Gold-Vision Version 6 Enhancements

Gold-Vision 6.5 Enhancements

Calendar View

A revised calendar view provides a significantly enhanced view of items, providing month, week and day views as well as scrolling and spanned items.

The 'My Calendar' View

A new list allows users to easily see their forthcoming appointments/activities

Creating/Editing Appointments in Gold-Vision

Users can now create appointments within Gold-Vision, allowing Gold-Vision to operate as a stand alone calendar system (or in conjunction with an external calendar system) REQUIRES GOLD-VISION TO BE RUNNING IN NEW APPOINTMENTS MODE.

Third Party Calendar Synchronisation Service

A new Third Party Calendar Synchronisation Service allows Gold-Vision users to Synchronise their appointments with a greater number of external calendar suppliers than previously possible REQUIRES GOLD-VISION TO BE RUNNING IN NEW APPOINTMENTS MODE.

Tactical Features

Calendar Permissions

A new permission set has been added specifically for Calendars.

Setting Calendar Permissions

Calendar permissions must be set by the user and can be configured from under the 'User Settings' screen, which can be found under the 'Home' menu or by clicking on the user's name in the bottom left corner of the screen.

From the Calendar Permissions screen users can grant access to others to allow them to create/edit appointments on their behalf.

Create/Edit Permissions

Create/edit permissions can be granted by selecting a user from the drop down, checking the 'Create/Edit' box and clicking the confirmation button to the right. By granting a user Create/Edit permission you are allowing them to create appointments on your behalf and also be able to edit the attendee list (see below).

Setting Third Party Permissions

Third party permissions can be granted by selecting a user from the drop down, checking the 'Third Party' box and clicking the confirmation button to the right. By granting a user Third Party view permissions you are allowing them to be able to see the details (namely Subject and Location) of any non-Gold-Vision appointments in your calendar.

Please see the "Sync Service" section for more information about how third party appointments are visible in Gold-Vision and how to control their privacy.

Editing Organiser / Attendees

The organiser can never be changed once an appointment has been created. The reason for this is that an appointment will be tied to a particular user's third party calendar system.

Attendees can be edited in Gold-Vision after an appointment has been created but only by 'System Admins' or users that the organiser has granted Create/Edit permissions to as per the above process.

Admin Console

Various amendments have been made to the Admin Console to accommodate the appointments and calendar changes

Reference Numbers

Appointments can be given reference numbers. These can be configured as with any other item in the system. Under 'User Interface' > 'Reference Numbers'

List Design Default View

You can now configure the default view type under the 'List Design' section of the Admin Console.

User "Show on Calendar" Checkbox

A new checkbox has been added to the User screen in the admin console to control whether the user appears on the list when creating or filtering appointments. The reason for this is to support appointment resources such as meeting rooms separately from the "show on users" check box functionality.

Alerting

Gold-Vision appointments are now supported under the 'Alerting' section of the admin console.

Please note that at the time of writing you can alert from appointments but you can cannot create new appointments as a result of another alert firing.

On-Save and Reminder Alerts

Appointments support both 'On Save' and 'Reminder' alert types. This means you can trigger alerts that fire when are user makes a change to an appointment record field and also if a certain amount of time has passed or is due for a date field.

Please note that at present only appointment fields can be alerted on for on-save alerts. It is not currently possible to alert based upon attendees being added or removed.

Technical Note: The 'Type' field is the only 'state tracked' appointment field at the time of writing.

Start Date Reminder Alerts

If a 'Reminder' has been set for an appointment then Gold-Vision will generate an alert at the selected time prior to the 'Start Date'. This functionality is similar to an activity 'Due Date' reminder.

Please note that all users attendees will get an alert reminder for an appointment for which they have 'accepted' or 'maybe' attendance to. The organiser of an appointment always gets a reminder alert unless they selected 'None' as the reminder option.

Alert Source 'Calendar Sync'

Technical Note: A new alert program source has been added for the third party calendar appointment sync. This means you can trigger alerts that only fire when the update has been made by the new appointment sync service.

