

# GoldMine Premium Edition

## Version 9.0.1

### Release Notes

Updated January 4, 2011

#### **WHAT'S ENHANCED IN GOLDMINE PREMIUM EDITION 9.0.1**

GoldMine Premium Edition now supports **Microsoft Office 2010** (32-bit version).

GoldMine now can **access Windows certificate stores** to authenticate digitally signed e-mail messages. This option is available via Tools > Options > E-mail > More Options > Security > Digital IDs > Trusted Certificate Authorities > Import.

Users can now **minimize the details pane** that shows fields in the Opportunity Manager, Project Manager, and Service Center.

Note: GoldMine Premium Edition 9.0.1 also provides the fixes and enhancements included with GoldMine Premium Edition 9.0.0 and GoldMine Premium Edition 9.0.0 Hotfix 2, listed below.

#### **WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 9.0.1**

<b>ID #</b>	<b>Issue Description</b>
132899	Error message when opening Outlook folder from GoldMine E-mail Center on Windows 7
132294	Cannot add note from Outlook when using non-US regional settings
129817	ADO Error shown in Event Viewer after deleting e-mail message and synchronizing
129243	When multiple calendar tabs are open with activities selected, the contact record tab may oscillate between contacts
128879	Mail Merge fails when using a template that is active in preview pane in Links tab
128466	Localized characters corrupted when using Quote text on Plain text emails
127510	Non-master users cannot see closed opportunities managed by other users on the contact record's Opportunity tab
127504	Application error when retrieving transfer set with change to field label shown on active primary fields view while Contact Search Center is open
127503	Contact record focus changes when sync session ends
127086	Intermittent application errors when user retrieves meeting request
126946	Misspelling in Dashboard: 'defenition' instead of 'definition'
126689	Dialog text does not indicate that you can enter a company name when searching for a contact to link an Outlook e-mail
126588	Exception when saving GoldMine settings in Outlook
126515	When creating a forecasted sale, the product field is truncated to 20 Characters

126133	Line breaks are doubled in e-mails linked from Outlook on Windows 7
125818	Cannot use custom field labels in Opportunity Manager
125614	Report does not return results when using active contact filter and contact set is not the main one for the database
125287	Forecast Dashboard produces error when Windows regional settings are set to use comma as decimal symbol and period as digit grouping symbol
124901	Outlook sync does not automatically restart when GoldMine is launched and Outlook sync has been running in silent mode even with Automatically synchronize with Outlook option turned on
124807	Database operation error occurs after changing an option and selecting (All Users) in Outlook Integration Settings
124658	Stop Timer action causes timer to be removed from status bar
124173	Linking via Outlook corrupts special characters when e-mail uses UTF-8 encoding
123440	Auto-linking does not work for e-mails received into non-default Outlook inbox on Vista
123394	Universal Search for e-mail does not return correct results in Windows 7
123267	After scheduling an activity with a primary contact, edit to replace the primary contact with an additional contact is not saved
123263	Send E-mail option in Additional Contacts tab opens GoldMine compose window even if Outlook is the default e-mail client
123221	E-mail link produces two prompts for an e-mail address when there are multiple e-mail addresses related to the contact and Outlook is used for linked e-mail addresses in GoldMine
122554	Error message is generated after clicking on New >> Opportunity or New >> Project in E-mail message window without manually linking a contact
122480	Opportunities in which contact is a team member are unavailable for linking from Outlook
122475	Up/Down buttons are missing in Column Selection tab of Select Browser Columns window in Contact Search Center
122229	Macro data is not merged when applying an e-mail template in Outlook
121836	Performance issue when selecting a Recently Viewed contact with a lot of history or pending activities
121631	Application error when closing GoldMine with Script tab open in tabbed view or in custom view
121464	When using Windows 2008 R2 Remote Desktop Services, GoldMine may hang when user scrolls rapidly through e-mail messages with images
120744	Contact2 macro within e-mail template displays the macro when field data is unavailable
120379	Comodo Digital Signature not valid in GoldMine
119945	Sporadic application errors when sending e-mails
118323	Cannot change the label display for user-defined fields in Opportunities
118303	From: e-mail address is truncated when replying to an e-mail sent from Outlook with Exchange 2007
118152	Error when using Lookup Wizard for query based on field value and history in selected date range
117069	Removing a user from one group may cause it to be removed from other user groups
117048	Internal GoldMine e-mails are not visible in E-mail Center until Refresh button is pressed
116650	When opportunity manager is not open, clicking on the opportunity link from Regarding column in task folder in activity list navigates to wrong opportunity
115314	Error message when attempting to open e-mails from the online folder after disconnecting from server
114430	Google Analytics scripts cause error when an e-mail containing them is viewed in the History tab with the preview pane open
114391	Converting additional contact does not carry over the additional contact's notes
114244	Private activates are not indicated on Free/Busy tab for non-master users
113411	Auto link of an Excel .xls template will link the template, not the merged document
112404	After changes are made to the System tab in user options, notes are set to use plain text
109213	"Assertion Failed" message appears sporadically when using GoldMine E-mail center
108606	Intermittent application error when forwarding e-mail message
107643	E-mail preview stops working when headers are downloading and user toggles between inbox and online
107496	Can't right-click and 'file to' a custom filed folder in the E-mail center if there are 51+ folders
107232	When GoldMine is open on the links tab, and an Excel file is in the preview, user is unable to open Excel document
107212	Pressing a key while viewing Inbox does not take you to section of messages beginning with associated key

