



# GoldMine Premium Edition Installation Guide

Version 2014.1



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# Installation

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## Overview

GoldMine Mobile is a powerful tool designed to help manage your day-to-day business activities. Maintain business relationships, manage time, establish and achieve goals.

The installation process for GoldMine Mobile involves several prerequisites (depending on your Windows Server version) and then installation of both GoldMine PE and GoldMine Mobile. This section provides an overview of the necessary steps to install and configure the various applications to get GoldMine Mobile running.

## Prerequisites

The following lists the prerequisites for specific versions of Windows Server. In addition you must also determine an installation process based on your set up (see [Installation Options](#)).

<b>Windows Server 2008 R2/ Windows Server 2012</b>	<ol style="list-style-type: none"><li>1. Internet Information Services (IIS)</li><li>2. Microsoft .NET Framework 4.5</li><li>3. GoldMine PE 2014.1</li></ol>
<b>Windows Server 2008</b>	<ol style="list-style-type: none"><li>1. Internet Information Services (IIS)</li><li>2. Microsoft .NET Framework 4.5</li><li>3. GoldMine PE 2014.1</li></ol>

## Installation Options

There are three installation options available for installing and configuring GoldMine PE and GoldMine Mobile. Each option contains different configurations for the database, the GoldMine Application Server, and the GoldMine Mobile Server. The diagrams that follow depict a few variations of these scenarios, and the associated installation procedures:

- [Installation on a Local Server \(see page 6\)](#)
- [Installation in a Workgroup \(see page 8\)](#)
- [Installation in a Domain \(see page 10\)](#)

## Configuration

Once you have completed the Installation on the selected Windows Server platform, the GoldMine Mobile web server and the GoldMine PE application must both be configured to allow access by GoldMine Mobile. These steps include the following topics:

- [Grant Access to the GoldMine Mobile Web Server \(see page 13\)](#)
- [Configure Alarm Messages for GoldMine Mobile \(see page 14\)](#)

**NOTE:** If you receive error messages after completing the installation and configuration, refer to "[Error Messages Troubleshooting](#)" on page 16.

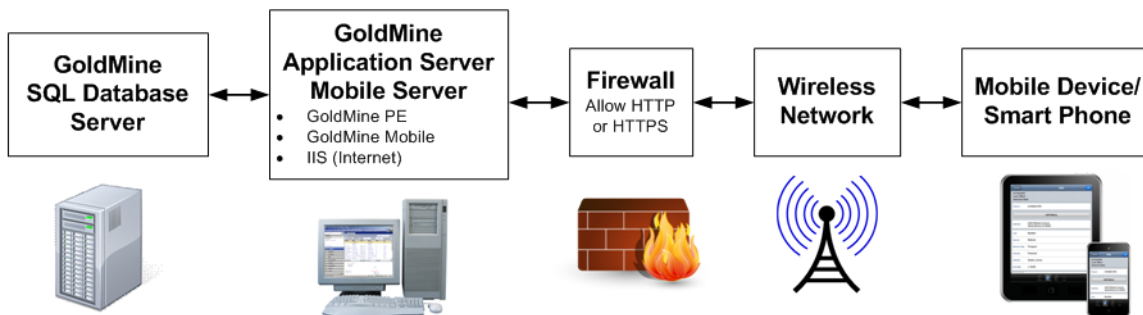
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## Installation on a Local Server

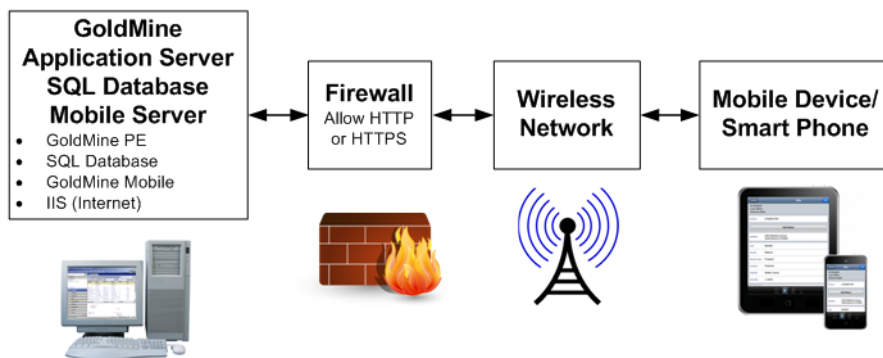
A **Local** installation is one where GoldMine PE and GoldMine Mobile are both installed on the same local computer. However, the GoldMine database can be on a different location. Refer to the *GoldMine Premium Edition Installation Guide* PDF for installation details.

### Installation Scenarios

- **Local Installation (with Remote Database)**



- **Local Installation (on a Single Server)**



# Installing on Windows Server 2008 or 2012 on a Local Server

The following instructions apply to both 32-bit and 64-bit (R2) versions of Windows Server 2008 or Windows Server 2012 installed on a Local Server.



**IMPORTANT:** SQL Server must be running for GoldMine Mobile to access the database.

---

1. Configure IIS.
  - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
  - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
2. Install the GoldMine Mobile application.
  - a. Run the **gmmobile.exe** file to start the wizard, and then click **Next**.
  - b. Accept the license agreement and confirmation options, and then click **Next**.
  - c. Choose the **Complete** installation type, and then click **Next**.
  - d. Click **Install** to start the installation process.
  - e. Click **Finish** to complete the installation.
3. Grant the **Users** group permissions to modify the **\ProgramData\GoldMine** directory.
4. [Adding the GoldMine Mobile License to GoldMine \(see page 12\).](#)
5. [Setting GoldMine Mobile User Options \(see page 12\).](#)
6. [Configure Alarm Messages for GoldMine Mobile \(see page 14\).](#)
7. Restart IIS.
  - a. **Start > Run**
  - b. Type `iisreset` and click **OK**.

