**Gold-Vision Version 7 Enhancements** 

Gold-Vision 7.0.3

Gold-Vision 7.0.4

**Gold-Vision 7.0.5** 

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Gold-Vision 7.0.11

# **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.

A 7	A 7	A 7	A 7	A 7		
Name	Account V	Email 🗸	Phone V	Fax 🗸	Query	
(	<u>م</u> م	( Q	Q	٩		
-	Joseph Woods	-	01905455060	-	0	X
55555555 55555555	55555555 55555555	55555555@E3E83282	-	-	0	X
A Ash	Ash Satellite	A@465622C8C62E49	02089083398	02089081045	0	X
A Brett	Evander Glazing Locks	A@31F4C9F43F4341	01932254969	01932251824	0	×
A Carrington	A C Roof Trusses Ltd	A@94E5E7005165487	01938554881	-	0	X
A Clark	Clark Transport	A@3942DF77F15C4A	01514953600	01514953440	0	×
A Gains	Gains Transport	A@98B8B852186045	02072310918	02072316307	0	X
A J Soni	Allied Self Drive	A J@E8FD611BF5F24	02072242257	02072246039	0	X
A Lee	Didcot Glass And Glazi	A@5A0E349B8CC545	01235512957	-	0	X
A Lengridge	Chelsea Construction	A@75EEBA75911B48	02073500990	-	0	×
A Miles	Mts Nationwide Ltd	A@E96FA9F52B0445	01924387007		0	×
A Pateman	Elgood And Sons Ltd	A@AC202FCA33704D	01945583160		0	X
A W Rutter	A Wilson & Sons Ltd	A W@FDF184DFD5B5	01992899226	01992899225	0	X

#### 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

gold-vision <sup>.</sup>			🌍 Home	Accounts	Contacts	Appointments	& Activities	<b>%</b> Opportunities	Quotes	Profile:	s Projects
New - My - View - Tools - Fa	ivorites	- Recent	- Help -	Alerts: 0	To Do: 33	Calendar: 1	Email: 0	±			A
Accounts: All Team My	View	: 📃 List	Li Report	Calendar	📰 Item 🕒	\$				Action:	⊕ New   ℓ Rej
Account	Gold	Vision Mes	sage			A 7			* *		
		ch History									
&/stables????		Account	Primary Conta	ict Account	t Manager Ac	count Type 1	Phone Numb	er Account T	ype 2 Ref	ference	Edit
&/stables3			<b>A</b>		e Pr	ospect		A	<u>a</u>		a a
021 Courier Services Ltd3		Account	Primary Conta	ict Account	t Manager Ac	count Type 1	Phone Numb	er Account T	ype 2 Ref	ference	Edit
11			<b>A</b>	<b>A</b>	e Ho	ot Prospect	1	A	<u> </u>		<u>ه</u>
11111111 Ltd											
151 Products											

#### 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.

27 OUTON YONGHI LIG	2010012011 00.00.00
Gold-Vision Message	
Please enter a name for this favorite.	
Webinars 2014	×
O New Favorite	
Add to Dashboard: Nikki	]
Save	Cancel

# 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.

gold-vision <sup>.</sup>		<b>Š</b> Home
New - My - View - Tools	s 🕆 Favorites 🔹 Recent 😴 Help 👻	Alerts: 0 To Do: 33 Calenda
To Do: All Appointment	s Alerts Activities Call-backs View	w: 📑 List 🕼 Report 🗞

#### 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.

			~		*		~	
💠 Prev	/ Ne	ext 🛶 🛛 🖸	Z Email 🔊 Call	👱 Re-assign 🕜 Pro	mote 🔊 Discard 🗙	Delete		
Status / O	utcome:	Not Set			Find other Contac	ts at Esteiro	>	
X This	Gold-Vis	ion Message						
		tial Colle		Filter: 🔽	QV Gold-Vision Contact	🗸 🚍 Same	List 🔽 🗐 Othe	r List 🔽 ⊘ No Access
	Source		Company	Job Title	Status		Owner	
		Jim Bob	Esteiro	500 1100	Not Set	~	Nikki Bugla 2	~ ×
		2000 2000	2010110			•	Chinese and the la	(°)
								$\smile$

