User Guide

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Welcome

Welcome to GoldMine

GoldMine is a powerful tool designed to automate and manage your day-to-day business activities. Use GoldMine to build and maintain business relationships, manage time, and achieve goals more easily than ever before.

GoldMine automates key areas of daily business activity:

- Client/contact management
- Time and task management
- Document and e-mail management
- Sales management
- What's New in GoldMine 7.0

What's New Overview

The new features and enhancements available in GoldMine 7.0 support a variety of business processes while improving efficiency and usability and automating administration.

- **Pluggable Active X and HTML containers:** Development tool allowing programmers to more tightly integrate their applications with GoldMine (similar to current SoftPhone integration).
- **GM+Browser:** Similar to GM+View, but provides floating window with multi-tab capability.
- **Contact Search Center enhancements:** Simplifies performing an action on a Contact. Includes new buttons for immediate functionality from the interface.
- **Microsoft Reporting Services Integration:** Allows Corporate Edition users to view and schedule reports from within GoldMine.
- **Changes to databases and database engines:** Support for dBASE has been replaced by the Firebird database, an opensource SQL solution. Support for BDE has been replaced by ADO (ActiveX Data Objects). Certain system files have been updated.
- **Database Connections Manager:** Creates and maintains aliases used to connect to databases.
- **Changes to Databases Wizard:** Changes to workflow using this wizard.
- **Licensing model:** Reflects the current paradigm for licensing.

What's New

Plug-Ins

About GoldMine Plug-ins

GoldMine contains a mechanism to support ActiveX controls and HTML-based integrations as if they were part of GoldMine. The structures allow for rapid integration, ease-of-use, and security.

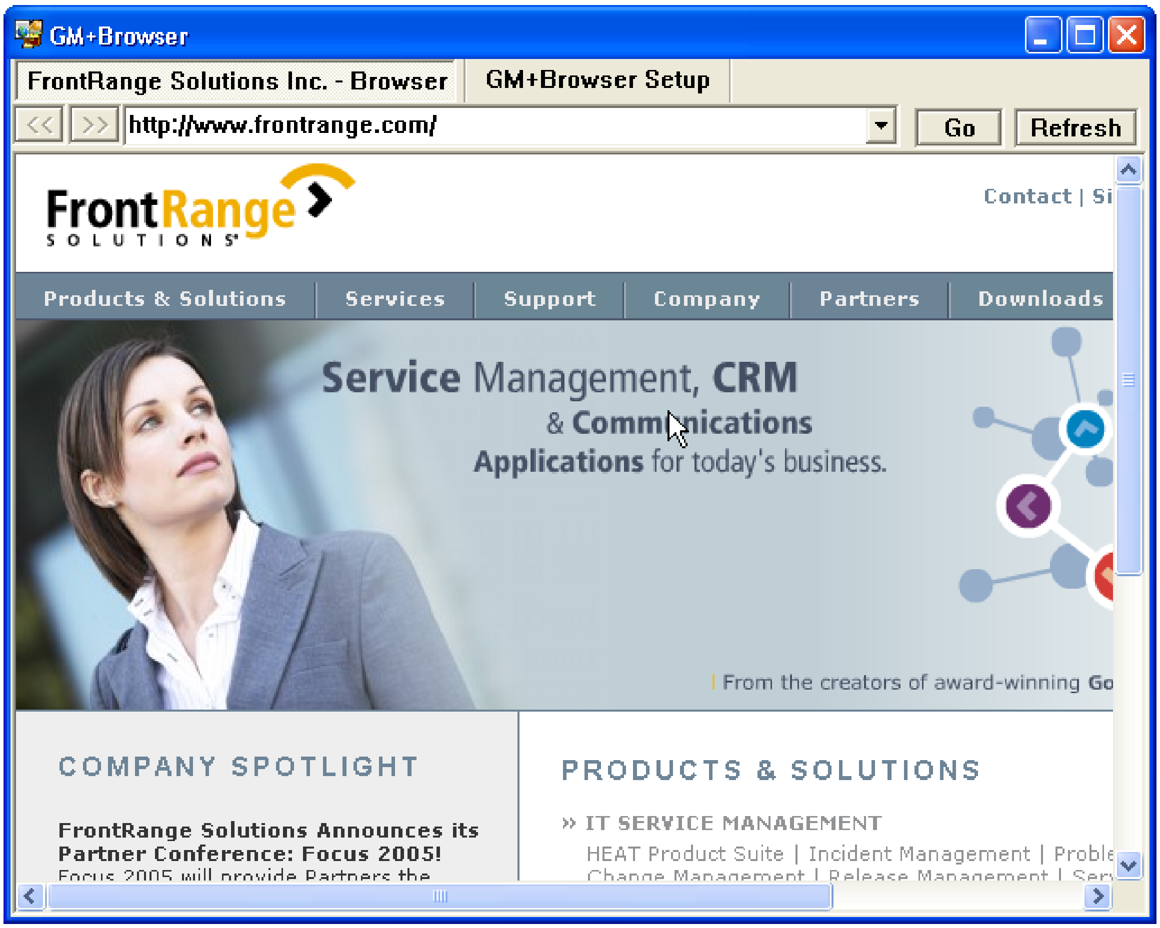
To begin, create an Active X control or an HTML file/web site for integration, then set up security.

GM+Browser

About GM+Browser

This floating window allows you to have important GM+View and other Web pages at your fingertips from within GoldMine, regardless of what contact is displayed.

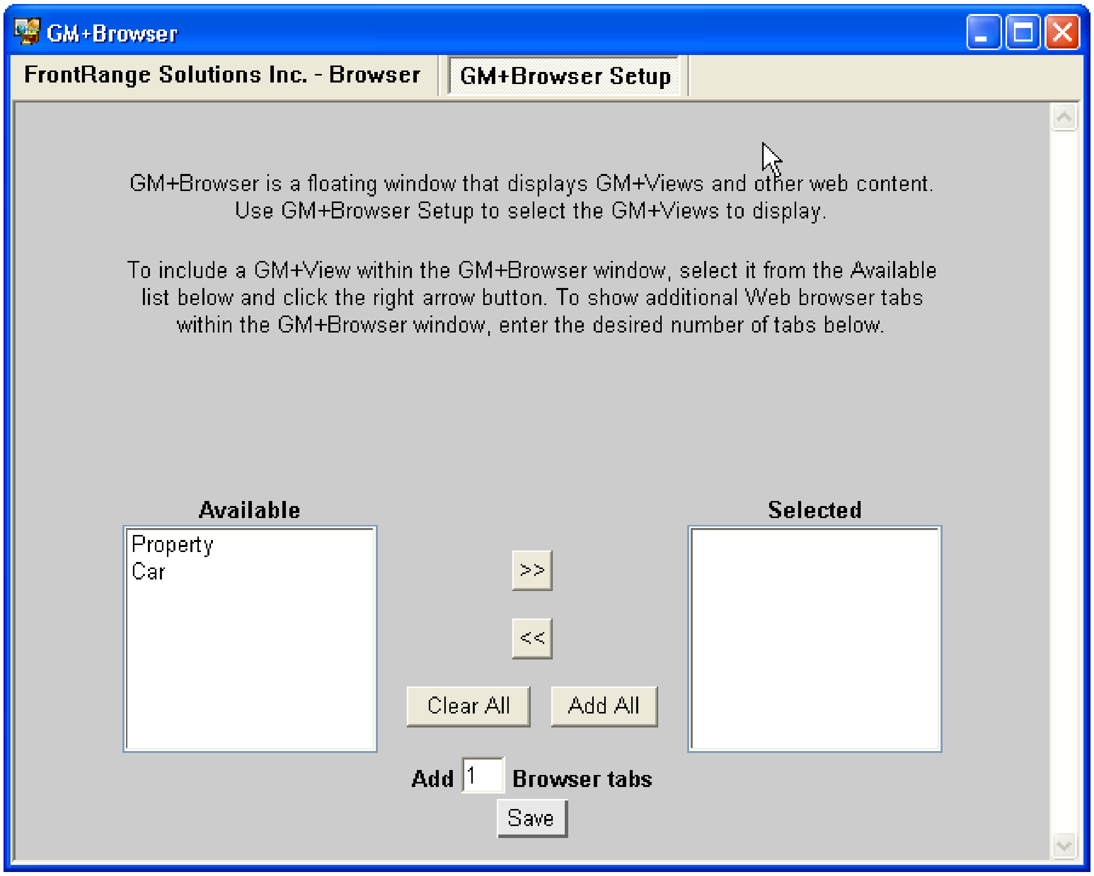
From the menu bar, select **View**>>**GM+Browser**. **GM+Browser** appears. Your Microsoft Internet Explorer home page is displayed in the Browser.



See Configuring GM+Browser.

Configuring GM+Browser

1. In the **GM+Browser** tab bar, click **GM+Browser Setup**. The setup page appears.

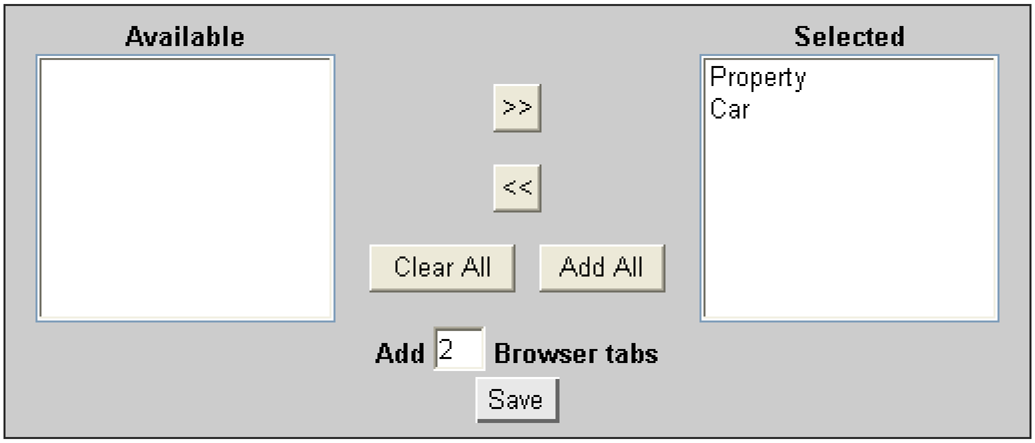


2. From the **Available** list, highlight an available GM+View (such as, **Property**, from the demo data).

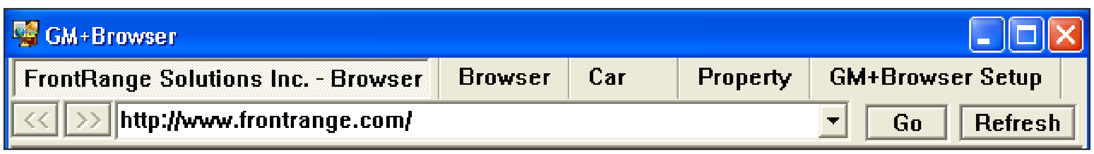
Note: This list is autofilled based on all available GM+View templates.

3. Click the **[>>]** move button. The **Property** view moves to the **Selected** list.

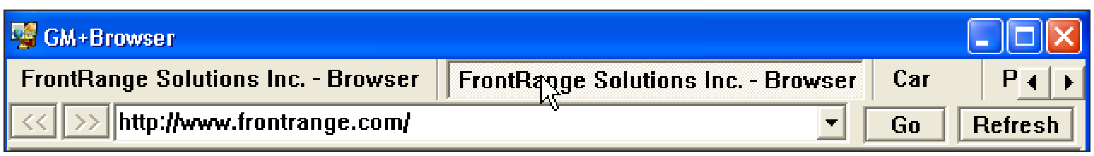
4. To make all views available, click **Add All**. All **Available** views move to the **Selected** list.



5. To create a placeholder for other Web pages in GM+Browser, in the **Add _ Browser Tabs** text box, type **2**.
6. Click **Save**. A tab for the **Property** and **Car** views and an extra **Browser** tab now appear in the GM+Browser tab bar.



7. Click the unassigned **Browser** tab. It loads the default Web page until changed.



8. In the **address bar**, type the appropriate Web address of a different Web page to assign to this tab and click **Go** (alternatively, you can navigate to the appropriate page through the default page). The tab title changes to the assigned page.

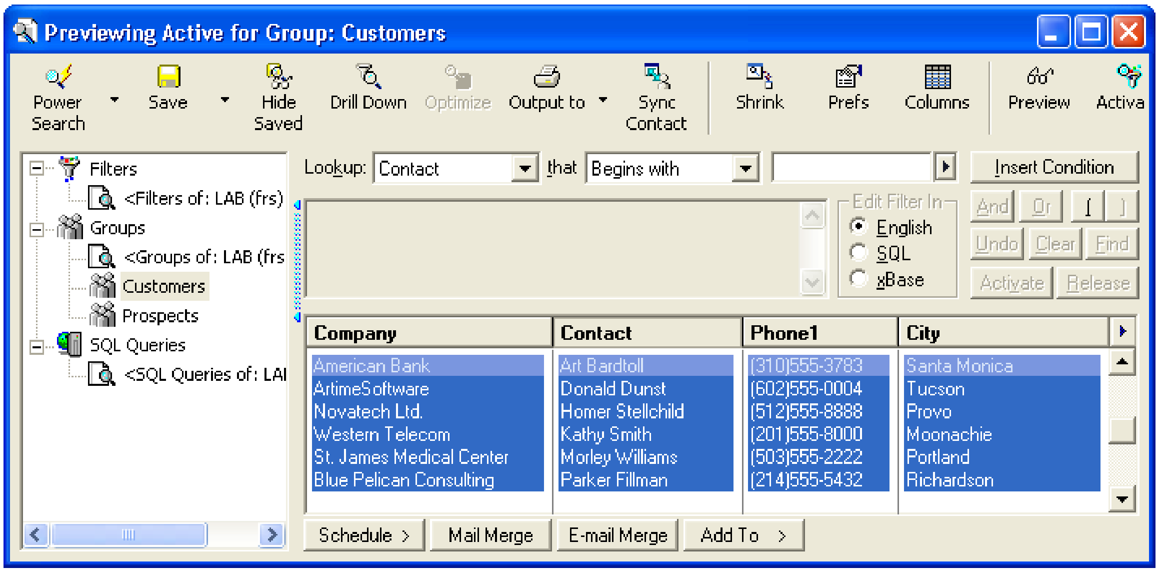
Note: When the tab bar exceeds the size of the GM+Browser window, forward and back buttons appear on the right side of the bar. Use these buttons to navigate to additional tabs. Or, resize the window.

- As you work in GoldMine, minimize GM+Browser or leave it open.
- If you click a Contact record, GM+Browser moves behind the record.
- When you close this instance of GM+Browser, it retains all settings except the additional Browser tab addresses.
- The Browser tabs always display ahead of the GM+View tabs in the tab bar.

Contact Search Center Enhancements

About Contact Search Center Enhancements

Four buttons have been added to the Contact Search Center. These buttons enhance the usability by simplifying the process of performing common actions on a Contact. These one-click quick actions consolidate multiple steps.



Schedule

Tag one or more records. Click **Schedule**. A context menu appears. From this menu, schedule a **Call**, **Next Action**, **Appointment**, **Literature Request**, **Forecasted Sale**, **Other Action**, or an **Event** for the **Selected Contact** or **All Tagged Records**.

Mail Merge

Tag one or more records. Click **Mail Merge**. The **Mail Merge Properties** dialog box appears. From here, select a template, user, and recipient.

E-mail Merge

Tag one or more records. Click **Mail Merge**. The **Mail Merge Properties** dialog box appears. From here, select a template, user, and recipient.