106374	JavaScript in E-mail causes GoldMine to hang when viewing the History tab with the preview window active
104757	'Remember lookup by' option does not retain 'contact (primary and additional)' selection after closing contact search center
104596	Workstation still launches previous version of GoldMine after upgrade process is canceled
104074	Change of E-mail list and Preview splitter is not retained after navigating away from E-mail Center
103994	Pressing a key while viewing Inbox does not take you to section of messages beginning with associated key
102393	Activity list focus does not move to the next item in list after completing an activity
102310	Getting a Digital Signature Verification Failure from military sender
100992	Keyboard shortcut to search for sender does not work in the E-mail Center
100046	E-mails sent from Newfoundland are being received 2.5 hours earlier in the GoldMine E-mail Center

## **WHAT'S NEW IN GOLDMINE PREMIUM EDITION 9.0**

### *Operating System Compatibility*

**Windows 7** is now supported, both in 32-bit and 64-bit versions.

**Windows Server 2008 R2** is now supported.

### *Dashboards*

**Dashboards** provide a real-time, graphical, and interactive view into key business processes. GoldMine Premium Edition includes eight standard dashboards and also provides a Dashboard Designer for administrators to create additional dashboards, representing data in GoldMine or in other databases. Please see the GoldMine documentation for details.

### *Outlook Integration*

**Outlook integration** includes several major enhancements in this release.

- New **GoldMine panes in Outlook** show related contact information. Administrators can configure the display to select the fields and layout to be shown in Outlook.
- **E-mails can be linked** to contacts, opportunities, projects, and cases from Outlook.
- Automatic **linking for messages sent and received in Outlook**, with the ability to prompt the user to find or create a contact if there is no matching e-mail address in GoldMine.
- **Centralized administration** for Outlook synchronization enables administrators to set synchronization settings and schedules for GoldMine users.
- Support for **recurring activities** when synchronizing with Outlook
- Option to automatically link attachments without prompting the user. In Outlook, go to **Setup GoldMine Plus > Options > Use GoldMine attachment handling settings**. This option will apply the Existing Attachment Default Action that is established here in GoldMine: **Tools > Options > E-mail > More Options > Advanced**.
- One-Button Synchronization Profiles can be applied without using the GoldMine internal e-mail client. To update a profile when using Outlook for e-mail, save the profile attachment from the e-mail in Outlook, open GoldMine, go to **Tools > Synchronize > Synchronization Settings**, browse to the file, and click Update.
- Outlook can be used for composing messages when clicking the E-mail hyperlink in GoldMine. Go to **Tools > Options > E-mail** and click **Use Outlook for linked e-mail addresses**.
- Improved usability in Outlook when re-linking an e-mail message to a different contact

- A new **navigation pane in Outlook** displays clickable links to recently viewed items in GoldMine, to make it easier to switch between applications.
- An option to **include the contact's address in the subject that appears in Outlook** after synchronizing calendar items. Go to **Tools > Configure > Outlook Integration Settings > Synchronization > Set Up... > Next > Advanced** and check **Add contact's address to subject**.

#### *Administration*

GoldMine includes **native support for Microsoft SQL Server Express** instead of the Firebird database. Firebird is no longer a supported database in GoldMine Premium Edition. During the upgrade to GoldMine Premium Edition 9, a default Firebird database will automatically be rehosted to Microsoft SQL Server. After the upgrade, GoldMine will rehost any other Firebird database if a user attempts to open it.