#### Select the Relationship

e	
Save	
0	ge Save Cancel

Lead 🗸								
🖕 Prev 🛛 Next 🔿 🖂	3 Email 🕼 Call 👱 Re-assign 🔗 Promote 🕄 Discard 🗙 Delete							
Status / Outcome: Not Set	Find other Contacts at Estei	ro						
imes This record is owned by some	X This record is owned by som							
✓ Details	✓ Details							
	Assign to: Jiggy Keith (Projects)							
	Go Cancel							
	web Domain.	-						

#### **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.

Lead 🗸								
🖕 Prev 🛛 Next 🔿 🖸	3 Email 🔊 Call 👱 Re-assign 🔗 Promote 🕄 Discard 🗙 Delete							
Status / Outcome: Not Set Find other Contacts at Esteiro								
<ul> <li>This record is owned by som</li> <li>Details</li> </ul>	Assign to a User O Assign to a Team     Assign to: Jiggy Keith (Projects)							
	Go Cancel							
	web Domain.							

#### 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

			Action: 🕁 N	ew 🔒 Print	☆ Favorite
	A <b>V</b>	A . V		∕ + <b>∀</b>	
Created Date	~	Total Records	<ul> <li>Status</li> </ul>		~
Select a <mark>Gold-\</mark>	/ision Message				~
)4/11/201	e enter a name for the list:			<ul> <li>Image: A set of the set of the</li></ul>	
)4/11/201				<ul> <li>Image: A set of the set of the</li></ul>	
29/10/201	Ok	Cancel		<ul> <li>Image: A set of the set of the</li></ul>	
16/10/201 - 15.50	.20				

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.

Sec	urity 🗸					😚 🚱 🚳 🕄	0
	Overview	-		<b>_</b>	*	A 🔻	
	Details	•		Visible		Reason	
	Events & Notes		Q	All	~		C
And	Contacts	•		-		The user is not a member of a team with access	
	Appointments			-		The user is not a member of a team with access	
	Activities			-		The user is not a member of a team with access	
	Opportunities	•		-		The user is not a member of a team with access	
	Quotes			-		The user is not a member of a team with access	
	Profiles			-		The user is not a member of a team with access	
	Projects			<ul> <li>✓</li> </ul>		The user has a team member relationship to the item	
	Campaigns			<ul> <li>✓</li> </ul>		User is a System Administrator	
	Events			<ul> <li>✓</li> </ul>		User is a System Administrator	
	Links			<ul> <li>✓</li> </ul>		User is the Account Manager	
Balt	Security	•	Security	<ul> <li>✓</li> </ul>		User is a System Administrator	
Bho	Decancy	<u> </u>	Members			User is a System Administrator	
	Documents	- L	members				

# **General Enhancements**

#### Menus can be opened by hovering

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

Gold-Vision Administration Console							
Home - User Interface - Settin	gs - Users - Products - Alerting - Data - Documents - L	uveUpdate • Help •					
User Interface Settings							
Default Date Format:	Day Month Year 😒						
Note Editing:	All Users can edit any notes	~					
Note Broadcast Log:	Enabled O Disabled						
Create Phone Notes:	No - Do not automatically create phone notes	V 0					
List Bulk Edit (System Admins):	Enabled - All lists	💌 🥨					
List Bulk Edit (Basic Users):	Enabled - All lists	✓ <sup>3</sup>					
Allow Right Cick:	• Yes O No 🐲						
Open Menus:	O By Clicking  On Hover						
Enable Linkedin Icons:	Yes O No						
Charting Animations:	Enabled      Disabled						
Custom Logo:	Browse Using a 134x38 pixel image is recommended						
List Drop Zone:	Enabled      Disabled						
Save							

#### **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.

Account +	
Account Name: 151 Products	<b>1</b>
Primary Contact: Fred Shonn	
Primary Contact Phone: 01618395949	<b>a</b>
Account Manager: Andrew Fiendley	<u> </u>