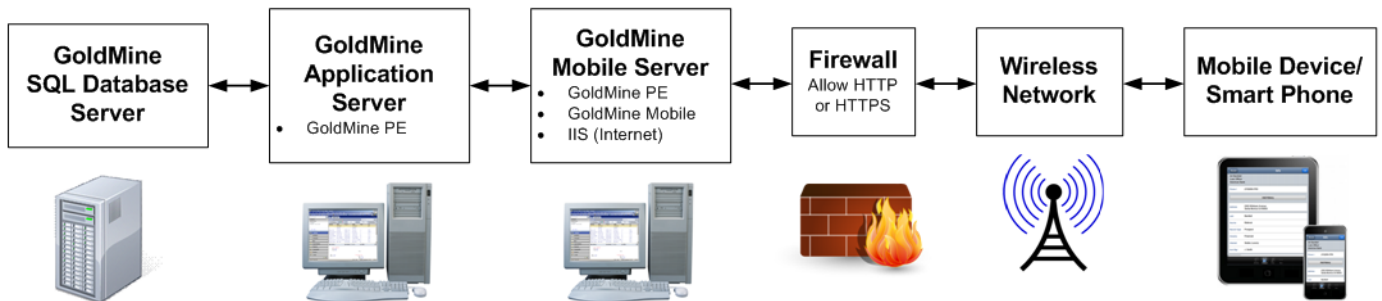
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## Installation in a Workgroup

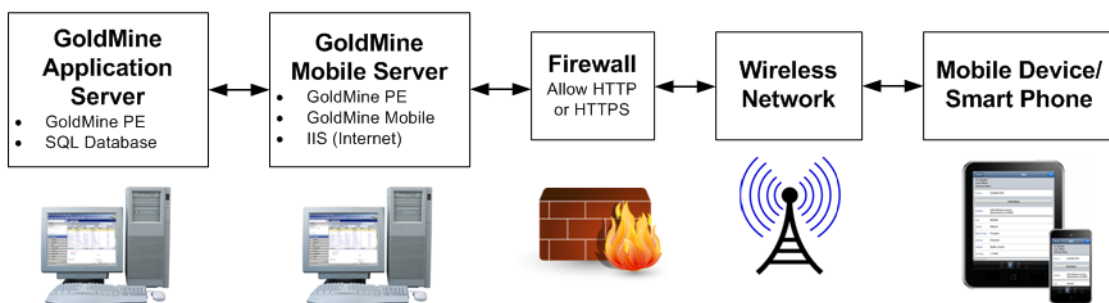
A **Workgroup** installation is an accessible server where the **GoldMine Application Server** (installed GoldMine PE connected to the GoldMine Database) and **GoldMine Mobile Server** (installed GoldMine PE and GoldMine Mobile Edition) are installed on separate computers located in the same workgroup. Refer to the *GoldMine Premium Edition Installation Guide* PDF for installation details.

### Installation Scenarios

- **Workgroup Installation (with Remote Database)**



- **Workgroup Installation (with Local Database)**



## Installing on Windows Server 2008 or 2012 in a Workgroup

The following instructions apply to both 32-bit and 64-bit (R2) versions of Windows Server 2008 or Windows Server 2012 installed in the same workgroup.

In this example, the GoldMine Application Server and GoldMine Mobile Server are part of the same workgroup, but on different computers in the Workgroup. For additional installation details, refer to the *GoldMine Premium Edition Installation Guide* PDF.

1. On the GoldMine Mobile Server, Install GoldMine PE using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server.
2. Configure IIS on the GoldMine Web Server.
  - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
  - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
3. Install the GoldMine Mobile Edition application on the GoldMine Mobile Server.
  - a. Run the **gmmobile.exe** file to start the wizard and **Next** to continue.
  - b. Accept the license agreement and confirmation options, and then click **Next**.
  - c. Choose the **Complete** installation type, and then click **Next**.
  - d. Click **Install** to start the installation process.



- e. Click **Finish** to complete the installation.
  - 4. Add a user (e.g, **gmmobile**) at the GoldMine Mobile Server to the **Users** group.
    - a. **Start > Programs > Administrative Tools > Computer Management.**
    - b. On the Computer Management tree, expand **Local Users and Groups.**
    - c. Select the **Users** folder, then right click and select **New User.**
    - d. Add the **User name** (e.g, **gmmobile**) and the **Password.**
    - e. Click the **Create** button.
  - 5. Add the user (e.g, **gmmobile**) to the GoldMine Mobile Server **IIS\_IUSRS** group.
    - a. On the Computer Management tree, expand **Local Users and Groups.**
    - b. Select the **Groups** folder.
    - c. In the panel on the right, select the **IIS\_IUSRS** group, then right-click and select **Properties.**
    - d. Click the **Add** button and add the user (e.g, **gmmobile**) created in the previous step.
    - e. Click **OK** and then **OK.**
  - 6. Add the user (e.g., **gmmobile**) at the GoldMine Application Server to the **Users** group.
  - 7. Grant the user (e.g., **gmmobile**) permission to modify the **\ProgramData\GoldMine** folders on the GoldMine Application Server and the GoldMine Mobile Server.
  - 8. On the GoldMine Mobile Server, assign the application pool identity to the added user.
    - a. Open IIS Manager.
    - b. Right-click on the **GMMobileAppPool** application pool.
    - c. Select **Advanced Settings**, then **Process Model > Identity.**
    - d. Click the ellipses button (...) next to **ApplicationPoolIdentity.**
    - e. Select the **Custom account** radio button.
    - f. Click **Set.**
    - g. Enter the Windows **User name** (e.g., **gmmobile**) and **Password.**
- NOTE:** The **User name/Password** combination must be the same in all locations where the User (e.g, **gmmobile**) is added.
- 9. [Adding the GoldMine Mobile License to GoldMine \(see page 12\).](#)
  - 10. [Setting GoldMine Mobile User Options \(see page 12\).](#)
  - 11. [Configure Alarm Messages for GoldMine Mobile \(see page 14\) .](#)
  - 12. Restart IIS.
    - a. **Start > Run**
    - b. Type `iisreset` and click **OK.**

