

# GoldMine

## Version 2015.2 Hotfix 4

GoldMine Premium 2015.2.0.208 / GoldMine Connect 2015.2.0.366

### Release Notes

Updated April 7, 2016

**Note:** Run the GoldMine Premium 2015.2 HF4 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 2015.2 HF4 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 2015.2 HF4 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 2015.2 Hotfix 4

#### 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
  - Settings are per system; when added the setting applies for all users of current system
  - Settings do not sync; apply separately for Sites and Undocked users
  - Settings are applied per activity type:  
Appointment –A, Event –E, Call –C, Next Action –T, Other Action –O, Sale –S
  - 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
- GoldMine Plus for Microsoft Outlook has been refactored for enhanced maintainability and predictability by limiting connection concurrency. See KM 22121 for further information.

### What's Fixed in GoldMine 2015.2 Hotfix 4

GoldMine Premium 2015.2.0.208 / GoldMine Connect 2015.2.0.366

Issue Number	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
233709	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
234531	Outlook Integration disconnects/freezes/hangs sporadically - When this happens the OutlookLog file show suddenly prior the disconnect a change in the connection string
234960	Web Import - Webimport emails are not downloaded - "Failed to retrieve message 1" other emails from same account are retrieved ok
236011	When linking an email from a 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, the email is than duplicated over and over again in Outlook.
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.
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

### What's Fixed in GoldMine 2015.2 Hotfix 3

GoldMine Premium 2015.2.0.190 / GoldMine Connect 2015.2.0.361

Issue Number	Title
234041	Automated Processes attached to a new record after being created by WebImport will skip events and stop at this point
235563	When the "stage" value of an opportunity is updated in GMWEB, the u_stage field is not updated to reflect the new value.
235643	When you view a contact within Goldmine Web and you drill down to the Opportunities section within the main page, the correct Stage value is displayed. But if you click on the Opportunities to view the details, the Stage information within the details is not correct.

### What's New in GoldMine 2015.2 Hotfix 2

Email rule actions 'File' and 'File To' configured in GoldMine Premium are respected when email is retrieved during GoldMine Web login.

### What's Fixed in GoldMine 2015.2 Hotfix 2

GoldMine Premium 2015.2.0.183 / GoldMine Connect 2015.2.0.357

Issue Number	Title
233484	Auto complete for F2 Lookup values leads in several fields to apply also the // description value instead only the real F2 Lookup value

### What's New in GoldMine 2015.2 Hotfix 1

GoldMine Web

- "Add History" 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.

## What's Changed in GoldMine 2015.2 Hotfix 1

### 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.
  - 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
  - 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 2015.2 Hotfix 1

GoldMine Premium 2015.2.0.173 / GoldMine Connect 2015.2.0.348

Issue Number	Title
231243	[GMWEB] The ability to completely hide curtailed records on contact list and search results so that a full list is shown on every available page
232812	[GMPE] Webimport is creating a Duplicate Contact2 records when updating an existing record.
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.
234247	[GMWEB] <sessionState timeout="30"></sessionState> setting in web.config file is not respected when greater than the default value of 30
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
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.

## What's New in GoldMine 2015.2

GoldMine Premium 2015.2.0.159 / GoldMine Connect 2015.2.0.326

Functionality added since GoldMine 2015.1 release; functionality added in monthly 2015.1 hotfixes is included.

### GoldMine Premium

- Windows 10 compatibility
- Microsoft Office 2016 compatibility
- Add and access Links from Cloud storage

### GoldMine Web > Responsiveness

- GoldMine Web has a new responsive layout that is touch-sensitive and provides easy navigation to key elements. You can now access GoldMine functionality from a web browser on desktops, tablets or smart phones. Whether working in the office, in the field, or at home, users can access GoldMine Web to add, view, or edit contact data and to schedule, update, or complete activities and opportunities. Our modern design is similar across all supported platforms and browsers so users are able to work efficiently no matter their location or method of access.

### GoldMine Web > Contacts

- Click to dial for Primary or Additional Contact phone fields and custom phone fields where name begins UPHONE
- Links section
  - View and open Links added to a contact record in PE
  - Protected links are not displayed
- Filter Pending and History sections by activity type and user
- Additional Contacts – click to send email via default mail client

#### GoldMine Web > Activities

- Complete Activity from Activity List
- View and Complete Pending Opportunity tasks

#### GoldMine Web > Opportunities

- Add Opportunity from main menu
- View associated Pending, History, and Tasks on an Opportunity record
- Complete Pending activities and Tasks from an Opportunity name
- Search for Opportunity by name

#### GoldMine Web > Emails

- View/download Email attachments

When logged into GoldMine Web, view page source to determine the GoldMine Base and Contact Set database aliases currently in use. (Feature #227485)

## What's Changed in GoldMine 2015.2

Changes made since the GoldMine 2015.1 release; changes made in monthly 2015.1 hotfixes are included.

#### GoldMine Web

- Contact Search uses the operator 'begins with' instead of 'contains'.
- On Contact list, Company field does not link to primary website.

Diagnostic logs for GoldMine Plus for Microsoft Office (Word and Excel) are now user specific. To enable logging:

1. Open the appropriate location to create folder and file for logging:
  - a. Enter %appdata% in Windows Explorer address bar
  - OR
  - b. browse to user's appdata folder – typically C:\Users\\AppData\Roaming
2. Create folder GoldMine
3. In the GoldMine folder, create new text file and name to OfficeLink.log (verify there is not a hidden .txt extension)
4. Launch GoldMine and Office to gather logs as needed.
5. Once troubleshooting is complete, delete the GoldMine folder and OfficeLink.log

## What's Fixed in GoldMine 2015.2

GoldMine Premium 2015.2.0.159 / GoldMine Connect 2015.2.0.326

Issues addressed since the 2015.1 release; issues addressed in monthly 2015.1 hotfixes are included.

