsoft Windows Server 2016.
249326	Error: Unable to create PDA transfer set when using Outlook Sync with any kind of filter set - Outlook Sync is not possible at all.
250162	Special characters destroyed when downloading emails (similar to RM 235847 and/or 246998)
250721	[GMWEB] Forced valid input for Reference field is not forced when Scheduling or Completing activities.
250756	Ability to have by default the setting "Include items from the local windows index" under Universal Search > Options > Documents tab" disabled by default.
251497	Creation transfer sets when selecting no users (or only specific) and a sync filter is set - An error occurred while creating the transfer set. for gathering TLOGS for CALDEF.

| 252213 | Wrong / outdated link on Record Type HTML Information screen - Welcome to GoldMine's Record Types Administration Center! - Partner locator points to Frontrange.com web site and is not correctly redirected - The requested page cannot be found. |