

GoldMine Premium Edition

Version 8.5.1

Release Notes

Updated June 5, 2009

WHAT'S NEW IN GOLDMINE PREMIUM EDITION 8.5.1

Note: GoldMine Premium Edition 8.5.1 also provides the enhancements included with GoldMine Premium Edition 8.5.0, listed below.

GoldMine now supports **Windows Vista SP2**.

GoldMine now supports **Windows 2008 SP2**.

GoldMine now supports **Microsoft SQL Server 2008 SP1**.

GoldMine now supports **Microsoft Office 2007 SP2**.

GoldMine now supports **Windows Internet Explorer 8**.

WHAT'S NEW IN GOLDMINE PREMIUM EDITION 8.5.0

GoldMine now supports **32-bit and 64-bit versions of Windows Server 2008**.

GoldMine now supports **Microsoft SQL Server 2008**.

GoldMine now supports the **64-bit version of Windows Server 2003**.

Universal Search provides a single search box from which you can find contacts, notes, activities, e-mail messages, documents, and other items in GoldMine. This new feature is located at Go To > Search > Universal Search.

GoldMine Integration Services for Microsoft Outlook (GISMO) is now included in the GoldMine installer, no longer requiring a separate installation.

Cross-field validation enables an F2 lookup list to change based on the value in another field. For example, you can enter a value for the Title field that is only valid for a specific Department. To enable this option, click the Setup button in the Field Lookup (F2) screen and select "Lookup list depends on another field". Check the "Force valid input" box to enforce the validation.

A **Preview Pane** is available in the tabs within a contact record, providing a faster view into activities, e-mails, details, and linked documents.

Unattended installation enables GoldMine to be installed or upgraded without end-user intervention. To enable this option, check the box labeled "Create configuration file for unattended installation" when installing GoldMine on an end-user's computer. Then place the gmsetup.exe, gm_is.ini, and gmsetup_si.bat files into the same directory on another end-user's computer, and execute the gmsetup_si.bat file to install GoldMine.

In addition, future workstation **upgrades can be setup to install automatically**. After installing GoldMine on a server and creating the files listed above, go to Tools -> Configure -> System Settings -> Upgrade and enter the paths for the files. This automatic upgrade process will take effect in releases after GoldMine Premium Edition 8.5.0.

As a result of the changes described above, the Minimal Setup and option was removed from the GoldMine installer and the Install Locally option was removed from the License Manager.

The **E-mail Center and Opportunity/Project Manager user interfaces** have been redesigned for better usability.

Secure **SSL connections** now are supported in the E-mail Center. To configure an SSL connection, go to Tools > Options > E-mail.

The **IMAP** protocol now is supported in the E-mail Center, providing more security and better interoperability with other e-mail clients. To configure an IMAP e-mail account, go to Tools > Options > E-mail.

A new **System Settings** screen is available for administrators to establish global system settings for search performance tuning and other items.

Unicode database support enables multiple languages to be stored within a single GoldMine database. This option is available when installing, upgrading, or rehosting GoldMine. Note: selecting this option will significantly increase the size of the database.

New user settings are available for administrators to permit a user to **Insert notes, Edit/delete own notes, and Edit/delete others' notes**. These permissions can be set by clicking on Tools > Users' Settings > Properties > Access.

A new user setting is available to grant **permission for end users to customize their toolbars**. To prevent end users from customizing their toolbars, go to Tools > Users' Settings > Properties > Access and uncheck "Customize toolbar".

The GoldMine Lookup Wizard now enables users to **look up contacts matching multiple fields within Details**. To use this feature, click on Tools > Filters and Groups > SQL Query > Build... to launch the wizard, and then select "Contact Information" and "Contacts containing the following Details tab information".

A new **Pending RSVP folder** is available in the Activity List, displaying the pending activities for which the user has requested notification via RSVP.

Additional configuration options are available in the Service Center. Category, Offering, and Origin now are optional columns to be displayed in the case list view. Case field labels also can be modified by users with master rights.

A single case can be associated with multiple contacts, using the new Contacts tab displayed in the case view. With this feature, activities and e-mail messages associated with multiple contacts also can be linked to the same case.

When a case is reassigned, escalated, abandoned, or resolved, there now is a History entry that indicates what occurred. This history is viewable from the case or from the primary contact for the case.

GoldMine includes new tools for managing relationships between records in your database. To set up relationships between records that already are in your database, use the new **relationship tree builder** at Tools > Data Management > Create Default Relationship Trees. To add relationships as new records are created, check the **"Relate To" box** when adding a new record. The section name used when creating a new record can also be set by record type (Tools > Configure > Record Types, select a record type, click Edit, and enter a **Relationship Tree Section Name**).

The **updated column chooser in the Contact Search Center** now includes the ability to display the contact's e-mail address and web site as columns in the Search Center and Contact List views.

Users now can run a **single search for primary and additional contacts within the Contact Search Center**. To use this option, select Search by: Contact (primary or additional).

Individual activities can be printed or copied to other applications. To print or copy an activity, right-click on the activity and select Output To.

The Field Properties screen has been redesigned to **simplify the process of changing global field labels**. To access the previous settings, including the ability to define a local label specific to a contact set, click the More Options button on the Profile tab of Field Properties.

