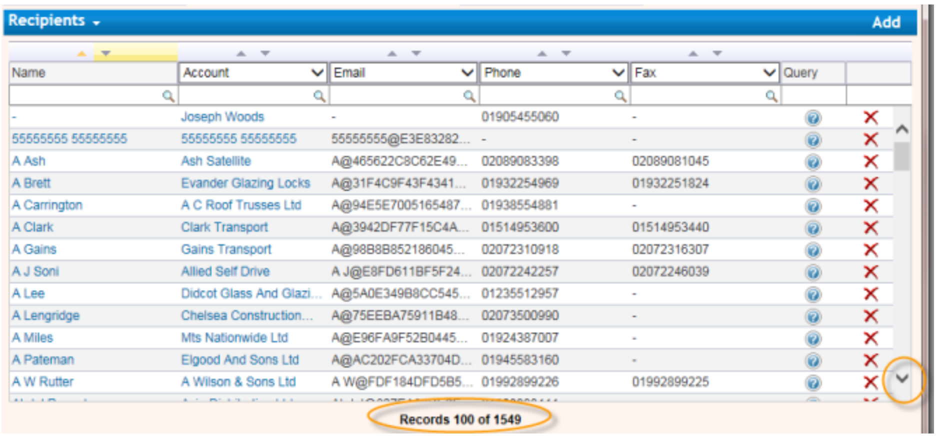
Gold-Vision 7 Enhancements

List Changes

Infinite List Scrolling

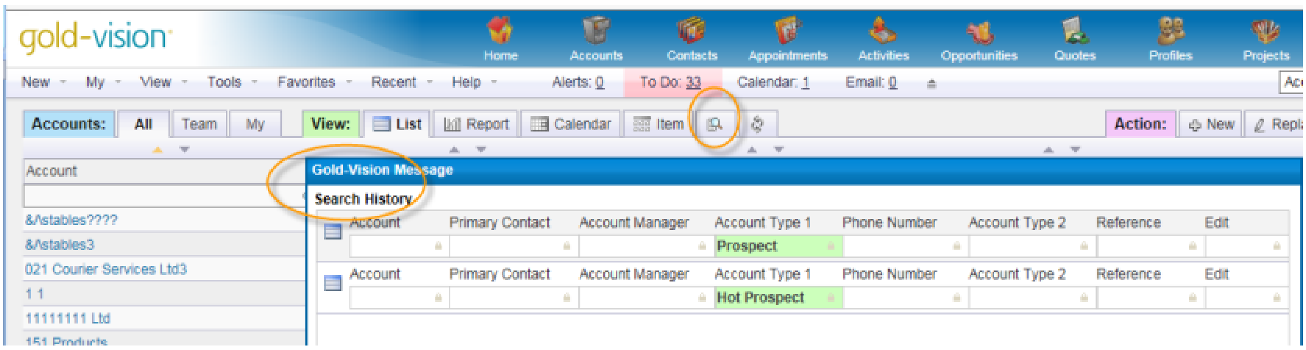
On touch points and campaign recipients lists, the user is offered a new interface to obtain more data. The traditional paging controls are replaced with an infinite scrolling system. When the user scrolls down to the bottom (100th record) the list automatically loads more data into the bottom of the list.



Search History

Search history is a system that allows users to quickly search a list in Gold-Vision using filters they have recently used.

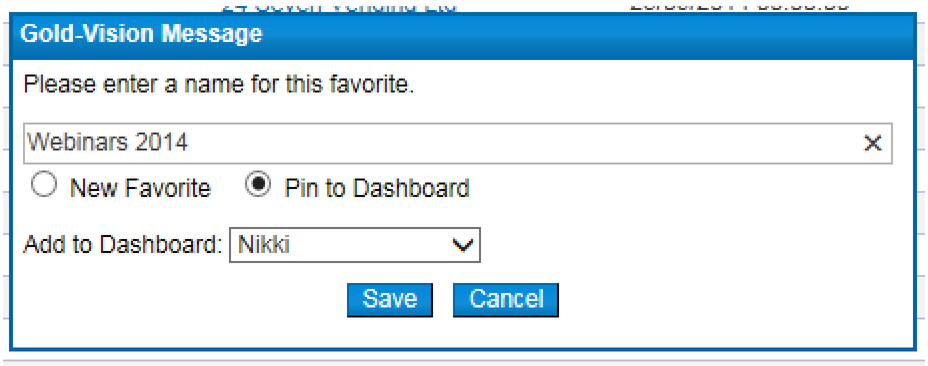
1. Click the icon to the left of the list 'refresh' button
2. Gold-Vision will show a dialog containing a list of recent searches for the list you are currently viewing.
3. Click on one of rows in the pop up dialog to re-filter the list with the selected filters



Home Dashboard List Favourites

It is now possible to pin list search favourites to the user home pages. When making a favourite the user is now presented with two options 1) to save the favourite as normal and 2) to 'pin' the list to their home page. When choosing the second option the user must select a home page dash board to pin the list to.

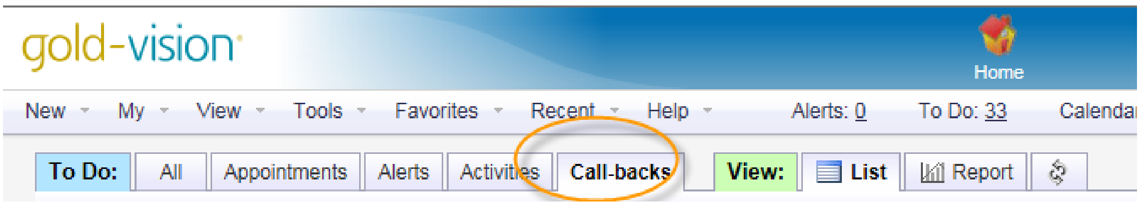
When a list has been pinned to the home page the standard tabs and title bar for that list are no longer displayed but any search filters or table the user has selected will be preserved.



Lead Management Changes

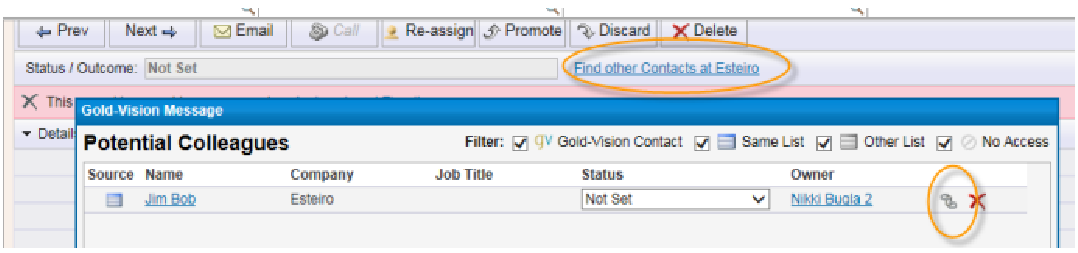
Call-Backs on ToDo List

When setting a call-back in Lead Management it is now visible on the user's "To Do" list. The call-back only shows up if the call back date is today or in the past. If the call back is overdue the row in the "To Do" list appears in red.

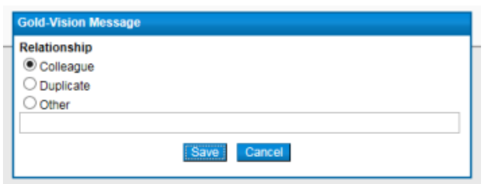


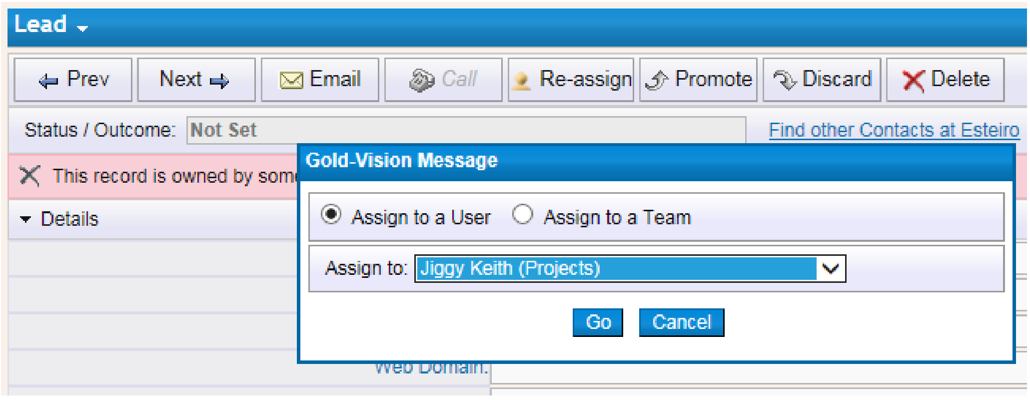
Linking Leads

In the review potential duplicates and find other contacts windows, there is now an option to link to other leads (Duplicate, Colleague and Other). If there are links they will appear below the lead details and above notes.