Add To

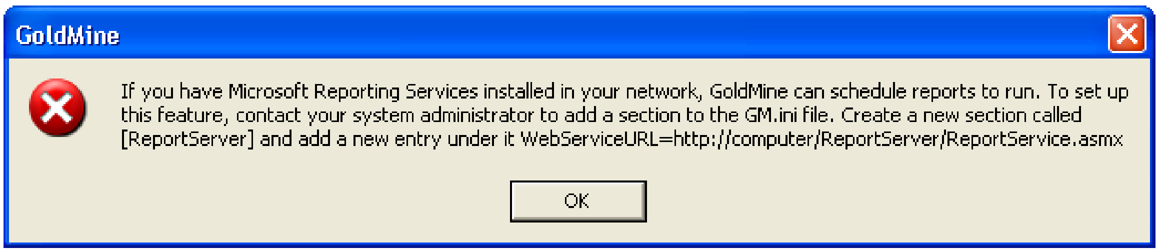
Tag one or more records. Click **Add To**. A context menu appears. From this menu, add **All Tagged Records** or the **Selected Contact** to a **Contact Group** or **Distribution List**.

Reporting Services Integration

About Scheduled Reports

Use this feature to run reports at scheduled times from within GoldMine. It works in conjunction with **Microsoft's SQL Server 2000 Reporting Services** and **Microsoft Visual Studio 2003 .NET**. These programs must be installed and operating successfully for Scheduled Reports to function. Reporting Services must be configured for E-Mail Delivery.

From the menu bar, select **View**>>**Scheduled Reports**. If the feature has not been configured, the following message appears.



If the feature has been configured, the **Scheduled Reports** dialog box appears.

See Using Scheduled Reports.

Configuring for E-Mail Delivery

Reporting Services includes an e-mail delivery extension so that you can distribute reports through an existing e-mail server. Before it can be used, you must configure the report server to make e-mail delivery available to your users. Report server e-mail delivery is implemented on Collaboration Data Objects (CDO), and requires a Simple Mail Transport Protocol (SMTP) server. The e-mail delivery extension does not provide support for digitally signing or encrypting outgoing mail messages.

The config file is an XML document called **rsreportserver.config**. Below is a snip of how it should be set for the e-mail delivery:

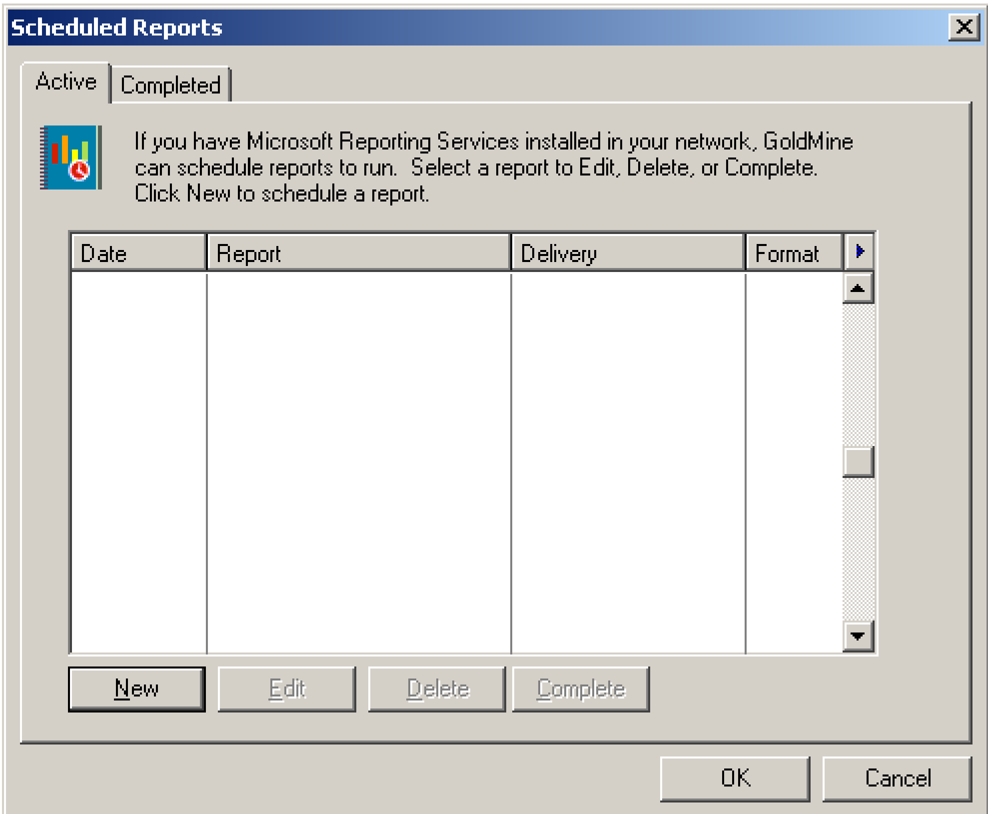
```
<RSEmailDPConfiguration>
 <SMTPServer>mail.frontrange.com</SMTPServer>
 <SMTPServerPort>25</SMTPServerPort>
 <SMTPAccountName>cosmin</SMTPAccountName>
 <SMTPConnectionTimeout>30</SMTPConnectionTimeout>
 <SMTPServerPickupDirectory></SMTPServerPickupDirectory>
 <SMTPUseSSL></SMTPUseSSL>
 <SendUsing>2</SendUsing>
 <SMTPAuthenticate>0</SMTPAuthenticate>
 <From>cosmin@frontrange.com</From>
 <EmbeddedRenderFormats>
 <RenderingExtension>MHTML</RenderingExtension>
 </EmbeddedRenderFormats>
 <PrivilegedUserRenderFormats></PrivilegedUserRenderFormats>
 <ExcludedRenderFormats>
 <RenderingExtension>HTMLOWC</RenderingExtension>
 <RenderingExtension>NULL</RenderingExtension>
 </ExcludedRenderFormats>
 <SendEmailToUserAlias>True</SendEmailToUserAlias>
 <DefaultHostName></DefaultHostName>
 <PermittedHosts></PermittedHosts>
</RSEmailDPConfiguration>
```

See the article Configuring a Report Server for E-Mail Delivery at:

http://msdn.microsoft.com/library/default.asp?url=/library/en-us/rsadmin/htm/arp_configserver_v1_4bzl.asp

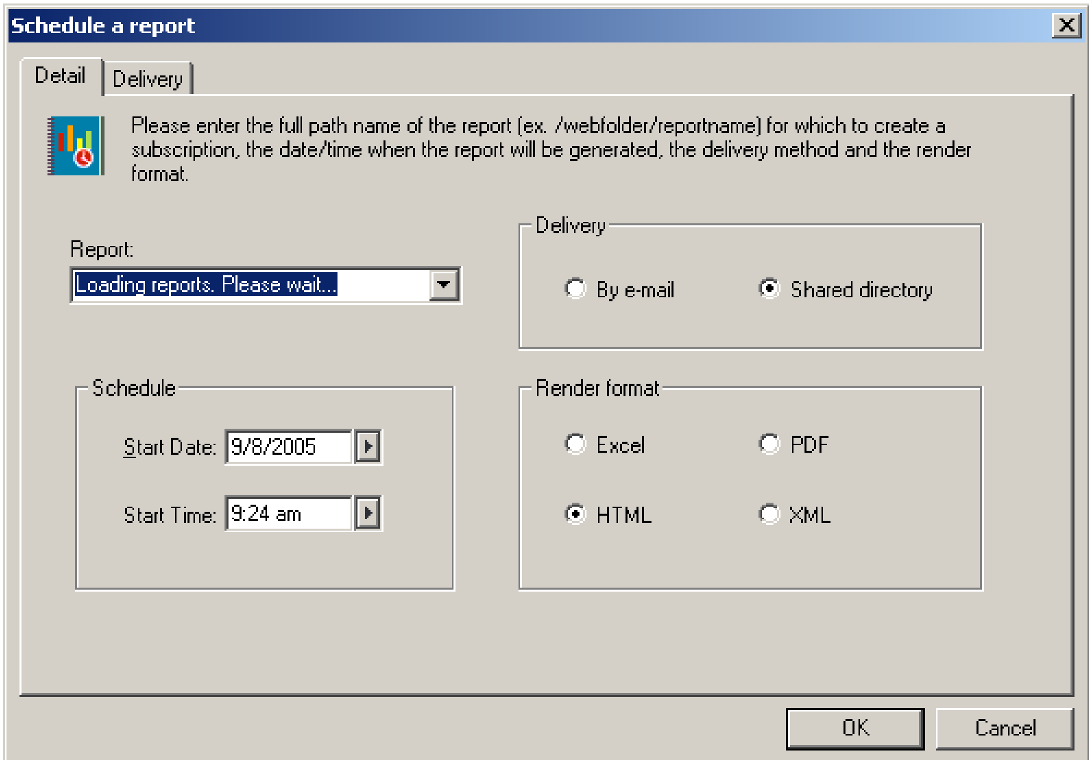
Using Scheduled Reports

1. From the menu bar, select **View**>>**Scheduled Reports**. The **Scheduled Reports** dialog box appears. This dialog box is blank until you have scheduled a report and it is pending.



2. Click **New**. The **Schedule a Report** dialog box appears.

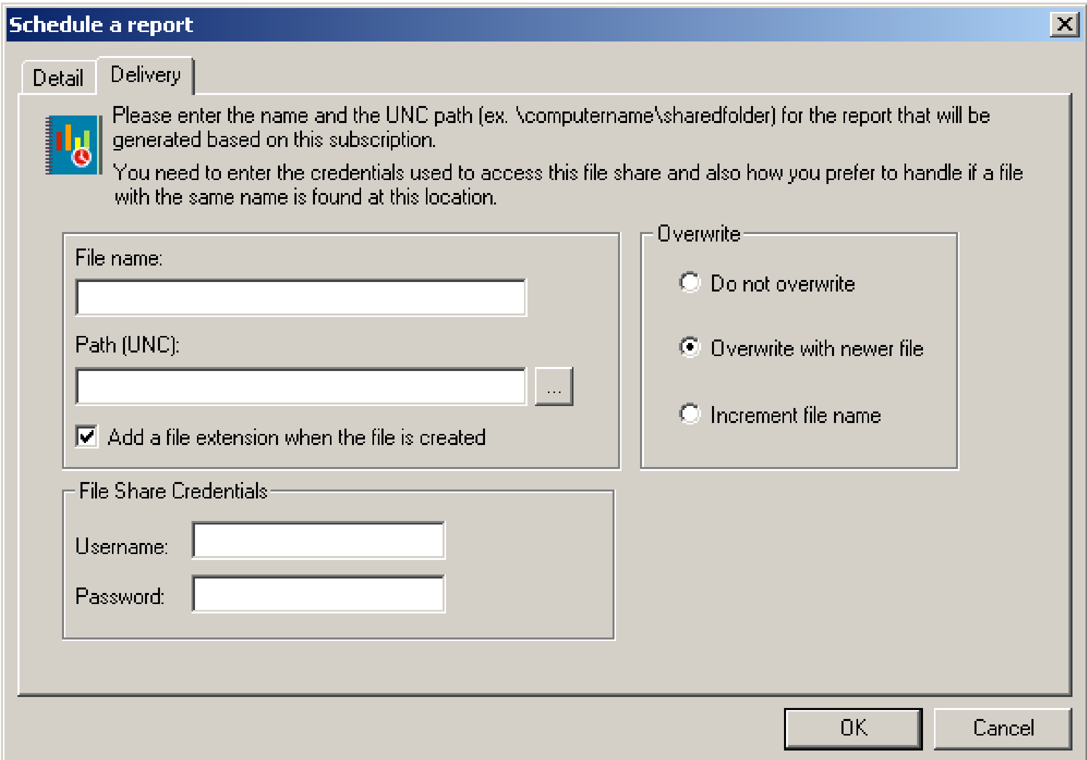
Note: If Microsoft .NET 1.1 has not been installed, an error message appears explaining the RepServicesBridge.dll has not been registered. Ask your system administrator to register this DLL file.



3. Click the **Detail** tab.
4. From the **Report** drop-down list, select one of the reports contained in Microsoft Reporting Services.
5. From the **Schedule** area, select a **Start Date** and **Start Time**.
6. From the **Delivery** area, select **By e-mail** or **Shared directory**. [E-mail is sent by MSSQL Reporting Services, not from within GoldMine).
7. From the **Render** format area, select **Excel**, **HTML**, **PDF**, or **XML**. The report is delivered in this format. The formats mimic those available in Microsoft Reporting Services.

8. If you have selected **Shared directory**, click the **Delivery** tab.

Note: If you selected **Shared directory** and do not configure the **Delivery** settings, an error is logged in the GoldMine Process Monitor and the report is not delivered.



9. If you selected **Shared directory** on the **Detail** tab, configure the path here.
10. In the **File name** text box, type the folder name of the shared directory.
11. In the **Path (UNC)** text box, type the UNC path to this folder.
12. Select **Add a file extension when the file is created** check box.
13. In the **File Share Credentials**, type a **Username** and **Password** for this folder. If the folder has an existing username and password, type these.
14. In the **Overwrite** area, select **Do not overwrite**, **Overwrite with newer file**, or **Increment file name**.
15. Click **OK**. The **Scheduled Reports** — **Active** tab reappears. The report you just scheduled should be listed.

Notes:

- After the report runs based on the scheduled time in Scheduled Reports, that report is automatically removed from the **Active** tab and then logged in the **Completed** tab.
- If you want a report to run immediately, select the report and click **Complete**.
- To make changes to the settings in the **Schedule a Report** – **Detail** or **Delivery** tabs, click **Edit** in the Scheduled Reports dialog box.
- To delete a report from the schedule, select it in the **Active** tab, and click **Delete**.
- To delete a report from the **Completed** tab, select it and click **Purge**. Select **Purge All** to delete all reports.
- There is no recurrence with this feature. You must manually schedule a report to run each time.

Firebird

About Firebird

Firebird is an open source relational database offering many ANSI SQL-99 features. It runs on Windows, Linux, and a variety of Unix platforms. It offers excellent concurrency, high performance, and powerful language support for stored procedures and triggers.

- This database management system is now an option for GoldMine users and provides you with a more robust solution to database needs and performance. Previous systems limited customization and integration, were prone to corruption, and structure changes were difficult to introduce.
- The switch to Firebird also lets you use the Microsoft technology ActiveX Data Objects (ADO). ADO enables programmatic access to database, supports multiple databases, and requires MDAC 2.6 or higher.
- You selected Firebird as a database choice during installation. If you accepted the defaults during installation, the data base name is **GoldMine.FDB** (all Firebird databases have this extension) and it is located in **Program Files>>GoldMine>>GoldMine>>Data**. The username is **SYSDBA** and the password is **masterkey**. The password can be changed after installation.
- GoldMine lets you migrate data from your previous dBASE system, so valuable information is not lost. See the **GoldMine Installation Guide** or support.frontrange.com for steps about migration.

See www.ibphoenix.com and www.firebirdsql.org for additional information.

Administration

Firebird comes with an ISQL command line tool. There are also free tools to help you administrate, such as those available from FlameRobin, FeniSQL, and IBExpert. The **Firebird Quick Start Guide** provides essential details and is available online, including from firebird.sourceforge.net/.

See also: Changing the Firebird Password.

Database Connections Manager

About Database Connections Manager

The Database Connections Manager lets you establish an **alias** for each database management system used with GoldMine. An alias is required to connect your database to the application. It tells GoldMine where to find the database, collecting information from which to build the ADO connection string.

Use the Manager if you are already using an existing or multiple databases with GoldMine. It imports any existing MSSQL BDE aliases.

