

# GoldMine

## Version 2018.1 - Release Notes

GoldMine Premium 2018.1.0.261 / GoldMine Connect 2018.1.0.184  
Updated November 24, 2017

### Please Note

Run the GoldMine Premium 2018.1 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 2018.1 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 2018.1 as a new installation.

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

### What's New in GoldMine 2018.1

GoldMine Premium 2018.1.0.261 / GoldMine Connect 2018.1.0.184

Includes all functionalities added after GoldMine 2017.1 and any added in the 2017.1 Hot Fixes.

### GoldMine Web

#### Web customization

- New customization controls for the **User > Settings > Contact Details** area:
  - Hide/show/change order of sections:
    - **Pending emails and email history**: One must always be visible.
    - **Other information**: Details, additional contacts, opportunities, cases, links, and notes.
  - Changes are automatically saved for viewing on iOS devices as well.
- Contact detail settings are configured per user and are saved in the **LocalStorage** of supported browsers (user\_CustomConfig) and the database **ENVIRONMENT** table (new record type "W").

#### Link email messages to GoldMine contacts

- New ability to link email messages to a contact (similar in functionality to GoldMine Link):
  - Search for a contact, or create a new one, and link an email message to it.
  - Link an email message to a **suggested** contact.
  - Unlink an email message from a contact.
  - Relink an email message to a contact.
  - Move an email address from one contact and associate it with another contact.

### GoldMine Link for Microsoft Outlook

#### Link draft email messages to GoldMine contacts

- New ability to link emails while composing them in the Outlook draft folder.

#### GoldMine templates for emails

- New ability to use GoldMine PE-defined document templates within Outlook as part of the message or as an attachment.

### Search for a contact via email address

- The Search Contact field is now auto-populated with a contact's email information.

### Miscellaneous enhancements

- New ability to view a contact in GoldMine before linking (suggested contact and search results).

## Goldmine Premium Edition

### Overall visual updates, applied to as many areas of PE as possible

In the **Tools > Options > System tab**, new ability for the administrator to:

- Change background color scheme of the PE user interface.
- Change font face/size used in the PE user interface.

### Constant Contact integration upgrades

- New ability to upload a group from PE and associate it to a new or existing Constant Contact email list:
  - Contacts must have an associated email address to be uploaded.
  - This functionality exists in two places—the Group Configuration screen and Constant Contact Campaigns screen.
- New ability to display details of a Constant Contact campaign:
  - In the Constant Contact Screen of PE, double-click a specific campaign to view details such as email and click-through statistics.
- New ability to view hyperlinks that a contact has clicked in a campaign:
  - In the **History tab** of a contact, select a click action. In the **Preview** pane, view hyperlink(s) the contact has clicked.

## What's Fixed in GoldMine 2018.1

GoldMine Premium 2018.1.0.261 / GoldMine Connect 2018.1.0.184

Includes issues that were addressed after GoldMine 2017.1 and issues fixed in the 2017.1 Hot Fixes.

254339	When setting up email rules, a warning message states that it's possible to carbon copy as a rule, but there is no CC or BCC rule possible.
235057	GM Web graphical calendar day/dates not responsive enough on small devices; they are partly overlapping each other.
248871	WebImport does not update Contact2 records when a LOOKUP.INI is in place and one of the WebImport fields is numeric (XML format).
253620	Outlook Link - Being able to manually link an email when writing and then send it - like in Outlook Integration Plus via the GoldMine pane when creating an email.
238987	Emails are duplicated when using retrieving emails. The middle part of the Mail ID changes itself; therefore, GoldMine cannot identify that the email is already in.
209886	Only the 50 most recent campaigns at time of retrieval into GoldMine are available on the Constant Contact tab.
252734	Renaming a GM+ View template strips the HTML code from the template, causing the View to stop working.
248856	HTML-formatted emails created and sent from Constant Contact are not displaying formatting properly when downloaded to GoldMine.
215927	Ability to view which hyperlinks have been clicked when using the Constant Contact integration.