GoldMine now supports **unattended installation for undocked users and environments with multiple GoldMine configurations**. Go to **Tools > Configure > System Settings > Script for Unattended Installation** and select the type of configuration to install, and fill in the fields shown. Then click Create to generate .ini and .bat files that are used, along with gmsetup.exe, to install GoldMine without requiring a user to click through the installation wizard. Please read the GoldMine Install Guide for more information about unattended installation.

New options for password policy are included. Administrators can set the following policies at **Tools > Configure > System Settings > Password Policy**:

- Minimum password length
- Block accounts after three invalid login attempts
- New password cannot repeat any previous password, up to a specified number of previous passwords

GoldMine now provides a **master list of all field label names and database names**, to facilitate data import and export. Go to **Tools > Configure > Record Types** and click All Fields in the left panel. A list of all contact database fields and labels will be shown, for view or export to Excel.

### **WHAT'S ENHANCED IN GOLDMINE PREMIUM EDITION 9.0**

#### *Search*

The options shown in the "Search By" list in the Contact Search Center can be reduced to improve usability. Go to **Tools > Options > Lookup > More Options** and check the boxes corresponding to fields you want to use for searching in the Contact Search Center.

**Last Name is now an option in the Search List** drop-down in the Contact List, to simplify searching for a contact by last name.

The **Search List selection in the Contact List is now retained** between sessions, so your preferred method of searching is kept automatically.

When the SQL Query Editor is used in the Contact Search Center, GoldMine now shows a clear error message to the user if the SQL syntax is incorrect.

### *Administration*

For improved auditing, archiving, and smartphone access to messages generated within GoldMine, there is a new **option to force all e-mail sent to a user to go through the mail server**. To enable or change this setting, go to **Tools > Users' Settings > Properties > Choose how to deliver e-mail messages to this user**

GoldMine now **automatically repairs corrupted e-mail records**, rather than displaying a "Cal record for this e-mail is missing" message as in previous versions.

With the **ClearTLogByDelFilter** setting customers can control whether to delete TLog records when applying a deletion filter during synchronization. This setting is placed in the [GoldSync] section of the GoldSync.ini file.

- To delete TLog records (default): ClearTLogByDelFilter =1
- To retain TLog records: ClearTLogByDelFilter=0

### *Calendar*

GoldMine now provides the option to **add or remove users and contacts from an existing activity**. To use this feature, edit an existing activity and select the Contacts tab or Users tab to make changes.

GoldMine now provides the ability to schedule **recurring activities with no end date**. When this option is used, GoldMine will add a number specific instance of activities corresponding to the recurring activity, and then continue to add more over time to keep calendars booked appropriately.

The Preview Pane in the Activity List now includes a **hyperlink to navigate to the contact** record related to the selected activity.

With the **EditWhenDbIClick** setting customers can choose what happens when they **double-click on a calendar item**. This setting is placed in the [CalObj] section of the <username>.ini file.

- To open the activity (default): EditWhenDbIClick=1
- To open the contact record: EditWhenDbIClick=0

### *Customer Service*

Column and Tab Selection in Case Management is now applied only to the logged-in user, not changed globally. Other customizations, as shown on the Labels and Options tabs, are now read-only for users without Master Rights.

Case Tasks now have a lookup list available to make task names more consistent and easier to enter.

### *Marketing Campaigns*

Marketing campaigns now include the ability to **add a contact group or filter to an existing campaign**. Select a campaign, click Assign Contacts, then select Link All Group/Filter Contacts.

## **WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 9.0.0 HOTFIX 2**

ID #	Issue Description
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127906	Performance issues when browsing through e-mails in Outlook
126948	Contact2 data does not print for non-master users when merging with template
125956	Upgraded HTML notes appear as text with exposed HTML tags
125332	Outlook becomes non-responsive for several seconds when moving an e-mail message from one folder to another
125284	Cannot link Outlook e-mails to curtained contact records owned by a user group with long name
124969	While linking an e-mail to a contact record, Outlook is not responsive for 6-10 seconds
124561	Only one instance of Outlook sync can be started when running via Terminal Services
122182	Activities for today are not shown on Sales User Dashboard
110951	E-mail server Communication Timeout cannot be higher than 30 seconds