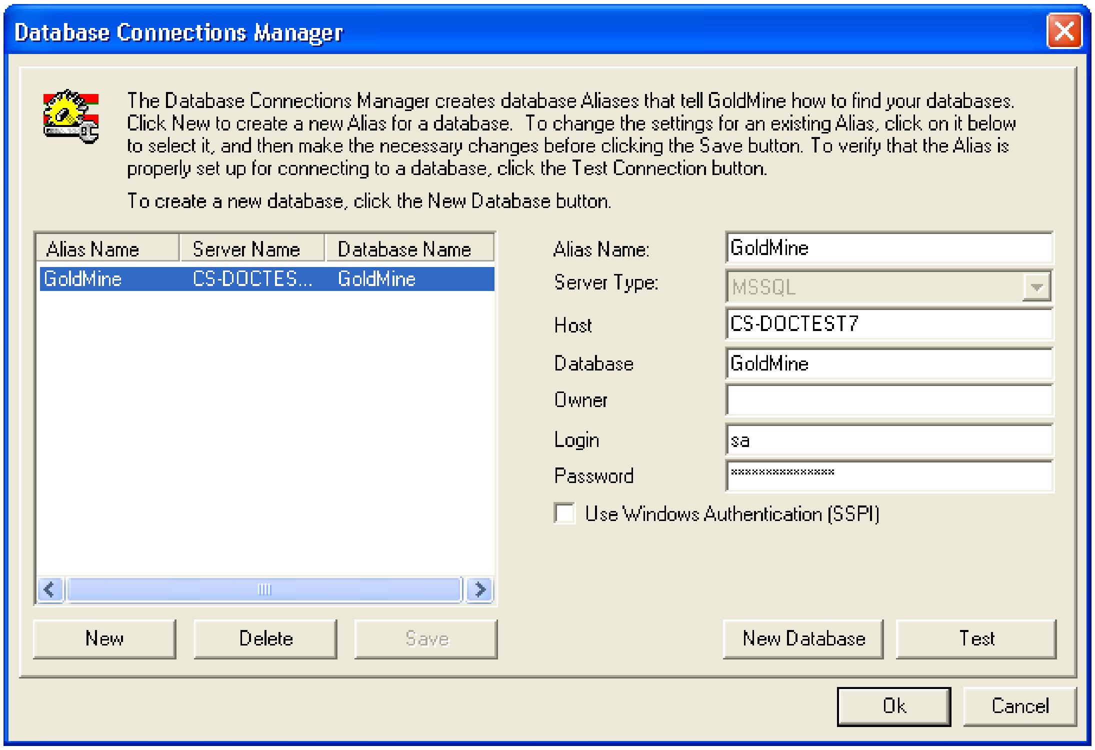
Note: The Database Connections Manager creates the alias and the shell (only two of the three stages for creating a database). If you are creating a new database, use the **Databases Wizard**. The wizard process leads you through the three-stage process often needed for creating the database and allows you to create the tables as well. To access the wizard, select **File**>>**New Database**.

See Using the Database Connections Manager.

Using the Database Connections Manager

1. From the menu bar, select **Tools>>Database Connections Manager**. The Manager appears.

> **Note:** Any previously aliased databases are listed on the left. The right side of the dialog box contains a form for collecting information from which it will build an ADO connection string. This information is stored in an INI file.



2. To alias a database, click **New**. This clears the form.

> **Note:** The form may change depending on the Server Type selected.

3. In the **Alias Name** text box, type a name for the alias. There is a 100-character limit.
4. From the **Server Type** drop-down list, select either **MSSQL** or **Firebird**.
5. In the **Host** text box, type the name of the computer hosting the database.
6. In the **Database** text box, type the name of the database.
7. In the **Owner** text box, type the database owner's name. [Typically, this is **dbo**. This only applies to MSSQL aliases.]
8. In the **Login** text box, type the username for the database.
9. In the **Password** text box, type the password for the database.

> **Note:** By default, the Password text box displays a fixed number of asterisks as a security measure.

10. Select the **Use Windows Authentication (SSPI)** check box if you have designated Windows Authentication Mode instead of the SQL authentication. [This only applies to MSSQL aliases.]
11. Click **New Database**.

> **Note:** This action registers the alias and creates the database specified. It will not exist without this step, even though it appears in the list on the left. You cannot test it prior to this step.

12. Click **Test**. It notifies you if the alias was created successfully.
13. Repeat this process for each alias you want to create.
14. Click **OK** when done.

See Editing an Alias.

Editing an Alias

1. From the menu bar, select **Tools>>Database Connections Manager**. The Manager appears.

2. To edit an alias, select an alias from the list on the left.
3. Click **Edit**. This activates the associated form.
4. Make appropriate changes to the information in the text boxes.
5. Click **Save**.
6. Click **OK**.

---

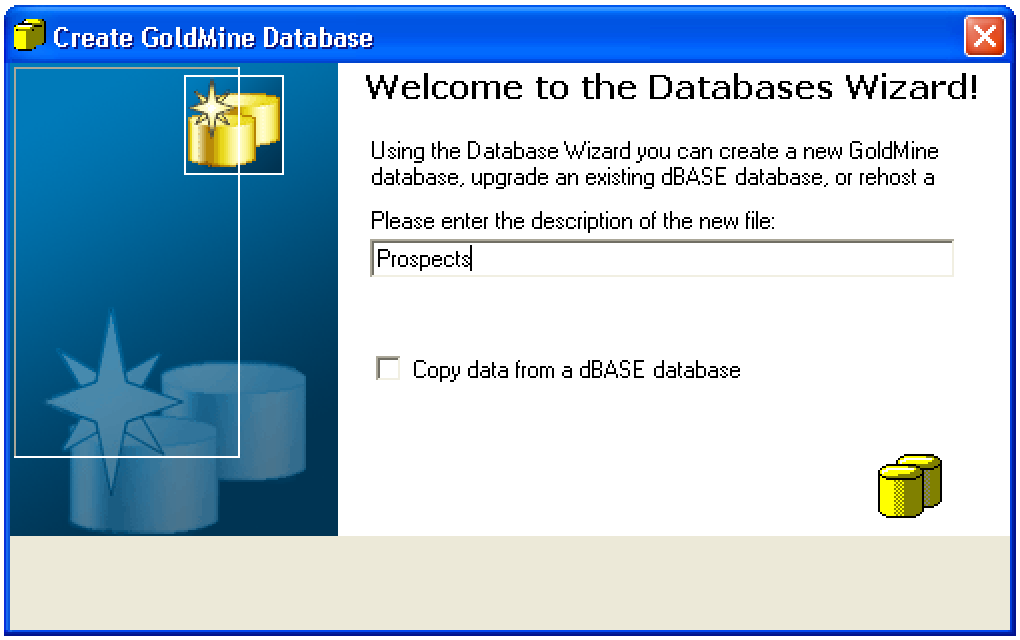
1. To delete an alias, select the alias.
2. Click **Delete**.
3. Click **OK**.

Databases Wizard

Using the Databases Wizard

Use the **Databases Wizard** to create a new database or contact set. It can be empty or a copy. If you create a blank database, it has the same fields as the old database. You can also copy data from a dBASE database.

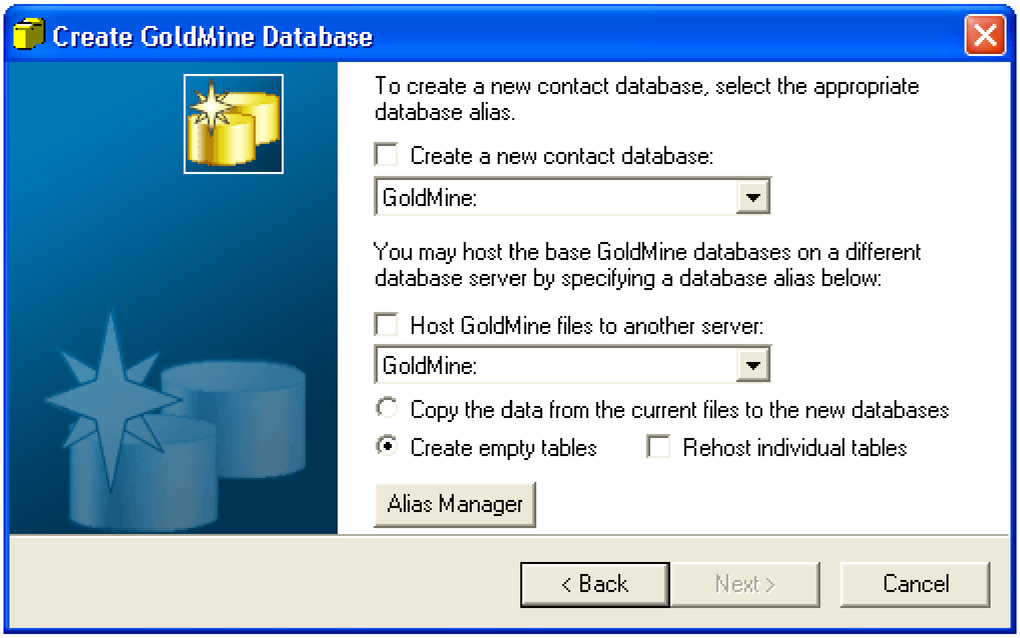
1. Select **File**>>**New Database**. The **Welcome to the Databases Wizard** dialog box appears.



2. Type a description in the **Please enter the description of the new file** text box (such as, **Prospects**).

Note: For this example, leave the Copy data from a dBASE database check box clear.

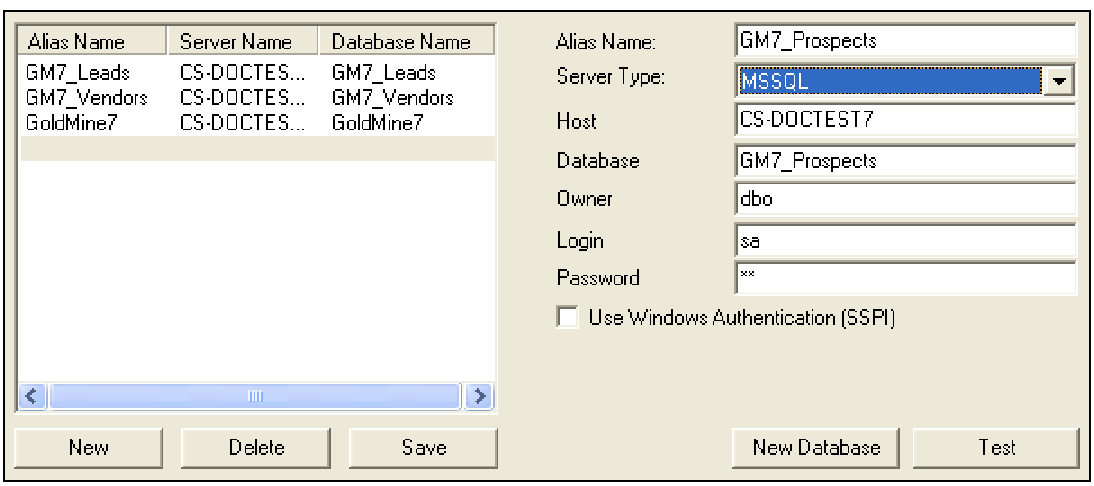
3. Click **Next**. The **Create GoldMine Database** dialog box appears.



4. Click **Alias Manager**. The **Database Connections Manager** dialog box appears.

5. Click **New**. The form clears.

6. Complete the form:



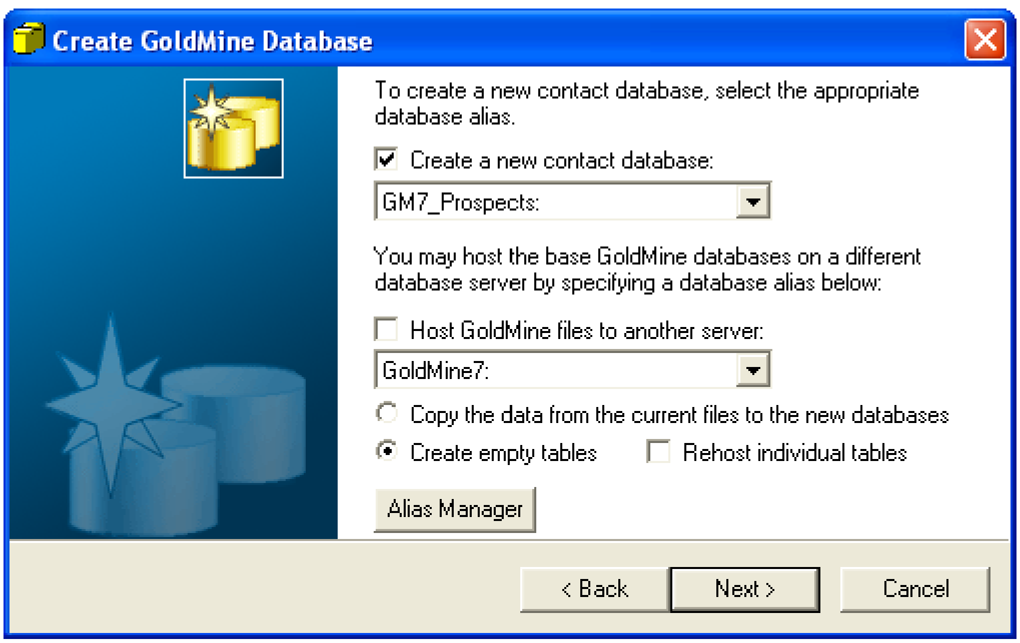
- In the **Alias Name** text box, type **GM7_Prospects**.
- From the **Server Type** drop-down list, select **MSSQL** (**MSSQL** and **Firebird** are available).
- In the **Host** text box, type the name of the computer hosting the database.
- In the **Database** text box, type **GM7_Prospects**.

Note: In this example, the **description** is named Prospects and the **alias** and the **database** are both named GM7_Prospects. You can give each a different name or all the same name, but keep track of your naming convention.

- In the **Owner** text box, type **dbo** (typical for MSSQL aliases).
- In the **Login** text box, type the username for the database (such as, **sa**).
- In the **Password** text box, clear the asterisks and type the password for the database (such as, **sa**).

Note: We recommend that during database creation, you use the SQL username and password. This ensures you have adequate rights to create the database, the empty tables, and so on. Later, you can change this alias's username and password to adjust the security.

7. Click **New Database** to register the alias. It notifies you if the alias was created successfully.
8. Click **OK**. The **Database Connections Manager** dialog box reappears.
9. Click **OK**. The **Create GoldMine Database** dialog box reappears.



10. Select the **Create a new contact database** check box to create a new Contact Set.
11. From the drop-down list, select **GM7_Prospects**, the alias just created.
12. Select **Create empty tables**.

