

# What's New in GoldMine 6.7



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### INTRODUCTION



# Introduction

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## Welcome to GoldMine 6.7

GoldMine is a business contact management tool with sales force and marketing automation functionality for individuals and teams.

GoldMine 6.7 enhanced functionality includes a new Lookup Wizard, advanced security and control features for PDA synchronization, with developer enhancements such as an XML wrapper for the API as well as compatibility with .NET development environments.

## About this Guide

### Audience and Expertise

The information in this manual is written for GoldMine users and system administrators reviewing the new features and enhancements. It assumes the user has a basic understanding of databases and the Microsoft Windows operating system.


### Document Conventions

This document uses the following terms and syntax when explaining steps and procedures:

- Menu bar commands and the corresponding menu item are presented as **File>>Print**. This means you should select the word **File** on the menu bar, and then click **Print** in the drop-down menu.
- Dialog box, window, menu, and menu bar names begin with uppercase letters and are referenced in bold text when they are the result of an action. For example: "Click **OK**. The **Select a Data Source** dialog box appears." Bold text may also be used if needed for emphasis on the first mention of that item.
- Command buttons you click on-screen are referenced in bold text or pictured as they actually appear.

*Example:* **OK** or 

- Tips are presented in the margins to provide users with alternative procedures or with suggestions for using the feature.
- Notes are presented with a line above and below the paragraph; the word **Note** always appears in bold text. Notes provide information to supplement or emphasize information in the text.

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- Cautions are presented with the word **CAUTION** in all capital letters and bold text. Cautions alert users that failure to read and use information provided may result in data loss.
- Warnings are presented with the word **WARNING** in all capital letters and bold text. Warnings alert users that failure to read and use information provided may result in functionality and/or data loss.
- Cross-references are presented with a book icon . Cross-references inform users that related or additional information is available in another topic or manual.

## Resources

- **GoldMine Help** (access from the Help menu)
- **What's New in GoldMine**
- **GoldMine Installation Guide**
- **Using GoldMine**
- **Administrating GoldMine**
- **Manager's Console/Answer Wizard**

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**IMPORTANT:** Manuals are available in PDF format from the Installation CD-ROM or NetUpdate download or from **support.frontrange.com** for maintenance customers.

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## in this chapter...

Overview

Working with the Lookup Wizard

SoftPhone

PDA Synchronization

Working with Record Types

Integrating with .NET

## CHAPTER ONE

# 1

# What's New in GoldMine 6.7

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## Overview

The new features and enhancements available in GoldMine 6.7 are designed to support a variety of business processes while improving efficiency and usability and automating administration.

This document is intended to provide you with general information about the new features in GoldMine 6.7. The information is designed to work with the online Help where in-depth information and step-by-step instructions are available. To access the online Help, select **Help>>Help Topics** or press **F1**.



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For a detailed list of new features, changes, and fixes, select **Help>>Release Notes**.

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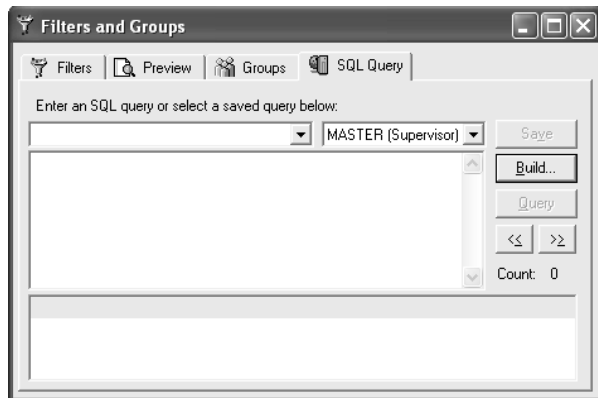
## Working with the Lookup Wizard

The new GoldMine Lookup Wizard is a centralized search tool that helps users build SQL query strings to locate specific records and contact information stored in your GoldMine database. Guided by a step-by-step wizard, users can customize query parameters to quickly locate the information they need. You can then use the query results to create a grouping of contacts, which can then be used as a contact range for actions such as campaigns, mail merges, and so on. Query storage features allow users to save and reuse custom query parameters.

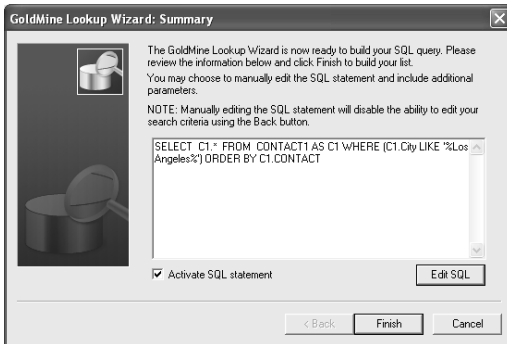
### Using the Lookup Wizard

Rather than having to manually create an SQL query, the Lookup Wizard will automatically generate and run an SQL query based on a series of inputs provided by the user.

To access the Lookup Wizard, select **Lookup>>SQL Queries** and click **Build**.