The user interface for **scheduling an activity with multiple contacts** has been redesigned to be easier to use and more powerful. To add multiple contacts to an activity, click on the search icon next to the contact field on the Activity Detail tab. By default, the activity will be set at the same time for all contacts. To make the activities occur in a series, select the Series tab and choose "Schedule a series of activities with different times for different contacts".

Activities now can be scheduled based on a maximum number of activities per day, or based on fixed activity duration. In addition, a "wrap up time after each activity" can be used to provide a delay between the completion of one activity and the beginning of the next activity.

WHAT'S ENHANCED IN GOLDMINE PREMIUM EDITION 8.5.0

Keyboard navigation has been enhanced to provide better access to core product features without using the mouse.

Synchronization and database rehosting performance has been enhanced, especially when using the Firebird database.

The 2 GB size limit has been removed for synchronization transfer sets and installation files for one-button synchronization.

Concurrent GoldSync connections are queued to improve reliability. As users connect to a GoldSync server, they automatically are placed in a queue, up to the number of users established

in the Number of Connections screen within GoldSync configuration. If simultaneous processing of concurrent connections is required instead of queuing, please contact your Solutions Partner or FrontRange Support Services for recommendations and instructions.

E-mail messages sent when viewing a case are automatically linked to the case. While viewing a case in the service center, click on Actions > Send E-mail Message in the top menu bar.

The **Linked Document Mover** has been enhanced with the ability to restrict the locations from which documents will be moved. This feature is available at Tools > Data Management > Move Linked Docs and Attachments.

The **Details tab now provides 12 customizable fields** for each type of Detail. Previous versions of GoldMine provided 8 customizable fields for Details.

The import and export wizards now have **simplified support for comma-separated (CSV) files**. To import a CSV file, click on File > Import and Export > Import Contact Records.

Automated Processes can create cases, using the Create Case action in Event Properties. To create or edit a process, click on Tools > Automated Processes > Manage Processes.

For consistent terminology, the Tracks tab has been renamed to **Processes**.

The sort order of records displayed in the Contact List and Contact Search Center can be synchronized to allow users to **scroll through records in the same order as they are displayed in the Contact Search Center**. To enable this option, right-click on the results in the Contact Search Center and select "Set Record Scroll Order".

The **Contact Search Center supports the percent symbol (%)** as a 'wildcard' for matching partial names of contacts or companies.

Macros can be added to custom toolbars. To use macros, first add the macro buttons (Record, Edit, Stop, and Pause) to the standard toolbar by clicking on the down-arrow button at the right end of the toolbar, and clicking on each button. Click the Edit button to view existing macros and drag-and-drop them to a custom toolbar.

Notes are now stored in a dedicated NOTES table for better reporting, auditing, and data synchronization. Previous versions of GoldMine combined all notes for a contact in a single field.

Because of this new structure for Notes, GoldMine does not support Global Replace on notes or filters based on notes. However, Universal Search provides similar functionality, as it enables the user to search within notes and then use the list of matching contacts as an active filter. To do this, check the Advanced box in Universal Search and select Notes as the only item within "Find these items". Enter the search term and click Go. Check the box in the Tag column in the first row of the search results. Scroll to the bottom of the search results and shift-click the Tag column in the last row. This will activate a contact list of all the contacts with notes that include the search term.

A cancel button has been added to the toolbar that appears when editing notes for a contact record. To cancel the entry of a note, click the red X that appears in the Notes tab.

The Tasks folder of the Activity List now shows the related opportunity, project or case and enables the user to navigate directly to it, by clicking on the link shown in the Regarding column.

The **Fax field in the Additional Contact record can be relabeled** for use as a Mobile number or for storing other data. To change the label of this field, include the following entry in the [GoldMine] section of the gm.ini configuration file: AddContactFaxLabel=[*yourlabel*]

Users can now **cut, copy, and paste field data with a right-click** on the field. In previous versions of GoldMine, right-clicking on a selected field would display the lookup list for the field. To display the lookup list, press F2 or the Application Key (on most keyboards, this is a button with a picture of a drop-down menu). In addition, the auto-complete feature is activated when a user begins typing data into a field, as an alternative to opening the lookup list window.

The E-mail Center now supports integrated Windows authentication using **NTLM**. With this feature, e-mail access can be set up without entering or updating the password in GoldMine. To configure this option, go to Tools > Options > E-Mail.

E-mail Center performance can be configured with the following settings:

1. (New) When messages are deleted in the E-mail Center, they are not immediately deleted from the server until the connection is closed. This behavior provides the fastest performance but can cause deleted messages to reappear as duplicates in some scenarios. If this problem appears, the following <UserName>.INI setting can be used:

```
[Internet]
PopImmediateDelete=1           (closes server connection after each message is deleted)
```

The default value for this setting is 0, which keeps the connection open after deleting a message.