13. Click **Next**. The **Database Access** dialog box appears.

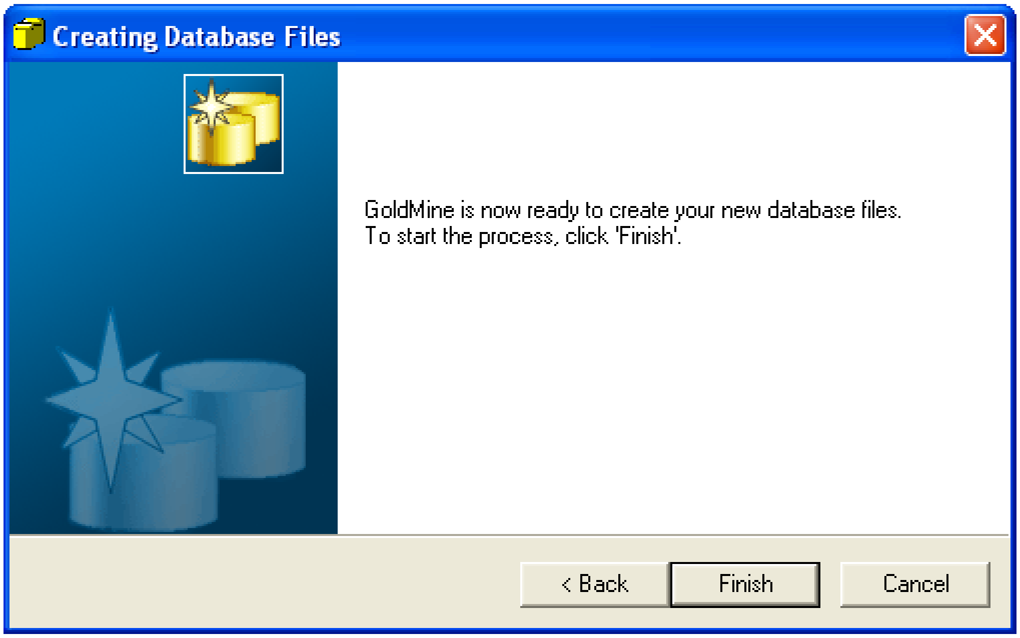
14. From the **Allow access to** drop-down list, accept the default **(public)**. This grants access to all users and groups. To select a user or user group, select a name in the drop-down list.
15. In the **Contact set code** text box, type a unique value (such as, **GM7_P**). GoldMine uses it to associate synchronized data with the correct database, regardless of the name given to the database locally.

Example: An East Coast branch office and a West Coast branch office might have the same Contact Set. Each branch office wants to synchronize data from their local Contact Set with the other office. The East Coast office named the Contact Set Industrial; the West Coast office named the same contact set Manufacturing. If each office assigns the same Contact set code value to the local copy of the database, the offices can synchronize data.

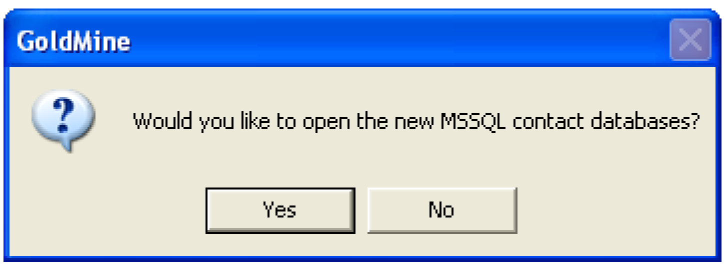
16. Clear the **Allow database access only from this GoldMine installation** check box.

Note: Selecting this check box lets only the GoldMine currently running (as determined by serial number) log into the database. A GoldMine system with a different serial number cannot log into the database.

17. Click **Next**. The **Creating Database Files** dialog box appears.



18. Click **Finish**. The status dialog box appears. When complete, a message appears asking if you want to open this new database now.

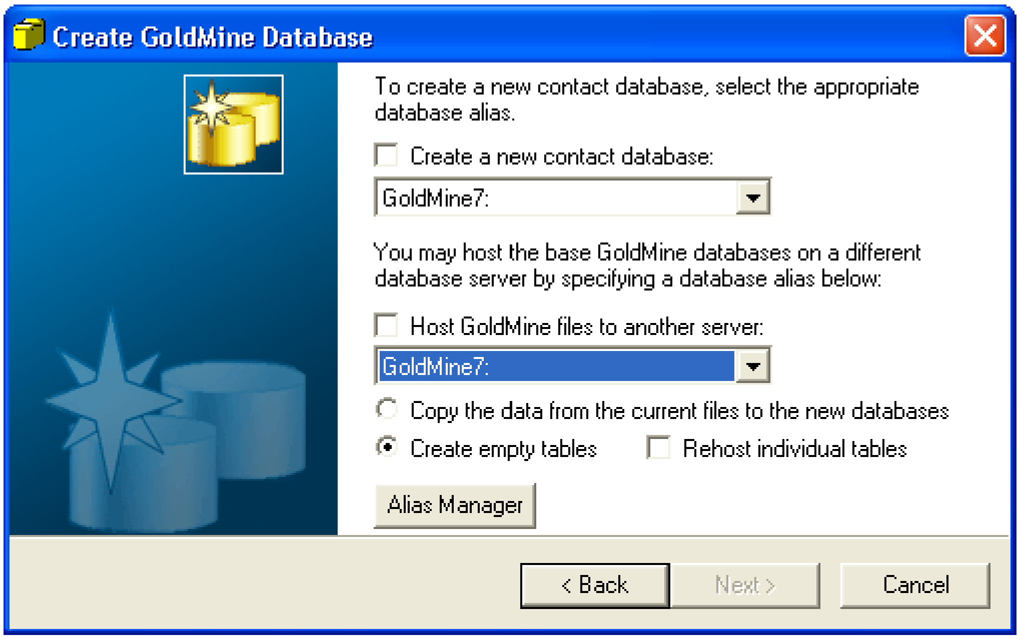


19. Click **No**.

Important: If you are creating a Firebird database and receive an error message (ODBC drivers are not present), install the ODBC driver first, then copy the **FBclient32.dll** to the GoldMine installation directory.

Using the Create GoldMine Database Dialog Box

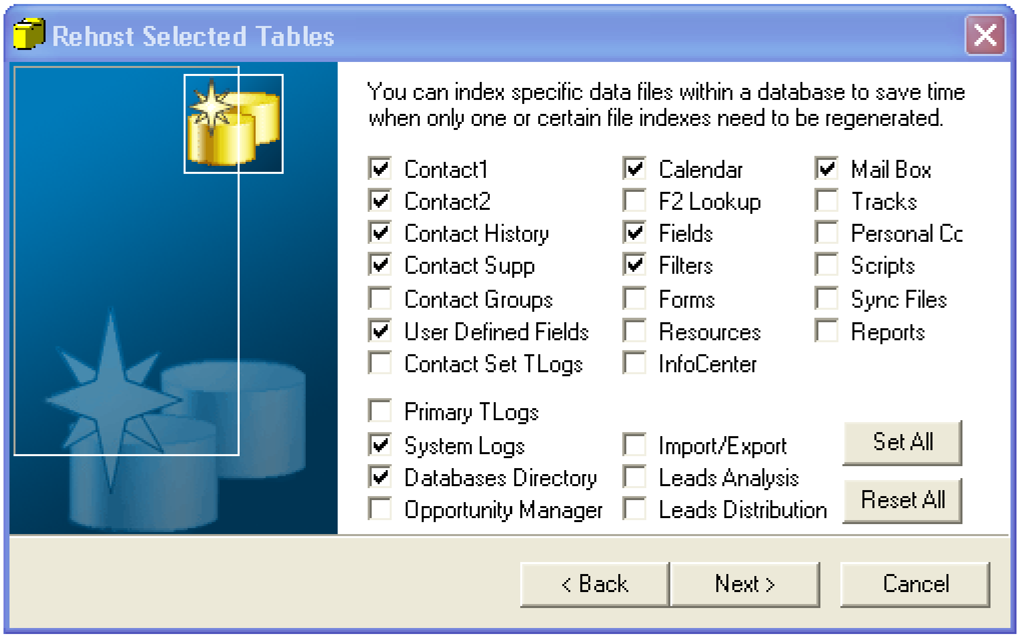
Adjust the settings on this dialog box depending on the database or Contact Set you are creating. Selections made in this box determine what dialog box appears next (such as for rehosting).



- **Create a new contact database:** Select this option to create or rehost a new Contact Set. The associated drop-down list contains known aliases. If you need to create a new alias, click **Alias Manager** and complete that process prior to completing selections on this dialog box.
- **Host GoldMine files to another server:** Select to create or rehost the shared GoldMine files. Select this option only if you are rehosting from dBASE to SQL or creating a complete copy of the entire database. The associated drop-down list contains known aliases. If you need to create a new alias, click **Alias Manager** and complete that process prior to completing selections on this dialog box.
- **Copy the data from the current files to the new databases:** Copies data from the currently open Contact Set. If necessary, GoldMine converts the data to the format appropriate for the database type specified in the first dialog box of the Create GoldMine Database Wizard.
- **Create empty tables:** Creates a database structure to receive data at a later time. Using this option with the GoldMine files causes missing Reports, Templates, and Automated Processes.
- **Rehost individual tables:** Select to create or copy one or more individual tables. For example, copy tables that were not copied if the rehosting process was interrupted. With this option the **Rehost Selected Tables** dialog box appears when clicking Next.

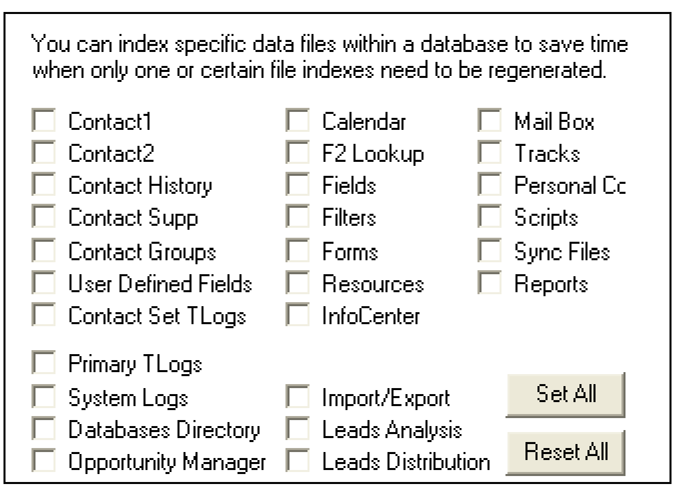
Rehosting

This dialog box lets you index specific data files during the creation of the new database or Contact Set. Select the check box associated with the data to index. Click **Set All** to select all check boxes. Click **Reset All** to clear them. Depending on your settings in the **Create GoldMine Database** dialog box, certain check boxes are not available.



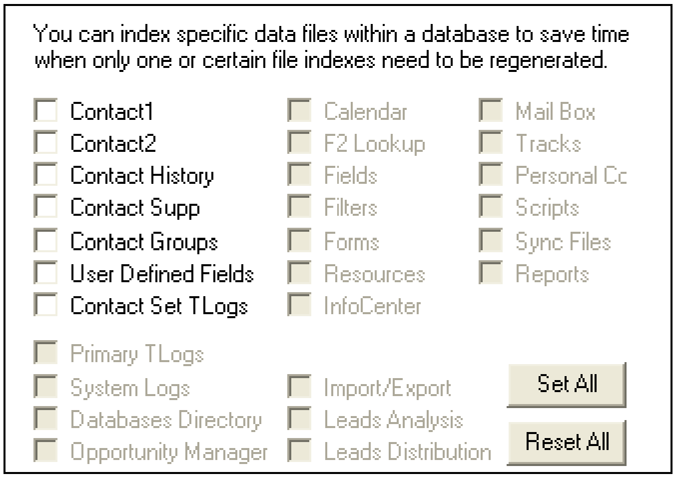
To make ALL check boxes available

Select **Create a new contact database** and **Host GoldMine files to another server** with **Rehost individual tables**.



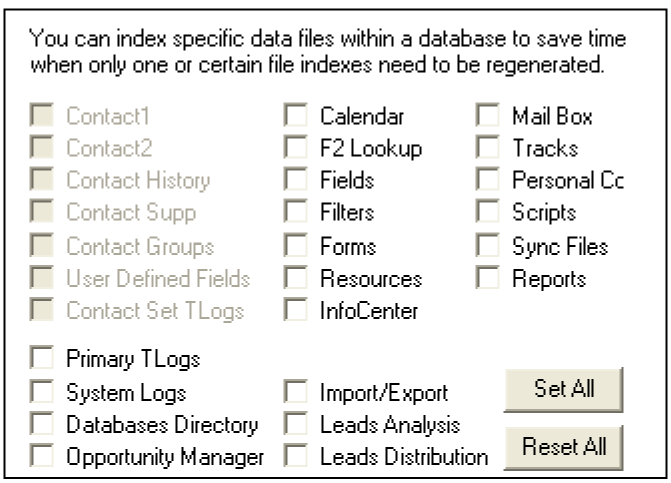
To make CONTACT check boxes available

Select **Create a new contact database** with **Rehost individual tables**.



To make GM FILES check boxes available

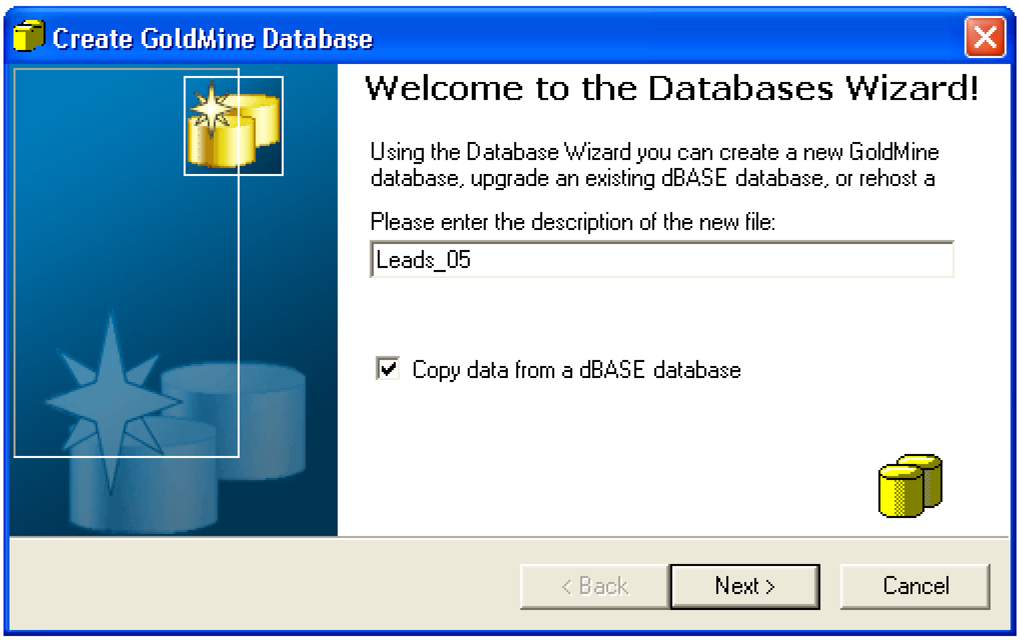
Select **Host GoldMine files to another server** with **Rehost individual tables**.



Copying Data from a dBASE Database

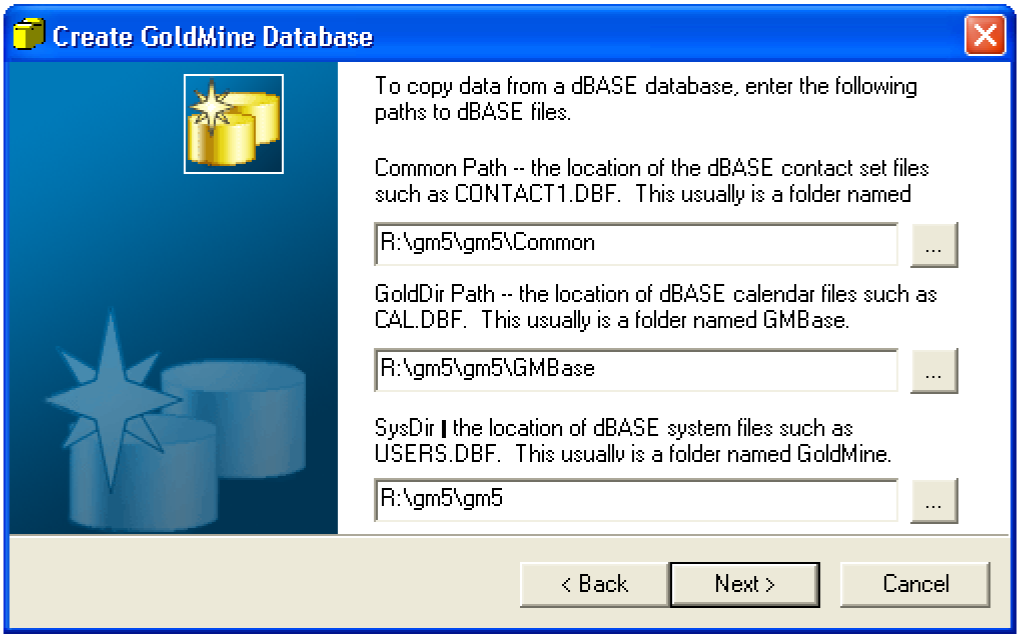
If, for example, you purchase a leads list and it is in a dBASE database, use the Databases Wizard to copy the data into your GoldMine database.