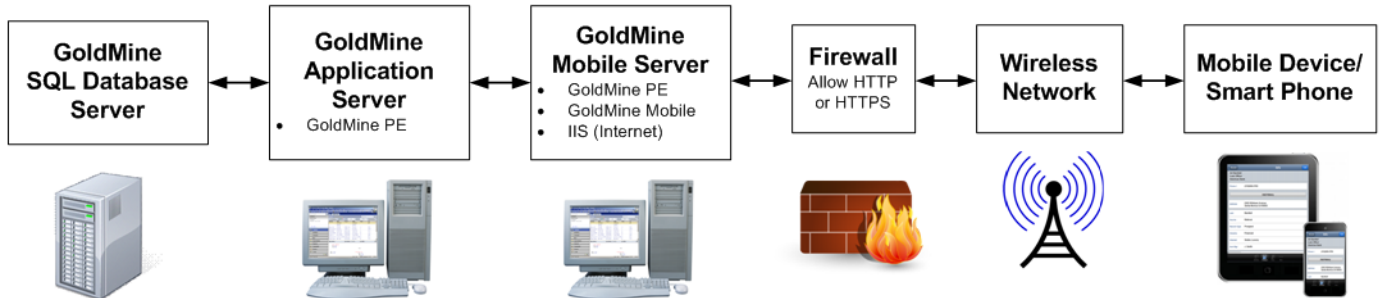
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## Installation in a Domain

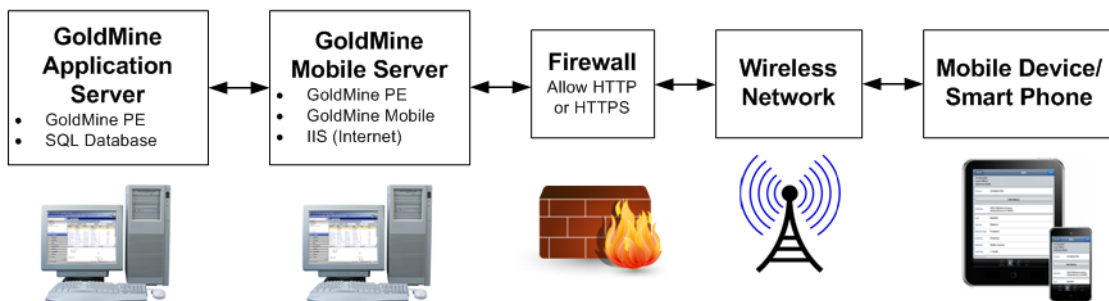
A **Domain** installation is an accessible server where the **GoldMine Application Server** (installed GoldMine PE connected to the GoldMine Database) and **GoldMine Mobile Server** (installed GoldMine PE and GoldMine Mobile Edition) are installed on separate computers located in the same domain. Refer to the *GoldMine Premium Edition Installation Guide* for further information.

### Installation Scenarios

- **Domain Installation (with Remote Database)**



- **Domain Installation (with Local Database)**



## Installing on Windows Server 2008 or 2012 in a Domain

The following instructions apply to both 32-bit and 64-bit (R2) versions of Windows Server 2008 and Windows Server 2012 in the same domain.

In this example, the GoldMine Application Server and GoldMine Mobile Server are part of the same domain. For additional installation details, refer to the *GoldMine Premium Edition Installation Guide*.

1. On the GoldMine Mobile Server, Install GoldMine PE using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server (refer to the *GoldMine Premium Edition Installation Guide*).
2. Configure IIS.
  - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
  - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
3. Install the GoldMine Mobile application.
  - a. Run the **gmmobile.exe** file to start the wizard, and then click **Next**.
  - b. Accept the license agreement and confirmation options, and then click **Next**.
  - c. Choose the **Complete** installation type, and then click **Next**.
  - d. Click **Install** to start the installation process.
  - e. Click **Finish** to complete the installation.
4. Grant the **Users** group **Modify** permissions on the **\ProgramData\GoldMine** folder on the GoldMine Application Server and the GoldMine Mobile Server.
5. [Adding the GoldMine Mobile License to GoldMine \(see page 12\).](#)
6. [Setting GoldMine Mobile User Options \(see page 12\).](#)
7. [Configure Alarm Messages for GoldMine Mobile \(see page 14\).](#)
8. Restart IIS.
  - a. **Start > Run**
  - b. Type `iisreset` and click **OK**.

---

# Update GoldMine Mobile License and Users

GoldMine Mobile cannot be used until you have added the license information into GoldMine PE and configured GoldMine Mobile User Options as seen in the following processes.

## Adding the GoldMine Mobile License to GoldMine

1. In GoldMine PE, open the **Tools** menu and select **Configure > License Manager**.
2. Click **New License** to open the GoldMine License Upgrade dialog box.
3. Click **I AGREE** to accept the Terms and Conditions and to continue.
4. Enter or paste the GoldMine Mobile license number (composed of the Serial Number & Key Code), and then click **OK**.
5. Click **Close**.