2. (New) GoldMine automatically sends periodic messages ("no-ops") to the e-mail server to keep the connection open for fast response time. By default these messages occur every 10 seconds. Some e-mail servers require more frequent messages to maintain the connection. To change the frequency of these messages, use the following <UserName>.INI setting:

```
[Internet]
PopNoopTimer=nnnn           (where nnnn is the number of seconds between messages)
```

3. GoldMine automatically disconnects from the e-mail server if it has no related activity for 10 minutes, by default. This is useful, for example, when using both the Online and Auto-retrieve options with an e-mail server that permits only one connection. To change the time delay before automatically disconnecting, use the following <UserName>.INI setting:

```
[Internet]
PopIdle=nnnn               (where nnnn is the number of minutes until disconnect)
```

WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 8.5.1

Note: GoldMine Premium Edition 8.5.1 also provides the fixes included with GoldMine Premium Edition 8.5.0, listed below.

ID #	Issue Description
101874	Contact Search Center appears to hang when search term is configured to 'popup when selected' and focus is reset to search center multiple times
101863	When typing the @ sign for an email address on a Danish keyboard, the focus shifts

to the search box

101684 When executing an automated process that updates Key1, focus is changed to another contact record

101562 Activities in history are displayed in the incorrect order after sorting by date

101493 E-mails without unique message IDs are not downloaded

101407 Activity scheduled for multiple contacts and multiple users is repeated once per user

101323 There is no feedback to the end user when using 'get selected message' for a message that is already in the inbox

101289 Sorting on Forecast column in opportunity manager is by characters, not on their numerical value

101261 Cannot uncheck 'Link to selected Contact:' when editing previously scheduled activity

101221 Page style and column schemes are not available for My GoldMine

101214 Upgrade to 8.5.0 leaves CONTSUPP.CONTACT NOT NULL

101159 Opportunity Manager focuses on oldest entry when selecting History tab

101098 Adding an automated process that updates a field causes the contact tab to change positions

101040 Previews of Office 2007 documents open in a separate window unless registry change is applied

101026 GM7S32.dll call GMW_NewRecID returns a corrupted version of the parameterized LPSTR

101019 Unattended installer does not remove registry key 'GMInProgress' after installation

100996 Performance issues when opening GoldMine due to usage of COALESCE function in SQL query

100914 After dragging an e-mail to another folder, focus is on the oldest message rather than next message

100798 Toolbar and menu bar customizations are not retained when menu access settings are changed for user

100770 Activating a Group of 1000 or more records takes over a minute

100746 Using the Edit dialog to change stage field on opportunities with multiple forecasts results in overall and first forecasted sale being set to zero

100716 Curtaining of records causes GoldMine to use maximum CPU when non-master user views calendar

100715 Activity on curtained record for non-master user does not appear on calendar

100709 Record counter is not properly updated after opening a record in contact search center that is outside the active filter

100700 Taskbar is duplicated if additional Global items exist before upgrade

100678 Unable to export Knowledge Base topic pages

100669 E-mail Addresses window opens with default action to create a new e-mail address

100315 Case template truncates Subject at 20 characters

100060 Automated Process cloning causes crash

99958 Daily - Day Timer (detailed) and Daily Appointment List Reports display HTML tags in notes

99950 Server location is requested twice for the 'connect to existing database' installation option

99904 Unexpected sorting for activities in history tab

99675 Certain e-mail signatures can cause e-mail body to become empty after download

99398 Contact List view is not limited via the Tag All feature in the Contact Search Center

99353 Incorrect 'POST' method used for web import templates

99269 All data packed into transfer set does not retrieve on remote

99121 Change in stage will insert the Forecast value of the Opportunity into the duration field of the created history item

98789 Incorrect behavior of macros on Vista

- 98547 Slow response time for first menu action after login on Windows 2008
- 97507 Preview Pane opens Microsoft Word and Excel documents in separate window
- 96698 AllUsersForFilteredRecs sync setting is not respected
- 95898 GoldMine sync process will "stall" at random when a site displays a message of "please wait" in the process monitor window.
- 95896 While synchronizing more than one site, the message "The GoldMine supervisor will perform system maintenance" is displayed
- 95889 If sync process terminates, users cannot sync until the SYNCTASK table is cleared
- 83613 Required Field Alert appears intermittently even when required field is populated
- 78386 In Microsoft Word, fields listed under the heading "_DATABASE" are not sorted
- 42027 E-mails older than 2 years do not come in with the correct date when converted or linked from Outlook

WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 8.5.0

ID #	Issue Description
96767	When editing the alarm time for a previously scheduled Event, the alarm time changes back to 12:00 am
96130	When replying to some HTML e-mails sent from Outlook 2007, the replied text is truncated from the e-mail
96007	Auto-complete enters the wrong field value if the selected lookup list entry contains a semicolon
95688	If the file attribute "A" (Archive) is not set on the transfer set file, the file is not downloaded by the remote and is not deleted from the server
95298	Data is not rehosted from dBASE database for user-defined fields with field name in 'u_' format
95283	When a Forecasted Sale has been scheduled, you cannot edit the Forecasted Sale to change the Contact to an Additional Contact
95232	Manually linking of e-mails in Outlook produces prompts to file in GoldMine, with no means to suppress the prompt
95203	Scheduled For date in History tab is different from the scheduled date of the activity
94941	When selecting a different group in the Groups tab via filter on Group Name column, group members do not refresh
94915	Contact record window not syncing with the Contact List window when you scroll to the bottom of the contact list window then back to the top again
94771	When creating a new contact while linking an e-mail, the phone number is always in USA format
94632	Real-Time folder doesn't have a preview pane
94620	Opportunity sales summary is missing from completed opportunity
94508	Text in 'Send request with appt' dialog says to click 'OK' but the actual button label is 'Add'
94209	Contact with Notes Tab report prints notes upgraded from 6.7 with long date in a continuous line
93989	Alarms are set incorrectly for activities scheduled for multiple contacts spanning multiple days
93828	When correcting the spelling of a manually selected section of text, incorrect characters are replaced
93814	Ext field value truncated after autofill
93717	Search for phone numbers with only one character does not return results