1. Select **File**>>**New Database**. The **Welcome to the Databases Wizard** dialog box appears.
2. Type a description in the **Please enter the description of the new file** text box (such as, **Leads_05**).



3. Select the **Copy data from a dBASE database** check box.

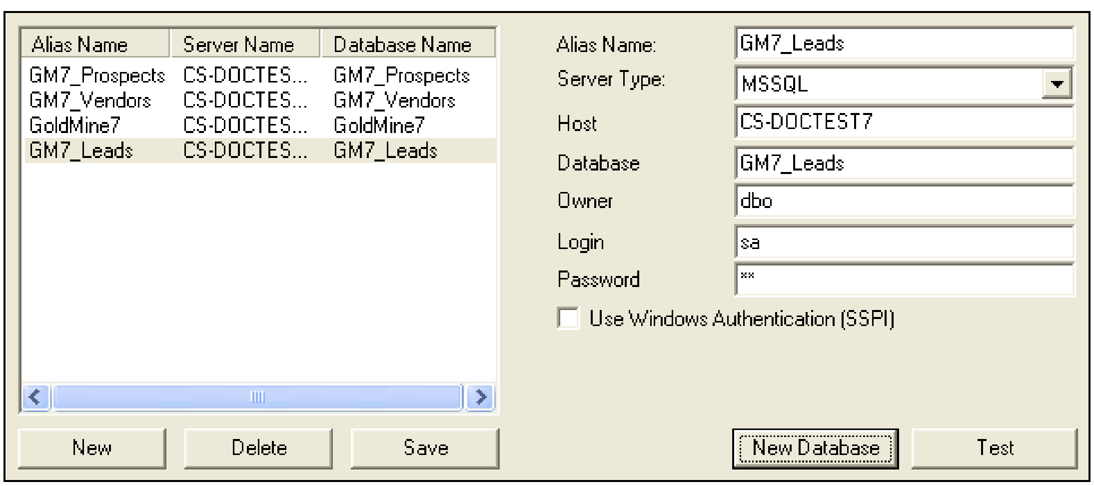
4. Click **Next**. The **Create GoldMine Database** dialog box appears.



5. Browse to the:

- **Common Path:** the location of the dBASE contact set files.
- **GoldDir Path:** the location of dBASE calendar files.
- **SysDir:** the location of dBASE system files.

6. Click **Next**. The **Create GoldMine Database** dialog box appears.
7. Click **Alias Manager**. The **Database Connections Manager** dialog box appears.
8. Click **New**. The form clears.
9. Complete the form:

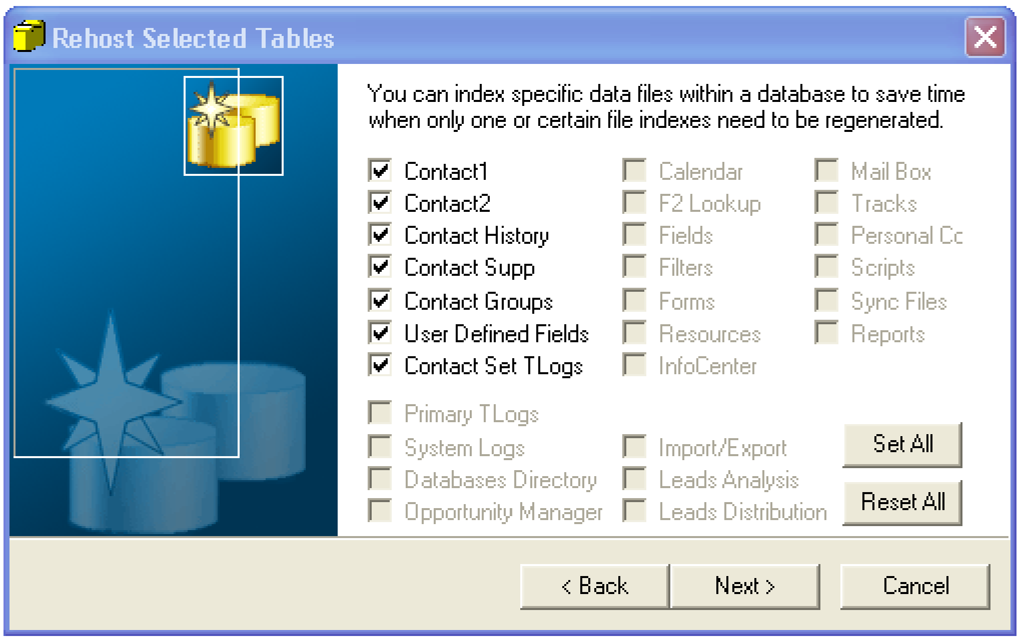


- In the **Alias Name** text box, type **GM7_Leads**.
- From the **Server Type** drop-down list, select **MSSQL** (**MSSQL** and **Firebird** are available).
- In the **Host** text box, type the name of the computer hosting the database.

- In the **Database** text box, type **GM7_Leads**.

- In the **Owner** text box, type **dbo** (typical for MSSQL aliases).
- In the **Login** text box, type the username for the database (such as, **sa**).
- In the **Password** text box, clear the asterisks and type the password for the database (such as, **sa**).

10. Click **New Database** to register the alias. It notifies you if the alias was created successfully.
11. Click **OK**. The **Database Connections Manager** dialog box reappears.
12. Click **OK**. The **Create GoldMine Database** dialog box reappears.
13. Select the **Create a new contact database** check box to create a new Contact Set.
14. From the drop-down list, select **GM7_Leads**, the alias just created.
15. Accept the default **Rehost individual tables**.
16. Click **Next**. The <u>**Rehost Selected Tables**</u> dialog box appears.



17. Click **Set All**.
18. Click **Next**. The **Database Access** dialog box appears.
19. From the **Allow access to** drop-down list, accept the default **(public)**. This grants access to all users and groups.
20. In the **Contact set code** text box, type a unique value (such as, **GM7_L**).
21. Clear the **Allow database access only from this GoldMine installation** check box.
22. Click **Next**. The **Creating Database Files** dialog box appears.
23. Click **Finish**. The status dialog box appears. When complete, a message appears asking if you want to open this new database now.
24. Click **No**.

Getting Started

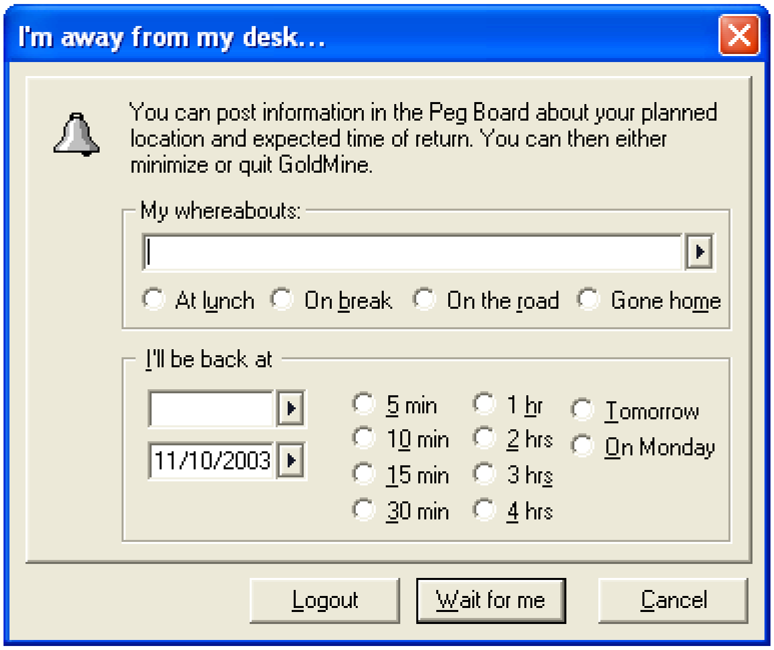
Launching GoldMine

1. On the Windows desktop, select **Start>>Programs>>GoldMine** or double-click the GoldMine desktop icon. The **GoldMine logon** window appears.
2. Type your **Username** and **Password.**
3. Click **OK**.

Logging Away from GoldMine

When leaving GoldMine for a period of time, post information about your current location and the time/date of your expected return.

1. Select **File>>Log Away**. The **I'm away from my desk dialog box** appears.



2. In the **My Whereabouts** area, type where you have gone in the text box, select from the F2 Lookup list , or select one of the radio button options below the text box to select:
   - At lunch
   - On break
   - On the road
   - Gone home

3. In the **I'll be back at** area, select the time from the time options or select the time from the F2 graphical clock on the first text box.
4. Select the day for the day options (Tomorrow or On Monday) or select the date from the F2 graphical calendar on the second text box.
5. Select an option:
   - **Logout:** Posts the time of logout in the Peg Board.
   - **Wait for me:** Minimizes GoldMine. Although you are not logged out of GoldMine, you are prompted for your password to restore the display. After returning to your work session, GoldMine automatically clears the reference in the Whereabouts column of the Peg Board.
   - **Cancel:** Cancels the action.

Logging in Another User

Log in Another User to log out and log in as a different user.

1. Select **File>>Log in Another User**. GoldMine closes and a new login splash screen immediately appears.
2. Type the **Username** and **Password**.
3. Click **OK** to log in as that user.

Key Terms and Concepts

Activity List
A categorized list of activities associated with a particular Contact Record or assigned to a GoldMine user. Use the Activity List to view details of an activity, display the Contact Record linked to an activity, schedule and complete the activity, and save reference information in the history file.

Browse Window
A list of contacts, Calendar events, reports, and other items. Browse windows differ from other types of windows in GoldMine because they display information in columns.

Calendar
Activity information organized in tabs that access different levels and types of detail. Use the Calendar to schedule and complete activities.

Contact Record
Standard contact information, such as name, company, phone number, and address. Most operations in GoldMine are performed on the Contact Record. The Contact Record is the basis for scheduled work in GoldMine, acting as the link between GoldMine's Calendar and History by maintaining pending and past events related to each Contact Record.

When multiple windows are open in your GoldMine work area, the title bar of an active Contact Record is a different color from other items occupying the work area.

F2 Lookup
A data entry tool listing frequently used or code-specific entries. Security options control F2 Lookups, ensuring user input and allowing data standardization.

Work Area
Displays open Contact Records, the Calendar, Activity List, E-mail Center, and any other open windows. Although you can open, position, and size multiple contact records in the work area, only one Contact Record can be active at a time.

Shortcut Keys

GoldMine menu commands can be executed with shortcut keys. Rather than using the mouse to select menu options, the shortcut keys are keyboard keys (F1) or key combinations (such as CTRL+P) that invoke a particular command.

GoldMine Shortcut Keys

Display online Help for the active window	F1
Display predefined field entries for lookups, calendar (date fields), or clock (time fields)	F2
Display the Contact Search Center	F4
Display the E-mail Center	F5
Display the Activity List	F6
Display your Calendar	F7
Display the Opportunity Manager	F9
Exit GoldMine	Alt+F4

Contact Record Shortcut Keys

Search for a string within the active tab	F3
Display predefined field entries for lookups, calendar (date fields), or clock (time fields)	F2
Edit Contact record	Ctrl+E
Edit text in Notes	Ctrl+I
Undo typing in Notes	Ctrl+Z
Cut selected text in Notes	Ctrl+X
Copy selected text in Notes	Ctrl+C
Paste copied text in Notes	Ctrl+V
Resize the record	Ctrl+W
Go to the next Contact record	Page Down
Go to the previous Contact record	Page Up
Go to the first record	Ctrl+Page Up
Go to the last record	Ctrl+Page Down
Cycle through last-viewed records	Shift+Page Up
Write an e-mail message to Contact	Ctrl+Shift+E
Dial the Phone1 telephone number for the Contact	Alt+1
Dial the Phone2 telephone number for the Contact	Alt+2
Dial the Phone3 telephone number for the Contact	Alt+3
Dial Fax for the Contact	Alt+4
View the Summary tab	Ctrl+S
View the Fields tab	Ctrl+F
View the Organization Chart	Ctrl+Q
View the Notes tab	Ctrl+N
View the Contacts tab for additional contacts	Ctrl+C
View the Details tab	Ctrl+D
View the Referrals tab	Ctrl+R
View the Pending tab	Ctrl+P

View the History tab	Ctrl+H
View the Links tab	Ctrl+L
View the Groups tab for contact group membership	Ctrl+M
View the Tracks tab	Ctrl+T
View the Opportunities tab	Ctrl+Y
View the Projects tab	Ctrl+J
Display Personal Contacts	F11
Start timer	F8
Stop timer	Shift+F
Reset timer	Alt+F8
Restart timer	Ctrl+F8

GoldMine Reports Shortcut Keys

Center the object	Alt+C
Cut the object	Ctrl+X
Copy the object	Ctrl+C
Delete the object	Delete
Change the font for the text	Alt+F10
Align the text within the object	Ctrl+P
Specify outline properties	Ctrl+O
Select a background	Ctrl+B
Edit a field expression	Ctrl+F
Edit a filter	Ctrl+F6
Insert a section label	F6
Insert a text label	F9
Insert data field	F2
Insert expression field	F3
Insert system field	F4
Insert dialog field	F5
Insert line	Ctrl+F9
Insert picture from clipboard	Alt+F7
Insert picture from disk file	Alt+F8
Create a dialog field	Ctrl+R
Edit a dialog field	Ctrl+M
Delete a dialog field	Ctrl+D
Define margins, ruler, and date format	F7
Define a filter	Ctrl+F7
Save or update report template	F10
Save template with a new file name	Shift+F10

Viewing GoldMine Information

View summary information, credits, installation details, or contact information for FrontRange Solutions.

1. Select **Help>>About**. The **About GoldMine** window appears.
2. View version, registered owner, product serial number, and copyright information.
    - **Credits:** Displays integrated applications.
    - **FrontRange:** Displays contact information for FrontRange Solutions.
    - **System:** Displays information about your GoldMine installation. To copy the information, click **Copy All**. Paste the information into your outside application.