#### 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

gold-vision <sup>.</sup>		S Home	Accounts	Contacts	Appointments	Activities	Opportunities	
New - My - View - To	ools - Favorites - Recent - Help - Alert	s: 0 To Do: <u>33</u> Calen	dar: <u>1</u> Email: <u>0</u>					
	\$							
Favorites: My Public	Rename Delete		· ·	•				
Summary	Make Public Add Custom Item	Type	Public Q All	Delete				
	Cancel	List		×				
AB11 Accounts		List						
Attendees This Year		List						
N Postcode Customers		List	Add Cu	ustom Page				
Sales this year		List	Dago	(Custom Url - Enter	Relaw)	~		
Sales this year	44 4	LIST	Page. ₽₽ Url:	http://www.gold-visi				
14				Gold-Vision Home	on.com			
	Records 1 to 6	of 9	riue.	Gold-Vision Home				
To Do: All Appointm	ments Alerts Activities Call-backs &				Add Close			
	-	_					-	
gold-vision								
		8 0	17 Se		1		<u> </u>	2
New - My - View - Tools - Favo		Accounts Contexts Ap	E Actives	Operatives -	Cutters Pro	Anna Projecta	Conjungens Events	
New - My - View - Tools - Favo		Accounts Contexts Ap	galetren) Articles	Casedurees	Cutter Pro	in the second	Cerrolegen Evotes Accounts V	
New My View Tools Favo		Accounts Contexts Ap	gyettern Achdes	Opportunities	Guotes Pro	B Ak An Pains	Conjungers Events Accounts V	
New My View Tools - Favo		Accounts Contexts Ap		Opportunities			Compages Exercis	LSS ( 6 ) 4   5 13
New My View Tools Favo	Hone ontes - Recent - Hurp - Avents 2 Tis Des 23 Calendar 1	Annorm Carlann An Email: <u>a</u>		Opportunities	Custes Ave		Careadora Envis	
New My View Toos Favo	Hone ontes - Recent - Hurp - Avents 2 Tis Des 23 Calendar 1	Annorm Carlann An Email: <u>a</u>	Home At	Opportunities	Dumo Contact U	•	Consideration Accounts V	
New My View Tools Favo		Annorm Carlann An Email: <u>a</u>		Opportunities	Dumo Contact U	•	Carevers Exits	
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New My View Toos Favo	Hone ontes - Recent - Hurp - Avents 2 Tis Des 23 Calendar 1	Annorm Carlann An Email: <u>a</u>	Home At	Opportunities	Dumo Contact U	•	Careyeves Carey Accourds V	
New My View Tools Favo	Hone ontes - Recent - Hurp - Avents 2 Tis Des 23 Calendar 1	Annorm Carlann An Email: <u>a</u>	Home AE	Opportunities	Demo Contact U	•	(2000)         (2000)           (Accourts         ∨)	
New My View Tools Favo	Hone ontes - Recent - Hurp - Avents 2 Tis Des 23 Calendar 1	Annorm Carlann An Email: <u>a</u>	Home AE	Opportunities	Demo Contact U	•	Conserve Contra	
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New My View Tools Favo	Hone ontes - Recent - Hurp - Avents 2 Tis Des 23 Calendar 1	Annorm Carlann An Email: <u>a</u>	Home AE	Opportunities	Demo Contact U	•		
New My View Tools Favo	Hone ontes - Recent - Hurp - Avents 2 Tis Des 23 Calendar 1	Annorm Carlann An Email: <u>a</u>	Home AE	Opportunities	Demo Contact U	•		
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New My View Toos Favo	Hone ontes - Recent - Hurp - Avents 2 Tis Des 23 Calendar 1	Annorm Carlann An Email: <u>a</u>	Home AE	Opportunities	Demo Contact U	•		
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New My View Tools Favo		Novo Overs A Ener 2 6 Cold Vision	a GAM Implementat	countum	Duno Contact U pport Our Custom	•		

• PageLets or partial Pages

1.

- Open an Existing Home Page tab
   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

		Document Production
Select temp	late:	Preview:
Account Ex	ample Letter.dot	
AccountLet	terTemplateKeywords.dot	
		Mr Adrian Wilson
Output as:	Microsoft Word (.docx)	Red Rock C P House
Output to:	● File ○ Email	97-107 Uxbridge Road London
Save:	$\checkmark$	W5 5TL
Folder:	\\10.200.5.30\CustomerDocs\trainir V	
File:	Red Rock.docx	Dear Adrian,
Create Note	: 🗆	_
	Ok Cancel	