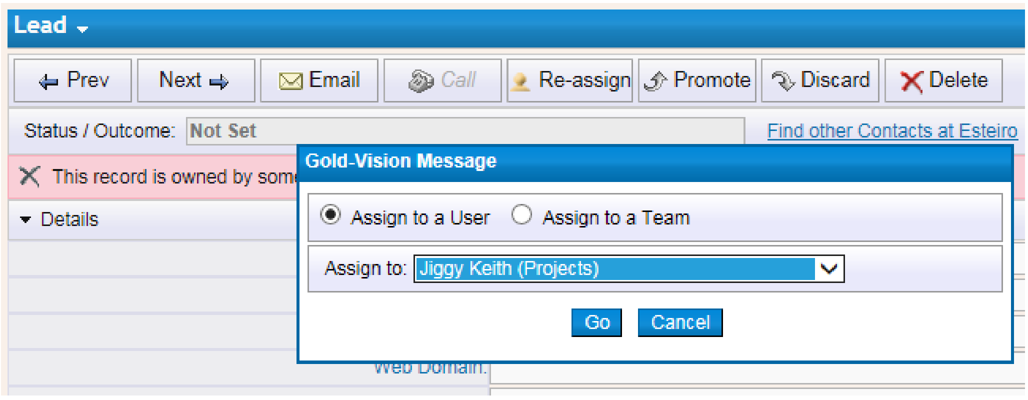
Select the Relationship





Re-assign

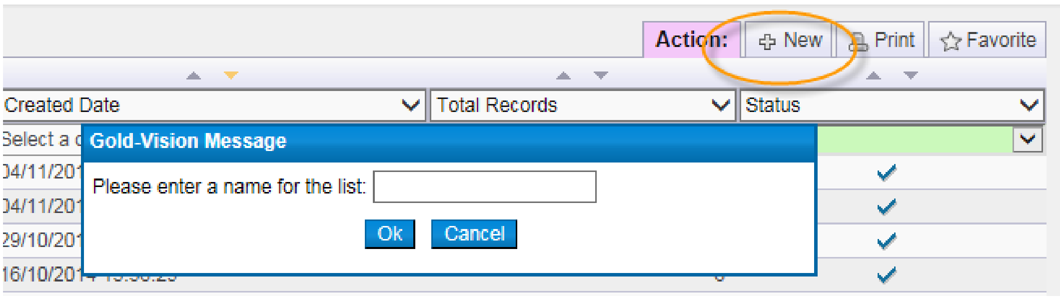
There is now a button to re-assign leads from the lead itself without having to go to list management. You can also remove a leads owner in this way.



Create New Empty List

New Lead Lists can now be created in Gold-Vision (without having to use the Import Tool)

From the List Control view, click the New tab and enter a name for the list



Leads will be created with a standard layout which can be screen designed in the Admin Console.

Alerting Changes

Alerting Extended to Leads / Extension Items

Alerting has been extended to leads and extension items in the "on save" alert area. When creating a new "on save" alert the user can now select Lead / Extension as an option. When choosing this option the user is then presented with a further option to select which lead or extension object definition to use for the alert.

It is important to note that not all features of alerting may be available for extension alerts. Please contact your account manager for more information.

Touch Point Alerts

A new type of alert definition has been created for touch point score-based alerts. These alerts work in a similar way to reminder alerts - i.e they are checked on a schedule using the alert scanner.

Create Touch Points from Alerts

A new alert action has been added to allow a touch point to be added to an item. Setting up touch points from alerts is a two-step process.

Please see the Gold-Vision Administration Help Site for more information.

Please note: Touch Point Alerts and Creating Touch Points From Alerts are only available with Marketing Automation.

Security Enhancements

Sub-object security

Security has been added to Opportunities and Projects to allow team and private sub items.

- Account Managers, Support Managers and administrators will be able to see all items related to an Account that they have access to.
- Public is the default and will behave the same as previously.
- Team and Private will restrict access to that sub-item and all related items such as activities, appointments and recent events to the appropriate people.
- Sub-object security will be checked before Account security.
- Security will be applied to all relevant child items such as quotes, notes, activities and appointments.
- Emails will not be affected by this mechanism. See the new email security features that are designed to be used alongside sub-object security.

Team-based email security

The email security model is motivated by sub security but is not using any of the same mechanisms and is instead being done at an account level based on user teams. If an account meets the criteria to have this team based email security turned on, you will have to be either in the same team as a recipient/sender of the email. There is also a new setting for allowing/preventing propagating email visibility via secondary team memberships. This is motivated by the case where a super user has secondary team memberships across many accounts and may want to view email related to that team, but that team shouldn't see what the super user has access to.

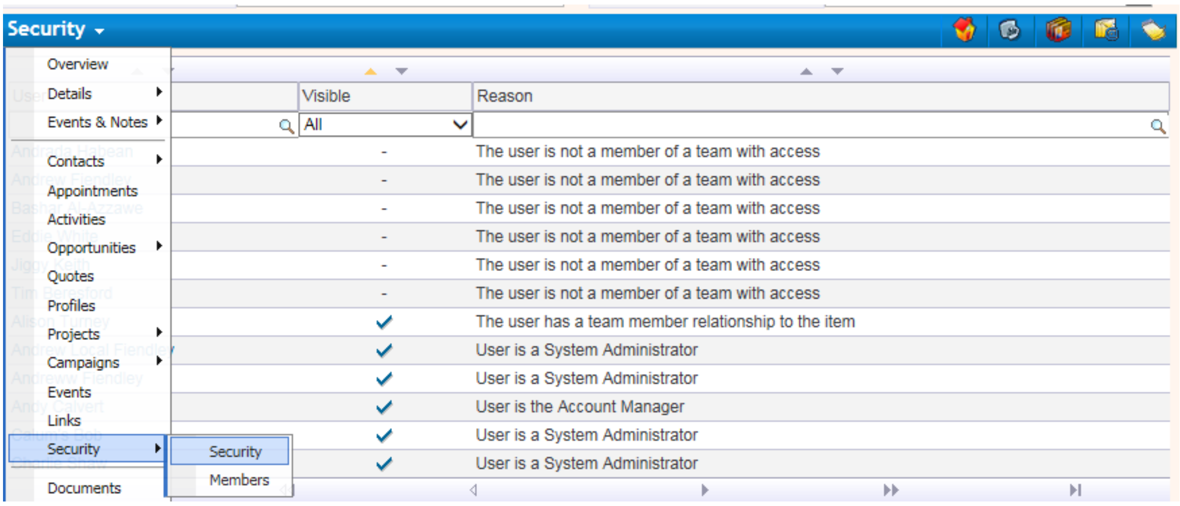
In the use case where there are two secured opportunities under an account, this model would mean that competing teams could not see each others emails and would not rely on those emails being tracked against the sub objects.

- Based on primary team membership, propagated by secondary membership if a flag is set against that membership, will not propagate by default
- Uses recipients table - not just email owner
- System option to apply to: All accounts, team accounts or none
- Accounts being private should supersede this security

Note that a cached table is used for this, which is re-built at the end of each mail scan.

Security Lists

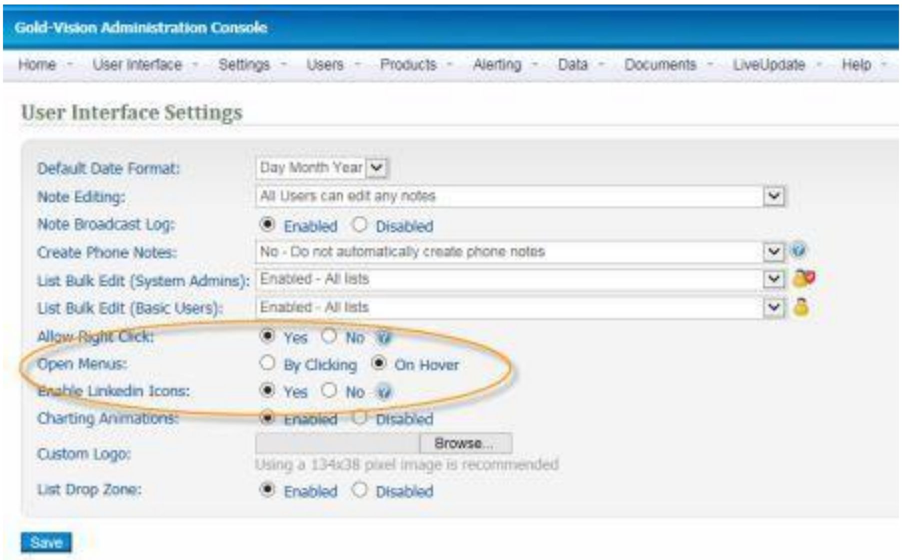
Under each item that can have security applied to it (accounts, projects, opportunities and activities) there is now a sub-list called Security that lists each user, whether or not they can see the item and a reason why.