### **WHAT'S FIXED IN GOLDMINE PREMIUM EDITION 9.0.0**

<b>ID #</b>	<b>Issue Description</b>
120111	Selecting different filters on the Filters tab may cause erroneous filter name to be displayed
117221	When all opportunities are shown in the opportunity manager, the pipeline chart only shows opportunities owned by a single user
115456	GoldMine Plus for Microsoft Word shows error message when several standard users are working in Windows 2008 Terminal Services
114357	Cannot set GoldMine as default e-mail client on Windows 7
114133	GoldMine Address Book not available for selection after installation due to buffer overflow
113759	From: address is incorrect in a redirected e-mail
113683	"Look-up a replacement value in lookup.ini" is grayed out for Update Field action in Automated Process options
113653	When select 5 hours in graphical calendar, the scheduled activity defaults to 5 minutes
113568	Lookup list for Code field is different when creating a Project from when editing a Project
113476	Application error when changing to non-default Status value while closing lost Opportunity
113457	Opening the case management module is slow when you have a lot of cases in the database
112858	Link to opportunity or project is broken when sending an e-mail message
112855	E-mail created from Opportunity/Project Manager Influencer/Contacts tab has empty Regarding field
112851	When editing multiple extended details in succession GoldMine will edit the last detail and not the current one highlighted
112792	Performance issue when browsing through records after selecting first record from Contact Search Center
112135	Regarding: field in e-mail window shows items sorted by creation date, not alphabetically
111974	'Font increase' and 'Font decrease' buttons work only after the font is manually changed using 'Font' button
111846	Incorrect results in Contact Search Center if no Contact2 column is shown when applying a power search filter with Contact2 fields
111800	User speller file is not generated correctly
110090	Resolved Date for cases does not synchronize back to server if case was created on remote system and previously synchronized to server
110085	Cannot add a contact with empty Company field to a case
109921	Error when opening e-mail from sender with apostrophe in e-mail address
109341	When performing a two-way sync with Outlook, some calendar items become unlinked from contacts in GoldMine
109030	Upgraded opportunities not displayed when selecting a user group in the Manager dropdown
109027	The drop-down list for Manager in the opportunity detail view does not include user groups
108594	User and Date are not populated in 'Assigned Cases by User' report
108270	Create Unicode Database option is enabled during upgrade but has no effect
108023	Copy current record takes wrong current record information when auto-retrieval in background is active
107943	When a new user logs in for the first time, Case tab names are reset to default settings

107638	the f2 lookup for product in a new opportunity shows incorrectly if the product field has cross-field validation in the forecasted sale dialog
107133	E-mail address for additional contact gets deleted from database when record is opened by user associated with recid ending in a space
107116	Reference column is too narrow in task list on calendar
107021	Preview pane in Opportunity History tab does not display e-mails
106872	Activities occurring on the same date in Case History are displayed in incorrect order after sorting by date
106611	"Auto name assignment" setting for attachments in GoldMine is not applied when forwarding e-mail in Outlook
106564	Incorrect labels shown in preview pane for completed Case Task
106529	GMAPI call MenuCommand produces "Access Denied" status
106472	Opportunity Forecast field does not refresh when adding sales line items
106426	Number of units and price are not visible in Opportunity detail view after closing Opportunity
106295	Extended detail tabs do not sort in date order correctly
106112	When adding a Competitor to an Opportunity, the Select button adds the first Competitor from the lookup list
105380	Unlinked phone message does not save the Contact name entered
105317	F2 lookup for Product field varies, depending on where the field is accessed
105310	Switching from Fields tab to Summary tab causes incorrect editable fields to appear
105253	There is no vertical scroll bar for Tasks in Opportunities or Projects
105235	Users without master rights cannot see cases associated to curtailed contact records owned by a group of which user is member
105113	HTML e-mail font changes when clicking in the top left of the e-mail body
104975	Cannot link messages to additional contacts in Outlook
104879	EditWhenDbClick setting produces inconsistent results when double-clicking on an activity
104782	Font is set to Times New Roman 3 while composing new e-mail from HTML template
104757	'Remember lookup by' option does not retain 'contact (primary and additional)' selection after closing contact search center
104734	When E-mail Center is opened, keyboard focus is on the folder tree rather than the message list
104688	Changes made to tabs of master users do not remain static
104672	User column in History contains wrong value when overriding required field entry
104655	'Send Outlook Message' defaults always to Plain Text format if a default template exists in GoldMine
104635	Changes made to maximized Case Description field do not save
104550	E-mail fields [subject, date, linked to, from] occasionally disappearing when opening e-mails linked from Outlook
104192	Only one instance of a recurring GoldMine appointment syncs into Outlook
104191	Time Clock sorts dates numerically, not chronologically
104177	Contact Search Center does not display more than two decimal places for a numeric field
104080	Main Dictionary Language does not have a default value
103837	Only one case is included in service report when run for current contact only
103818	Ctrl + C does not copy highlighted text on Pending or History preview pane
103808	Incorrect results in contact search center with Power Search using filters
103729	Cannot use tab key to select field displayed off screen in Fields tab
103727	Last Attempt is only updated by an unsuccessful call or message, not any other activity
103702	Revoked menu items are still visible for GoldMine user
103674	revoking ALL rights and almost all menus from a User still allows User to change / create Relationships and set access options
103638	Inconsistent retention of Show field between Activity List sessions
103608	Notes field from extended details are not displayed on reports
103418	GoldMine macro in e-mail subject line pulls data from active contact instead of merged contact if filter/group is selected before template