93728 Unrelated history items are shown after deleting history record within rolled up relationship tree

93598 Automated Processes not executed in order of designed event number

93451 Web Import template created with Perl script when CDO is selected

93449 With 24 hour format unchecked, GoldMine will still show in 24 hour format based on Windows settings

93440 Editing the view below the contact list can corrupt the view on contact tabs

93319 Notes fields aren't shown for some reports

93072 Case becomes unlinked from contact after merging contacts

92845 Activity code and Result code fields do not have lookup list in Statistical Analysis

92629 Selecting to E-mail Contact from a calendar activity linked to an Additional Contact creates email to Primary Contact instead of Additional Contact

92597 If contact record is put into group by more than one user, neither user can remove it

83611 GoldMine closes with no error when selecting Tasks tab for Opportunity Template if Task Dates To Be Based field is not populated in Template Properties

83449 Change to document extension causes corruption in attributes of synchronized document

83344 Incomplete documentation on automated process option "Attempt to trigger only once"

83262 Template loses HTML formatting when switching from primary to additional contact in To: dropdown.

83259 Extra spaces shown on Recently Viewed list for converted additional contact

83158 "%3E" appears after recipient e-mail address after adding multiple CC recipients with friendly names on Vista

83142 E-mail attachments not moved from TEMP directory on the last day of a month or the beginning of a new month

83081 Automated process prints documents for incorrect contacts

83010 If GoldMine is minimized and an alarm appears, if the user selects "View Contact", GoldMine will not "restore" to show contact

82910 Automated Process is not merging documents in expected order

82832 Change in user's access settings not synchronized to remote

82791 Automated process prints documents for incorrect contacts

82650 Forecasted sales for other users are completely hidden from user when access to others Calendars is removed

82637 Slow loading of custom screen with large number of custom fields

82611 Changes to a contact record name will not apply when scheduling activity

82567 Pasting into the activity notes field adds a carriage return

82554 Web Import fails when using Exchange 2007

82542 Lookup Wizard truncated field to 20 characters in SQL query

79113 CSV export does not include Notes and saves as .txt file

79085 Process Monitor interrupts user the first time auto retrieve is processed after logging in

79084 Re-Link button on toolbar always moves the e-mail address to the selected contact

79080 Inconsistent logging of field history changes

79074 Inconsistency in Lookup lists when completing calls within one Call Type after changing the Call Type in the Completion window

78980 Frequent synchronization using MS SQL 2005 causes event logs on the remote: 'Cannot create new connection because in manual or distributed transaction mode.'

78955 Line breaks removed when editing a note

78952 Blank date fields rehosted from dBASE database shown as 12/30/1899

78980 Frequently synching on MS SQL 2005 causes event logs on the remote: 'Cannot create new connection because in manual or distributed transaction mode.'

78898 Document merge in literature fulfillment printed for incorrect contact record

78894 Unable to search on full e-mail address if its over 40 characters

78740 Cannot add a contact to relationship tree using look up an existing contact lookup with E-mail as search criteria

78631 GM+ View is visible when scrolling through Semi-partial curtained records (tabs hidden)

78548 When printing emails, there is no indication of an attached document

78512 Sync logs in GoldSync Administration Center show incorrect site name

78466 Forecasted sales analysis cuts off large numbers

78464 History/Pending tab with large number of records does not show most recent history on first sort

78456 Sync to Outlook doesn't display the contact name in Outlook's calendar

78451 When recording macro, tabs cannot be opened by keystrokes

78450 Log this alert in history...' option appears unchecked even when active

78447 Arabic characters are displayed incorrectly in the contact search center

78423 When scrolling through an active filter, record count changes and an ADO Error is generated in the Windows Event Viewer