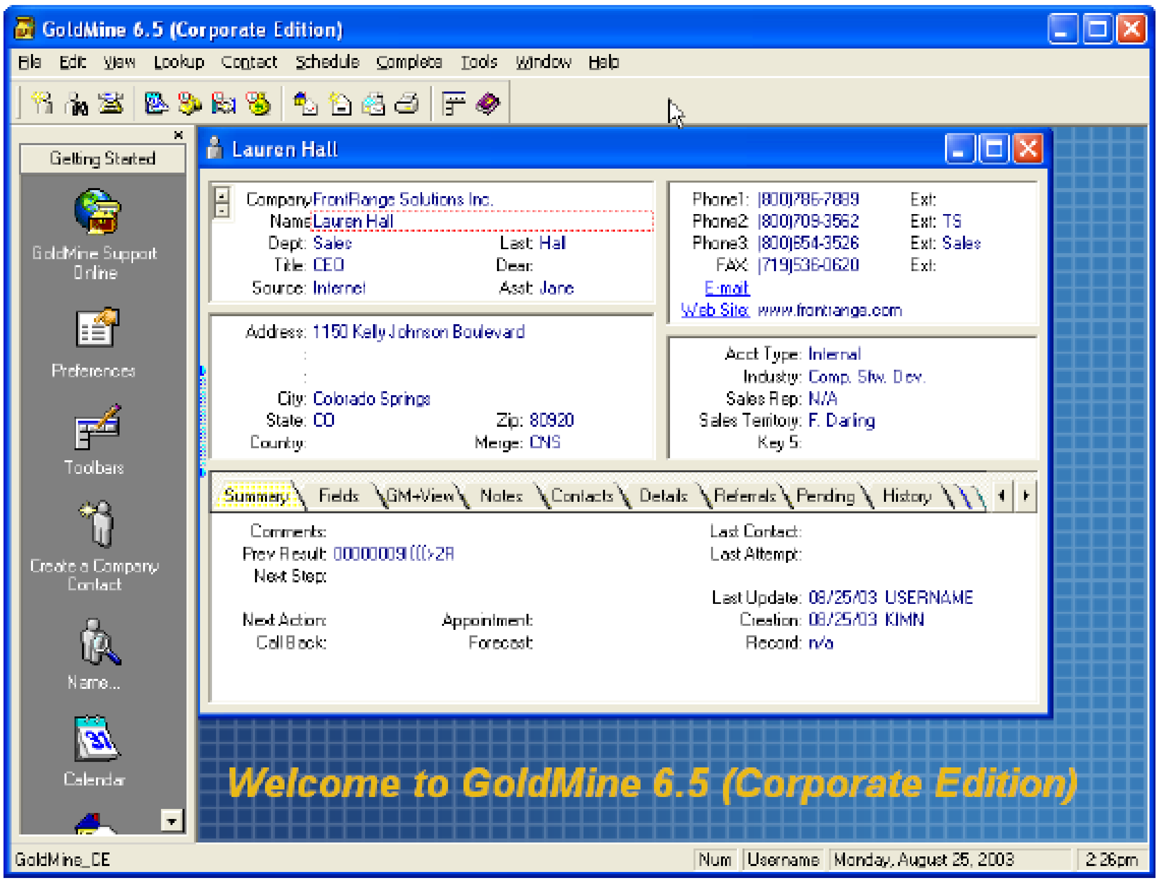
3. Click **OK**.

Navigating GoldMine

Main Window

GoldMine's work area displays contact information and the options to manage contact relationships. Click on each part of the graphic below to display a description of work area components.

Parts of the GoldMine work area: main menu, toolbar, taskbar, work area, and status bar.



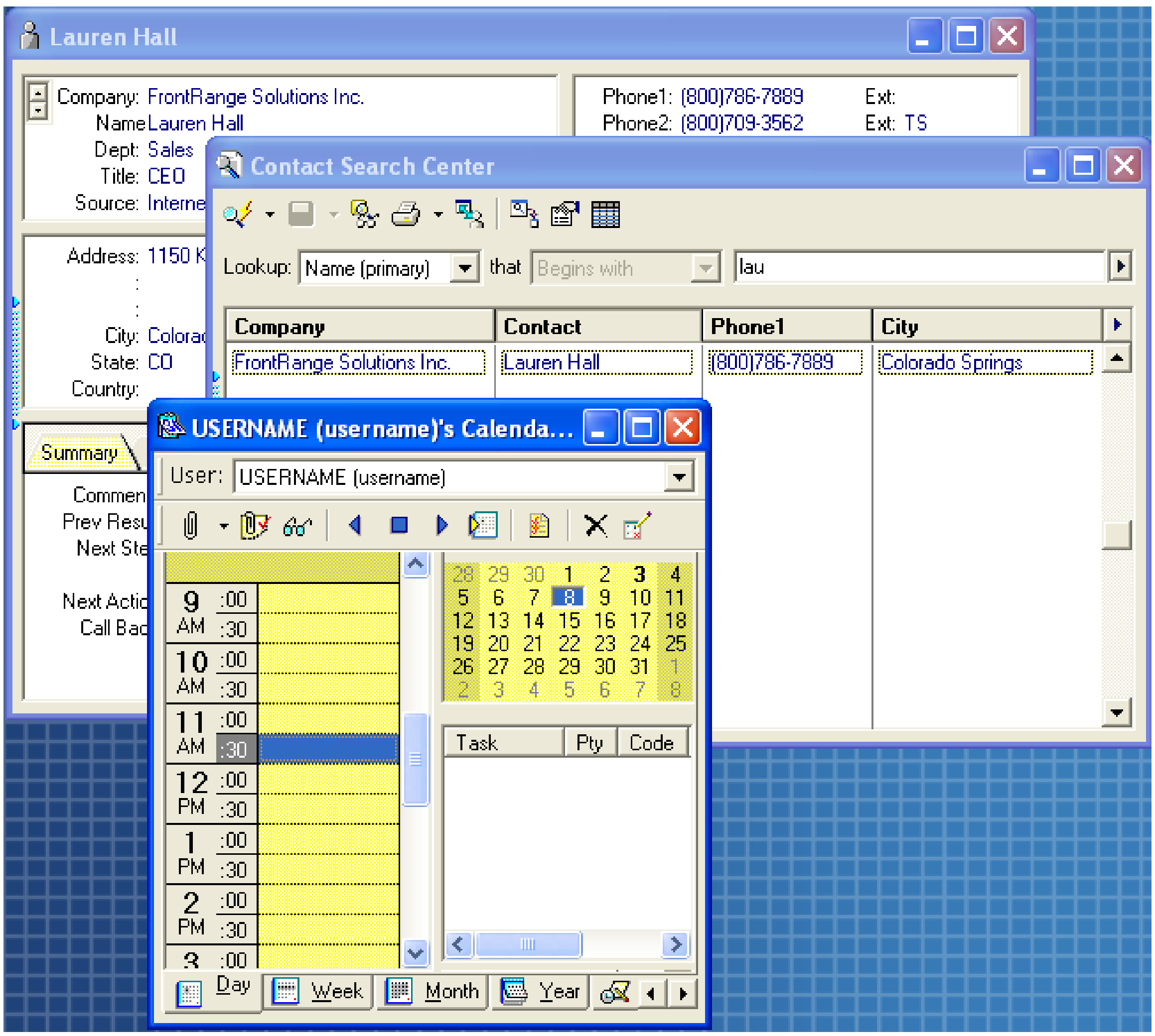
Work Area

The screen's center is the work area. The GoldMine work area displays active windows, including the open contact records, Calendar, Activity List, and Contact Search Center. The work area also displays the scheduling dialog boxes, tools, and wizards.

The active window title bar is a darker color than for the inactive window. Although you can open, position, and size multiple windows in the work area, only one window is active.

Customize the work area background by adding graphics, logos, and text.

Below, the work area contains three windows; the calendar window is active.



Main Menu

The **Main Menu** bar offers the first level of commands, which display in standard Windows pull-down menus.

Note: Use the default main menu configuration, or use the GoldMine 4.0 main menu configuration by selecting **Edit>>Preferences>>Misc** tab. Select **Use the old GoldMine 4.0 menu**.

1. Use the mouse to select the menu option from the main menu. The selected menu appears.
2. Select the submenu option. The appropriate dialog box, wizard, or window appears.

- **File:** Create contact records, manage databases, print reports, synchronize, configure GoldMine settings, and log in options. Also exit GoldMine from this menu.
- **Edit:** Edit Contact records, record properties, toolbars, templates, and user preferences.
- **View:** Options for the new contact windows or groups, activities, e-mail center, InfoCenter, projects, literature fulfillment, sales and analysis tools, and logs.
- **Lookup:** Lookup windows for contacts, indexed fields, detail records, filters, full text, and Internet searching.
- **Contact:** Options for the current contact record, including dialing the phone number, inserting a note, writing a letter or memo, creating an e-mail, taking a message, assigning an Automated Process, or browsing the Web site.
- **Schedule:** Scheduling options for the contact record, including scheduling a call, appointment, literature request, forecasted sale, and a follow-up action.
- **Complete:** Completed action options for scheduled and unscheduled calls, appointments, sales, other actions, correspondence, and other pending activities.
- **Tools:** GoldMine tools for creating and running Automated Processes, Server Agents, importing and exporting data, globally replacing data, territory realignment, deleting contact records, launching the Database Connections Manager, QuickStart Wizard, optimizing the Org Chart, and Sync Spy.
- **Window:** Window, toolbar, taskbar, and status bar display options.
- **Help:** Online Help, the GoldMine Web site, NetUpdate, and important system information in About.

Note: Menu options may be unavailable because the option does not apply to the current selection, another command option must be activated before, or security restrictions limit your menu rights. Contact your GoldMine Administrator if a menu option you need in unavailable.

Local Menus

Use a local menu (shortcut menu) to access commands effecting options or information in the selected browse window, tab, or pane.

Accessing Local Menus:

1. Right-click in the window, tab, or pane you are working in.
2. Select the action from the menu.

Taskbar

Use GoldMine's user-defined Taskbar to group most frequently used commands. Customize the Taskbar to access frequently used GoldMine menu commands and macros, to launch external applications and websites, and to display documents and files.

The taskbar is on the left side of the work area. Each icon in the taskbar represents a task item. There can be 50 task items in a task group and 20 task groups. To change how the icons display, click and drag to change the order the icons appear in the taskbar or to move icons from one taskbar group to another, or right-click and select display large or display small icons. Close the taskbar by clicking the **X** in its upper right corner. To re-open the taskbar, select **Window>>Taskbar**.

Customizing

About Customizing GoldMine

GoldMine provides extensive customization opportunities. Customize aesthetic an navigational areas, including adding background images, adding taskbar items, and customizing toolbars. Also configure your calendar, and customize record types, field views, and fields and screens.

Two files store user-related information: **username.ini** and **username.tbi**. The username is the GoldMine login name. For example, JohnB.ini and the JohnB.tbi are files in the GoldMine directory.

Customizing the GoldMine Background

About Customizing the Background

Customize the background of the work area with:

- Background Wallpaper
- Specialized Logos
- Custom Text

Note: Users with Master rights can define global settings that apply to all workstations. Any user can set individual settings to personalize the work area on a single system.

1. Select **Edit>>Custom Background**. The **Edit Background** dialog box appears.
2. The **Background** tab contains options for **Global Background Bitmap Settings** and **User Background Bitmap Settings**:
    - **Background bitmap:** Type of browse to the location of the of the .bmp file to use as wallpaper.
    - **Position:** Select where to place the graphic. If you select Tile, the graphic file repeats to fill the work area. Other options specify unique positions.
    - **Margins X, Y:** Specify margins around the graphic. X sets the side margins and Y sets vertical margins. Depending upon the Position selected for the graphic file, margin options vary. For example, if you select Center Top, only the Y margin can be edited.

Adding Items to the Taskbar

About Adding Items to the Taskbar

GoldMine installs a default Getting Started taskbar. Customize this taskbar as needed.

1. Right-click on the taskbar to add the item to, and select **Add New Item**. The **Taskbar Group Item Selection** dialog box appears.
2. Select an option from the **Item Type** drop-down list; then configure the option settings.
    - **Main Menu Action**: Adds a GoldMine menu option to the taskbar.
    - **GoldMine Users' Macro**: Adds another user's macro.
    - **External Application**: Creates a path to launch an external application.
    - **Document Link**: Links to a document.
    - **Website**: Launches a Web site.

Customizing Toolbars

About Customizing Toolbars

Users and administrators can configure GoldMine toolbars. Distribute toolbars by copying toolbar options into the Username.ini of other users.

Customizing options:

- **Toolbars:** Select the predefined toolbars to display, add toolbars to the work area, and create custom toolbars.
- **Options:** Enable or disable toolbar options.
- **Insert item:** Insert buttons for the options you find useful; record a macro to assign to a button.

Editing Toolbar Options

1. Right-click a blank area outside the toolbar.
2. Select **Options**. The **Toolbar Options** dialog box appears.
3. From the **Toolbar Options** dialog box, select from:

- Show quick help

  Rolling the mouse pointer over the button displays a brief description of its function in a yellow box below the button.

- Show fly-by status bar help

  Rolling the mouse over a button displays its description in the lower left side of the GoldMine status bar.

- Show button text

  Enlarges toolbar buttons and displays text on each icon describing the operation it performs.

- Allow user configuration

  Enables toolbar editing capabilities, such as adding new toolbar buttons, moving buttons from one toolbar to another, and removing toolbar buttons.

  If this operation is disabled, you can reset the original toolbars to the default icons, create a new toolbar group, and move a toolbar; however, you cannot move icons from existing toolbars into the new toolbar, or insert items into the toolbar. The Insert Item option does not appear on the Toolbar local menu.

- Allow undocking and docking

  Release a toolbar from its current position and place—or dock—the toolbar at the top or on either side of the work area display.

  If this operation is disabled, you can move a floating toolbar (an undocked toolbar "floating" inside the work area); however, you cannot dock a toolbar at the top or either side of the work area, nor can you move a toolbar from a docked position.

Configuring Calendar Options

Using the Calendar Options Dialog Box

Configure calendar options.

1. Select **Edit>>Preferences>>Calendar**. Click **More Options**. The **Calendar Options** dialog box appears.
2. Select from these tabs to configure how information appears on your calendar:
   - **Holidays:** Holiday categories and holidays to display.
   - **Activity Details:** How scheduled and completed activities display.
   - **Publishing:** iCalendar and Web publishing options.
   - **Free/Busy:** How your scheduled busy times display.

Customizing Record Types

About Record Types

Record types are customized combinations of Primary Fields Views, Custom Screens, and GM+Views. Linked and applied based on user-defined rules, record types determine what users see when working in GoldMine. The full record type combination (Primary Field View, Custom Screens and GM+View) is an "entity." Manage record types in the Record Types Administration Center.

Effective use of the Record Types Administration Center depends on a sensible workflow.

The Workflow: Creating Primary Fields Views, Custom Screens, and GM+Views

1. Defining Primary Fields Views

- Creating Primary Fields Views
- Editing fields
- Using Field Typing

2. Creating Custom Screens
   - Creating Custom Screens
   - Adding Fields to Screens
   - Editing fields
   - Using Field Typing

3. Creating GM+Views

Using the Record Types Administration Center

The Record Types Administration Center manages record types.

1. Creating Record Types
2. Configuring Record Type Rules

Using Record Types and Contact Records

After creating record types and configuring the in the Record Types Administration Center, the record type (entity) displaying in GoldMine is based on how the record meets the rules criteria.