General Enhancements

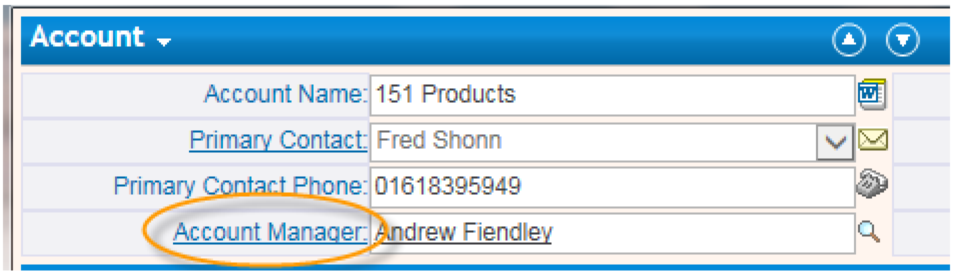
Menus can be opened by hovering

This is set up in the Admin Console under User Interface, General Settings



Owner Item Link Clickable

The "Owner" field against most items has been made into a clickable link that will open the user's Gold-Vision record. Screen design will need to be edit/saved in order for this to appear on existing systems.

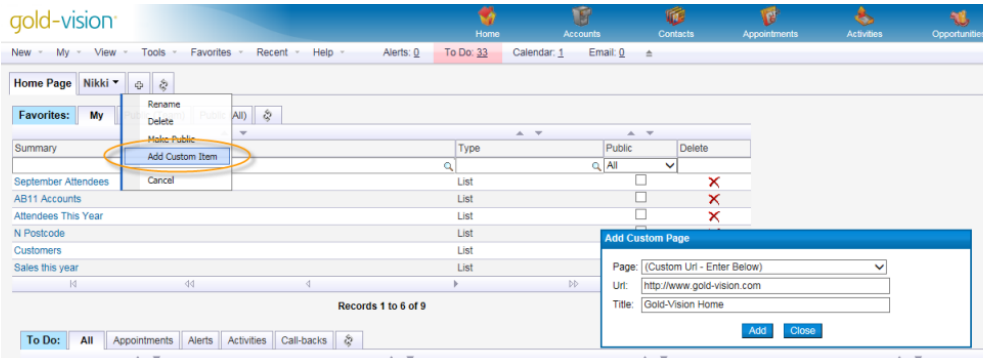


Home Page PageLets

It is now possible to add either full page links or HTML page fragments to the Gold-Vision home page.

- Full Framed Pages

1.
    1. Open an Existing Home Page tab
    2. Click the small down arrow on the tab
    3. Select 'Add Custom Item'
    4. From the dialog select 'Custom Url'
    5. Enter the full http... address of the page to add
    6. Click 'Add' to save



- PageLets or partial Pages

1.
    1. Open an Existing Home Page tab
    2. Click the small down arrow on the tab
    3. Select 'Add Custom Item'
    4. Drop down the list in the dialog and select the pagelet to add
    5. Click 'Add' to save.

Please note: PageLets are stored in the Gold-Vision install folder under the "DashboardPages" folder.

Account Overview Ajax

The counts and latest item on the account overview screen are now loaded via ajax to help improve performance.

7.0.3 Enhancements

Outlook Plugin

- **Multiple E-Mail Add from Outlook**
- **Outlook Social Connector Deployment**
- **Outlook Social Connector**
- **Create a Lead from an Email in Outlook**

Seminar / Event Management

- **Ability to set default page for Seminar Session**

Legacy Campaigns

- **Legacy Connect Un-Subscribe Prefs List**

  Legacy Connect unsubscribe preferences added back in.

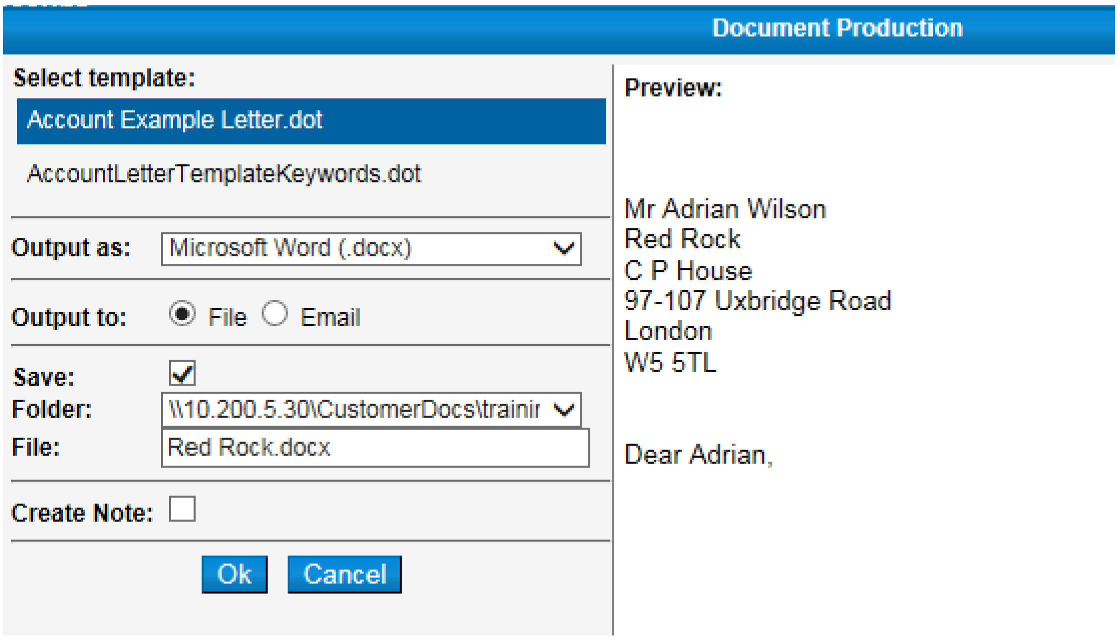
Alternative Authentication System

- **Alternative authentication model**

Server-Side Document Production Improvements

- **Advanced template production - New Document Production Engine**

  Document template preview option

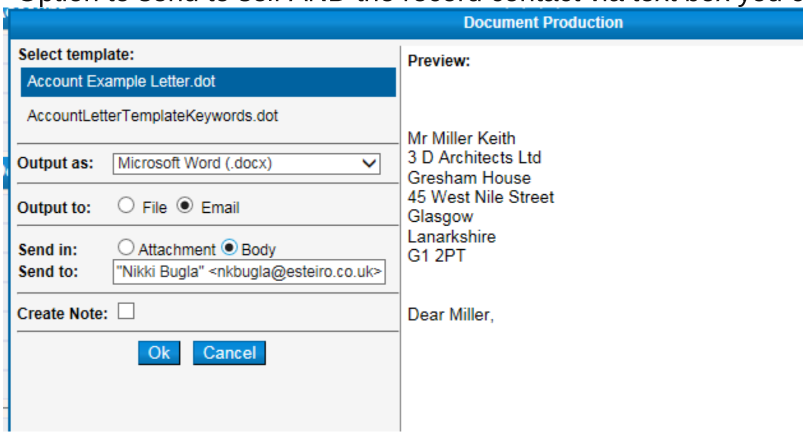


- **Server-side email option sends template to as body or attachment**

  - Email options sends to 'self'

- Option to include template as attachment or email body.