78388 Public group not available in drop-down list for the "add to group" action in automated process

78124 E-mail message with 1000 continuous characters generates "i500 5.5.0 Syntax error - line too long"

78117 Until contact search center is refreshed, user-defined fields are displayed with a maximum of 25 characters

78076 Forwarded message body does not show all GoldMine E-mail recipients

78004 Projects window is not retained between user sessions

77897 After scrolling past 1000 e-mail messages in the History tab, user cannot open an e-mail message

77859 Sync Spy truncation on Vista

77843 Single-character field appears too small in SQL query results

77825 Completed sales by user ignores cents (only adds whole dollars)

77813 Document name with over 35 characters is truncated on linked documents

77763 GM+View template containing &emailaddress causes application error if active when launching GoldMine

77734 E-mail template sent to a filtered group will only merge the information of the current contact

77709 Option to send a meeting request update is re-activated after user unchecks the option

77688 Forecasted Sales of amount/price of xx.74 will automatically be reduced to xx.73 (for 64 < xx < 82)

77678 New Record creation via Referrals tab context menu causes application error

77539 Activities scheduled with a "Notification" but NO Alarm are still sending an Alarm to the scheduled user

77507 Incomplete documentation on Service Center

77469 Plain Text e-mail allows HTML text to be pasted in

77446 dBASE expressions are not respected in signature file

77442 Calendar refresh in outline view causes GoldMine to take focus from every other application

77357 Incorrect results when sorting on Age column in opportunity manager

77246 Case History tab sort is not most recent at top and does not remember user selection

77230 Error message: Cannot insert duplicate key row in object 'dbo.HISTORY_ITEM' with unique index 'HISTITSEL'

77154 Office documents (Word/Excel) added via hyperlinks cannot be seen in GM+View Tab

- 77150 'Remember Lookup By' does not work when clicking Search button with CSC open
- 77099 Notes print from earliest to latest
- 76926 Missing CAL record message appears when syncing a "draft" e-mail to the server
- 76865 User defined fields are not populated in Contact Search Center when searching by a Filter or Group
- 76861 Some options in context menu become inactive in CSC when scrolling down more than 1000 records with activated filters
- 76815 Export wizard truncates secondary contact e-mail addresses to 35 characters
- 76767 Special characters are not showing correctly when receiving e-mails
- 76765 E-mail History reference text longer than 20 characters is truncated
- 76586 GoldMine automatically displays the date format from the Windows regional date settings
- 76565 When printing the "Contact with notes" report, the notes are listed with the oldest date first
- 76481 Report with large history record only showing 'Notes' information on first page
- 76396 Title is incorrectly displayed for additional contact added as Influencer when field is empty
- 76189 Leads Analysis does not show values when table name begins with numbers or contains blanks
- 76075 Merge & Edit do not give a message that GoldMine Plus for Microsoft Word is not installed
- 76071 Filter counts correctly but does not show correct numbers in search center
- 76022 Free/Busy tab when scheduling activities falsely alerting of a conflict
- 75803 Result Code checkbox is always disabled in graphical analysis
- 75802 F2 lookup is empty for second filter condition added in the contact search center
- 75784 Hot key for Mark as Private does not check box in Schedule an Activity window
- 75742 Upgraded data does not have appropriate friendly name associated to email address of additional contact following merge.
- 75736 Clone of closed-won opportunity creates too many opportunity records
- 75710 Unable to use Office Link (Word) with Vista - User Account Control (UAC) Enabled
- 75699 Application error when using alarm notification taskbar setting in GMPE
- 75633 INSERT INTO error when converting an additional contact to a new record
- 75591 If laptop user has an active filter, a saved sync wizard profile will update to the active filter instead of its saved settings
- 75585 After creating a macro with keyboard shortcuts, the edit macro button is grayed out on the toolbar
- 75546 If CSC is opened with no value entered and operator that does not require a value is selected (Is Empty or Is Not Empty), search does not trigger
- 75532 When filtering a Group of contacts, only those records in the first 500 display unless the entire list is loaded prior to filtering
- 75513 Label customizations in the opportunity manager are not respected in the opportunity tab on the contact record
- 75452 SQL temp tables created when creating new record do not consistently drop
- 75364 If multiple detail names begin with the same characters, then entries for the detail with the longer names will display on the custom tab for the detail with the shorter name
- 75335 GSSITES table rebuilds itself every other time GMPE is launched on Vista
- 75329 Process Monitor window can get saved off the screen, making it inaccessible
- 75300 Contact search center does not show all data after resorting by a column header
- 75277 Inconsistent prompts for completed activity information when linking a message in Outlook
- 75207 Contact notes saved to a wrong record using 'Recently viewed' list

75096 Data not populated correctly in Adobe document
75073 Dates on the navigation pane calendar do not display in bold font for days with Events scheduled
75001 Sorting a group does not retain the sort order when scrolling through the contacts record in the active group
74987 While editing a SQL query, if an alarm pops up, the text in the SQL query box gets erased
74973 Unmarked button available in Process Monitor Window - "close when all processes are done"
74957 Selecting 'options' for a calendar report actually opens the 'profile' tab instead of the 'options' tab
74893 Scrolling by Company via arrows does not display all records seen in Contact Search Center
74847 Double click on e-mail button in the toolbar causes GoldMine to become unresponsive
74834 Using the mouse wheel when editing a contact note changes contact record in view
74831 "Start time cannot be empty" message appears when scheduling an activity to a group without spanning across multiple days
74816 Macro icons cannot be reused for different users with different macros
74647 When viewing another users preferences, the "Full Name" value is taken from the logged in user
74547 Notes are saved to a wrong contact if arrow buttons are used while typing a note
74489 Notes upgraded from GoldMine 6.7.70226 are incorrectly formatted
74380 Activities are duplicated in the activity list, when viewing data for another user with activities scheduled against curtained records
74292 Cannot activate a Group and a Filter at the same time
74282 Time Clock sorts by day of week instead of day of year
73992 Sync with Outlook profile does not save mapping settings or respect the setting when deleted
73991 Information on the bottom status bar does not update properly when sorting by different criteria
73990 User toolbar settings documentation update
73989 When searching on Company is not Empty, nothing comes up
73988 Issue seen when editing the pending activity that is created by escalating a case
73987 Idle time logout is not configurable on Vista Machines
73955 Lookup.ini is not respected when new contacted is created via gmxmlapi
73893 Military time is displayed in opened e-mail message
73842 Command Line parameter -a does not allow user to enter GoldMine username
73807 MSSQLMaxBrowseRecs setting no longer affects Contact Search Center Searches and results in inconsistent query against CONTSUPP table
73769 When adding an influencer or team member to an opportunity, an unrelated contact record will open
73768 When creating New Company and Contact, doesn't check for duplicates the first time
73666 When a group member is deleted from Groups tab in Filters and Groups screen, the screen refresh moves you back to the top of the list
73494 Default Sort for Opportunities is Account descending
73490 When adding cc to email, sporadically receive error Runtime Error! [path to \gmw.exe] R6025 - pure virtual function call
73472 If service case mask is changed to #### , pending activities disappear when edited
73438 When a detail is deleted, the screen refreshes and moves you back to the top of the list
73433 Unable to delete books with no name from Knowledge Base
73407 Import Wizard does not respect [Autoupdate] section of lookup.ini with option to do