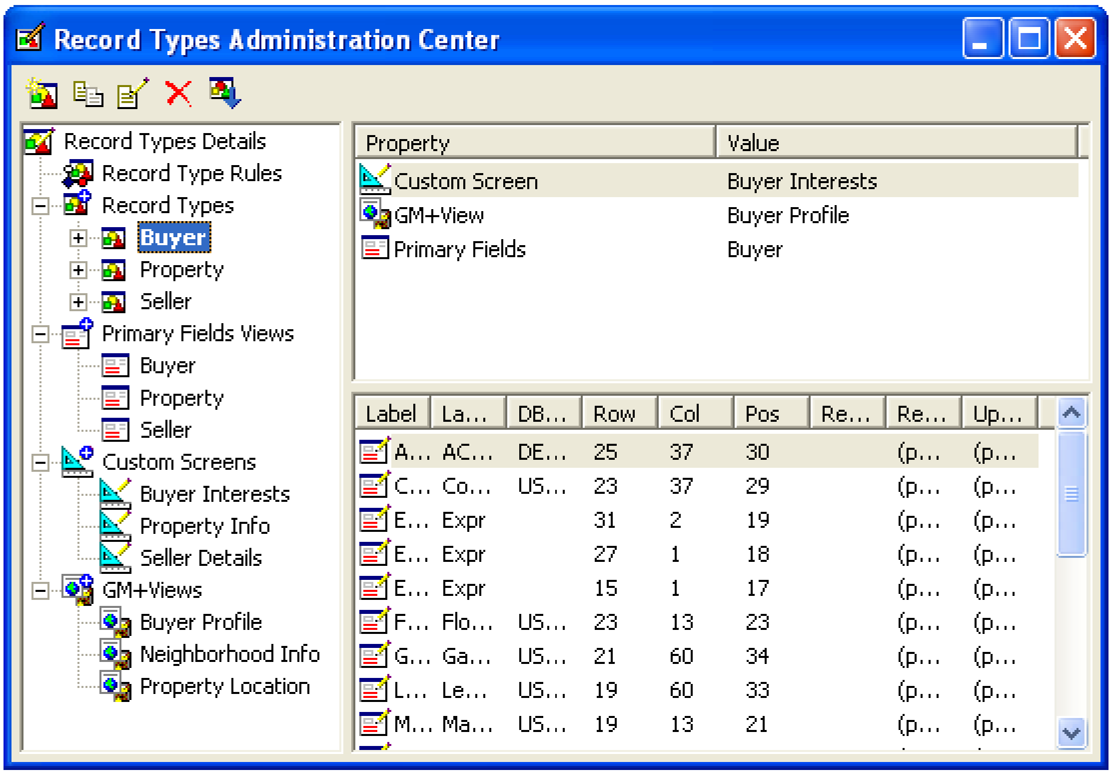
With the **Field value-based rules** activated, the **File>>New Record** menu expands to include record types with the New Record Creation Options configured. Create new records based on the selected record type, providing you with an efficient data entry option.

You are not always restricted to the views determined by the record types and rules. With sufficient GoldMine permissions, manually change the primary field view, custom screen, or GM+View.

Using the Record Types Administration Center

Use this Center to create and manage Contact Record customizations. Record typing is powerful and dynamic, letting you customize the type of Contact Record GoldMine users see and combine, within one database, what may appear to be disparate types of Contact Records.

To access the Record Types Administration Center, select **File>>Configure>>Record Types Administration Center**. (View...)



Enhanced logic simplifies working with data records. Users can perform searches for record types instead of field names, enabling them to find information without identifying a field name. Logical pick lists display field names for the record type.

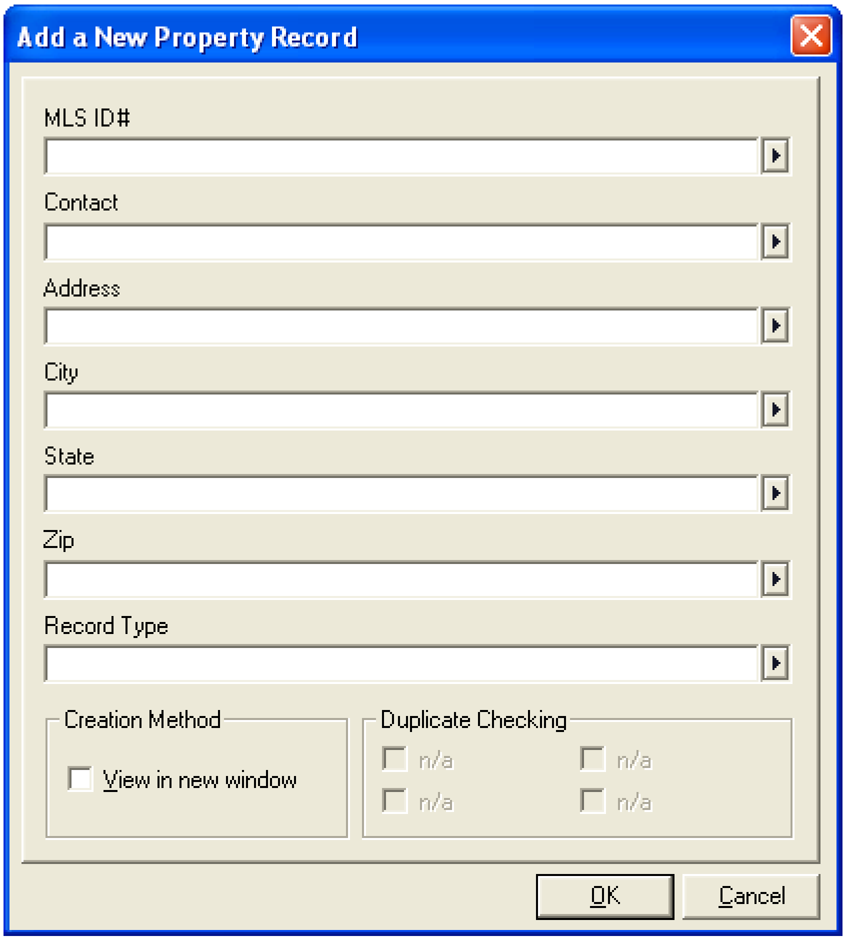
Use the Record Types Administration Center to create Record Types based on combinations of different Primary Field Views, Custom Screens, and GM+Views, and apply them in GoldMine based on your user-defined Record Type Rules. The full record type combination (Primary Field View, Custom Screens, and GM+View) is an "entity."

Examples:

- A manufacturing company uses GoldMine to track suppliers and customers. They use record typing to create a Supplier record type and a Customer record type.
- Realtors use GoldMine to maintain information about properties, sellers, buyers, and real estate financing sources. They use record typing to create customized record types for each category they work with.

Part of the Record Typing is determining New Record Creation Options to specify fields displayed to a user who is creating a record based on a record type. Available fields are limited to fields included in the selected record type and are only available when the field value-based record type rules are activated.

Note: The New Record Creation Options, once configured, let you create new records based on record types. Select **File>>New Record**. The menu expands to include configured record types. Select the **New <record type> Record**. A customized dialog box appears.



Also create and apply Record Type Rules to govern what record type displays based on a field value-based or dBase expression-based rule, or to disable the rules. Rules can be as simple as when the value in the Acct. Type field is Property display the Property record type; when the value is Buyer, display the Buyer record type; or when the value is Seller, display the Seller Record type.

Working with Record Types

Creating Record Types

After creating the appropriate Primary Fields Views, Custom Screens, and GM+Views, create new Record Types. A record type consists of a unique name and is composed of a combination of Primary Fields, Custom Screens, and GM+Views. The combination of these components creates an record type entity.

1. Select **File>>Configure>>Record Types Administration Center**. The **Record Types Administration Center** appears.
2. In the **Record Types Details** pane, right-click and select **New Record Type** or click **New Record Type**  on the toolbar. The **Record Type Settings** dialog box appears.
3. Specify:
    - **Record Type Name** text box: A unique name for the record type.
    - **Primary Fields** drop-down list: The Primary Fields View to associate with this record type.
    - **Custom Screens** drop-down list: The Custom Screen to associate with this record type.
    - **GM+View** drop-down list: select: The GM+View to associate with this record type.

4. To specify the fields to populate when creating a record based on the record type, click **New Record Creation Options**. The **Record Type: New Record Creation Options** dialog box appears.
5. Select **Set as Default Record Type** to use the current record type as the default when record type rules are not met. The default record type could be a generic view or the record type used by the largest number of users. Only one record type can be the default at one time. Selecting this option on a different record type makes it the default. Bold Type in the Record Types Details pane identifies the default record type.
6. Click **Apply Changes** .

Editing Record Types

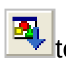
1. Select **File>>Configure>>Record Types Administration Center**. The **Record Types Administration Center** appears.
2. Expand the Record Types Details tree and expand Record Types. Select the Record Types to edit. The associated Custom Screen, GM+View, and Primary Fields display in the upper right pane. The lower right pane displays the fields (for Custom Screens and Primary Views) and the HTML template (for the GM+View) when the object is selected in the upper right pane.
3. To edit change the Record Type Name, reconfigure new record selection options, or select new Primary Fields, Custom Screens, or GM+Views, right-click and select **Edit**. The **Record Type Settings** dialog box appears. Make necessary changes.
4. Edit Primary Fields and Custom Screen fields by right-clicking on the field when it displays in the lower right pane and select **Edit**. The **Field Properties** dialog box appears.
5. Edit GM+View templates by right-clicking on the GM+View in the upper right pane and select **Edit**. The **Edit <template name> GM+View** dialog box appears.
6. Click **Apply changes**  to apply the changes to GoldMine records.

Configuring Record Type Rules

Record type rules are key to effective use of record types. They govern which record types display when the conditions of the rules are met.

Select one of three rules to apply to the record types: use text boxes and drop-down lists, use dBASE expressions, or disable rules. If no rules are configured, users can manually select Primary Fields Views, Custom Screens, and GM+Views as they work in GoldMine. Apply only one set of rules at a time when working with record types.

1. Select **File>>Configure>>Record Types Administration Center**. The **Record Types Administration Center** appears.
2. In the **Record Types Details** pane, right-click on Record Type Rules and select **Edit**. The **Rule Definition for Record Type** dialog box appears.
3. Select a rule type:
   - **Field value-based:** Evaluates the field for the specified values and displays the record type you select.
   - **dBase Expression result-based:** Evaluates an expression that returns a string the name of a record type.
   - **Inactive (disable rules):** Turns off the record type rules. When the rules are inactive, manually change the primary field view, custom screen, or GM+View.

4. Click **Apply changes**  to apply the changes to your GoldMine records.

Notes:

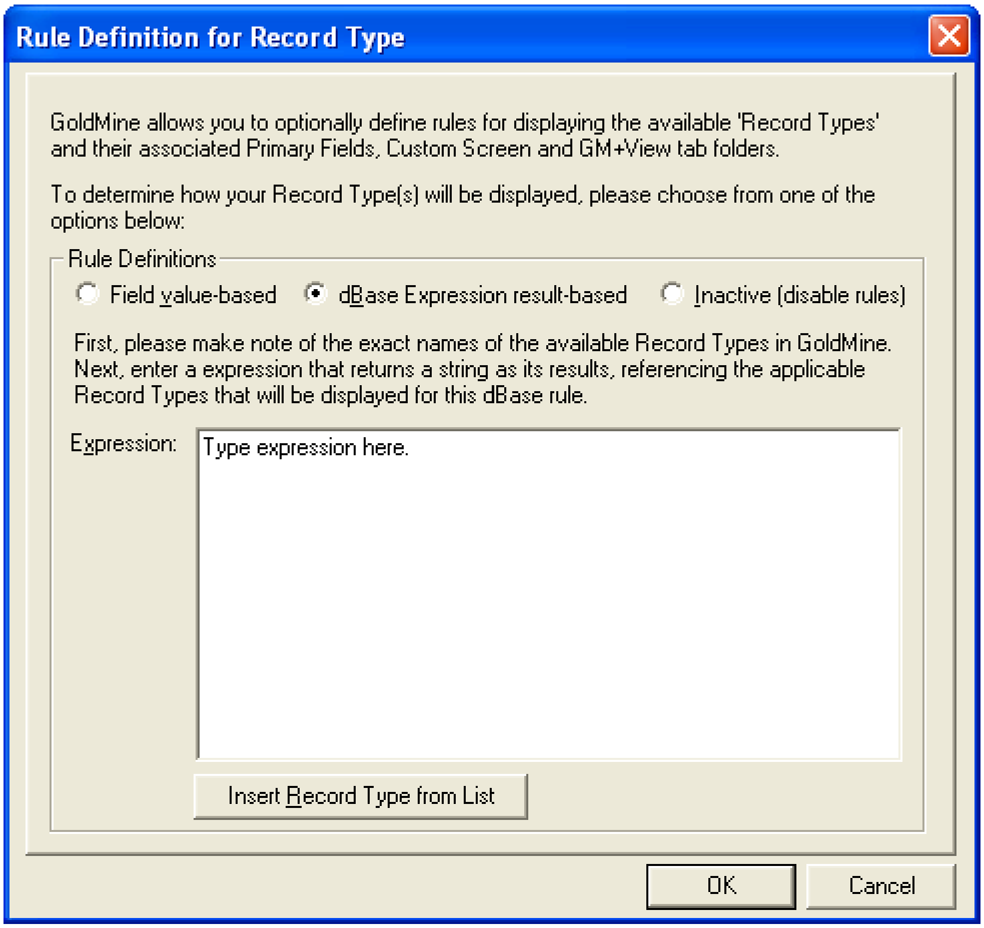
- Field value-based rules are limited to 32. If you have 33 or more, no rules are evaluated.
- If the rules are not met, GoldMine displays your default record type.

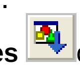
Creating Record Type Rules Based on dBASE Expressions

Use Record Type Rules to determine the displaying record type. Define rules by field values and dBASE expressions, or make them inactive.

dBASE expressions are for advanced users. If you activate the dBASE expression rules, you cannot create new records based on record types. Activate field value rules to create new records based on record types.

1. Select **dBase Expression result-based** on the **Rule Definition for Record Type** dialog box. The dialog box displays an **Expression** text box.



2. In the text box, type or copy and paste the expression you are creating.
3. As you type or modify the expression, use the **Insert Record type from List** button to select a record type from the list and guarantee data consistency.
4. After creating your expression, click **OK** and then **Apply Changes**  on the Record Types Administration toolbar.
5. To verify your record type selection is based on rules, right-click in the primary fields and select **Select Primary Fields**. On the expanded local menu, **Rules-Based selection** should have a check mark next to it; otherwise, select Rules-Based selection.

Expressions using Values Corresponding to Record Type Names

When the string value in the field being evaluated corresponds to the name of the record type, use these expressions:

Simple Expression

Assuming Key1 can have Supplier, Customer, or Equipment as a value and assuming you have record types named Supplier, Customer, and Equipment, use this expression:

```
trim(contact1->key1)
```

Results: Each record where the key1 field value equals Supplier, the Supplier record type displays. Each record where the key1 field value equals Customer, the Customer record type displays. Each record where the key1 field value equals Equipment, the Equipment record type displays.

Sum of Two Fields Expression

Assuming Key1 can contain the value Supplier or Customer and Key2 can contain Insured or Uninsured and assuming four record types are named Supplier Insured, Supplier Uninsured, Customer Insured, Customer Uninsured, use this expression:

```
trim(contact1->key1)+" "+trim(contact1->key2)
```

Results: The expression returns <Key1string><space><Key2string>. If the value in Key1 is Supplier and the value in Key2 is Uninsured, then the Supplier Uninsured record type display for the record. When moving to another record where the value of Key1 is Customer and the value in Key2 is Insured, then the Customer Insured record type display for the record.

If...Then...Else Expressions

An even more effective expression is the dBASE IIF statement. The structure of the iif statement, for example, iif((trim(contact1->key1)="Supplier"),"Supplier","Customer") reads as: If the statement is true (contact1->key1)="Supplier"), then display the Supplier record type, else (if statement is not true) display the Customer record type.

Simple IIF Expression

Assuming Key1 can have Supplier or Customer as a value and assuming record types are named Supplier and Customer, use this expression:

```
iif((trim(contact1->key1)="Supplier"),"Supplier","Customer")
```

Results: For each record where the Key1 field value equals Supplier, the Supplier record type displays; otherwise the Customer record type displays.

Complex IIF with .AND. Expression

Assuming Key1 can contain the value Supplier or Customer and Key2 can contain Insured or Uninsured and assuming four record types are named Supplier Insured, Supplier Uninsured, Customer Insured, Customer Uninsured, use this expression:

```
(iif((trim(contact1->key1)="Supplier").and.(trim(contact1-
>key2)="Insured"),"Supplier Insured","Supplier Uninsured"))
```

Results: If the value in Key1 is Supplier and the value in Key2 is Insured, then the Supplier Insured record type display for the record. When moving to another record where the value of Key1 is Supplier and the value in Key2 is Pending, the Supplier Uninsured record type displays for the record.