**NOTE:** For more information about “Licensing”, refer to the *GoldMine Premium Edition Administrator Guide* or GoldMine PE Online Help.

## Setting GoldMine Mobile User Options

After the GoldMine Mobile License has been added, GoldMine Mobile users must be added and configured. The following options are available on the GoldMine Mobile configuration dialog box:

- [To Specify GoldMine Users \(see page 12\)](#)
- [To Select the E-mail Composer \(see page 12\)](#)
- [To Enable the “Remember Me” Option \(see page 13\)](#)
- [To Set the User Time-Out Duration \(see page 13\)](#)

### *To Specify GoldMine Users*

The GoldMine Users that are allowed access to GoldMine Mobile must be defined in GoldMine PE before they can access the database.



**IMPORTANT:** If you assign the Master user as a GoldMine Mobile user, it is recommended that you change the default password. Otherwise, the system could be exposed to unauthorized users.

---

1. In GoldMine PE, open the **Tools** menu and select **Configure > GoldMine Mobile**.
2. Specify the GoldMine Mobile user(s) by double-clicking the User name from the list on the left to move it to the list on the right.

**TIP:** You can also select users from the list and then click the **Left** or **Right** arrow buttons to move them from one list to the other.

3. Click **OK**.

### *To Select the E-mail Composer*

By default, GoldMine Mobile uses the GoldMine e-mail composer for sending and receiving e-mail. This can be changed to use the e-mail application on the mobile device, if desired.

1. In GoldMine PE, open the **Tools** menu and select **Configure > GoldMine Mobile**.
2. Choose whether or not to **Use the GoldMine e-mail composer by default**.
3. Click **OK**.

## *To Enable the “Remember Me” Option*

When the GoldMine Mobile user access the login screen, they can be provided the option to remember their login user name, but not their password. To enable this option, follow the steps below.

1. In GoldMine PE, open the **Tools** menu and select **Configure > GoldMine Mobile**.
2. Check the **Enable ‘Remember Me’ on the login screen** option.
3. Click **OK**.

**NOTE:** This option can be configured individually by each user.

## *To Set the User Time-Out Duration*

GoldMine Mobile automatically logs out a user after a defined duration of non-activity. This value is set to 15 minutes by default, but can be modified to suit your needs.

**NOTE:** After the time-out duration has been exceeded, the screen continues to display the last screen in use. However, if you attempt to do anything within the application, you will be directed back to the login screen.

1. In GoldMine PE, open the **Tools** menu and select **Configure > GoldMine Mobile**.
2. In the **Time-out user session when idle** area, use the Up/Down arrows, or enter a value, to set the time-out duration.
3. Click **OK**.

---

## Grant Access to the GoldMine Mobile Web Server

Users access GoldMine Mobile through a web server, which needs to be accessible from the Internet. By default, the GoldMine Mobile installer creates the virtual directory **goldmine**. The URL used by GoldMine Mobile users will be **http://<server-IP-address>/goldmine** (or **https://** if you are using SSL). If you would like to use a URL (such as, mycompany.com) you will need to configure the DNS server.

**TIP:** HTTPS (HyperText Transfer Protocol Secure) is optional and requires an SSL (Secure Sockets Layer) certificate and configuration in IIS.

In this case, ensure that the following items are set:

- The server computer has a public IP address that is reachable by the Internet.
- The Domain Name System (DNS) should be able to resolve the web server name to an IP address.
- The web server firewall needs to allow data exchange via HTTP or HTTPS protocols.

**NOTE:** For information about setting up your Firewall, refer to the documentation provided by the manufacturer.

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# Configure Alarm Messages for GoldMine Mobile

Alarms for upcoming activities can be sent to a mobile device as SMS messages (Short Message Service). This enables users to receive reminders even when they are not logged in to GoldMine Mobile Edition. After being configured in GoldMine PE, users can receive text message reminders, and audible or vibration alerts.

Messaging must be configured within GoldMine PE in the following places:

- [Enabling Activity Reminders in GoldMine PE \(see page 14\)](#)
- [Setting the Web Server URL \(see page 15\)](#)
- [Enabling Message Reception for GoldMine Mobile Users \(see page 16\)](#)

**TIP:** [Modifying the SMS Template](#) allows you to customize the content of the text messages.

## Important Notes about SMS Messaging

- GoldMine SMS messaging requires a GoldMine Mobile license (see ["Adding the GoldMine Mobile License to GoldMine" on page 12](#)).
- The **GoldMine Messaging** service (Window's **Control Panel > Administrative Tools > Services**) must be running before SMS messages can be sent.
- GoldMine SMS messaging is only available for users that are specified as GoldMine Mobile users (see ["Setting GoldMine Mobile User Options" on page 12](#)).

## Enabling Activity Reminders in GoldMine PE

You must enable messaging, before GoldMine PE can send Activity reminders to mobile device users.



**IMPORTANT:** GoldMine Mobile must be installed before you can enable activity reminders.

---

1. Log into GoldMine PE as a user with Master rights.
2. Open **Tools > Configure > System Settings**.
3. Click the **Messaging** tab.
4. Check the **Enable GoldMine Messaging** box.
  - **For Workgroup Installations:** Change the logon account for the GoldMine Messaging Service.
    - a. **Start > Settings > Control Panel > Administrative Tools > Services.**
    - b. Select the **GoldMine Messaging Service**.
    - c. Right-click and select **Properties**.
    - d. Click the **Log On** tab.
    - e. Select the **This account** radio button.
    - f. Enter the GoldMine Windows account (e.g, **gmmobile**) and password.
    - g. Click **OK**.
    - h. Start the **GoldMine Messaging Service**.
5. Specify the GoldMine username used to send GoldMine Alarms from the **Send from** drop-down list.