An example of this might be to fire an alert if the location of an appointment changes in the third party calendar.

Mobile

Gold-Vision mobile has been updated to support the new Calendar changes.

Create Appointments

To create a new Appointment you must first enter an account record, as with any new item in Gold-Vision Mobile.

1. Find an Account and open it
2. Click the 'New' link at the bottom
3. Click the 'New Appointment' link

Adding Attendees

To add an attendee to an appointment you must first open it in Gold-Vision mobile

1. Find the appointment and open it

2. Click the 'New' link at the bottom

3. Click 'New Attendee'

4. Search for a record and click the 'Add' link to add the attende

Editing Appointments

To edit an appointment record you must click the [Edit] link next to the field you wish to edit as per normal Gold-Vision mobile functionality.

Appointment Summary Report

A new in-item report has been added against an Appointment when running in "New Mode". The report can be run by selecting "Appointment" and then "Report" from the Appointment item menu.

When the report is run it will show key information from the Appointment including the start/end dates, location, subject, attendees, notes and activities.

Gold-Link API

The Gold-Vision API (Gold-Link) has been updated according to some of the appointment changes.

Time Zones and UTC Dates

It is worthy of note that the Start and End dates for all appointments will be stored in UTC dates from the 6.5 patch onwards. In order to accommodate this change users can select their timezone such that appointments always appear in their local time.

Changing a User's Time Zone

A user's time zone setting can be changed in two places. Users can change their own time zone in Gold-Vision user settings and administrators can change any user's time zone from the users list. Since the dates are stored in UTC, changing a user's time zone will have immediate effect on what they see in the UI.

- Admin Console
  - Open the Admin Console
  - Click Users > Users
  - Click on the User to open their record
  - Change the time zone from the drop down

- Click Save
- Gold-Vision
  - Click Home > User Settings
  - Click the 'Edit' button
  - Change the time zone from the drop down
  - Click Save

User Categories

The Gold-Vision categories (aka tagging) system has been extended to Users. You can create categories for users in the normal way, under the 'UI Config' then 'Categories' menu from the Admin Console.

You can view user categories in the main Gold-Vision users list and also against the "Add User Attendee" list. You can edit user categories either against the user record in main Gold-Vision or alternatively in the main Gold-Vision users list.

Appointments 'Full Object'

Appointments are now considered a 'full object' in Gold-Vision'.

- A full set of user defined fields have been added against appointments.
- Appointments are now screeen-designable
- Appointments can be alerted from.
- Appointments can have reference numbers.

Activity Due Date Reminder

A new drop down has been added to all activity types (including 'Campaign' activities) to allow you to choose a time before which you will be alerted about an activity due date. The drop down has been added in addition to the check box and you can choose to use either. For new installs the Due Date Reminder check box is hidden and replaced by the drop down. For existing implementations it is recommended that the Due Date Reminder check box is removed from the screen and replaced by the drop down.

The new 'Reminder' drop down has values ranging from 0 minutes (i.e on the due date) up to 2 weeks before.

Activity Show on Calendar

A new checkbox has been added to the activity screens to allow the activities to be displayed on the new 'Calendar' view (See above). For existing systems this checkbox will need to be screen-designed onto the screen.

'Home' Menu Changed to 'My'

The 'Home' menu has been renamed to the 'My' menu with the following additional changes made

- The 'Notice Board' has been moved to the Tools > Search Notes menu
- The 'Users' list has been moved to the 'List' menu
- The 'Recent Events' list has been moved to the 'Tools' menu
- The 'Calendar' and 'Pending Appointments' lists have been added.

Today, Yesterday, Tomorrow Date Filters

Three additional date filter options have been added to the list date pickers.

- Today
- Tomorrow
- Yesterday

These place holders all maintain their meaning when used for favourites and dashboard reports.