• 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

		Document Production
Select templ	ate:	Preview:
Account Exa	ample Letter.dot	
AccountLett	terTemplateKeywords.dot	
		Mr Miller Keith
Output as:	Microsoft Word (.docx)	3 D Architects Ltd Gresham House
Output to:	○ File    Email	45 West Nile Street Glasgow
Send in:	O Attachment  Body	Lanarkshire G1 2PT
Send to:	"Nikki Bugla" <nkbugla@esteiro.co.uk></nkbugla@esteiro.co.uk>	
Create Note:	:	Dear Miller,
	Ok Cancel	

- 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

ount 🗸						Edit	Und	lo	Clos
New Note Account Name	AJ	Cope & Son Lt			Main Phone: 02	077 292405			
New Contact New Appointment	Jon 020	Select Recipients	- Gold-Vision - Internet		The local				x
New Opportunity New Quote New Quick Quote	Not		emo.goldvisioncrm.com ect the email recipient	-	aspx?page=SendAcco	untPersonsEmail&Item	D=b5b	d2a3c	-76   Sen
New Activity						Select All			
New Profile	<u>st</u>	Name	Job Title	Role	Туре	Email	То	ee	Bcc
New Project		Andrada Habean	-	-	Gold-Vision	-			
New Link		Andrew Fiendley	-	-	Gold-Vision	ajfiendley@esteiro			
Add Member (5/	0 9	Bash Al-Azzawe	-		Gold-Vision				
Import Tasks	Pr	Cory Wise	-	-	Gold-Vision				
Import Contacts		Harriet Smith	Sales Engineer	-	Contact	hsmith@ajcope.com			
Undate Contact Address		Jamie Brett	Marketing Manager	-	Contact	jbrett@ajcope.com			
Send Email	M	Jimmy Jones	Sales Engineer	-	Contact	ijones@ajcope.com			
Add to Campaign Source	-	Jonathan Cope	IT Manager	-	Contact	jonathanw@test.cg			
tecent Events		Mark Vernon	-		Gold-Vision	mjvernon@esteiro			
Report		Nat Gorton	-	-	Gold-Vision	-			
Favorite		Nikki Bugla	-	-	Gold-Vision	nkbugla@esteiro.c			

# 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.

Note -	Save Close
Users	То
Charlie Shaw (Account Manager) - Executive	
ABS Exchequer - Exchequer	
Accounts - Accounts	
Alison Turney - Executive	
Andrada Habean - Projects	
Andrew Fiendley - Technical Development	
Andy Calvert - Technical Development	
Bashar Al-Azzawe - Projects	
4 F	-
Add Members Add Owner	Send Email - Raise Alert Done

# 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.

Gold-Vision Administration Console	
Home  Very User Interface  Settings  Users  Products  Alerting  Data  Documents  LiveUpdate	Diagnostics - Help -
Welcome to the Gold-Vision Administration Console This console enables the system-wide configuration of Gold-Vision as well as providing a number of tools for the maint the menu.	Logging Mail Tracking & Calendar Database Details Alert Trace

#### Test button on Mail Tracking Settings

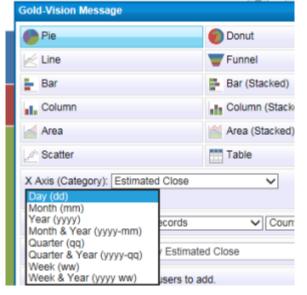
Test button to validate mail tracking details are correct before saving them against a user



# 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

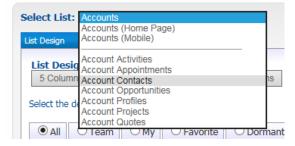
#### • Account key sub-list design in Admin Console

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.

Account 🗸		(	$\mathbf{O}$		Edit	Undo	Close	
Account Name: 3	D Architects L	.td	<b>W</b>	Main Phone:	01412 263030		(Sec.	2
Primary Contact: N	liller Keith	$\sim$		Created By:	Gold-Vision		A (	?
Primary Contact Phone: 0	1412 263030		<b>9</b>	Web Site:			•	D
Account Manager: N	likki Bugla		Q.	Alert:	Not Set		$\checkmark$	
Contacts -		A <b>V</b>		•	6 6		New	
Name	Email	~	Phone		<ul> <li>Mobile Phone</li> </ul>	e (	<ul> <li>Link</li> </ul>	
	Q	Q		(	۹.		4	
Adrian Wilson	amcalvert	@outlook.com	01412 263030		-		0	
Miller Keith	arch@gla	s.3dgroup.co.uk	01412 263030		-			
М	44	4		Þ	$\Diamond \Diamond$	ÞI	J	
		Record	ls 1 to 2 of 2					