**NOTE:** The selected username must have an email account already configured in their user options or they will not receive reminder messages.

6. Click **OK**.

## Modifying the SMS Template

The SMS Message contains text and macros that produce the reminder message. Modify the Message Template as follows, to change the content that displays within the activity reminder message.

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools > Configure > System Settings**.
3. Click the **Messaging** tab.
4. Modify the Message Template.

The **Message Template** field contains a combination of **Text** and **Macros**.

- **Text:** The alphanumeric characters before and/or after the Macro.
- **Macro:** Macros are marked with surrounding brackets (e.g., **[date]**).

The following macros can be used in the message body:

**[date]** – date of an activity (CAL.ONDATE)

**[time]** – time of an activity (CAL.ONTIME)

**[reference]** – reference (CAL.REF)

**[company]** – linked contact name (Contact1.Company)

**[contact]** – linked contact name (Contact1.Contact)

**[phone]** – linked contact name (Contact1.Phone1)

**[link]** – link to an activity that is used to open it in GoldMine Mobile

5. Click **Show Example** to view a sample message.
6. Click **OK** to save your changes.

## Setting the Web Server URL

The Alarm message includes a link to the Activity in the GoldMine database. The URL to the GoldMine Mobile web server must be defined in order to enable this feature.

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools > Configure > GoldMine Mobile**.
3. In the Web server URL text box, enter the path to the GoldMine Mobile site.

For example: **http://yourcompany.com/goldmine**

4. Click **OK**.

## Enabling Message Reception for GoldMine Mobile Users

After [Enabling Activity Reminders in GoldMine PE \(see page 14\)](#), specify the GoldMine Mobile users that can receive activity message reminders from GoldMine PE, and configure the message reception for their mobile devices.



**IMPORTANT:** GoldMine Mobile must be installed before enabling message reception.

---

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Users' Settings**.
3. Select a GoldMine Mobile user and click **Preferences**.
4. On the <User's> Options page, select the **Messaging** tab.
5. Check the **Send activity alarms as a message to my device** box.
6. Specify the GoldMine Mobile User's e-mail address used for receiving SMS messages in the **E-mail address for the mobile device** text box.

**TIP:** For assistance in determining the e-mail address, refer to the following article for a listing of service providers' SMS gateways: [http://en.wikipedia.org/wiki/List\\_of\\_SMS\\_gateways](http://en.wikipedia.org/wiki/List_of_SMS_gateways)

7. Click **OK**.
8. Repeat this process for other GoldMine Mobile users as needed.

---

## Error Messages Troubleshooting

After installation and configuration of GoldMine PE and GoldMine Mobile, any error messages that appear in the GoldMine Mobile application are logged by the Event Viewer to the server where GoldMine Mobile is installed. If there is a system error (such as an error message shown to an end user) the administrator can check the Event Viewer (Application log) for troubleshooting information. Administrators can use this information to troubleshoot the problem or provide it to technical support for further assistance.

### *To Access the Event Viewer*

Use one of the following methods to open the Event Viewer:

- Open **Administrative Tools** and double-click **Event Viewer**
- Open a **Command Prompt**, type `eventvwr`, and then press **ENTER**.

**NOTE:** For more information about the Event Viewer, refer to the Server documentation provided by the manufacturer.



# GoldMine Mobile User Guide

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## Overview

- [GoldMine Mobile Overview \(see page 18\)](#)
  - [Activities \(see page 21\)](#)
  - [Contacts \(see page 22\)](#)
  - [Cases \(see page 24\)](#)
  - [More \(see page 25\)](#)
- 

## Getting Started

- [Login to GoldMine Mobile \(see page 17\)](#)
- [Create a Shortcut on the Home Screen \(see page 18\)](#)

## Login to GoldMine Mobile

The first time you open the GoldMine Mobile application, you will be required to login before you can access the database. Your login and password combination is the same one used when logging in to GoldMine PE, and contains all the rights defined for your login role.

**NOTE:** Passwords are sent in encrypted form when using either HTTP or HTTPS. HTTPS provides a higher level of security and also encrypts customer data sent over the network.

### *To Open GoldMine Mobile from a Link*

If you were sent a link to the URL in a message, follow the steps below.

1. Open the message (email or text) and tap the link.
2. Your default mobile web browser opens to the GoldMine Mobile login screen.
3. Enter your Username and Password and then tap **Login**.
4. [Create a Shortcut on the Home Screen \(see page 18\)](#).

### *To Open GoldMine Mobile from the Home Screen*

1. Tap the **GoldMine Mobile** shortcut on the Home screen
2. Your default web browser opens to the login screen.
3. Enter your Username and Password and then tap **Login**.
4. [Create a Shortcut on the Home Screen \(see page 18\)](#).

## Create a Shortcut on the Home Screen

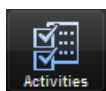
If you do not have a shortcut to GoldMine Mobile on the Home screen of your mobile device, follow these steps to create one.

**NOTE:** The shortcut must be made from the GoldMine Mobile Login screen. If you are currently logged in, you must logout before creating the shortcut.

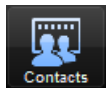
1. Open the GoldMine Mobile location in your mobile browser.
2. Tap the **Bookmarks** button on the tab bar.
3. Tap **Add to Home Screen**.
4. Enter **GoldMine Mobile** as the title and then click **Add**.