Gold-Vision 6.5.2 Enhancements

Lead Management Improvements

- It is now possible to edit Lead Management promotion options using the screen designer
  - Open the Admin Console
  - Open the screen designer for a Lead Management import
  - Click on a field
  - Click the 'Advanced' tab
  - Change the mapping under 'Promote To'
  - Click the associated 'Save' button
- All new Lead Management imports are automatically assigned a full set of additional user-defined fields. These can be added to the screen using the screen and lists in the normal way and the promotion mapping can be edited as above.
  - 10 Text
  - 10 Drop
  - 10 Date
  - 10 Checkbox
  - 10 Numeric
- Lead Management now supports user-defined drop downs, which can be promote-mapped
  - Please note you cannot yet import to drop down fields
  - Drop downs are only supported for new imports
  - If you map a LM drop to a GV drop it will promote and create the option in the target drop automatically
- Additional logging has been added to the Lead Management import area
- When a lead is promoted and being merged, the user can choose whether or not to overwrite existing data for the Account/Contact

Price List Changes

Main Changes

There are two main changes that have been made to the price list and currency system.

1. Price lists are now 'children' of currencies.

1. When creating a price list you must select a parent currency or the base currency

2. The price list parent currency cannot be changed once the price list has been saved

3. Currencies are responsible for managing the exchange rate only. Discount has been removed at this level

4. Price lists are responsible for discount only. Exchange rate has been removed at this level

2. Price lists and currencies have an 'exclusivity' setting

1. Both currencies and price lists can be set as 'exclusive'

2. The default setting is for 'exclusive' mode to be off

3. When a currency or price list is set as 'exclusive' products/groups must be manually added

4. Products/groups can be managed and added to 'exclusive' lists via the 'Edit Prices' screen

Other Changes

- It is now possible to set a default tax code for a price list as well as a currency
- Tax code order of preference is now: Price List Fixed > Currency Product Fixed > Price List Default > Currency Default > Product Default
- Cost is now editable against a product fixed price
- Product fixed prices list has been updated to allow cost to be editable
- Fixed price at currency level now appears as 'fixed price' at price list level (i.e no discount at currency level)
- Currencies, Price Lists, Products can be limited by financial entity.

Calculations

Currency (Apply Exchange Rate)

Single Item Currency = Price x Exchange Rate

Quote Line Currency = Single Item Currency Price to 2dp x Quantity

Discount

Single Item Discount = (Single Item Currency to 2dp / 100) x Discount Rate

Quote Line Discount = Single Item Discount to 6dp x Quantity

Tax

Quote Line Tax = (Quote Line Discount to 2dp / 100) x Tax Rate

Totals

List Price = Line 1 Quote Line Currency + Line 2 Quote Line Currency + Line 3 Quote Line Currency + ...

Item Discount = List Price - Sub Total

Sub Total = Line 1 Total to 2dp + Line 2 Total to 2dp + Line 3 Total to 2dp + ...

Tax = Line 1 Quote Line Tax to 2dp + Line 2 Quote Line Tax to 2dp + Line 3 Quote Line tax to 2dp + ...

Total = Sub Total + Tax

Discount Mode Switch

A discount mode switch has been added to control whether discount is applied before quantity multiplication on a line-item bases. This option has been added mainly to allow for a match in functionality with Sage/Exchequer.

To control the mode switch select 'Settings > Product Settings' from the admin console.

Default Quote Price List

If an Account has a single price list against it when a quote is created for a matching currency that price list will be selected by default.

Financial Entities

Financial Entities are a solution primarily to handle Company data sets of a number of financial packages Gold-Vision integrates with (e.g. Sage, Exchequer). Ultimately, this will allow multi-company integrations (i.e. a single instance of Gold-Vision will be able to integrate with multiple data sets of a financial package).

A true multi-company integration will allow an Account to be associated customers of multiple financial entities. A Quote will be associated with a single financial entity so that it is processed into the correct third party data set.

There is no need for any Gold-Vision customers to have to use Financial Entities - it is an additional option primarily designed to handle integrations which no customer currently has. Admin Console

Administration

Financial Entities can be managed via Products > Financial Entities.