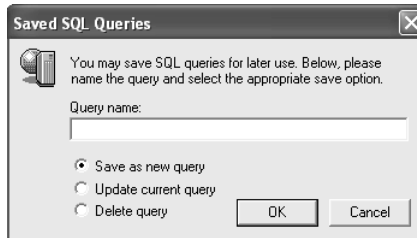


The queries that are generated are based on Category radio buttons. You can choose **Contact information**, **Pending Activities (Calls, Forecasted Sales, E-mails, etc.)**, or **Completed activities (Calls, Sales, E-mails, etc.)**. The next series of inputs will be based on which of the Category radio buttons the user selects. After the user selects the appropriate criteria, the **GoldMine Lookup Wizard: Summary** dialog box will appear containing the automatically generated SQL query. The user may choose to edit the SQL query by clicking the **Edit SQL** button. Select the **Activate SQL statement** check box to automatically run the query when you click **Finish**. You may also choose to run the query after selecting **Finish** by clicking the **Query** button.



## Saving Query Parameters

To save the SQL query that you manually created or one that was created via the Lookup Wizard, click the **Save** button. The **Save SQL Queries** dialog box appears.



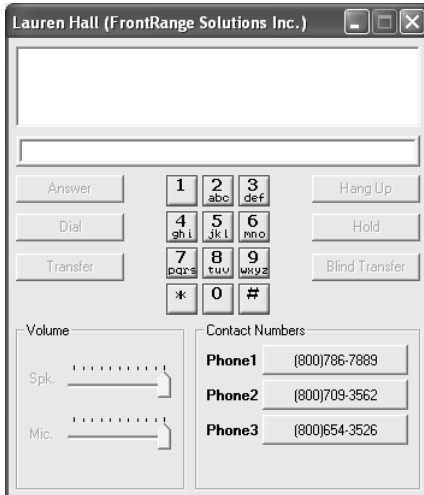
Next, enter a name for the query. In the Save SQL Queries dialog box, you may choose to **Save as new query**, **Update current query**, or **Delete query**. Click **OK** to close the dialog box after making your selection. Click **Cancel** to exit the **Saved SQL Queries** dialog box without saving, updating, or deleting queries.

To select a saved query, you may either choose the query from the drop-down list or click the << or >> buttons to scroll through the queries. You can output the query results to the printer, Microsoft Excel, Microsoft Word, or to the clipboard by right-clicking on the result.

# SoftPhone

GoldMine 6.7 includes an integrated SoftPhone that utilizes SIP (Session Initiation Protocol) and VoIP (Voice over IP) technology to place and answer calls with your contacts.

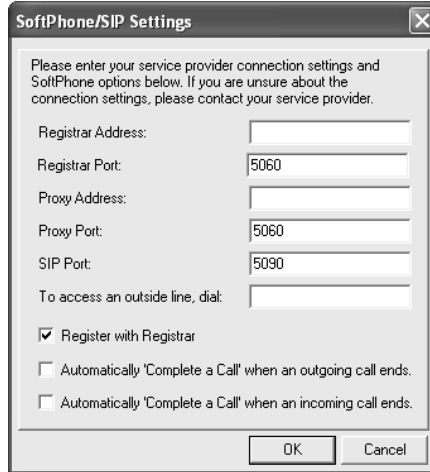
To access the SoftPhone, select **Contact>>Dial Phone>>Launch SoftPhone**. The SoftPhone control box appears.



With SoftPhone, you can **Answer** incoming calls, manually **Dial** phone numbers, **Transfer** calls, **Hang up**, place calls on **Hold**, and **Blind Transfer** calls to another number or GoldMine user.

## SoftPhone Advanced Settings

To access SoftPhone advanced settings (service provider connection settings and SoftPhone options), select **Edit>>Preferences**. Select the **Telephony** tab. Click on the **Advanced** button to open the **SoftPhone/SIP Settings** dialog box.



The image shows a dialog box titled "SoftPhone/SIP Settings" with a close button (X) in the top right corner. The dialog contains a text area with the following text: "Please enter your service provider connection settings and SoftPhone options below. If you are unsure about the connection settings, please contact your service provider." Below this text are several input fields: "Registrar Address:" (empty), "Registrar Port:" (5060), "Proxy Address:" (empty), "Proxy Port:" (5060), "SIP Port:" (5090), and "To access an outside line, dial:" (empty). There are three checkboxes: "Register with Registrar" (checked), "Automatically 'Complete a Call' when an outgoing call ends." (unchecked), and "Automatically 'Complete a Call' when an incoming call ends." (unchecked). At the bottom right are "OK" and "Cancel" buttons.

SoftPhone/SIP Settings

Please enter your service provider connection settings and SoftPhone options below. If you are unsure about the connection settings, please contact your service provider.

Registrar Address:

Registrar Port:

Proxy Address:

Proxy Port:

SIP Port:

To access an outside line, dial:

☒ Register with Registrar

☐ Automatically 'Complete a Call' when an outgoing call ends.

☐ Automatically 'Complete a Call' when an incoming call ends.