217356	Create a new Constant Contact details window that displays the details related to the selected campaign.
253365	When saving an email with special characters as a draft or outbox for later editing and sending, the special characters are destroyed.
253423	Using GM Outlook Link "View in GoldMine" resizes GoldMine to full screen.
253336	When a username has a special character (e.g., in Danish or German) and emails are sent, the name's special characters are destroyed.
253496	Outlook Link - Having a hyperlink for View Contact only on the value and not complete row when searching for a contact record.
253528	Outlook Link - Being able to search for email address when linking an email and searching for a contact.
253523	Outlook Link - When Link Email offers all contact records in a list containing any of the related email addresses (this helps when the user is in a B2B communicating to end customers)
253500	Outlook Link Configuration - Having a default option set and saved for adding or not adding the email address when searching for a contact record within Outlook in PE.
253774	When you select a contact on the screen, it would be nice if you could double-click to link. The Link button could also be the default button so when you press Enter, it would link the contact.
253823	Outlook Link - Not recognizing email addresses that don't have a contact's name from the record (E-mail Addresses Window > Contact's name) and therefore auto linking such emails fails and when manually linking getting message No Contact ...
253897	Server error - An error has occurred on the server please contact your system administrator - When clicking Refine in GoldMine Connect and selecting a custom screen and selecting the field comments >> Select (any operator) ...
253863	History tab filter exclusion breaking corrupting user.ini FILTERCONDITION= entry.
237160	Grid filters in Pending/History tab (most likely everywhere grid filters can be set) do not work consistently when the filter value has an ' (apostrophe).
240605	When manually copying an Outlook email to GoldMine from within E-Mail Center, the special characters are changed and corrupted.
215271	When replying to an email, inline images do not show in the reply and the email is changed to content type: css/text.
165979	With IE 9-11, cursor not visible in Reference when scheduling activity.
249609	Follow-up on RM 214724 - In certain cases, a customer is recognized only on replies; German characters are still destroyed.
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 a recipient to an email will automatically take all related email addresses instead of offering the selection dialog box.
252667	GM Web - Revoked Opportunities, Activities, or Calendar rights will remove tabs in GoldMine Web (ACTIVITIES, OPPORTUNITIES, CASES) but the Home dashboard still shows My Activities, Recent

	Opportunities/Cases.
156252	Duplicate screen tab names appear when you customize the screen tab names.
250662	Unable to log into Constant Contact via GoldMine to set up or create new campaigns.
252773	Even if the "Save attachments as linked documents" setting is unchecked, the new GoldMine Link for Outlook does NOT honor 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.
239832	Image attachments in emails sent from iOS devices add what appears to be header information to the attachment extension when downloaded into GoldMine.
246648	API assistance request - customer getting an error - object reference not set to an instance of an object on inserting data and retrieving data via API.
234347	Setting custom filters on any grids (e.g., History and Pending tabs, and most likely other grids as well) for blank values will result in inconsistent and wrong results.
223755	After setting the encoding for sending an email in GoldMine, Exchange shows the proper name of the retrieved email as =?iso 8859-1?B?MQ==?=.
252928	Error editing or viewing activities in GM Web - "Server error: error in activity controller action: get activity F2 metadata"
206519	After creating custom tabs and then moving their position, the tab list duplicates the custom tabs created.
238991	When the message ID contains an apostrophe, the email will be downloaded repeatedly.
230409	Setting a filter on a tab with a lot of records (e.g., History by Contact), then sorting the results by date, will result in a blank window as no records 'match' the criteria.
253026	Privilege errors when 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.
247943	Expanded notes windows appear when the activity-related fields (for example CAL>REF or CONTHIST>RESULTCODE) have a context-dependent F2 Lookup, and you try and open the specific field from an activity.
230812	Setting a filter (not grid filter but via Options) on a tab with a lot of records (e.g., with a certain reference) and scrolling down to get more results, the existing results will be visually duplicated repeatedly, and no real further results if a
253173	GM Web - An error has occurred on the server. Please contact your system administrator when clicking the Refine button for an advanced search.
252893	Provide better logging or information about possible HRESULT exception meanings, as they cannot be identified via Google.
247237	The Save as Group feature within the Contact Search Center allows curtained records to be added

	to a group.
232875	Constant Contact campaigns occasionally display as duplicated in the Campaigns grid. This can happen when 2 different users are logging into the same Constant Contact account but also in other instances.
217215	Replying to email with an apostrophe and a comma in the alias will cause an error stating that the email address is not linked.
247469	Build a Group contains unexpectedly curtailed contact records - group building does not respect record ownership and curtaining.
253146	Unable to open email attachments from Pending Email (email in the GoldMine Inbox).
253181	GM Web - An error has occurred on the server. Please contact your system administrator when clicking the Refine button for an advanced search.
253262	Unable to set the GMGoogleSync configuration, error when trying to access <a href="http://localhost/goldmine/configuration">http://localhost/goldmine/configuration</a> - Server error in 'Goldmine/Configuration' application.
253430	If a non-master user has the Add New option unchecked under the Access Tab of Tools > User Settings > Properties, they can't edit a contact record in GM Web, even if they are the owner of the contact record.
253476	Outlook Link - When searching for contacts, clicking the found name immediately opens GoldMine. This is inconvenient and should require a double-click.
253292	Clone a primary field view in Record Types Admin. Whatever name is chosen brings up a "This name is already in use" error.
253836	Special characters (e.g., French) are destroyed when saving an email template and when sending such an email to a contact.
254172	Change default action when linking an email to a different contact. Currently, the default option is "YES," but the preferred and least destructive default should be "NO."
254487	GM Web hangs on the landing page and when opening a contact record for an extended period before showing results.

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