#### **List Design - Accounts**

Using this screen you can configure the default list that appear



this screen you can configure the default l	ist that appears to Gold-Vision users. You can also	o control the list of options that are available und	er the 'Optional Headings' for each column B	ack to list me
ect List: Account Contacts	V			
t Design Optional Headings				
.ist Design				
lect the default tab, sort, heading and size.				
All				
			Name	Link
● All	Email	✓ Phone	Job Title Email	Link
● All	Email	♥ Phone	Job Title Email Rhone	5%
● All ○▲ ▼○ lame	Email	✓ Phone	Job Title Email	

Account 🗸					Edit	Undo	Close
Account Name: 3 [	O Architects Ltd		<b>1</b>	Main Phone: 01	1412 263030		2
Primary Contact: Mi	ller Keith	~		Created By: G	old-Vision		A (
Primary Contact Phone: 01	412 263030		<b>D</b>	Web Site:			6
Account Manager: Ni	kki Bugla		a.	Alert: N	ot Set		$\sim$
Contacts 🗸				<b>1</b>	6	S 🕹	New
▲ <b>▼</b>	A 3		A			■	
	Email		Phone	▼ ▼	~ •		New
Name			Phone				
Name	Email	~ ~	Phone	~			✓ Link
Name	Email Q	Cok.com	Phone	~	Job Title		✓ Link

# 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.

ccount 🗸				Edit	Undo	Close
Account Name:	ABC Education	8	Main Phone:	01222 567 7666		á
Primary Contact:	Not Assigned		Created By:	Gold-Vision		A (
Primary Contact Phone:		<b>@</b>	Web Site:			
Account Manager	Nikki Bugla	٩	Alert:	Not Set		$\sim$
ocuments +		Add Documents	<b>*</b> a <i>*</i>	📲 💊 🕞 File	Folder	Web
	Do you wish to lin	nk or upload an item?				
		Link O Upload				
	What kind of link	do you wish to create?				
		File O Folder O V	Veb			
	File Path:					
	Please select a f	file				
		Browse				
		Save Cancel H	lelp			

#### • 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 List - Partner 15% Discount

rateric currency.	[Base Currency] (£ GBP)				
Discount %:	15.000000		ISO Code:	GBP	
Currency Symbol:	8	<b>A</b>	Exchange Rate:	1.000000	
Default Tax Code:	[Default]	•	Financial Entity:	Not Set	
Price List Open:			Exclusive:		
Start Date:	01/06/2015 00:00:00	•	End Date:	30/06/2015 00:00:00	

• 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.

Price	List -	Partner	15%	Discount
1 1 100	LIDU	I LEI CHICI	10/0	DIDCOULI

Discount %:	15.000000		ISO Code:	GBP	1
Currency Symbol:	£	A	Exchange Rate:	1.000000	
Default Tax Code:	[Default]	٣	Financial Entity:	Not Set	
Pr <u>ice List Open:</u>	<b>(</b>		Exclusive:		
Start Date:	01/06/2015 00:00:00		End Date:	30/06/2015 00:00:00	

# 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

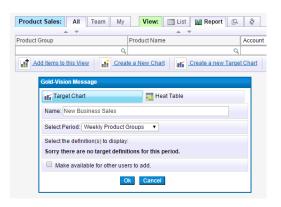
It is now possible to set targets for product groups. These targets work in a similar way to user sales targets but are visible under the Product Sales main list view.

Gold-Vision Administration Console				
Home   User Interface   Settings   Users	Pro	oducts -	Integration	IS
Welcome to the Gold-Vision Admini		General	Settings	
welcome to the Gold-Vision Admini	Suc	Financial	l Entities	-
This console enables the system-wide configuration configuring the Gold-Vision system. You can reload		Products		
Gold-Vision Setup Guide	—	Product		
User Management Setup Users and Teams ( <u>Teams</u> , <u>Users</u> , <u>Team Me</u>	mber	Price List	Currencies ts Fixed-Prices	
User Interface		Tax Code	es	
Configure Global Item Names Screen Design - Labels and Layout		Product 7	Targets	

