

GoldMine

Version 2015.1

GoldMine Premium 2015.1.0.161 / GoldMine Connect 2015.1.0.351

Release Notes

Updated May 21, 2015

Note: To upgrade GoldMine Connect, it is necessary to uninstall any existing version of GoldMine Mobile or GoldMine Connect and install GoldMine Connect 2015.1 as a new installation. It is also recommended to clear device/browser cache and to restart IIS.

What's New in GoldMine 2015.1

Functionality added since GoldMine 2014.2 release; functionality added in monthly 2014.2 hotfixes is included.

GoldMine Web > Contacts

- Contact name on Contact list is link to Contact record. Left click to open in current window; right click to select to open in new tab/window.
- Fields on custom screens in Contact record are ordered by tab position set in GoldMine Premium.
- A Create History (checkmark) icon is available on the Contact list and record to allow users to add a completed call, action, or event directly to History without first scheduling the activity.
- Opportunities section is available on Contact record
 - An Add link is available for creation of new Opportunities.
 - Active Opportunities are displayed before completed Opportunities.
 - Opportunities are further ordered by most recent start date, then by most recent create date.

GoldMine Web > Activities

- In addition to Week view, Activities page now includes Day and Month views.
- Activities scheduled for multiple contacts will display as a single activity with multiple attendees instead of as one activity per contact on Activities page.
- Activities list Contact name is a link to Contact record. Left click to open in current window; right click to select to open in new tab/window.
- Link activities and emails to Opportunities, Projects, and Cases by selecting from dropdown in edit mode.
- Completed Forecast Sales linked to an Opportunity cannot be edited in Goldmine Web.

GoldMine Web > Opportunities

- Opportunities can be created from Contact record Opportunities section.
 - A linked Forecast Sale is always created when creating a new Opportunity. This Forecast Sale can be viewed from the Contact record pending section or the Activities page list.
 - New or active Opportunities can only be set to an active status. It is not possible to set an open Opportunity to Won, Lost, or Abandoned.
- An Opportunities list is available.
 - Select to view by Opportunity Manager and/or Status.
 - Sort Opportunities ascending or descending from column headers. A secondary sort by Company name ascending is automatically applied.
 - Opportunity name is link to Opportunity record. Left click to open in current window; right click to select to open in new tab/window.
 - Company name is link to Contact record. Left click to open in current window; right click to select to open in new tab/window.
 - Active Opportunities can be opened for updating by clicking Edit icon in list view.
- An Opportunities record detail view is available.
 - Default and custom Opportunity fields are displayed.
 - Closed Units, Price, and Amount are displayed when Forecast Sales closed as successful are linked to the Opportunity.
 - Custom labels and order of custom fields set in GoldMine Premium are respected.

- Active Opportunities can be updated or completed by clicking the Edit or Complete icon following the Opportunity name.
- Pending and History activities linked to an Opportunity can be viewed from the associated Contact record. Viewing activities from the Opportunity as well as viewing and working with Influencers, Tasks, Team, Issues, Notes, Competitors, and Details is not currently available through GoldMine Web.
- Opportunities can be completed and set to Won, Lost, or Abandoned.
 - All Pending Forecast Sales are automatically completed.
 - User can select to complete other Pending activities.
 - Tasks and Issues cannot currently be completed when completing an Opportunity in GoldMine Web.
 - Wrap-up activity is not currently automatically recorded in contact History in GoldMine Web.
 - Setting a Competitor Contract Winner when losing an Opportunity is not currently available through GoldMine Web.
- Currency symbols for Opportunities respect GoldMine Web server settings. Because IIS uses Network Service as Identity for GMMobileAppPool, it may be necessary to copy current settings to system accounts via Control Panel > Region > Administrative tab > Copy settings > enable copy your current setting to Welcome screen and system accounts.

What's Changed in GoldMine 2015.1

Changes made since the GoldMine 2014.2 release; changes made in monthly 2014.2 hotfixes are included.

The locations of the Code and Result fields have been swapped in the Complete activity window in GoldMine Web.