- Name - description of the financial entity
- External Id - unique 3rd party code (for integrations)
- Created Date - the date the record was created
- Create By - the user who created the record
- Updated Date - the date the record was last updated
- Updated By - the user who last updated the record

Products

Products can each be associated with a single Financial Entity. This allows a specific third party data set to maintain those products without overwriting matching products maintained by a separate integration (as is the case pre 6.5.2).

In the Product View, it is possible to set or change a Financial Entity using the relevant drop down field. The field will be locked if the product is integrated with a third party to prevent a user adversely effecting an integration.

Currencies and Price Lists

Both currencies and price lists can have a financial entity set. For currencies, this is necessary because they are an item which can be synchronised with a third party. In instances of multi-company integrations, we have to ensure the currency is being updated from a single source and setting a financial entity enforces this.

Price Lists are not items which can be integrated with a financial package. The reason a financial entity can be set is to restrict the products available when maintaining the Price List and when building a Quote.

When editing prices for both currencies and Price Lists, if a financial entity is set, the Products available for editing will be restricted to those assigned to the Financial Entity and those which have not financial entity assigned.

Account Management

An Account can be associated with none, one or multiple Financial Entities. This is managed against an Account record via the menu Overview / Details > Opportunities > Financial Entities. Any Financial Entities already associated with will be listed here and new records can be added by selecting the Add button. Existing Financial Entities can only be removed from an Account if they have not been used for that Account elsewhere in the system.

Default Price Lists for the Account are dependent on the appropriate Financial Entity being set. This means the Add button (Overview / Details > Opportunities > Price Lists) will be restricted to those which have the same Financial Entity as one those listed against the Account or have no Financial Entity assigned at all.

Opportunities

The Currencies listed at Opportunity level will be those assigned to a Financial Entity which is also associated with the parent Account and those with no Financial Entity set.

Quote Building

If a User is using Financial Entities, upon selected a Financial Entity, the available Currencies and Price Lists will be restricted to those associated with that Financial Entity. The only Financial Entities available for selection are those belonging to the parent Account. Once a Financial Entity is set, like Currency, it can not be modified after the Quote is saved.

When adding Quote Items to the Quote, the Products available will be restricted to those which are assigned to the same Financial Entity as the Quote or those which have no Financial Entity set.

Campaigns

The 'Campaigns > Campaign click thrus' list has the following changes

- Report tab added
- Campaign name added as column

Gold-Vision 6.6 Enhancements

Server-side document production

Server-side document production is a new feature which switches document production from client side using the Active-x control (i.e. run on the user's machine) to server side (i.e. completed on the Gold-Vision server). This carries a number of benefits,

- Document creation can be completed in any browser, not just IE.
- User's do not require Microsoft Word to be installed on their machines for server-side document production to function.
- Server-side document production can be initiated from any device, including phones and tablets.

This feature will continue to be expanded upon in future releases.

Enabling Server-side document production

Server-side document production can be enabled (and disabled) via a new option on the User management screen. The option can be found in the bottom right, entitled 'Enable Server Side Document Production'.

Current Restrictions

on is an on going work in progress, with additional features being added over successive updates. Please note that as of 6.6, the following restrictions apply,

- The option to publish a created document to an email body is not available at this point.
- The option to open a document from the Gold-Vision documents list and then save it directly back to its server location is only available via Internet Explorer on desktop devices at this point.

Additional Changes

- The Contact tags loaded alongside an object have been expanded to include a number not present which are available in the standard object def (please see the object def ContactTemplateInfo). Please note this change also applied to client side document production.
- The Account tags loaded alongside an object have been expanded to include a number not present which are available in the standard object def (please see the object def AccountTemplateInfo). Please note this change also applied to client side document production.

Document Folder WebDAV Support

Support has been added for WebDAV users to make use of the built-in folder linking.

The WebDAV setup must have a UNC file system access setup that Gold-Vision can access it.

This will affect our hosted customers and also OS.