---

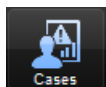
## GoldMine Mobile Overview



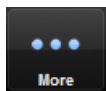
Activities



Contacts



Cases



More

For more information, see the ["Tab Bar" on page 18](#) and the ["List and Detail Panels" on page 19](#).

## Tab Bar



The Tab Bar is located at the bottom of the application screen. It contains a list of buttons to switch to another type of business object record and access to additional GoldMine Mobile content.

- **Activities:** search, view, schedule, reassign, and complete activities.
- **Contacts:** search, view, add, and update contacts.
- **Cases:** search, review, create, and change case information.
- **More:** open a new screen to change Settings, view About details, open Help, and Logout.

## List and Detail Panels

The user interface for GoldMine Mobile consists of the following topics:

- [List Panel \(see page 19\)](#)
- [Details Panel \(see page 19\)](#)

### List Panel

The List Panel initially contains a list of categories used to refine the list based on your selection. Subsequent to selecting a category option, the List panel displays a list of items from which you can make selection.

To select a list item and view the details, tap an item. The details appear in the [Details Panel \(see page 19\)](#) panel. The List Panel also contains a [Search Bar \(see page 19\)](#) to quickly filter and help you find the desired item(s) on the list.

**NOTE:** You can use the **Add** button on the List Panel to add new entries to the list.

### Search Bar

The Search bar is located at the top of the List of a selected category (see "[List Panel](#)" on page 19). You can enter alpha-numeric characters into this field to search the current list for matching entries.



Search Field

Clear Field Button

### To Run a Search

1. Tap in the Search Field to enable the on-screen keyboard of the mobile device.
2. Start entering text in the field.

As you start typing characters, Search automatically filters the current list. The more characters you enter, the further refined the search results appear. Alternately, as you remove characters from the search, the results increase.

3. Select the desired record to view the details.

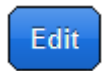
**TIP:** To clear the search field and reset the list, tap the **Clear Field** button to the right of the Search Field.

### Details Panel

When you select an item from the [List Panel \(see page 19\)](#), the general details appear in the Details Panel. The Details Panel is comprised of [Action Buttons \(see page 20\)](#) and the [Details Form \(see page 20\)](#).

## Action Buttons

The Action Buttons are located at the top of each form and allow you to perform various functions. They can include the following buttons, and will vary depending on the form:



**Edit:** Tap to open the current Details screen to edit the current record.



**Add:** Tap to add Details to a Contact.



**Add Contact:** Tap this button to add a Contact.



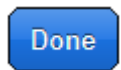
**Add Activity:** Tap to add a new Activity.



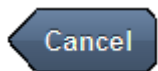
**Add Case:** Tap to add a new Case.



**Back:** Tap to navigate to the previous screen.



**Done:** Tap to save your changes when editing or adding records.



**Cancel:** Tap to abort any changes when editing or adding records.

## Details Form


The Details Form contains all defined fields for the form type for [Viewing Form Fields \(see page 20\)](#) and [Updating Form Fields \(see page 21\)](#).

### Viewing Form Fields

Forms are comprised of form fields. The fields that display depend on the type of record being viewed and the fields that you are allowed to view based on your login (also see [Updating Form Fields](#)).





**TIP:** If the fields extend beyond the visible area, drag (scroll) the screen to view more content.

There are several different fields types that can appear on the form screen.

- **Text Fields** display text, such as a names, values, or other details. Gray text indicates a read-only field and cannot be modified when editing a form.
- **Phone Number Fields** display numeric values as underlined text, which can be tapped to make a call (only available on mobile devices which allow cellular-based calls).
- **More Fields** display text with an icon . Tap this icon to open a new screen.
- **Email Fields** display the email address. Tap to send email to this address. For more information, see ["Disable the GoldMine Email Client" on page 26](#).
- **Address Fields** display the location for a contact. Tap to show the location on a map.

## Updating Form Fields

When adding information to or editing a form:

- Tap in a field to change the text or values (unless the field is read-only).
- Tap the **LookUp** button  to open a new screen of options.
- Tap the **Add Field** button  to open a list of optional fields to add to the form.
- Tap a **down arrow** button  to select from a list of options for the field.
- Tap the (-) or (+) buttons to set a duration, or enter text directly into a time field.
- Check  the field to enable/disable an option, such as an alarm or other notification.
- Tap a **Date** field to view a scrollable date wheel for Month, Day, and Year.
- Tap a **Time** field to view a scrollable time wheel for Hours, Minutes, and AM/PM.

---

## Activities

- [Select an Activities List Filter](#)
- [View Activity Details](#)
- [Update an Activity](#)
- [Add an Activity](#)

### Select an Activities List Filter

The Activities List filter options allow you to quickly sort through your Activities.

- **Recently Viewed** displays all recently viewed Activities.
- **All Open** displays all open activities.
- **Open To-Dos** displays all open items on your To-do list.
- **By type** displays a page sorted by Status. Select a Status to view and sort the Activities by that type.

**TIP:** After selecting a filter, use the [Search Bar \(see page 19\)](#) to search the Activities list.

### View Activity Details

1. Tap **Activities** on the [Tab Bar \(see page 18\)](#).
2. [Select an Activities List Filter \(see page 21\)](#) from the list.
3. Locate and select the Activity to view the details.


**TIP:** You can search for an Activity using the [Search Bar \(see page 19\)](#).

## Update an Activity

1. Tap **Activities** on the [Tab Bar \(see page 18\)](#).
2. Select an Activities filter from the list.
3. Locate and select the Activity to view the details.
4. Tap the **Edit** button to open the record for edit.
5. Make any changes, then tap **Done** to save changes.