- Option to send to self AND the record contact via text box you can over-type



- **Server-side template HTML and standard tables able to specify a driver list**
- **Server-side Template Output supports HTML tables**

Lead Management

- **New note field against a new lead**

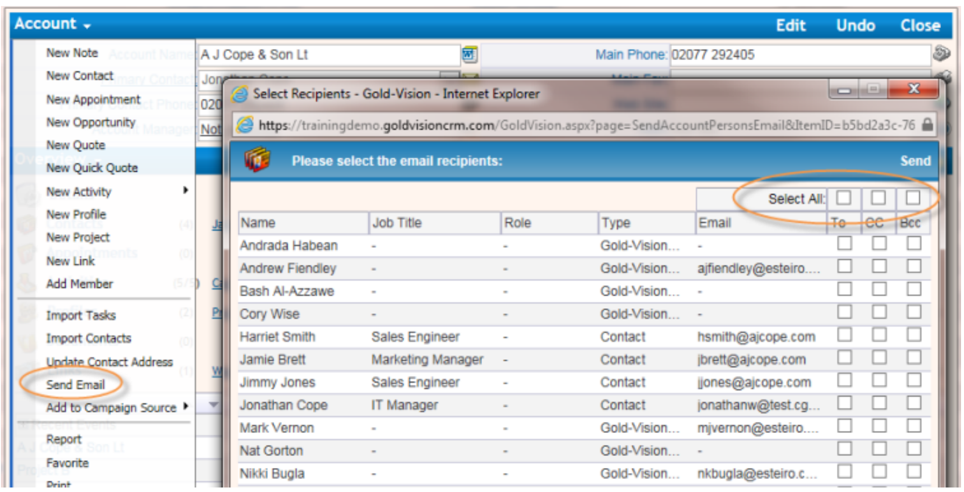
Touch Points

- **Ability to LiveUpdate Touch Point DLLs**

General

- **Account > Send email > Select all option**

  Also in account > update contact address



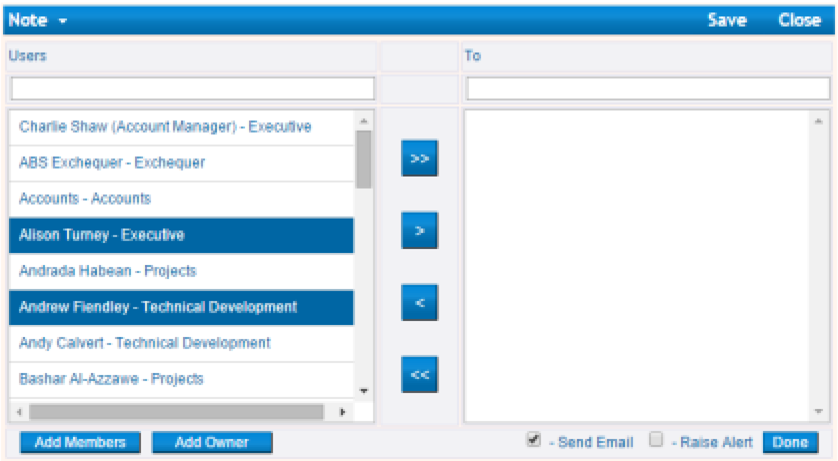
7.0.4 Enhancements

- **Option to sync all connect users and types from admin console.**

New option under the Marketing Settings screen to allow all users and campaign types to be synced with connect at the push of a button

- **New Note Broadcast Screen**

The note broadcast screen has been updated for better use on a tablet or mobile device.

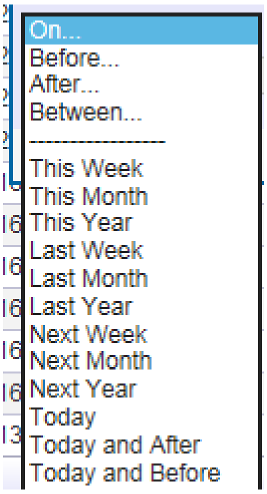


7.0.5 Enhancements

Lists

- **New list date filters "Today and After / Before"**

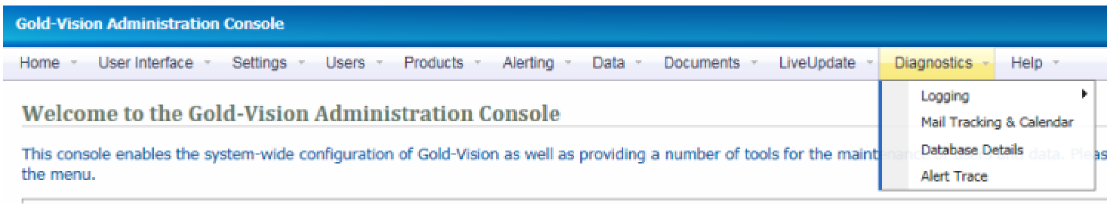
  New filter options for date columns to be able to specify from today and after or before. Useful when creating dashboards or reports with moving dates

- 

Mail Tracking

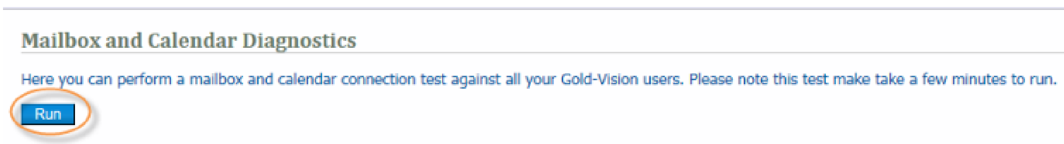
- **Admin Console Mailbox Diagnostics Screen**

  New view under the new 'Diagnostics' menu in the admin console to allow bulk mailbox connection tests to be performed.



- **Test button on Mail Tracking Settings**

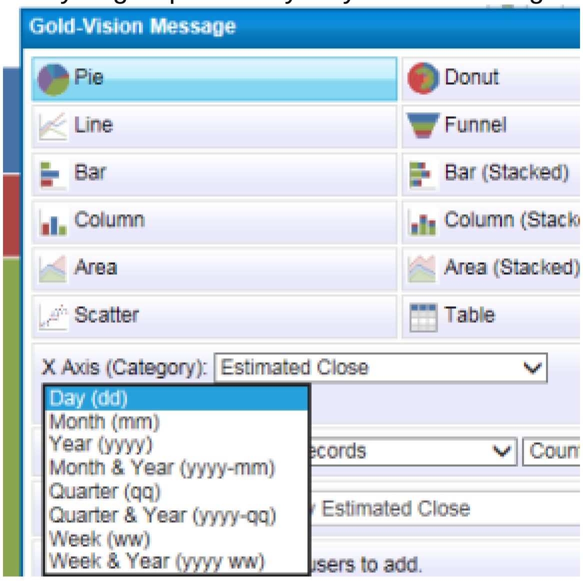
  Test button to validate mail tracking details are correct before saving them against a user



Dashboarding

- **Reporting on Dashboards in Days**

  Ability to group dates by 'day' when creating a dashboard report.



Alerting

- **Ability to define "Only if null or zero" for alerting set values**

  Now possible to specify the case for a number being zero-or-null when creating a new alert action to 'Modify Data for the Item'

Lead Management

- **Lead List Control to Show De-Duping Lists**

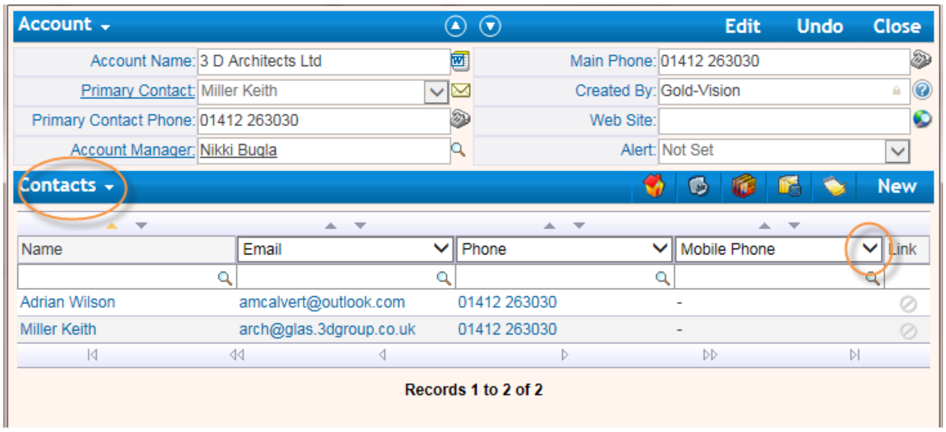
  When a Lead list is de-duplicating it will now show against the List Control view in Gold-Vision but be greyed out and flagged as duplicating. This should help users who notice the Lead list not appearing in the view.