New Outlook Plugin

A new version of the Outlook plugin will be released with the following features

- Outlook 2013 Support
- Support for linking imported email to additional items
    - Accounts / Contacts
    - Activities
    - Projects
    - Opportunities
    - Quotes
    - Profiles

Minor Items

A list of minor items is shown below

- Customers can now upload their own logo to the product in the Admin Console under User Interface > General Settings.
- You can disable the note broadcast log under User Interface > General Settings.

Gold-Vision 6.7 Enhancements

Google Maps Integration

Map View

A new 'Map' view option has been added to all major lists to allow any geocoded items to be displayed on a map. In order for the map view to be displayed, one geocoded field must be selected to be displayed on the list, else an error will be displayed to the user.

The map view shows individual pins for each object when there are less than approximately 100 of them and groups them together when there are more, for performance and ease of use. The user also has the option to sub-group by a field of their choice from the currently displayed fields and this will allow them to see a breakdown by each distinct value.

Route Planner

A Route Planner has been added which allows a user to drag and drop objects of any type into the dropzone and have a route planned between them. The Route Planner can optimise the route so that the route covers the shortest distance from start to finish, including all waypoints. NB. Only interim waypoints will be optimised, the start and finish points remain as they are. It also allows users to avoid toll road and highways and print the instructions and timings for their route.

Gold-Vision 6.8 Enhancements

Use Cases

Regional Sales Teams

You could have three sales teams: London, South West and South East. These teams are overlooked by the South Sales Manager. With team based email security applied to all accounts, they could set up their Gold-Vision such that the South Sales Manager could see the emails for all teams, but the sales people could not see emails of anyone outside of their own team.

HR Department

There could be a customer, for whom you have some public dealings and some team based dealings. For example, the HR department is communicating with the customer regarding a sensitive disciplinary action, which should not be visible to other teams. Team email security could be applied to this account so that any emails sent to a contact of that account, will only be visible to team members of a recipient.

Use cases this does not address

Project/Account Assignment

In the case where you want to allocate a user from a team to be assigned to a different team under a certain context. For example, in the HR use case, someone that is not usually in the HR department could need to be assigned to one of their projects. Under the current mechanisms you would have to make ALL HR emails visible to the user for all accounts. Also, if an email was sent to that user regarding a HR related issue, it would be made visible to their normal team.

MoD/High Security

In the use case where email security is private only to members of the sub-item and should not be visible to their team members, team email security does not address this. Possible solutions were discussed such as using Reference Number tracking, but it was deemed too unreliable for such a high security requirement. In this use case, emails should be left as private by default and linked to relevant sub-items manually.

Examples

(X) denotes that emails should not be propagated due to this membership

(P) denotes primary team membership

(S) denotes secondary team membership

TEAM A

Bob (P)

Sally (P) (X)

TEAM B

Fred (P)

Joe (P)

Sally (X) (S)

Email One

User Recipient/Sender: Bob

Can Team A members see it? Yes, because Bob has a primary membership in Team A.

Can Team B members see it? No, because there is no primary member in B that was included in the email. Sally's secondary membership does not cause this to become visible as it has the propagation flag set to false. If this was set to true, then it would become visible to Team B.

Email Two

User Recipient/Sender: Joe

Can Team A members see it? No, because there is no primary member in A that was included in the email. Sally's secondary membership does not cause this to become visible as it has the propagation flag set to false. If this was set to true, then it would become visible to Team A.

Can Team B members see it? Yes, because Joe has a primary membership in Team B.

Email Three:

User Recipient/Sender: Bob and Sally

Can Team A members see it? Yes, because Sally has a primary membership in Team A. Bob is also a primary member of Team A, which would mean they could see it.

Can Team B members see it? No, because Sally is only a secondary member and visibility is based on Primary membership, plus she has propagation turned off so the team membership doesn't cause propagation.

Email Four:

User Recipient/Sender: Joe and Sally

Can Team A members see it? Yes, because Sally has a primary membership in Team A.

Can Team B members see it? Yes, because Joe has a primary membership in Team B.