**NOTE:** Opportunities that are linked to a Sale activity cannot be closed through GoldMine Mobile. Alternately, you can set the RSVP option to flag the Sale activity after it has been closed.

## Add an Activity

1. Tap **Activities** on the [Tab Bar \(see page 18\)](#).
2. Tap the **Add Item** button. 
3. Select the type of Activity you want to add from the list.
4. Enter the details for the new record (see ["Details Form" on page 20](#)).

**TIP:** To view the schedules of users assigned to the activity, click the **Free/Busy** button at the bottom of the page.

5. Tap **Done** to create the new Activity.

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## Contacts

- [Select a Contact List Filter](#)
- [View Contact Details](#)
- [Add an Unscheduled Activity](#)
- [Edit Contact Details](#)
- [Add Contact Record](#)

## Select a Contact List Filter

The Contacts List displays several filter options to quickly sort through your Contacts.

- **Recent** displays recently viewed Contacts.
- **My Contacts** displays Contacts you added to your Contact list.
- **All Contacts** displays all Contacts in the database.

**NOTE:** Displaying all contacts in a large database can slow performance.

- **Filters** displays a list of filters used to sort Contacts.
- **Groups** displays a list of groups used to categorize a Contact. Select a Group option to view the Contacts list.

**TIP:** After selecting a filter, use the Search box to search the Contact list.

## View Contact Details

1. Tap **Contacts** on the [Tab Bar \(see page 18\)](#).
2. [Select a Contact List Filter \(see page 22\)](#) option from the list.
3. Scroll the list to view the records.
4. Tap a contact record to view details.

**NOTE:** Database fields used for addresses are always organized in a group, even if they are relabeled for a purpose other than storing addresses.

5. Select from the Additional Fields at the bottom of the details area:
  - **Details** displays details records to track information on topics meaningful to your business.
  - **Custom screens** displays the custom screens setup through GoldMine. For more information, refer to “Creating Custom Screens” in the *GoldMine Premium Edition Administrator Guide* PDF or Online Help.
  - **Notes** allows you to store information about the contact.
    - **To Add a Note:** Tap the **Add** button, enter the information, then tap **Done**.
    - **To Edit a Note:** Select the note and tap **Edit**. Edit the details and tap **Done**.
    - **To Delete a Note:** Select the note, tap **Edit**, then tap **Delete**.
  - **Pending** displays all [Activities \(see page 21\)](#) scheduled for the contact.
  - **History** stores completed scheduled and unscheduled activities for the contact.
  - **Additional contacts** displays a list of all contacts associated with the current contact.
  - **Cases** displays all cases linked to the contact.

**TIP:** You can search for a Contact by name, company, or phone number in the [Search Bar \(see page 19\)](#).

## Add an Unscheduled Activity



You can create a new unscheduled activity for an active Contact using the **Add History** button in Contact details form.

1. Tap **Add History** on the Contact’s detail screen.
2. On the New screen, complete all fields.
3. Tap **Done** to save the activity for the Contact.

## Edit Contact Details

1. Tap **Contacts** on the [Tab Bar \(see page 18\)](#).
2. Select a Contacts filter option from the list.
3. Scroll the list to view the records.
4. Tap the desired contact record to view the details.
5. Tap the **Edit** button to open the record for edit.
6. Make any changes and then tap **Done** to save changes.

## Add Contact Record

1. Tap **Contacts** on the [Tab Bar \(see page 18\)](#).
2. Tap the Add Contact  button.
3. Select the Contact type from the menu.
4. Enter the details for the new record.
5. To add additional fields, tap the **add field** button. .

**NOTE:** Only fields with content are displayed when viewing the Contact record details.

6. Tap **Done** to save the record.

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## Cases

- [Select a Cases List Filter](#)
- [View Case Details](#)
- [Update Case Details](#)
- [Add a Case](#)

## Select a Cases List Filter

The Cases List displays several filter options to quickly sort through your Cases.

- **Recent** displays all the recently viewed Cases.
- **All Cases** displays all Cases regardless of status or assignment.
- **Open Cases** displays all open Cases regardless of assignment.
- **My Priority List** displays all your high-priority Cases.
- **My Cases** displays all Cases assigned to you.
- **My Group's Cases** displays all Cases assigned to your group with additional filters by Open Cases and sorted by User.

**TIP:** After selecting a filter, use the [Search Bar \(see page 19\)](#) to search the Cases list.

## View Case Details

1. Tap **Cases** on the [Tab Bar \(see page 18\)](#).
2. Select a Cases filter from the list.
3. Tap the desired Case to view the details.


**TIP:** You can search for a Case using the [Search Bar \(see page 19\)](#).



## Update Case Details

1. Tap **Cases** on the [Tab Bar \(see page 18\)](#).
2. Select a Cases filter option from the list.
3. Tap the desired Case record to view the details.
4. Tap the **Edit** button to open the Case for edit.
5. Make any changes and then tap **Done** to save changes.

## Add a Case

1. Tap **Cases** on the [Tab Bar \(see page 18\)](#).
2. Tap the **Add** button .
3. Enter details for the new record.
4. Tap **Done** to save the record.

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## More

The **More** button on the [Tab Bar \(see page 18\)](#) opens a new screen with the following:

- **About** displays the version and copyright information.
- **Help** opens the GoldMine Mobile Online Help (see "[Viewing GoldMine Mobile Help](#)" on page 27).
- **Settings** opens the GoldMine Mobile [Settings](#) screen.
- **Logout** logs you out of the application and returns to the login screen.

## Settings

The **Settings** option displays the options, to modify how the data and interface appear for a user.