so selected

73398 Unchecking the group option in the History tab does not release the group

73363 Recently viewed items do not sync with the main opportunity manager window

73351 Sale amount is doubled when you complete a sale from the opportunity pending tab

73298 Linked Documents default sort is by date in ascending order

73151 User can't scroll beyond a certain number of history records with filter applied

73149 When you type in a zip code for a newly created contact, the field doesn't auto fill

73146 Renamed folder in knowledge base can become non-editable

73120 cannot re-enable menu item once deselected for non-master user

73110 'Adding Contact to an Existing Company' Help topic is incorrect

73032 ZIP code lookup activated after single character of ZIP code is entered for additional contact

72911 Only one e-mail address is moved when converting an additional contact to primary

72864 Fields to insert don't show up in order by Contact 1 or Contact2

72788 Sync Service does not respect Sync Settings

72737 Classic menu causes GM toolbar to be reset to default every time the user logs in

72695 Alarms associated with activities that auto roll-over are not updated to match activity date

72684 Zoom / previous option does not allow you to scroll through all history records in history tab

72636 Scroll order for activated filter does not respect Optimize Sort Order field

72610 Date field corrupted in new record dialog

72601 Follow-up activity from email linked to case is not automatically linked to the case

72284 Address2 field not populated when retrieving linked document

72160 Cannot import VCard after Web Import is configured

72028 GoldMine Hangs and freezes when editing a project from the project management centre

72015 User without scheduling permissions can schedule activities from search center

72000 Address & Phone Report with sort on Contact2 field run against a filter does not return all records meeting filter criteria

71972 Scrolling messages in Inbox also scrolls messages in Inbox sub-folders

71892 When selecting to print a report, Category field displays as Contact even if Report listing is for another Category

71891 Linking non-linked activities on completion window will not link activities although User has possibility to do so

71890 Clone Crystal Report does not create a copy of existing report. Clone function behaves like New function

71872 Unable to install GM if there is more than one SQL instance on the system

71853 When deleting a resolution note in Cases, the note is removed from the UI, but still appears in the database with ~~Deleted, instead of removing the note completely

71737 Date format in contact list is different from contact record

71598 Outlook calendar records deleted with synchronization

71519 User can only look at 2 emails from the activity list before they are forced to close the window

71517 Closed amount is being assigned to opened opportunities - amount does not even match forecasted sale

71352 Outlook contact deletions do not sync

71286 Error message when opening RDP file from links tab

71268 Linked Document Mover only supports a single path

71265 Outlook Sync does not respect New Record Ownership settings

71205 Automated process elapsed time trigger is ignored

71134 Cannot send a meeting request to multiple contacts
71113 Memory leak caused by Relationships tab
71108 Search entered in box automatically searches by first name only
70977 Incorrect lookup lists displayed for Reference when completing activity
70934 Refresh issue: The window title does not change to reflect that it is now searching by company
70930 E-mail sent from KB does not include attachment
70693 Cannot vertically scroll the Gantt chart
70641 Old GoldMine Setup File used in one-button installation
70469 On Edit menu, Copy, Cut and Paste are always grayed out
70414 Ability to add multiple contacts to relationship tree
70280 Phone number for Contact Info pasted into Pager Message is incorrect
70279 Option to send e-mail to user when alarm not acknowledged does not work
70277 Task focus lost after editing task
70276 Unlinked e-mail shows in sent folder as linked e-mail
70269 The import wizard will not import data from a field larger than 50 characters
70136 Text search on primary fields, there are inconsistencies... unless the key word is the first word in the field search can fail.
70103 Can't see opportunities or projects in Activity List when clicking on open activities
70059 Project task created for a user group to not show in the activity list
69990 Project Template tasks dates are not respected when creating a task for a new project created from a template
69960 Documentation does not include information regarding SQL protocols/enabled order for client workstations
69941 Automated Process does not trigger all events and sequential order of events is not respected
69910 Slow response during Relationship tab refresh
69820 Service reports do not appear in Print a report..." wizard"
69719 Auto populate of city and state not working when creating new record
69679 Default path is incorrectly displayed in the installer after browsing to a previous installation
69648 Amount field rounded incorrectly if it exceeds 8 characters when sale is completed
69603 Importing notes does not merge to the existing note
69602 Word Merge bottleneck in automated process execution
69595 Status drop-down list does not refresh when switching between Project and Opportunities
69594 Last Record button jumps only 500 records, and not to the last record as indicated
69555 'Refresh' button is always inactive in activity list
69469 Text formatting lost in notes after upgrade
69261 E-mail is linked to the wrong contact after an alarm pops up
69183 Contact Search Center settings ignored when creating a new case
69149 Case number identity seed is ignored
69101 User without merge permission can access merge & edit in Document Management Center
69069 Impossible to schedule a sale to an additional contact
69023 Write button on toolbar provides access to Document Management Center when menu access is removed
68879 Edit Menu (Cut/Copy/Paste) inactive
68868 Administrator unable to control access to tabs
68818 (Copy//)Move functionality: when source and destination database don't have the same structure the records in the source database are not deleted