#### 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

Campaign Source				$\overline{\mathbf{v}}$				Edit	Undo	Clos
Summary	r: Directors				En	nail Preferenc	e: Preferre	ed Email		٠
Owne	Gold-Vision Admini	strator	Q	1	Pho	ne Preferenc	e: Preferre	d Phone		•
Source Type	Account / Contact	A			F	ax Preferenc	e: Preferre	ed Fax		۲
Total Recipients	: 21	<u>ه</u>			Le	tter Preferenc	e: Preferre	d Addres	s	۲
Recipients 👻										Ado
▲ ▼	<b>▲</b> ▼	<b>A V</b>				• •		•		
Name	Account 🔹	Country		Ph	one	• •	Fax	•	Query	
Q	Q	Account			*	Q		Q		
Alison Moyet	Verto Design Lim	Valid for Email	Invalid Email Reaso	son	1	786 543	-		0	×
Amy Winehouse	B & Q Wandsworth	Valid for Fax				33 4444	01233 87	6655	(?)	×
Anne West	ICI plc			n		34 7000	0207 234	8888	0	×
April Stevens	Look East Devel			son	4	6 789 07	01392 88	5681	0	×
Bob Fitz	Aaron Fitz Electri	Valid for Pho					5) 646-9201	3.12435	+13	0
Brian Eno	ICI plc	Invalid Phone Valid for SMS		ason	234 7000		0207 234	0207 234 8888		×
Edith Piaf	Arles Constructio	Invalid SMS		on		30 17 12	+32 71 30	0 17 14	0	×
Eve Hernandez	Aaron Fitz Electri	Email			j	5) 646-9201	3.12435	+13	(?)	×
Fred Jones	Westminster City	Phone Mobile			5	67 8643	-		0	×
lan Masterston	Look East Devel	Fax			2	885680	01392 88	5681	0	×
lames Brown	B & O Walton on	Address Town Postcode			1	1932 500	01932.60	0611	à	×
		Job Title Country			Ŧ					

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 🗸				_	Edit	Undo
🖂 Email 🛛 🔊 Call	🛃 Call Back 👱 Re	-assign 🕜 Pr	omote 🔹 🔊 Disc	ard 🗙 Delet	e	
Status / Outcome: Not Set			Fin	d other Contacts	at Test Lea	ad
List Name: Web Leads	Last Action: Never					
<ul> <li>You are the owner of this</li> </ul>						-
	Gold-Vision Mess	-				
Summary: Tes	t Lead		ve the owner for th	is Lead?		
Company Name: Tes	t Lead	Remove Owner	Keep Owner	Cancel		
Phone: 016	04 5656566	<b>@</b>	Contact Phone:			8
Web Domain: www	w.gold-vision.com	<b>S</b>	Contact Mobile:	0798989898		100
Postcode:		ia.	Contact Email:			

• 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.

gold-vision		Home Accounts	Contacts	Appointments Activit	es Opportunities	Quotes	Profiles	Projects	Cempaigns	Seminara	Leads
New - My - View - To	ols - Favorites - Recent -	Help - Alerts	с <u>о</u> То D	o: 0 Calendar: 0	Email: <u>0</u> ≜			Account	s 🔻		)(
List Control: All Vi	iew: 📑 List 🕼 Report	🖬 Calendar 🛛 🗞						Act	tion: 🗇 New	A Print	☆ Favorite
A 7	A 7			A 7				+	A 7		A . T
Summary	Manage List	List Type	•	Owner	Created Da	te	<ul> <li>Total Red</li> </ul>	ords •	De-Duplicating	g 🔹 Status	5 <b>7</b>
	ď	Q	ΣQ		Σ 🔍 Select a dat	Ð		ΣQ	ILA	<ul> <li>Open</li> </ul>	•
Web Leads	Manage List	Web Enquiries	0	Sold-Vision Administrator	08/06/2015	16:34:59		1			~
	V Web Leads (Lead) - Gold-Vision		/ision.aspx	?page=LeadContro	l&ItemID=1					ÞI	
	Lead Management 🔹	13		1 2		Edit	Undo Close				
	Summary: Web	Leads		List C	wner Gold-Vision	Administrat	or l	2			
	Total Leads: 1		ŵ	List 8	tatus: Open (Lea	ds Editable)	•				
	Total Promoted 0 (0	%)	6	Access	Mode: Private (Us	er-Level)	۲				
	List Type Web	Enquiries	•	Promotion	Mode: Anyone		•				
	Assign Leads 👻						Assig	1			