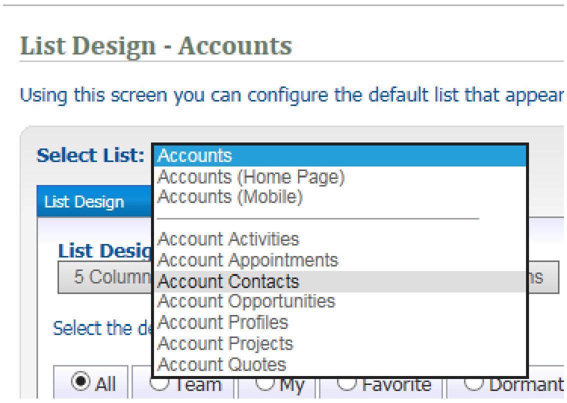
7.0.6 Enhancements

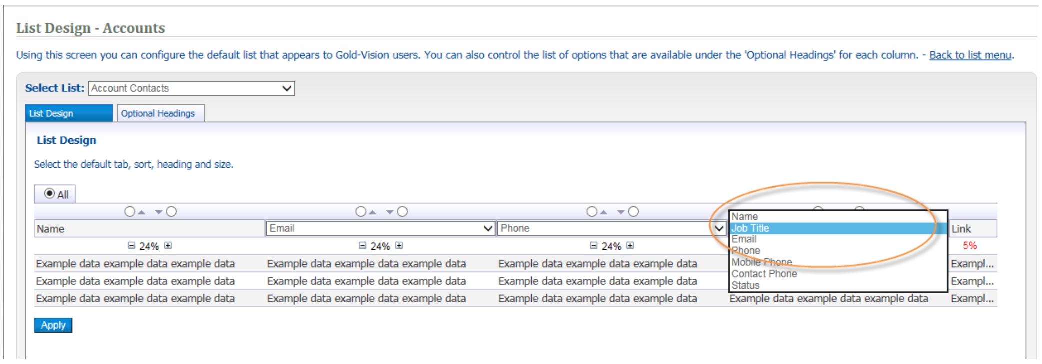
Lists

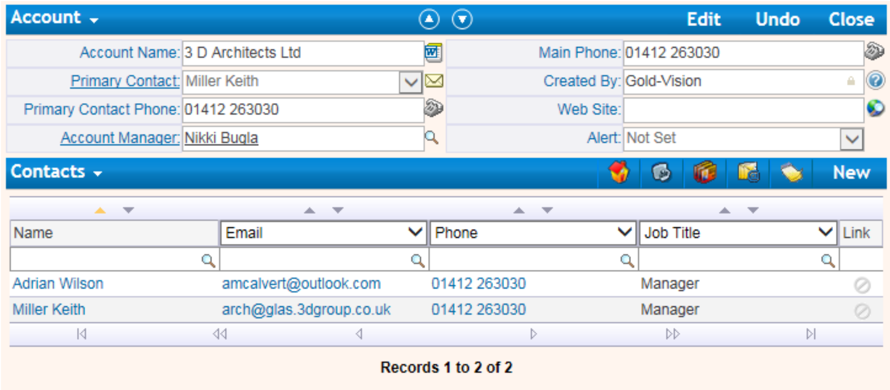
- **Account key sub-list design in Admin Console**

  It is now possible to design the Account sub-lists in the admin console. The following sub-lists are covered: Activities, Appointments, Contacts, Opportunities, Profiles, Projects, Quotes. For example you may want to change the column headings or add a field to the list design when viewing the Contacts in an Account record.









Integrations

- **Ability to Add a new Integration Link**

  It is now possible to create a new integration link between two systems manually through the Admin Console under the 'Integrations' menu.

- **Ability to edit Integration Link settings**

  It is now possible to edit an in existing integration link in order to change the item at either the Gold-Vision or the Third Party end. It is also possible to change the relationship type (Primary / Secondary).

- **Ability to Edit Integration Link Type (Primary/Secondary)**

  Ability to change integration link type from Primary / Secondary.

Extensibility

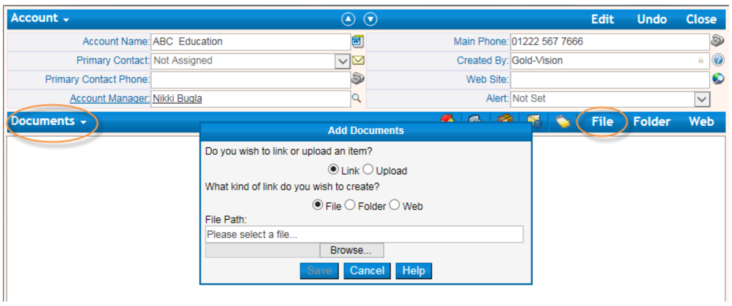
- **LabelDefs functionality for extension items (LabelDefExt.xml)**

  It is now possible to manually update a label defs dictionary for extension files.

General

- **Document Upload - Automatically Create Folder**

  When uploading a document a folder is now automatically created against the object if required.



- **Add appointment debugger to GVThirdPartyData service**

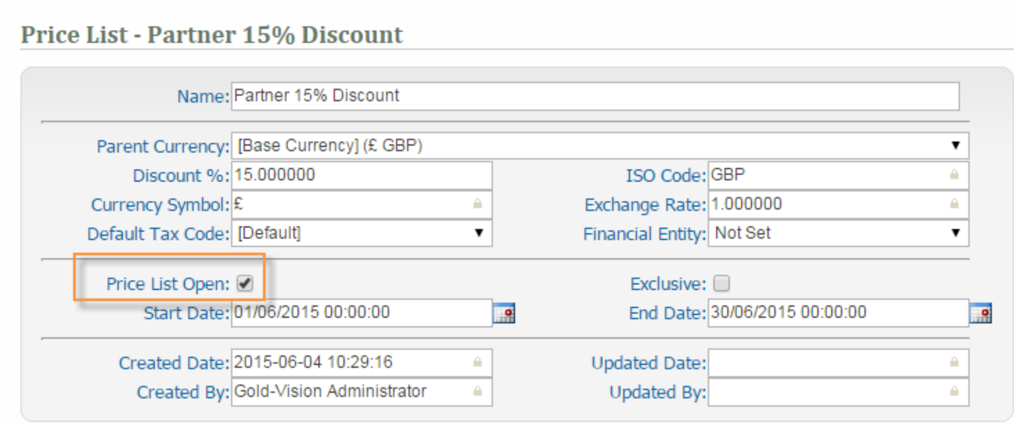
  The appointment scanner now has a new debug user interface to assist with finding issues and pulling data out from the third party appointment service.

7.0.7 Enhancements

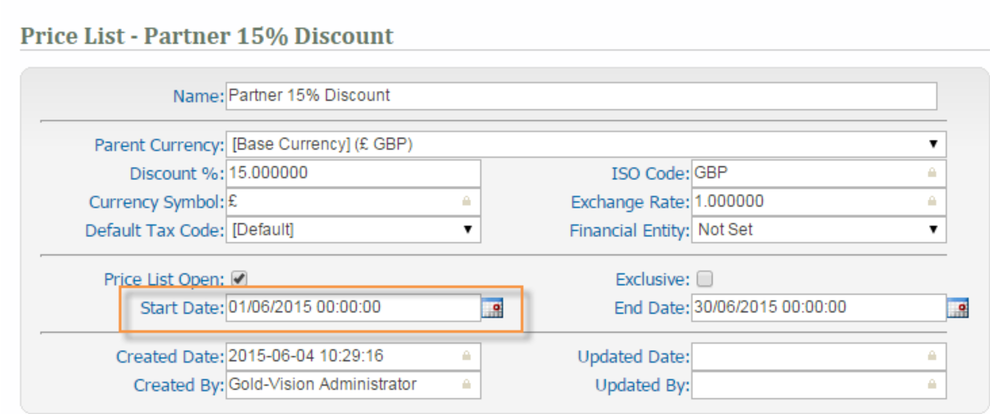
Price Lists

- **Price List Open/Close State and Start/End Dates**

  Price lists now have an active Open/Closed state, which can be toggled to show or hide them from users as desired.



- Price lists also have a selectable start and end date, which can be used to show or hide price lists during a specific date range.



Lists

- **Improved performance of Accounts, Contacts, and Activities lists.**

  The performance of the Accounts, Contacts, and Activities lists have been improved. If this is positive in deployment it can be extended to other lists.

Dashboards

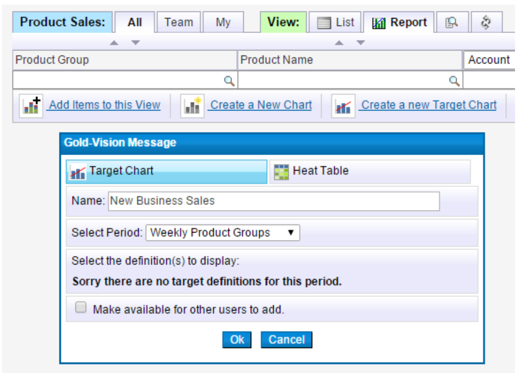
- **Targets by Product Group / Product**

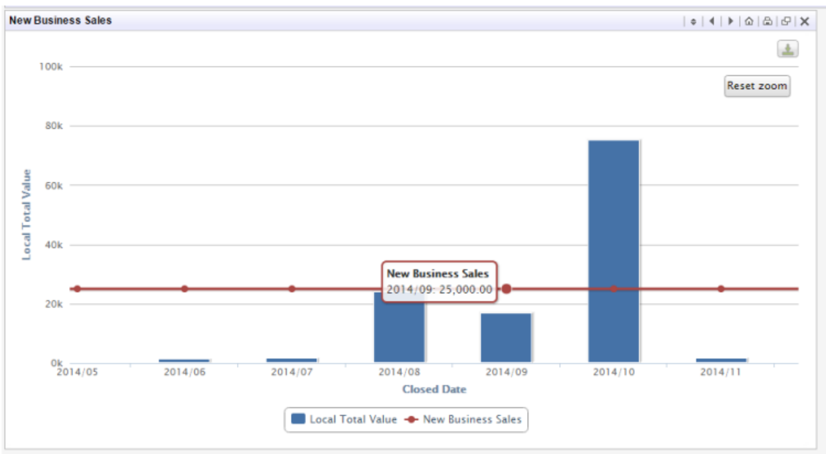
It is now possible to set targets for product groups. These targets work in a similar way to user sales targets but are visible under the Product Sales main list view.