68768 Details tab with over 500 records loses context menu options after scrolling to the end of the list

68755 Wrong activities displayed after activating rollup and switching contact record

68629 Sales Analysis Quota diff % calculation is unintuitive

68626 Window states are not restored when exiting via Switch User

68522 Remove Tracks is only available in Classic Menu

68361 E-mail bodies are truncated if the line length exceeds 998 characters, when sending via certain ISP's

68302 Reply to all brings wrong sender's and recipient information when several E-mail accounts are setup

68272 Digital Signature Verification Failure

68199 GMW.EXE application continues to run in windows Task Manager after closing GMPE

68194 INSERT errors on upgrade

68155 Activity List only loads first 500 activities, even after scrolling or sorting the list

67968 '%' and '?' as Wildcards do not work anymore in CSC

67892 The Outlook Sync profiles are not saving field mappings

67723 Month view calendar is not scrollable via keyboard arrows

67551 There is no option to select "All" users on the activity list

67457 Record Type field not populated correctly in new record for default record type

67404 Unable to scroll past 2000 records with active filter based on contact2 field

67294 User without menu access to Tools > Options is able to customize tabs displayed in contact record

67284 GoldMine does not apply more than one signature.txt file

67218 GoldMine receives multiple copies of e-mail with checked 'skip read' option

67212 Online help file not upgraded correctly

67158 Completing unscheduled call pops incorrect F2 lookup list for Reference Field

67114 Literature Request - print labels for more then one contact at the same time

67022 Project Manager sorts projects in reverse alphabetical order by default

66996 Group by in Contact List does not display all data

66972 Daily Day-Timer (detailed) report displays incorrect dates if you span multiple days

66971 Selecting the "Go To" option for a public opportunity opens the Opportunity manager with display of current user's opportunities

66712 Sender's Full name truncated (in Header) in sent E-mails if recipient uses Outlook (2003)

66666 notes with *** in older version will lost their formatting after being upgraded to GMPE

66479 "Unable to initialize" message when syncing with Outllok 2007 on Vista

66406 Contact list does not display all contacts in a large database

66367 Contact Search Center report, when editing the fields get a &SyParam1 value that is not documented.

66355 Phone Formatting affects phone1 searching

66353 Forwarding e-mails to a secondary contact from an open e-mail does not work, only wks from inbox

66326 E-mail address lost if address for additional contact is entered first

66275 Notes do not merge with target record

66272 Deleted notes are displayed in Reports

66270 New user setting needed to prohibit Notes deletion

66266 Case management report prints BJ instead of the Pound sign (£)

65953 Workstations are not seeing the alias for a new database

65861 Zip Code Validation Does Not Work When Creating New Record

65680 Contact Search Center does not respect size from previous settings

65637 Sales Price and Amount field values do not store data properly

65629 Group count changes when scrolling through large activated group
65468 Noticeable delay between the message request and message display
65410 E-mail Center cannot display Russian text correctly
65165 Greek Chars are destroyed while import from dbf-file
65074 Grid headers are wrong when using Thai Language
64786 Unable to schedule forecasted sales with negative amount values
64784 Cannot disable Status Bar unless Classic View is used
64734 Single click on e-mail folder changes icon but does not open the folder
64689 Users cannot edit case history items
64587 OPMGR Notes are merged when upgrading from an older GoldMine version, for the first note entered in Premium Edition
64433 Cannot display Code on History tab
64221 New Contact is automatically related to current contact
63925 Tabs are not saved when exiting via switch user
63909 Typing a lookup value does not jump to that value in the lookup list
63392 Unable to Dupe Check on e-mail address when creating a new Company
63139 Literature Fulfillment creates invalid History entry
62911 In an F2 lookup window right-click to output to clipboard only outputs first item
62909 Adding an influencer to an opportunity changes contact record to wrong contact
62902 Non-master user cannot perform analysis from the activity list
62859 Printing out Project Notes field onto a report displays the HTML code
62591 Org. Chart folders limited to 68 on root level.
62581 Screen Designer toolbar positioned almost off screen when initially viewed
62558 Undo Change to Contact menu option doesn't work
62346 Enable administrators to set permissions around contact record notes
62339 Unable to insert additional contact in the To field when creating a new e-mail message
62336 User's full name is missing an apostrophe when saving a note under the notes tab
62215 There is no simple search across different contact data structures
62135 Field security appears to be dependent on record type
61699 Sort Order in Details incorrect
61686 Lookup-window for new time setting on snooze alarm is behind the alarm window
61557 F2 lookups on Info tab of a detail record are not updated on detail type change
61487 Special characters from Notes are destroyed in Summary view of Contact window (Next Activity: / Last Activity: / Last Note:)
61451 Activity List displays events as occurring 12/30/1899
61427 Incremental search does not stay consistent with user input in large contact database
61214 E-mail Is Empty search returns no records
61177 User defined date field in upper half of contact window is not populated correctly on new records
61154 Sort order not retained on tab grids
60998 Delete button remains active after "delete contact" menu item is disabled
60976 When using the linked document mover with the option to "Update database references only", the CONTSUPP.U_ADDRESS1 field is unchanged
60948 Required fields not active during new contact entry
60947 Line breaks stripped out of Notes after upgrade
60926 Local dbalias.ini ignored
60904 Sort Order field not updated
60851 Cannot change contact record notes
60791 SITEID is upgraded incorrectly
60774 Optimized sort order does not work for filters