103192	When replying to an e-mail with spell checking disabled, double-clicking the Send button causes application error
103040	Non-Master users see non-functional menu items for features that are only available to Master users
102971	Required Fields setting does not alert always
102797	Incorrect sort on Date column for Extended Details
102790	Merged document has different format for Phone1 and FAX fields
102751	When replying to plain text emails, HTML formatting is set if using original text in reply
102643	Tempdb is not used when running reports, so users require more rights than needed in previous versions
102609	When replying with original message, the whole original message is not included if it contains "<< >>"
102581	When entering F2 lookup, // is required when creating non-displayed descriptive info but list shows the descriptive info in parentheses.
102566	Clicking header to sort Activated and Previewed filter in Contact Search Center releases filter but doesn't change tab text
102539	Selecting Relate to when creating a New Record will not add an relationship tree to existing record if one does not already exist
102477	E-mail fields [subject, date, linked to] intermittently disappear when scrolling through inbox
102474	Using an e-mail template to reply doesn't allow quoting original message with '>>' symbol
102412	User preference for 'Show numerics aligned to the right' does not stick for non-master users
102410	calendar displays closed amount of a forecasted sale on all completed activities
102373	E-mail message body is lost after closing error message regarding digital certificate
102290	when creating a opportunity after editing one the opportunity always defaults to the first if you edited
102277	Completion of a Literature request is based on the Assigned To field, not on who completes the literature request
102213	Relationship tab does not refresh properly when expanding a section
102032	Import from Outlook does not bring Notes over correctly
102020	When editing a follow-up activity that did not have Send a request selected but this option was selected on original activity, Send a Meeting Request Update is checked
102017	Delete key does not work when trying to remove attachment from outgoing e-mail
102009	Reports Center does not display preview of report if HTML_CAL_NOTES=0 is set
102001	Cannot copy/paste e-mail headers
101909	When scrolling between cases, the notes from the last case are displayed
101906	User name is incorrect on the History tab in a Case when the user name starts with a "K"
101846	Contact record focus changes after filing message with Sync Contact enabled
101713	Activity List displays wrong entries after automatically releasing an active contact filter
101704	If e-mail address is set as required data entry, user is prompted to fill in all required fields when creating a new record with an e-mail address
101687	&nameaddress macro in GoldMine Plus for Word puts a comma after the State
101686	HTML_CAL_NOTES=0 setting causes pending and completed activity notes to suppress blank lines
101632	When editing a History record you cannot click the New button to create a new opportunity
101613	Add ClearTLogByDelFilter setting to optimize sync performance with deletion filter
101592	When pasting text, an extra carriage return is added to the e-mail body
101567	Cannot drag and drop files from Windows Explorer to Details/Links tab of Opportunity
101564	When using a rich-text e-mail as a default reply template, the font always defaults to Times New Roman
101482	GoldMine installer does not alert user that Windows 2000 is incompatible
101381	Address macros that include City, State, ZIP have an extra comma
101372	Expanded details labels are incorrect when selecting the Setup or Info tab for the detail
101287	After closing e-mail message tab, focus shifts to the E-mail Center folder tree and not the e-mail message list
101257	The Copy Current Record box adds data to new record even though it has been removed from the dialog box before the record is created
101225	Relationship tab does not refresh automatically after adding a new record to a company.