Product Group Targets on Dashboards

The product group targets are available to be used on dashboards under the "Product Sales" top level list.

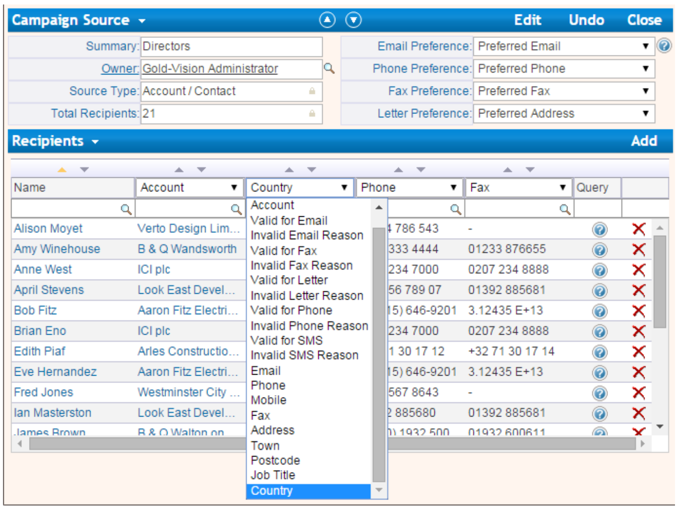
1. Click View > Products > Product Sales from the menu
2. Click the "Report" tab
3. Click "Create New Target Chart"
4. Select a period and target(s) and click "Ok"





Campaigns

- **Job Title and Country added to Campaign Source Recipients List**

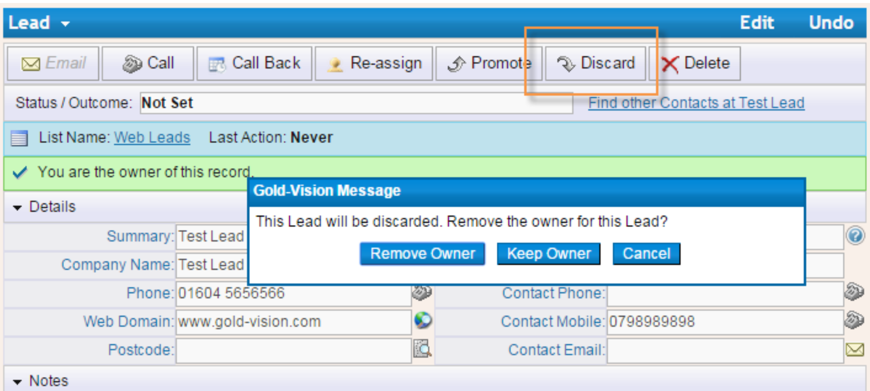


- **Account/Contact References and Contact Mobile Added to Campaign Stage Export**

Lead Management

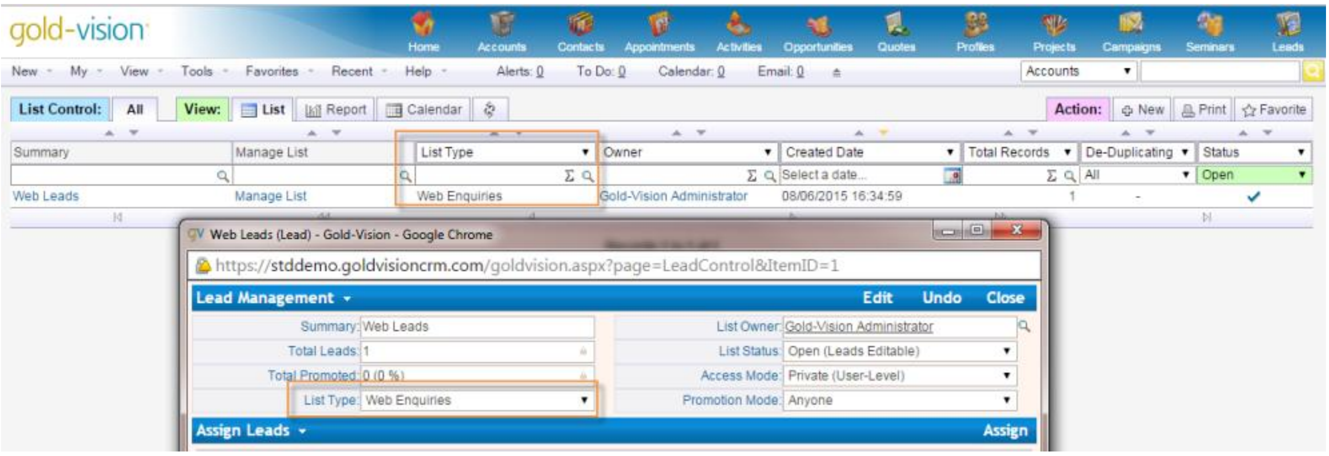
- **Prompt to Remove Owner when Discarding a Lead**

  When discarding a Lead the user is asked whether they would like to be removed as the owner. (Previously the owner was always removed.)



- **Lead List Type Drop-Down Field**

  A **Type** field has been added to Lead Management List Control items. This will allow for categorisation of Lead Management lists and can be configured in the same way as other item type fields in the admin console.



Calendar & Appointments

- **Calendar Print View Obeys Highlight Filtering**

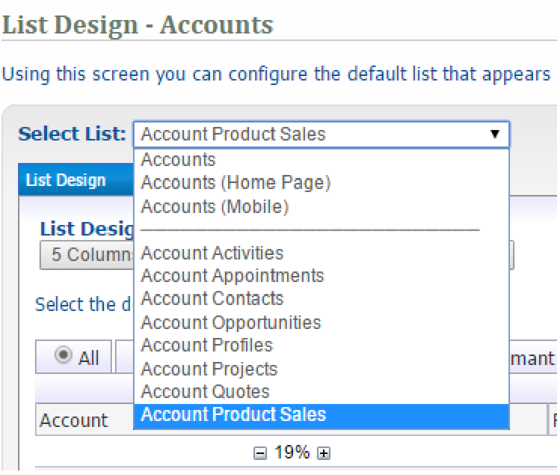
  When printing a calendar view that has been filtered by the selectable highlight options, those options will now correctly carry through to the print output.

7.0.8 Enhancements

Lists

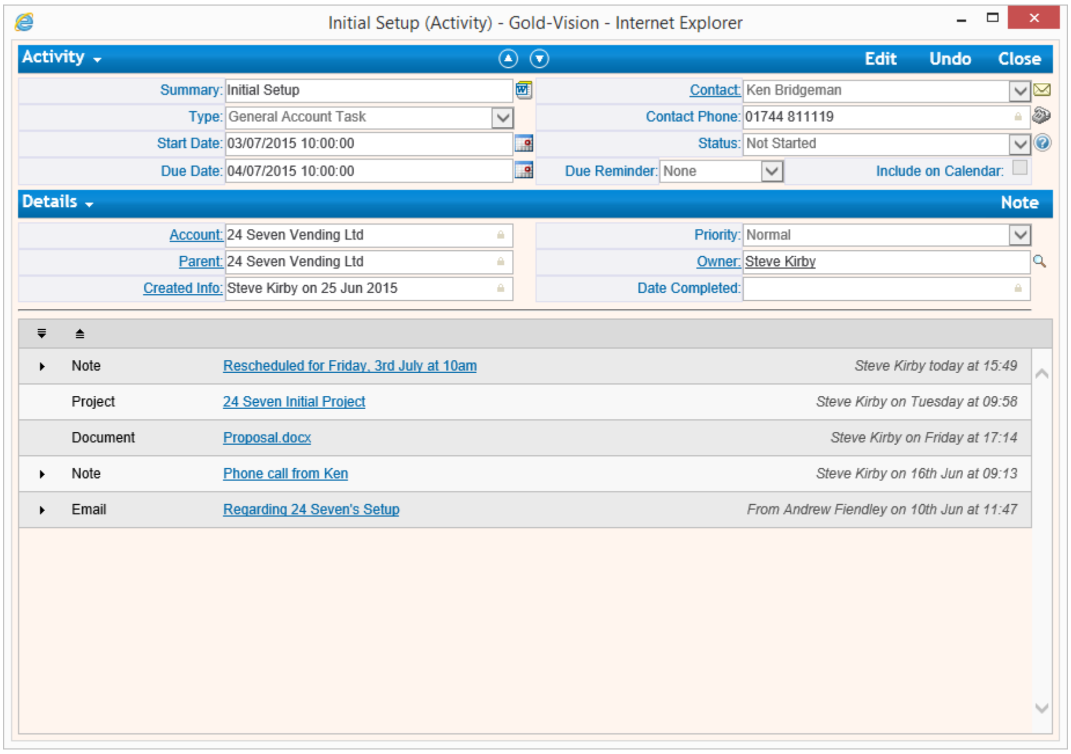
- **Accounts Product Sales List Design**

  It is now possible to list-design the Account product-sales list.