# **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.

	1 - Accounts en vou can configure the default list that appea	
Using this scree	en you can conligure die deradic list diat appea	11.5
Select List:	Account Product Sales 🔹	
	Accounts	
List Design	Accounts (Home Page)	
	Accounts (Mobile)	
List Desig		
5 Column	Account Activities	
	Account Appointments	
Select the d	Account Contacts	
Sciece and a	Account Opportunities	
	Account Profiles	
• All	Account Projects ma	ant
	Account Quotes	
Account	Account Product Sales	F
	<b>■ 19% </b>	

#### 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:

Activity -       Initial Setup         Summary:       Initial Setup         Type:       General Account Task         Start Date:       03/07/2015 10:00:00         Due Date:       04/07/2015 10:00:00         Details -       Due Reminder:		Undo de on Caler	Close
Type:     General Account Task     Contact Phone:     01744 811119       Start Date:     03/07/2015 10:00:00     Image: Status:     Not Started       Due Date:     04/07/2015 10:00:00     Image: Due Reminder:     None		de on Caler	
Start Date:         03/07/2015 10:00:00         Image: Comparison of the started           Due Date:         04/07/2015 10:00:00         Image: Comparison of the started	Inclu	de on Caler	
Due Date: 04/07/2015 10:00:00	Inclu	de on Caler	
	Inclu	de on Caler	
Details 🗸			idar: 🛄
			Note
Account: 24 Seven Vending Ltd  Priority: Normal			$\sim$
Parent: 24 Seven Vending Ltd			٩
Created Info: Steve Kirby on 25 Jun 2015			<b>A</b>
₹ ≜			
Note <u>Rescheduled for Friday, 3rd July at 10am</u>	Steve Ki	irby today at	15:49
Project <u>24 Seven Initial Project</u> Ster	ve Kirby on	Tuesday at	09:58
Document <u>Proposal.docx</u> S	steve Kirby	on Friday at	17:14
Note Phone call from Ken Stee	ve Kirby on	16th Jun at	09:13
Email Regarding 24 Seven's Setup     From Andrew F	Fiendley on	10th Jun at	11:47
			~

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

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)
- o Confirmed Value Is the total value of all "Confirmed" bookings

# Alerting

Ability to create and select extension email templates for alerting

	Email Templates
Template Name:	Alert Trace
Description:	
Gold-Vision Object:	Lead
Email Type:	text 💌
Message Subject	
Message Body	
Message Body	
Message Body Add item data field:	
	Insert

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.

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

#### Lead Management

# 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.

eminar 👻				Save Clo	se		Open		
Summary:	-	-	Currencu		0		Open		
		-					Open		
Start Date/Time:			Value				Open		
End Date/Time:		.9	Owner		Q		Open		
Type:	Not Set	•	Time Zone:	(UTC) Dublin, Edinburgh, Lisbon,			Open		
etoiis Address			Early Bird Discount %	(UTC-04:30) Caracas (UTC-04:00) Asuncion (UTC-04:00) Atlantic Time (Canada)					
			Early Bird Cut-Off Date	(UTC-04:00) Culaba	anau	us. Sa	in Juan		
			Bookings	(UTC-04:00) Santiago					
Town:			Attendees	(UTC-03.30) Newfoundland (dees: (UTC-03.30) Prasilia (UTC-03.00) Buenos Aires (UTC-03.00) Cayenne, Fortaleza					
County:			Length (Days)						
Post/Zip Code:			Account (Internal):	(UTC-03:00) Greenland					
Country			Campaign	(UTC-03:00) Montevideo (UTC-03:00) Salvador					
				(UTC-02:00) Coordinated Universal (UTC-02:00) Mid-Atlantic (UTC-01:00) Azores (UTC-01:00) Azores (UTC) Casablanca (UTC) Casablanca (UTC) Coordinated Universal Time (UTC) Dublin, Edinburgh, Lisbon, LC					

# 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.

Gold-Vision Message	
Pie Pie	🕖 Donut
📈 Line	<b>T</b> Funnel
늘 Bar	Bar (Stacked)
Column	Column (Stacked)
krea	Area (Stacked)
🦽 Scatter	Table
X Axis (Category): Created By	~
Y Axis (Value): Number of Records	✓ Count ✓
Series Axis: Created Date	V Date (dd-mm-yyyy)
Name: Number of Records by Created	By and Created Date
Make available for other users to a	dd.
Ok	Cancel