101213	Some e-mails with embedded images are not linked from Outlook
101212	Days are shown as bold in calendar when containing activities that are removed from display
101208	Contacts under Company are not sorted alphabetically in Contact Search Center
101137	Schedule Follow-up does not carry over time and duration when completing activity via Pending tab or Activity List
100928	Opportunity creation with Wizard should be consistent with creation without Wizard related to Product field.
100859	Column order from 'Column Selection' dialog is not respected by Contact List grid
100679	Context-dependent lookup setting is not retained if lookup is used in several areas of GoldMine
100587	'Assertion failed' error creating transfer set with serialized sync disabled
100400	List Existing Data option does not apply to all screens
100346	Deleting an activity is slow when using Activity List with Sync Contact option
100236	ADO errors recorded during sync processing
100024	When completing activities, user can bypass Force Valid Input setting by canceling the entry and clicking on a different field
100003	"Daily - DayTimer (detailed)" Fixed page layout creates duplicate entries on the report
99855	Copy current record option does not recognized blank edits
99717	Activating a Relationship tree at root only activates section containing current contact, unless all sections have been expanded
99665	After upgrade some e-mail addresses do not appear next to hyperlink on contact record view
99597	Incorrect times posted for activities falling after time-change
99390	Error sending read receipt message in response to message created in Outlook
99193	Relationship tree couldn't be found if it was created for contact with empty Company field
98821	Inbox tree is collapsed when Deleted folder is selected
97691	Clicking on a date in My Calendar pane may navigate to wrong dates on Weekly view after the 28th of the month
97652	User must reselect e-mail address when sending message to additional contact from the Influencers tab
97031	Field label length is not respected when limited in layout tab of field properties
96949	Merge tagged records does not keep first record tagged if subsequent tagged records are above the first record in the contact search center
96930	Log Away feature does not support passwords over 11 characters
96602	When selecting Users' Security in GoldSync site group, some override options are unavailable
96438	Improper spacing before Country when applying &FullAddress macro
96406	Adding contacts to a Relationships tab with an activated filter does not add all records in the filter
96149	Last field populates with data from current record when creating New Record with Copy current record option and no Contact name entered
96139	When editing from the Contact List view, edits to user-defined fields are not reflected in the Contact List until the user clicks the refresh button
96100	Status number of contacts when sorting a group exceeds the total number of contacts in the group
96032	Deleting system fields from Wide View can interfere with search functions
95952	PHP file from WebImport script generator is programmed incorrectly
95785	Cannot refresh results in Contact Search Center
95747	Ctrl + A to select All in the mail folder no longer works
95692	Users who cannot schedule a forecast sale can still create a sale against an opportunity
95595	Request a return receipt option is not respected when applied in a default template
95076	Inbound e-mail shows wrong activity type when viewed in Case History tab
95050	Notes duplicated with sync after upgrade
94565	Preference to set alarms by default is not respected when reassigning or escalating cases
94003	User is prompted three times when using Word document with FILLIN prompt
93992	GoldMine not listed as available mail program for mailto protocol on Vista
92886	Detail header records in the CONTSUPP table (rectype = 'H') have some blank or null field values after

	moving record to new database
83612	.docx preview is not displayed in lower right pane of Document Management Center
83595	Output To: >> Word function fails when using a localized version of Word
82882	Crystal Reports ODBC data source limited to SQL Server type, not SQL Native Client
77164	Completing an activity for one user while logged in as a different user displays the name of the original GoldMine user
76904	Process monitor logs appear under the GoldSync site logs in the GoldSync Admin Center
73456	<<cursor>> field is lost after editing existing document template
70932	Ability to select a group or filter of contacts to add to an existing campaign
70443	Cannot create an email rule that applies to case escalation messages
70348	custom details field are being truncated
68895	Notify via E-mail option does not support external e-mail clients such as smartphones
62591	Relationship Tree folders are limited to 68 on root level
61295	Peg Board does not show current data
57569	Date field does not function correctly when using new default Record Type
57387	Cannot drag and drop sections of Relationship Tree
57173	Peg Board column width is not adjustable
57170	Web Site is not copied when using Copy Current Record option
56650	User notifications for scheduled activities are not delivered to external e-mail clients
56624	Output To Printer Option is grayed out in Activity List for Non-Master users.
49788	When editing an existing document in the Document Management Center, carriage returns are double spaced
48519	Nothing returned with &AdditionalContact macro
8775	ITS 17260: Incorrect name displayed on Opportunity related to an Additional Contact