- **Activity Email/Notes/Etc view**

Activities now have a new overview list on the Details screen to show combined notes, emails, documents, etc. This replaces the old 'Actions' list:



Items are shown in a scrollable list. Notes and emails can be expanded to show their content by clicking on their bars. Expandable items are indicated by a right-pointing arrow.

When open, the black arrow points downwards. Expanded items can be closed by clicking their bars again, or by clicking the 'Close' link.
Clicking an item's underlined summary will open it in a pop-out window, similar to how the old list worked.

Seminar / Event Management

- **Closed Won/Lost Fields Value Against an Event**

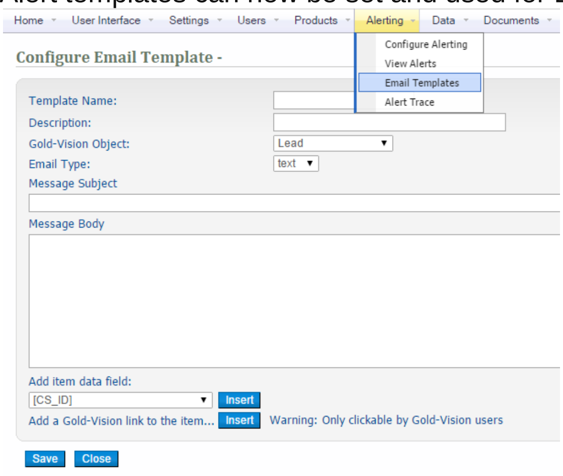
  It is now possible to report on the value won, lost, and confirmed against a Seminar/Event against both an item and a list.

  - Won Value - Is the total value of all "Closed - Won" bookings (regardless of confirmed state)
  - Lost Value - Is the total value of all "Closed - Lost" bookings (regardless of confirmed state)
  - Confirmed Value - Is the total value of all "Confirmed" bookings

Alerting

- **Ability to create and select extension email templates for alerting**

  Alert templates can now be set and used for Lead Management.

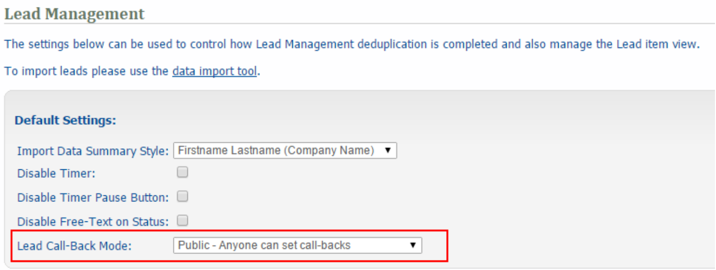


Lead Management

- **Make Lead Callback Button Enabled For Non-Owned Leads**

  A setting has been added that allows for the Lead Management "Call-Back" functionality to be made publicly available. When set to "public" other Lead Management users can set callbacks for Leads owned by other users. When a callback is set it still appears on the *owners* To-Do list.

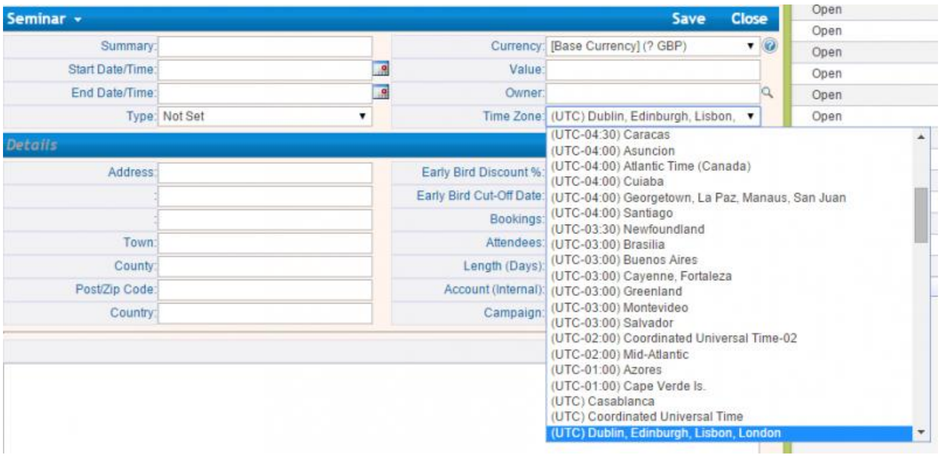
  - Open the Admin Console
  - Click Data>Lead Management>Lead Management Settings
  - Change the Lead Call-Back Mode


Lead Management
The settings below can be used to control how Lead Management deduplication is completed and also manage the Lead item view.
To import leads please use the data import tool.
Default Settings:
Import Data Summary Style:
Firstname Lastname (Company Name)
Disable Timer:
Disable Timer Pause Button:
Disable Free-Text on Status:
Lead Call-Back Mode:
Public - Anyone can set call-backs

7.0.9 Enhancements

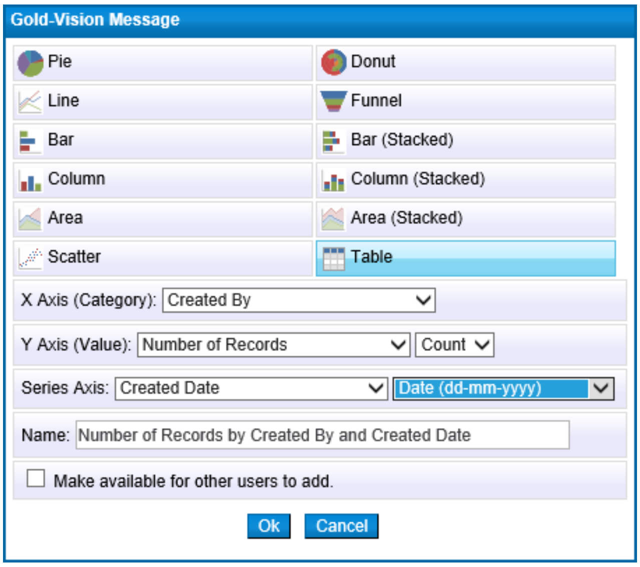
Seminar / Event Management

- **Time zone against an Event** It is now possible to specify a time zone against an event. The timezone can be specified via a simple drop down that can be added via the screen design tool. A new column has been added to the Seminar list to show the "local" time for the current user.



Dashboarding

- **Dashboard Charts - Explicit Date Series** - It is now possible to use an explicit date as a series for dashboard charts, allowing for more intuitive analysis of data over a short period of time. The new option appears in the Series Axis section when a date field is selected.



The data is then sorted by explicit date, rather than by the number of the day/week/month/etc as is the case with other date series options

	Andrew Fiendley	Sean Anderson	Tim Beresford
10/12/2012	1.00	0.00	0.00
11/12/2012	0.00	0.00	0.00
12/12/2012	0.00	0.00	1.00
13/12/2012	1.00	2.00	0.00

- **Dashboarding - Auto-Filled Date Series** - When using a date as a series in a dashboard chart, time periods (days/weeks/months/etc) without any data are now shown.

Number of Records by Created By and Created Date

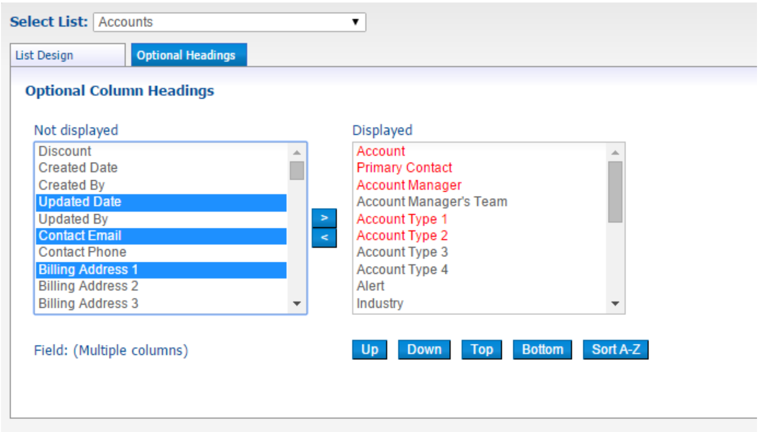
	Alison Turney	Andrew Fiendley	Calum Bob	Mark Vernon	Sean Anderson	Tim Beresford
7	0.00	0.00	0.00	0.00	1.00	0.00
8	0.00	0.00	0.00	0.00	0.00	0.00
9	0.00	0.00	0.00	0.00	0.00	0.00
10	0.00	1.00	0.00	0.00	0.00	0.00
11	1.00	0.00	0.00	0.00	0.00	0.00
12	0.00	0.00	0.00	0.00	0.00	4.00
13	0.00	1.00	0.00	0.00	2.00	0.00

7.0.10 Enhancements

Administration

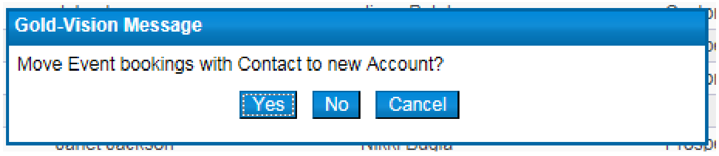
- **Multi-select fields to add/remove in list designer.**

  Users can select multiple fields to add / remove in the list design screen.