- [E-Mail \(see page 26\)](#)
- [Contact \(see page 26\)](#)
- [Theme \(see page 27\)](#)
- [Login \(see page 27\)](#)

## E-Mail

### Disable the GoldMine Email Client

By default, GoldMine Mobile uses GoldMine composer to send email from your mobile device. This allows for contact message-linking to automatically link to the contact and case, and history tracking features. However, if you prefer to use the default email client on your mobile device, you can disable the GoldMine Composer in GoldMine Mobile. Automatic linking will not occur when using another email client.

**NOTE:** Before you can use the GoldMine Email client, it must be configured from GoldMine. For more information, refer to the *GoldMine Premium Edition Administrator Guide* PDF.

1. Tap **More** on the [Tab Bar \(see page 18\)](#).
2. Tap the **Setting** tab.
3. Tap the **E-Mail** option.
4. Tap the **Off** button.

**TIP:** To enable the GoldMine Composer, set this option to **ON**.

### Add an Email Signature

1. Tap **More** on the [Tab Bar \(see page 18\)](#).
2. Tap the **Setting** tab.
3. Tap the **Mail** option.
4. Tap inside the **Signature** area and enter the text for your desired signature.

**NOTE:** Images are not supported in the GoldMine Mobile email signature.

## Contact

Change the default settings used for creating Contact records. Then, tap **Done** to save any changes.

- **Default Record Type**

The Default Record type is the type of record that is created when you add a new Contact record (see ["Add Contact Record" on page 24](#)).

To set the default record type, tap a **down arrow** button ▼ to select a type from the list.

- **Phone format**

Check **ON** or **OFF** to set the **International** option. This sets the phone number format for international calling (outside of the U.S.A.) to include both country code and local number.

- **Duplicate Checking**

Check **ON** or **OFF** to set the following options:

- **Contact & Company** - checks for duplicate contacts and companies.
- **Phone** - checks for duplicate phone numbers.
- **Email** - checks for duplicate email addresses.

## Theme

There are several different themes you can choose from. These themes alter the window colors and buttons. To change the theme, select from one of the available options.

- Dark Blue
- Light Blue
- Black/White/Orange
- Black/Blue

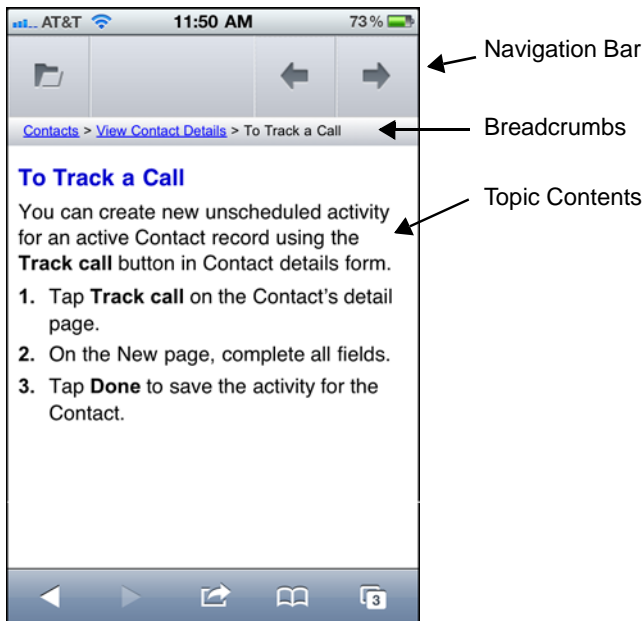
## Login

By default, GoldMine Mobile opens to the last viewed record that was open when you logged out. To change this option, tap the **OFF** button next to the **Restore last viewed object** field. Tap **ON** to re-enable this feature.

## Viewing GoldMine Mobile Help

Online Documentation is made available to all GoldMine Mobile users through the [More \(see page 25\)](#) button on the [Tab Bar \(see page 18\)](#). By clicking the Help link, you can access information related to using GoldMine Mobile on your mobile device. Installation and configuration content is only available in the *GoldMine Mobile Edition Installation and User Guide* pdf.

### Online Help Navigation



**Breadcrumbs** are navigation aids located at the top of each topic screen. They describe the path to the currently viewed topic, as well as linking back to the parent topic.

The **Navigation Bar** is located at the top of the Online Help screen and contains buttons to open the Table of Contents and move through the topics (see below).



The **Folder** button opens the Online Help Table of Contents. Headings can be tapped or expanded to view additional subtopics.



The **Next** button moves to the next topic in the Online Help.



The **Previous** button moves to the previous topic in the Online Help.

**NOTE:** Using the navigation buttons on the browser may navigate away from the Online Help. When viewing the Online Help, use only the Online Help Navigation buttons to move between topics.

**TIP:** If you inadvertently tap one of the browser's navigation buttons, tap the Folder button at the top of the screen to return to the list of topics.

# Resources

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## Additional Documentation

In addition to this guide, the following resources are available to provide you with information about GoldMine:

- **Online Help** - Accessed by clicking the Help menu option in GoldMine, Online Help provides topic overviews and step-by-step instructions to walk you through basic tasks, in addition to a comprehensive table of contents, index, and search function.

**TIP:** Guides are also available in PDF format from the Installation kit for maintenance customers at:

<http://www.frontrange.com/support>.

- **Training Courses** - Information regarding training courses for FrontRange Solutions family of products can be found at:  
<http://frontrange.learn.com>

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## Contact Us

### Support Site

FrontRange Solutions can answer your technical support questions about HEAT, FRS Foundation, GoldMine, and other FrontRange product families. Visit:

<http://www.frontrange.com/support>

### Contact Informations

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