OK Cancel

## Palm PDA Synchronization

GoldMine 6.7 enhances PDA Synchronization security and control for Palm OS3 and above. Older Palm devices support only 4 custom fields, as opposed to the 9 custom fields that newer Palm devices support. Users can now exercise more control when synchronizing between GoldMine and their Palm OS powered PDA or smartphone, including the ability to select from the specific activity types they need. Improved security features enhance the synchronization process for multi-user environments, applying GoldMine update and deletion rules to data synchronized from the Palm device.

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**Note:** In order to synchronize with GoldMine 6.7, you must have HotSync software version 4.0 or above.

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**Note:** Older Palm devices support only 4 custom fields for field mapping, as opposed to the 9 custom fields that newer Palm devices support.

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## Setting User Permissions for Palm PDA Synchronization

Additional security options allow administrators to control who can synchronize and what can be synchronized.

To define the Palm synchronization for a user, select **File>>Synchronize>>Synchronize with Palm/Treo**.

The **GoldMine Palm Synchronization Wizard** appears, which will allow the administrator to assign user-specific permissions.



The GoldMine Synchronization Wizard allows you to:

- Choose the type of data and the direction in which the data will synchronize between GoldMine and your Palm device.
- Configure contact synchronization options by choosing a filter and/or group of contacts and other settings.
- Map GoldMine data fields to custom Palm data fields.
- Filter activities based on their type, Reference field value, or other parameters.
- Choose which activities will synchronize based on the schedule date.
- Choose the type of deletions that will synchronize.
- Set purge options for previously synchronized data.
- Limit the synchronization of Palm information to specific categories.



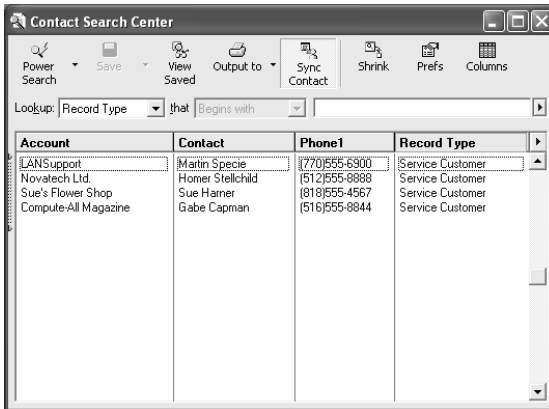
# Working With Record Types

Enhanced logic makes it easier for users to work with data records. Users can now perform searches for record types instead of field names, making it easy for users to find information without identifying a particular field name. Logical pick lists display field names for the selected record type.

An intuitive auto-fill feature allows automated city and state field population when users type in a ZIP code.

## Searching by Record Type

To search by Record Type, open the Contact Search Center by selecting **Lookup>>Indexed Fields>>Record Type**. You may also select **Lookup>>Contact**, then change the Lookup drop-down to **Record Type**.



## Administrating Auto-Fill by ZIP Code

For Additional Contacts (on the Contacts tab in the Contact record) GoldMine will auto-fill the **City**, **State**, and **ZIP/Postal code**. Select the **Auto-fill with Primary Address** check box to activate this feature.

## Integrating with .NET

The new API makes it easier to integrate with GoldMine by providing an XML-based programming interface and COM server. The API as a whole is also compatible with Microsoft .NET development tools like VB.NET and C#, again, simplifying the process of integrating with GoldMine.

The XML wrapper provides access to all previous functions available in the non-XML capable API available in previous versions of GoldMine.

GoldMine 6.7 also provides user-interface level integration tools that allow developers to interact. It is now possible to replace DDE with COM, which is a huge advantage for developers and TechPartners. The main advantages are:

- It implements use of current technology instead of DDE, which is very old and not widely supported.
- It is compatible with all COM-capable development tools.
- It is compatible with .NET applications.
- It allows for growth into a full UI API.
- It allows for the rewrite of Excel/Word link without having to load BDE.
- It will be easier to use an XML-base interface.

The COM server implements all the relevant DDE functions (and others will be added as well). An application that previously used DDE can now switch to communicating to GoldMine with this new interface.

Eventually, everything you currently do with the DDE interface, you will be able to do with COM and XML.

The description has 2 parts:

1. The XML API
2. The UI API to the running

The XML API and the UI API use the same basic schema to perform their actions.

```
<GMAPI  
  call="CallName"><dataname="DataName">XXXXXX</  
  data>...</GMAPI>
```

Eventually, this will evolve into a “retro-written” XML-schema and DTD for the full APIs.

The XML API basically wraps the existing GM API and makes a much simpler interface. All of the low-level functions to perform the actions that the non-XML API programmer would need are hidden. It self-documents the failures instead of giving cryptic return messages.

Obviously, in order to use either interface, you need a working knowledge of XML, or at the very least you need to be able to put XML well-formed strings together. Since this is a back-end programming piece, you need a working knowledge of COM. The end user should also have a working knowledge of the older standard function calls for the older gmx32.dll version of the GoldMine API. Please see the Open Developer section of our support Web site or our Partner section of the Web site to become a Technology Partner.



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