60565 Case IDs can be duplicated via sync
 60252 Column width in calendar Task List is not retained
 60245 Obsolete reference to Backup/Restore in online help
 60166 Menu item points to obsolete ZIP code import that was replaced by QuickStart Wizard
 60019 There are no commands in the toolbar customization window
 60005 Obscured attachment listing
 60002 Adding Users to Peg Board makes other calendar tabs show multiple users
 59902 There is no option to automatically display contact records in the same order as shown in the contact search center
 59689 Distribution list refresh when member added
 59677 Service Center filter setting is not retained between sessions
 59613 Record Type Rules are no longer recognized where Field value based rules exceed 32 rules
 59507 The left |< and the right >| arrows do not increment by 500 contact records
 59476 Text search is limited to primary contact fields
 59405 Unable to add Macro to custom toolbar
 59326 Column widths and position are not retained after exiting
 59170 Intermittent DB connectivity problems
 58935 Sort by column in opportunity manager list does not work on all columns
 58603 Taskbar customization uses old menu structure
 58203 Empty 'service reports' folder shown in report center
 57568 Key field labels are overridden by local labels when creating a new record type
 57223 Field inserted in Microsoft Word does not respect decimal place limitation set in GoldMine
 56951 User security template access not applied to e-mail templates
 56648 Pipeline Report does not respect opportunity filter
 56202 There is no option to automatically display contact records in the same order as shown in the contact search center
 54192 Taskbar customization uses old menu structure
 53909 "Log Changes in History" setting is not respected when change is made to a NULL or empty field
 53545 Incorrect calendar dates for Canadian holidays such as Victoria Day
 52525 Obsolete reference to Misc tab in documentation
 49406 "Log changes in the history" in Global replace wizard does not work when a filter is used
 48915 Projects and Opportunities lose notes and pending activities after converting
 48519 Nothing returned with &AdditionalContact macro
 45211 Weekend days included even when applying "Skip Weekends" option for scheduled activity in Automated Process
 42218 Document path is truncated in Project Management Details/Links tab
 40958 SQL Query Wizard on Pending or History items produces query of Activity Code with an extra space
 39607 GoldMine does not send a SMTP QUIT command as expected by some SMTP servers
 33596 Unable to type Polish characters with using <Right ALT> +<letter>
 28252 Additional contacts cannot be added to distribution lists through Contact Search Center
 28023 Print button in Forecasted Sales Analysis opens report behind the active dialog box
 24040 Behavior of F9 key is not changed by Opview setting in [username].ini
 21407 Office link does not prompt to save when closing document
 16703 Task Reference is displayed in date column in Tasks folder of Activity List when selecting Today

- 16412 Mail Merge creates undefined History record
- 13728 Forecasted Sale linked to an opportunity shows name of Opportunity in Product field
- 8519 ITS 27954: &FullAddress macro in Word merge doesn't print ZIP and State values if the City field is blank
- 8384 ITS 34524: Attachment not opened in e-mail sent from Entourage
- 7945 ITS 23620: Cannot select font type or size from drop downs when highlighting multiple fonts
- 5400 ITS 34975: When importing a .csv file with only one record, or choosing to ignore the first record when only two records exist, no records are imported

Copyright © 2009 FrontRange Solutions USA Inc. All Rights Reserved. GoldMine, HEAT and other FrontRange Solutions products, brands and trademarks are property of FrontRange Solutions USA Inc. and/or its affiliates in the United States and/or other countries. Other products, brands and trademarks are property of their respective owners/companies.

THE INFORMATION CONTAINED IN THIS DOCUMENT (I) IS INTENDED FOR INFORMATION PURPOSES ONLY; (II) DOES NOT CONSTITUTE A WARRANTY, EXPRESS OR IMPLIED, OF ANY KIND, OR EXTEND THE TERMS OF ANY EXISTING WARRANTY; AND (III) DOES NOT ALTER OR AMEND THE TERMS AND CONDITIONS OF THE END-USER LICENSE AGREEMENTS UNDER WHICH FRONTRANGE SOLUTIONS SOFTWARE PRODUCTS ARE LICENSED.