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.

lum	ber of Record	is by Created By	and Create	d Date			♦   ◀   ▶   쇼   읍   문	×
	Alison Turney	Andrew Fiendley	Calum Bob	Mark Vernon	Sean Anderson	Tim Beresford		
Z	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		
<u>10</u>	0.00	1.00	0.00	0.00	0.00	0.00		
11	1.00					0.00		
12	0.00							
<u>13</u>	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.

ot displayed		Displayed	
Discount Created Date Created By Jpdated Date Jpdated By		Account Primary Contact Account Manager Account Manager's Team Account Type 1	
Contact Email Contact Phone Billing Address 1		Account Type 2 Account Type 3 Account Type 4	
Billing Address 2 Billing Address 3	-	Alert Industry	-

# **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.

Gold-Vision Message	F 0.1.1	
Move Event bookings with Contac	ct to new Account?	
Yes	No Cancel	-
ounce ouchoon	Trinte Dagia	Coor -

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

ent Booking 🗸			)	Edit Und	lo Clos
Account:	Pringle	- 🗹	Event:	Test	<b>A</b>
Contact:	James Pringle		Contact Phone:	44 (0) 1420 123456	A
Number of Attendees:	1	A	Reference:		<b>A</b>
Confirmed:	YES	$\checkmark$	Total Cost:	420.00	<b>A</b>
etails 🗸	Open		List Price:	350.00	
Estimated Close Date:			Item Discount:		
			Account Discount:	0.00	A
Actual Close Date:		A	Account Discount.	0.00	
Actual Close Date: Campaign:			Sub Total:		<u></u>
	Not Set		Sub Total:		A

# **Connect Campaign Stage**

• Ability to Filter Clicks by Contact ManagerThe "Contact Manager" field has been added to the Connect clicks main list.

gold-visio	DU.		Accounts Contacts A	Appointm Activities Opportu	uni Quotes Prof	iles Projects	Campaigns Event	s Leads
New - My -	View - Tools - Favo	rites - Recent - Help	<ul> <li>Alerts: <u>0</u> T</li> </ul>	o Do: <u>13</u> Calendar: <u>0</u>	Email: <u>0</u> ≜	Accounts	~	Q
Campaigns	Campaign Contact CI	icks: All View:	List M Report	Ş	Action: 🔒 P	rint 🖙 Favorit	e 🖂 Campaign	P Route
Sources	Contact	Account	Campaign	Contact Manager	▲ Url		Date Clicked	~
Stages		a (	٩	9	Σ۹	Q	Select a date	
olugeo	Sam Berey	The Digital Room	Webinar Campaign	Nikki Bugla	https://youtu.t	e/rHYGQ4B	09/07/2015 17:08:2	1
	Andrada Habean	Astra Zenica	Webinar Campaign	Cory Wise	http://images.	gv-c.com/11	09/07/2015 17:07:5	5
Contact	Saqib Hussain	Benoy Limited	Webinar Campaign	Cory Wise	http://images.	gv-c.com/11	09/07/2015 17:07:53	3
All Desiri	Andrada Habean	Astra Zenica	Webinar Campaign	Cory Wise	https://youtu.t	e/rHYGQ4B	09/07/2015 17:00:4	5
All Recipi	Alison Turney	Diamond Logistics	Webinar Campaign	Nikki Bugla	https://global.	gotomeeting	09/07/2015 16:46:4	7

# 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 screendesigned onto the page as normal and will be defaulted to the Seminar owner when looking for bookings in a list.

## **Mail Tracking**

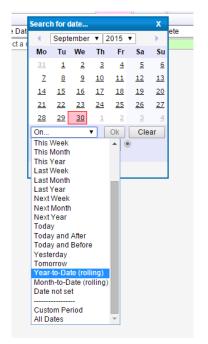
#### • Images Displayed In-line in Emails

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.

Merge Data - Contacts	
Use this screen to merge data between records.	. Search and select a 'source' and 'target' record then select th

Search
•
Ţ
<ul> <li>✓ - Event Bookings</li> <li>✓ - Documents</li> </ul>
mmary/Name)

# **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.