## DATABASE SCHEMA CHANGES IN GOLDMINE PREMIUM EDITION 9.0

### *New database tables*

#### **CUSTVIEW** (dashboard)

Column	Type	Allow nulls	Description
<b>NAME</b>	Varchar(100)	No	Dashboard's name
<b>CATEGORY</b>	Varchar(100)	No	Dashboard's category
<b>USERID</b>	Varchar(8)	No	Who has access (user or group name)
<b>CREATED_BY</b>	Varchar(8)	No	User who created the dashboard
<b>CREATED</b>	Datetime	No	When created
<b>MODIFIED_BY</b>	Varchar(8)	No	User who modified the dashboard
<b>MODIFIED</b>	Datetime	No	When modified
<b>DEVELOPED</b>	Smallint	No	Who developed: 1- FrontRange, 2 – Others
<b>METAINFO</b>	text	Yes	Meta information
<b>recid</b>	Varchar(15)	No	Unique ID

#### **CUSTDATASOURCE** (dashboard data source)

Column	Type	Allow nulls	Description
<b>NAME</b>	Varchar(100)	No	Data source name
<b>CATEGORY_ID</b>	Varchar(15)	No	Category id
<b>USERID</b>	Varchar(8)	No	Used for sorting

<b>CREATED_BY</b>	Varchar(8)	No	Who created
<b>CREATED</b>	Datetime	No	When created
<b>MODIFIED_BY</b>	Varchar(8)	No	Who modified
<b>MODIFIED</b>	Datetime	No	When modified
<b>DEVELOPED</b>	Smallint	No	Who developed: 1- FrontRange, 2 – Others
<b>RECTYPE</b>	Varchar(1)	No	C – category, D – data source
<b>METAINFO</b>	text	Yes	Meta information
<b>recid</b>	Varchar(15)	No	Unique ID

#### **CUSTRELATIONS** (which dashboard uses which data sources)

Column	Type	Allow nulls	Description
<b>VIEW_ID</b>	Varchar(15)	No	Dashboard's id
<b>DS_ID</b>	Varchar(15)	No	Data source's id
<b>CONTROL_ID</b>	Varchar(15)	No	Dashboard part's id
<b>recid</b>	Varchar(15)	No	Unique ID

#### **REPORTTEMP** (used for creating reports)

Column	Type	Allow nulls	Description
<b>REC</b>	Varchar(15)	No	Record id
<b>EXPR</b>	Varchar(256)	No	Expression
<b>USERID</b>	Varchar(8)	No	Who is printing the report

#### **CALDEF** (recurrence pattern for an activity)

Column	Type	Allow nulls	Description
<b>RECTYPE</b>	Smallint	No	1 = recurrence series pattern 2 = modified exception "pattern" 3 = deleted exception 4 = completed exception 5 = multiple-attendee activity pattern
<b>STARTDATE</b>	Datetime	Yes	
<b>STARTTIME</b>	Varchar(5)	Yes	
<b>ENDDATE</b>	Datetime	Yes	
<b>ENDTIME</b>	Varchar(5)	Yes	
<b>DURATION</b>	Smallint	Yes	
<b>ENDNOCCUR</b>	Smallint	Yes	The number of occurrences after which the recurrence ends. If specified, the value of ENDDATE is ignored. Null for exception pattern record.
<b>RECUR_TYPE</b>	Smallint	Yes	1 = hourly 2 = daily 3 = weekly 4 = monthly 5 = yearly  Null for exception pattern record.
<b>INTERVAL</b>	Smallint	Yes	A value which represents how often the activity repeats; e.g. a value of 2 for weekly recurrence means the activity occurs every 2 weeks. Null for exception pattern record.
<b>SKIPNONWORK</b>	Smallint	Yes	0 = no skip 1 = skip weekend/non-work hours Null for weekly recurrence. Null for exception pattern record.