Issue Number	Title
135279	Some emails are duplicated when retrieved into GoldMine NOTE: Following upgrade, one copy of emails displaying this behavior will be retrieved. This copy should not be deleted as it will be seen on further retrieval attempts and will prevent the download of more duplicate copies.
202285	When an instance of a recurring activity synced between Outlook and GoldMine is edited in Outlook after being completed in GoldMine, a new instance of the activity for the same date/time is created in GoldMine on next sync from Outlook to GoldMine.
203231	When in a detail tab, editing or creating new, when clicking the INFO tab, the dialogue box flickers, the recently viewed items flicker and also other non-GoldMine applications
204454	Syncing Contacts with Outlook will only sync the first 35 characters of an email address from Outlook to GoldMine.

215128	When scheduling or Completing activities, the Tab view and the recently viewed list will refresh causing a performance degrade.
215322	Mobile and WEB not working when GoldSync or other 3rd party GoldMine related services are setup and running as a service and started prior the IIS
217078	Basic functions such as typing or copy/paste into Microsoft Word or Excel are locking up on Terminal Server environment with the Office Link active
218095	If a file is open on a workstation it will not sync using GoldSync, File cannot be compressed
219095	When creating an email in Outlook and actively set to link to Primary Contact: and then back to Not Linked >> a .Net error appears 'Object not set to an instance of an object'
220719	[GMME] Unable to link a contact to an activity as the contact list only shows blank row or the top 100 contact records in the database (and no data available when searching for an existing contact)
220802	[GMME] Searching for a contact in the "Add Contact" section of an activity returns no results
221585	Text\HTML; Charset UTF-8 emails are displaying corrupt when downloaded into GoldMine.
224575	remove the company name hyperlink in GoldMine WEB once a record does have a primary web site
224911	Update "FrontRange Community" in GMPE Help menu
224949	Update "GoldMine Online" in GMPE Help menu
224965	[GMWEB] After clicking sign in you are sometimes redirected to GMME and username/password are seen in address bar
225212	GMWEB - Provide Action icons in the ACTIVITIES >> Activity list. Provide a possibility to edit AND complete the Activity from there
225765	Web import is duplicating contact2 entries for each imported contact when a lookup.ini is in use
226019	[GMWEB] Request to allow linked documents and email attachments to be viewed from GMWEB interface
226037	Feature Request: Click to Dial from GoldMine Web
226735	[GMME] Contacts are not appearing in filters and groups in GoldMine Mobile
227522	[GMWEB] If a user has been deleted in GMPE the contact's Pending and History does not show any activities of those users for any non-master user
228126	Outlook integration performance decreases, may lock up local Outlook (since 2014.2 HF 2 causing the integration silently to disconnect), or even slowing down the SQL server for all users - due to Outlook integration not closing connections appropriately
228696	ERROR: You are not authorized to process this request Error code: 8 -When logging into GoldMine mobile, the user is almost immediately logged out of GoldMine Mobile but can use GoldMine Web.
228730	Downloading E-mails with a winmail.dat attachment crashes GoldMine
229222	[GMME] After auto upgrade of Chrome to version 43.xxx GoldMine Mobile does not show any data anymore only the overall forms
229241	[GMWEB] F2 Lookup values with single slashes / or double slashes // (as for comments) causing inconsistent and unexpected behavior
229809	Email rule action File to Inbox configured in GoldMine Premium Edition is not respected when email is retrieved during GoldMine Web login.
229820	[GMWEB] Feature Request - Auto-launch Send Mail composer when clicking on email field of Additional Contacts in GoldMine Web
230551	Userlogo overlaps GoldMine logo in splash screen since 2015.1 release
230607	[GMWEB] Systems with a localized SQL Server install will result in Error failed to get activity list when clicking on Activities in GoldMine Web
230665	[GMWEB] When adding a user defined field in Opportunity Manager containing any value for existing default field names like STATUS, STAGE, SOURCE opening GoldMine Web Opportunities results in error: Server Error: An error has occurred on the server. Please contact your system administrator.
230676	[GMWEB] When using labels for Opportunity and Project Management, opening GoldMine Web Opportunities results in error: Server Error: An error has occurred on the server. Please contact your system administrator.
230858	Constant Contact Integration downloads only at maximum 500 SNT records into History
231399	[GMME] When trying to search for a contact to link a forecast sale to in activities, no results are returned in larger databases if that record is outside the records initially returned.
231429	Websites entered in GMPE without http:// prefix are not working as a hyperlink in GMWEB until opened and closed within GMPE which will add the http:// prefix
231823	[GMWEB] - Lookup list for Result (Code) when creating a History item (without prior scheduling it) will be taken from Calls and not from the specific Activity type (Action, Event/Appointment)

231989	Outlook integration isn't auto-linking retrieved or sent emails consistently although the folders are added to the watched folders into GoldMine
232273	Record Curtaining level reverts back to NONE if a contact record is edited in GoldMine Mobile or Web
233116	current GoldMine Premium Edition 2015.1 does not recognize Office 2016 as a valid Office installation - request for making Office 2016 compatible with GMPE
233245	(GMWEB) - Hyperlink to Contact in ACTIVITIES page Calendar bring user to full contact list instead to the contact record
233247	(GMWEB) - ACTIVITIES show User Full Name only, while OPPORTUNITIES show USERNAME only, this is confusing and may lead users not being able to identify the correct users

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