If the GoldMine system directory and/or SQL Server are not available when logging into Outlook with GoldMine Plus for Outlook installed and enabled, the user will receive a message 'GoldMine is not available. GoldMine Plus could not be connected.' If SQL Server becomes available, the user can manually connect without restarting Outlook. If the system directory becomes available, Outlook must be restarted to connect.

What's Fixed in GoldMine 2015.1

Issues addressed since the 2014.2 release; issues addressed in monthly 2014.2 hotfixes are included.

| Issue Number | Title |
|--------------|--|
| 149488 | GoldMine will sporadically crash with event viewer error referencing oleacc.dll when mouse cursor is moved over main menu items |
| 153792 | Major performance issues running any report that runs against conthist. |
| 217631 | Message regarding Microsoft Office during install updated |
| 218036 | security hole with exposing SQL password for GoldMine database in Log files for GMME and Google Apps Sync |
| 218038 | security hole when enabling Log files and APILogs for GMME - GoldMine user's password is exposed in plain text |
| 219509 | incorrect syntax error and GoldMine crashes, when downloading a constant contact campaign sent to a contact record with an apostrophe in the name or the e-mail address |
| 221355 | when the original sender has an apostrophe in the friendly name and the e-mail does have several recipients >> when replying to all the CC recipients will be stripped out |
| 222353 | GoldMine mobile does not release the license after you log out of GoldMine mobile. |
| 222906 | Constant Contact integration creates incorrect history records when writing the createon and lastdate fields in the history tab of GoldMine |
| 223032 | Completing a multi-user appointment will complete all appointments against the completing user, this is different to how a single appointment completes and needs to be changed. |
| 223053 | Use "EDIT" in a contact record with GoldMine Mobile and select "DONE," GoldMine Mobile removes the values the fields: Key2, Key3, Key4, and Key5 |
| 223815 | [GMME] When editing duration of an activity in GoldMine Mobile AND completing the activity, the new duration does not show correctly in GoldMine Mobile. |
| 223839 | Name window for completing activity for multiple users/contacts so it can be called by API |

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| 223983 | Specific RECIDs of contact records cause GMWEB not to open the Contact from a hyperlink e.f. from an activity in calendar to the contact >> it opens either nothing or instead the contact list |
| 224093 | [GMWEB] When using forced valid input for the state fields F2 Lookup entry that contains comments, the entry will not show as valid input in |
| 224301 | GMWEB does not display all activities graphical calendar or the Activities list when the user has more than 100 activities scheduled for the displayed activity type |
| 224447 | [GMWEB] Returning a tablet to a vertical (book) position some fields will overlap the field name and data. |
| 224703 | [GMWEB]Code field is missing from dialog box when schedule Calls, Actions, and Events. |
| 224795 | [GMWEB] Website with more than 40 characters cannot be entered via GoldMine Web client |
| 224832 | [GMWEB] E-mail addresses exceeding 35 characters can be entered but are truncated when saving / updating contact record |
| 224833 | [GMWEB] Adding Detail references exceeding 35 characters are truncated because you can enter up to 100 characters |
| 224837 | [GMWEB] Cannot add an extended detail anymore |
| 224856 | When completing a scheduled activity from a contacts pending tab the activity list will resort but the next appointment in the activity list does not cause a contact sync until it is clicked back and forth |
| 224897 | Unhandled exception errors cannot be cleared within Outlook with the GoldMine Plus for Outlook configured and the workstation cannot resolve the sysdir path |
| 225102 | [GMWEB] Provide Hyperlinks in the ACTIVITIES >> Activity List to Contacts (instead of opening the activity in edit mode) |
| 225538 | [GMWEB] If an 'other' or 'next' action activity is created in GoldMine without an time it displays at 12:00am in GMWeb. The activity displays in the list but unless the user scrolls down to 12:00AM it is not shown in the graphical calendar. |
| 225660 | [GMWEB] F2 lookup list for the reference field in scheduled activities all show the lookup list from Calls |
| 226720 | Replace Constant Contact dlls so that no workstation needs a separate new installation |
| 228189 | [GMME] GoldMine Mobile website shows three dots if you are trying to access through latest Chrome browser version (42.0.2311.90) |

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