<b>REPEATBY</b>	Smallint	Yes	1 = by specific day 2 = by day of the week Null for hourly, daily recurrence. Null for exception pattern record.
<b>ONDAY</b>	Smallint	Yes	For monthly and yearly recurrence, represents: a specific day of the month if Flags = 1; Nth day of the week if Flags = 2. Null for hourly, daily, weekly recurrence. Null for exception pattern record.
<b>ONDOW</b>	Smallint	Yes	For weekly recurrence, represents the day(s) of week when the activity occurs. E.g. Sunday and Tuesday = 20 + 22 = 5. For monthly and yearly recurrence, represents an Nth day of the week if Flags = 2. Null otherwise. Null for exception pattern record.
<b>ONMONTH</b>	Smallint	Yes	For yearly recurrence, represents a month of the year (for both Flags = 1 and Flags = 2). Null for the other types of recurrence. Null for exception pattern record.
<b>USERS</b>	Text	Yes	List of user items separated by a delimiter; a user item consists of a userid.
<b>RESOURCES</b>	Text	Yes	List of resources separated by a delimiter.
<b>CONTACTS</b>	Text	Yes	List of contact items separated by a delimiter; a contact item consists of an ACCOUNTNO and an optional CONTSUPP.RECID, separated by another delimiter, if the contact is an additional contact.
<b>EXCEPTIONS</b>	Text	Yes	List of exception items separated by a delimiter; an exception item consists of the original datetime of the instance, separated by another delimiter from the type: 1 = modified 2 = deleted 3 = completed Null for exception pattern record.
<b>COMPEXC</b>	Text	Yes	Data on partially-completed activity occurrences
<b>PRIMARYUSER</b>	Varchar(8)	Yes	User assigned to the activity; has full security rights over the activity.
<b>IS_INFINITE</b>	Smallint	Yes	0 = recurrence has end date, or no recurrence; 1 = recurrence is infinite Null for exception pattern record.
<b>LAST_ROLL_OCCUR</b>	Datetime	Yes	The last instance of an infinite recurrence that was generated during rolling. The next rolling should base its calculation of instances on this value. Null for finite recurrence. Null for exception pattern record.
<b>ROLL_DATE</b>	Datetime	Yes	For infinite recurrence, date when rolling of recurrence should occur. Null for exception pattern record.
<b>CREATED_BY</b>	Varchar(8)	No	User who created the activity
<b>CREATED_ON</b>	Datetime	No	Activity creation date
<b>CREATED_AT</b>	Varchar(5)	No	Activity creation time
<b>MODIFIED_BY</b>	Varchar(8)	No	User who modified the activity
<b>MODIFIED_ON</b>	Datetime	No	Activity modification date
<b>MODIFIED_AT</b>	Varchar(5)	No	Activity modification time
<b>ORIG_DATA</b>	Text	Yes	Some original information (color, rectype, ref, private,

			alarm flag, linked to)
<b>ORIG_NOTES</b>	Text	Yes	Original notes
<b>ORIG_DATE</b>	Datetime	Yes	Original date
<b>ORIG_TIME</b>	Varchar(5)	No	Original time
<b>LINKRECID</b>	Varchar(15)	No	Mail id
<b>ATTENDEES_EX</b>	Text	Yes	List of attendees separated by a delimiter
<b>CALRECTYPE</b>	Varchar(1)	Yes	Type of calendar activity
<b>ORGANIZER_EX</b>	Varchar(100)	Yes	Real organizer's name if it is not a user
<b>GLOBALID</b>	Varchar(200)	Yes	Global Appointment ID from Outlook
<b>BLOCKEDBY</b>	Varchar(8)	Yes	For internal use in synchronization process
<b>BLOCKEDON</b>	Datetime	Yes	For internal use in synchronization process
<b>BLOCKEDAT</b>	Varchar(5)	Yes	For internal use in synchronization process
<b>recid</b>	Varchar(15)	No	Record's id

*New columns in existing tables*

**CAL** (calendar activities)

Column	Type	Allow nulls	Description
<b>CALDEF_ID</b>	Varchar(15)	No	
<b>ORIG_DATE</b>	DATETIME	Yes	
<b>ORIG_TIME</b>	Varchar(5)	No	
<b>IS_EXCEPTION</b>	Smallint	Yes	
<b>CALDEFEX_ID</b>	Varchar(15)	No	
<b>FLAGS</b>	Int	Yes	
<b>ATTENDEES_EX</b>	Varchar(100)	Yes	

**CONTHIST** (contact history)

Column	Type	Allow nulls	Description
<b>COMPLETEDID</b>	Varchar(15)	No	Used for synchronizing completed activities

**USERS**

Column	Type	Allow nulls	Description
<b>EMC_ACC_EMAILS</b>	Text	Yes	List of all user's e-mails

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