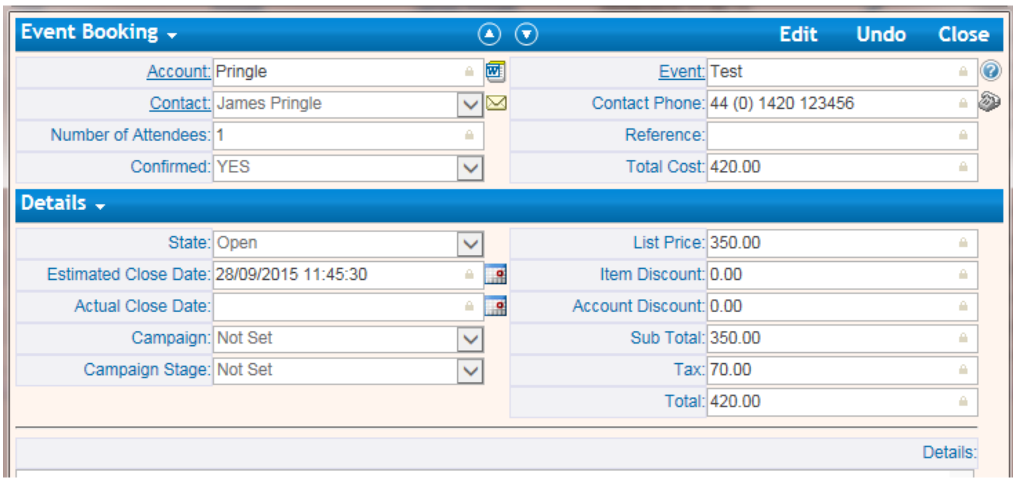


Seminar / Event Management

- **Re-Assign Contact and Move Event Bookings** When re-assigning a Contact with a bookig you will be asked if you want to move the booking.

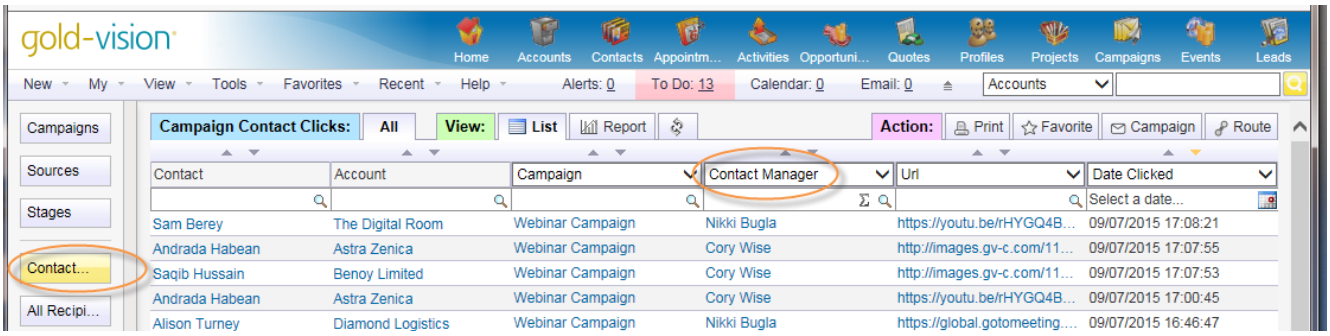


- **Add Open value to event bookings** The "Open" value of a seminar booking is now visible against a list an and item.



Connect Campaign Stage

- **Ability to Filter Clicks by Contact Manager**The "Contact Manager" field has been added to the Connect clicks main list.



7.0.11 Enhancements

Connect Integration

- **Additional Fields to Connect Up and Down Sync**

  Most account / contact fields are uploaded to Connect for mailshot design. The date of birth field will be added to the Contact Update fields and returned to Gold-Vision.

Seminar / Event Management

- **Owner now available at Booking level**

  An "Owner" field has been added at Seminar Booking level. This field can be screen-designed onto the page as normal and will be defaulted to the Seminar owner when looking for bookings in a list.

Mail Tracking

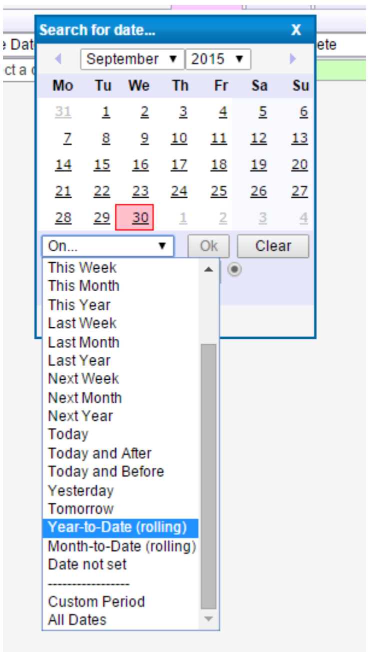
- **Images Displayed In-line in Emails**

  Display inline images in e-mails. Set in the Admin Console, User Interface, General Settings. . Images in emails are now shown inline by default. This is the case when viewing an email in a pop-out window, or when viewed in the new activity items screen:

Dashboarding

- **YTD and MTD List Filters**

  Two new date filters



YTD – 10 years filtered from January 1st to "today" every year for the last 10 years.

MTD – Last year and this year to date filtered from start of the month to "today".

Marketing Campaigns

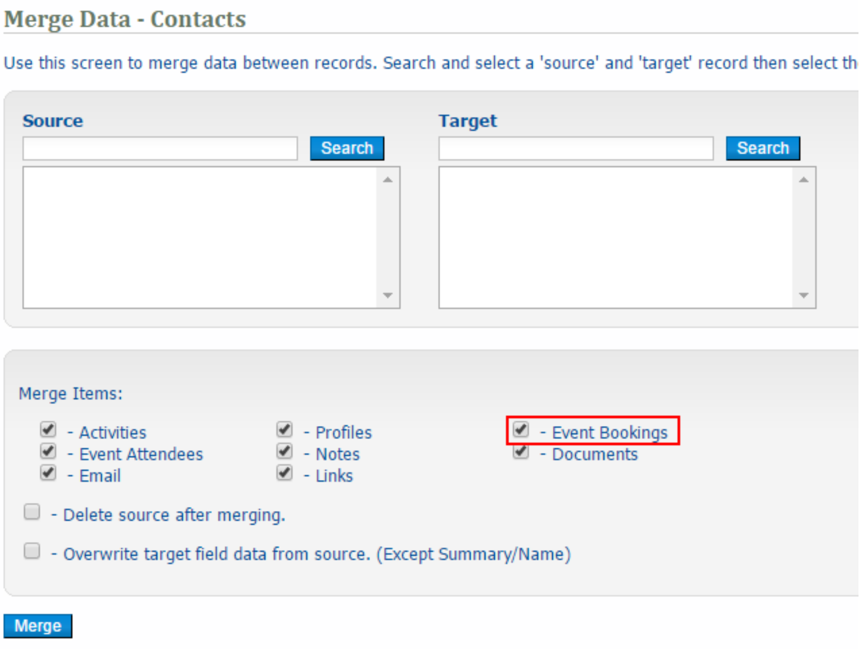
- **New Campaigns Copy the Current Item Summary**

  When creating a campaign from a session or seminar copy the summary to the new campaign dialog.

Merging Contacts Supports Bookings

- **Merge Contact Facility to include Events**

  When merging contacts in admin console there is now an an option to merge bookings.



Marketing - Campaign Stage

- **Campaign Stage - Recipients - Additional Contact & Account level fields**

  Additional fields have been added to the Campaign > Stage > Recipients list - you can also screen design the list in the admin console now.

Miscellaneous

- **Run custom SQL script after merge**

  To support integrations and extension customisations, at the end of the merge process for Accounts and Opportunities (preferably all objects) run an appropriately named SQL stored procedure if it exists.