Complex Multiple IIF Expression

Assuming Key1 can have Supplier, Customer, or Equipment as a value and assuming record types are named Supplier, Customer, Equipment, and Standard, use this expression:

```
iif(contact1->key1="Supplier","Supplier",iif(contact1-
>key1="Customer","Customer",iif(contact1-
>key1="Equipment","Equipment","Standard")))
```

Results: If the value in Key1 is Supplier, display the Supplier record type. If the value is not Supplier, evaluate whether Key1 is Customer. If the value is Customer, display the Customer record type; otherwise, evaluate whether Key1 is Equipment. If it is Equipment, display the Equipment record; otherwise, display the Standard record type.

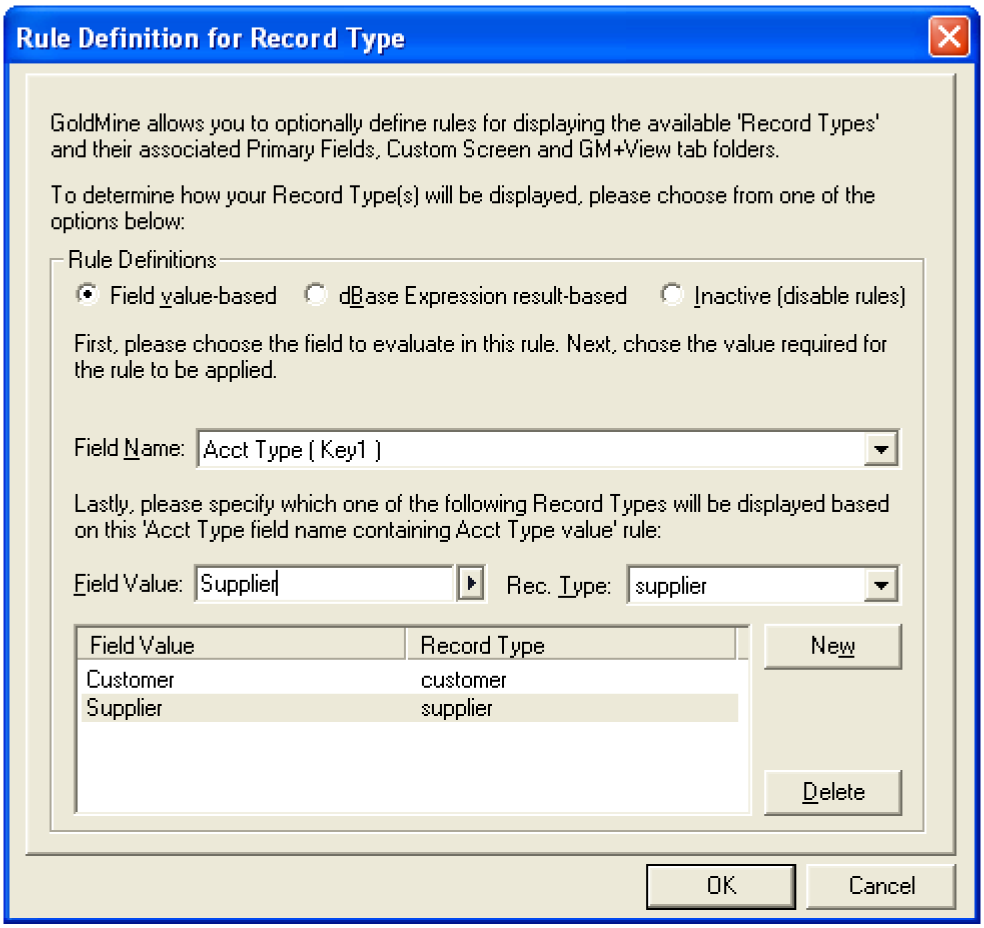
Creating Record Type Rules Based on Field Values

Use Record Type Rules to determine the record type that displays. Define the rules by field values, dBASE expressions, or make them inactive.

Field value-based rules are the easiest to use and are required for creating new records based on record types.

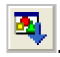
To create field value rule, select **Field value-based** on the **Rule Definition for Record Type** dialog box. Field value-based rules evaluate the value in only one field at a time, but can trigger the display of different record types depending on the value in the field.

The dialog box displays field names, values, and record types.



1. Click **New** to add a new value/record type rule to the list.
2. Select a field in the **Field Name** drop-down list.

Note: Although you may have several field value-based rules configured on fields, the field displayed in the Field Name text box is the only field evaluated by the rules. To evaluate from a different field, select the field in the drop-down list. Rules configured on the newly selected field go into effect when you apply changes.

3. In the **Field Value** text box, type or select a value in the F2 Lookup list.
4. Select a **Rec. Type** in the drop-down list.
5. To remove a rule, highlight the rule and click **Delete**.
6. When finished, click **OK**.
7. Click **Apply Changes** .
8. To verify your record type selection is based on rules, right-click in the primary fields and select **Select Primary Fields**. On the expanded local menu, **Rules-Based selection** should have a check mark next to it; otherwise, select Rules-Based selection.

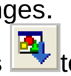
Configuring New Record Creation Options

Specify fields to display for update when creating a new record based on a record type.

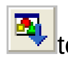
1. When creating or editing a new record type, click **New Record Creation Options**. The **Record Type: New Record Creation Options** dialog box appears.
2. Select **Use a type specific new record dialog** to activate the fields and begin configuration.
3. Beginning with **Field1**, select the field in the drop-down list to display on the **Add a New <Record Type> Record** dialog box.
4. Select **Duplicate checking** for the field to be a duplicate checking field when adding new records. Select a maximum of 4 fields to use for duplicate checking.
5. Continue adding fields, Field2, Field3, and so on as needed. Configure up to 10 fields.

Note: If you have a field(s) as a trigger field for your Record Type Rules, select the field(s) as part of your New Record Creation Options. This helps you create records that work with the record type rules.

Editing Primary Fields Views

1. Select **File>>Configure>>Record Types Administration Center**. The **Record Types Administration Center** appears.
2. Expand the Record Types Details tree and expand Primary Fields Views. Select the Primary Fields View to edit. The fields appear in the upper right pane.
3. To change the name or the access to the view, right-click the view name and select **Edit**. The **Main View Profile** dialog box appears. Make necessary changes.
4. To edit field properties (for example, to make a field a required field), right-click on the field in the upper right pane and select **Edit**. The **Fields Properties** dialog box appears. Make necessary changes.
5. Click **Apply Changes**  to apply the changes to GoldMine records.

Editing Custom Screens

1. Select **File>>Configure>>Record Types Administration Center**. The **Record Types Administration Center** appears.
2. Expand the Record Types Details tree and expand Custom Screens. Select the Custom Screen to edit. The fields appear in the upper right pane.
3. To change the name, the tab, or the access to the view, right-click the view name and select **Edit**. The **Custom Screen Profile** dialog box appears. Make necessary changes.
4. To edit field properties (for example, to make a field a required field), right-click the field in the upper right pane and select **Edit**. The **Fields Properties** dialog box appears. Make necessary changes.
5. Click **Apply Changes** to apply the changes to GoldMine records.

Editing GM+Views

1. Select **File>>Configure>>Record Types Administration Center**. The **Record Types Administration Center** appears.
2. Expand the Record Types Details tree and expand GM+Views. Select the GM+Views to edit. The template name appears in the upper right pane and the view of the template displays in the lower right pane.
3. To change the name and edit the template, right-click on the view name and select **Edit**. The **Edit <template name> GM+View** dialog box appears. Make necessary changes.
4. Click **Apply Changes**  to apply the changes to GoldMine records.

Customizing Primary Field Views

About Primary Field Views

Primary field views are customized views of primary fields. Primary fields are in the upper four panes of a Contact Record and are Contact1 fields. Since moving these fields from the upper four panes is not recommended, customize the display to reflect different business needs while still working within one database. The customizations can include changing the displayed label or color for a field or hiding a field. Apply many changes to many fields, creating a unique view for a type of record you are creating, and save the combination of customization as a primary fields view.

Create as many primary field views as needed. There is no set limit to the number of views in GoldMine; it is limited by the amount of available computer memory.

Creating a primary field view relies primarily on the field typing. Use field typing to customize the look of the fields and the values displayed in GoldMine's primary and user-defined fields.

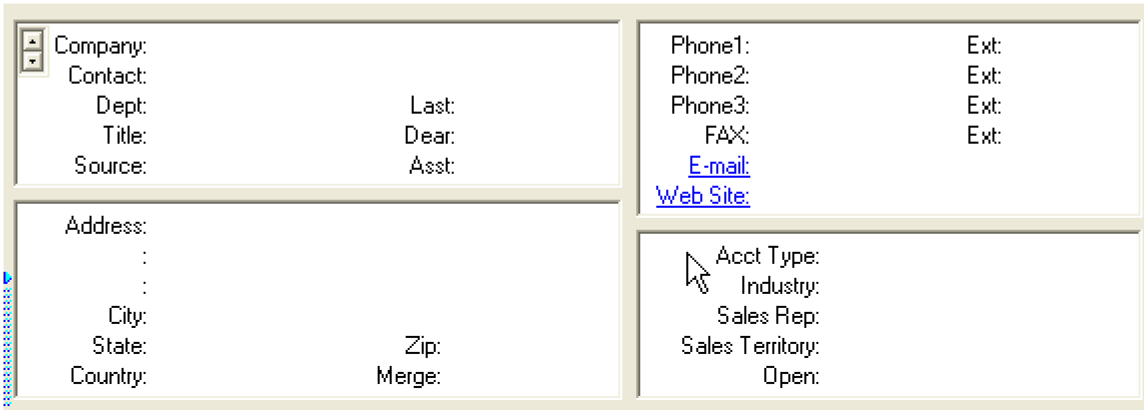
Primary field views are a key component of record typing in the Record Type Administration Center.

Use Primary Fields Views to:

- Create Primary Fields Views
- Customize Primary Fields
- Edit Primary Fields Views in the Record Types Administration Center
- Add to Record Type
- Delete Primary Fields Views
- Manually Change Primary Fields Views

Customizing Primary Fields

Primary fields are in the upper four panes of the Contact record. Many fields are indexed fields. You can modify the field labels and data display with colors or other expressions using the fields properties to create custom field typing, but you cannot move fields without affecting GoldMine performance.



Important: We recommend not moving primary fields and not moving existing user-defined fields into the primary field panes.

Note: Whenever a form of DDE is used, the external application extracts data based on the hard-coded Field Name, irrespective of the Field Label.

Save different modifications to primary fields as primary fields views.

The Contact1 table stores primary field data.

1. Right-click on the field and select **Properties**. The **Field Properties** dialog box appears.
2. Modify field properties using the **Field Properties** dialog box.

Working with Primary Field Views

Creating Primary Field Views

Primary field views are customized modifications to the primary fields saved as views. They are in the upper four panes of a Contact record.

Tips:

- When creating your first primary field views, create a named view based on your current view before modifying the fields to create your new view.
- If you already have several primary field views, to create a new one, select the view that most closely resembles the view you are creating; create a new named view based on that view before modifying the fields to create your new view.

1. Before modifying the fields, right-click in the primary fields panes and select **Select Primary Fields**. Select your named view from the menu. The primary fields update to the select view.
2. Right-click in the primary fields panes and select **Screen Design**. The Screen Design toolbar appears.
3. Click **Save as a Primary Field view** . The **Main View Profile** dialog box appears.
4. When clicking **OK** on the Main View Profile dialog box, the new view appears in screen design mode and ready for modification.
5. To modify the fields in the view, see Customizing Primary Fields.

Manually Changing Primary Field Views

Primary Fields Views are typically determined by the record types and record type rules configured in the Record Types Administration Center. However, with permissions, manually change the displayed primary field view.

1. Right-click in the primary fields of a record and select **Select Primary Fields**. The sub-menu includes **Rule-Based selection** and a list of primary fields views.
2. On the menu, select the view to apply to the displayed record. The record updates to selected primary fields view.

Deleting Primary Field Views

Deleting Primary Fields Views does not remove field data from the database.

1. Select **File>>Configure>>Record Types Administration Center**. The **Record Types Administration Center** appears.
2. Expand the **Record Types Details** tree and expand Primary Fields Views.
3. Select the view to delete, right-click and select **Delete**. The view is removed from GoldMine.

Customizing Fields and Screens

About Custom Fields and Screens

Apply several levels of customization to Contact records. When creating custom screens and fields, you have greater flexibility in the information stored in GoldMine.

Customize GoldMine by:

- Creating custom screens
- Creating custom fields
- Changing field labels
- Customized field typing

Custom Screens

Custom screens let you group related custom fields together. Create up to 20 custom screens, each with up to 250 fields. Custom screen information is stored in the Fields5 table.

Custom Fields

Custom fields, also called user-defined fields, make GoldMine an adaptable program, able to meet the needs of a broad range of businesses. Information about user-defined fields are stored in the Contact2, ContuDef, and Fields5 table.

(User-defined Fields vs. Details)

GoldMine on a Firebird database can store a maximum of 32k (SQL is 8k) for the combined length of user-defined fields in a record. GoldMine on an SQL database can store 1024 fields. For additional information, consult the knowledge base at support.frontrange.com.

The system administrator determines each field's type. Fields can store the following:

- **Character field type:** Alphanumeric data. A character field can also contain a dBASE expression that calculates field values or displays text.
- **Numeric field type:** Numeric data; required for the field to calculate values related to other numeric fields.
- **Date field type:** Contains dates.

When creating user-defined fields, plan your implementation: what is the field type, what data is going into the field, will it be a calculating field, and will it be associated with other fields in a custom screen? Are you on Firebird or SQL?

To create a field, select **File>>Configure>>Custom Fields**. The list of 10 user-defined fields and other user-defined fields appear. The mechanism is the same for creating one field as for creating many fields; it makes the repeated creation of fields easier by not returning to the screen designer after the one field is created.

Field Labels

Field properties determine the field's label in GoldMine. When changing labels on fields (whether primary fields or user-defined fields) you have a limit of 15 characters for the label. To change the label, right-click its name and select **Properties**. The **Field Properties** dialog box appears.

Field Typing

Use field typing to customize the look of field labels and values. The customization may include changing the label or data color in a field based on the value in that field or in another field, hide labels and values, assign a generic field use name to a field that may have different labels and values.

Working with Custom Fields and Screens

Creating Custom Screens

Custom screens are user-defined areas that appear under the Fields tab or as an individual tab. Use these screens to logically group user-defined fields.

Create up to 20 screens, each one with maximum of 250 fields.

Custom screens are a key component of the record typing in the Record Type Administration Center.

1. Select **File>>Configure>>Custom Screens**. The **Custom Screens Setup** dialog box appears.
2. Click **New**. The **Custom Screen Profile** dialog box appears.
3. After configuring the **Custom Screen Profile** dialog box, click **OK**. The **Custom Screens Setup** dialog box reappears.
4. Click **Close**. Now add fields to your new custom screen.

Creating Custom Fields

GoldMine's flexibility meets a range of business information needs. The ability to create user-defined custom fields goes beyond the variety of options in GoldMine and better tailors the Contact record to meet your company's needs. Plan custom field implementation by considering these:

- What is the field type?
- What data is going into the field?
- Will the field calculate?

When adding user-defined fields, create a custom screen to display the related fields.

Note: Always back up your databases before creating user-defined fields.

Tip: Create telephone number fields that format numbers like other phone fields. Create a field named UPHONEn, where n is a user-defined number.

1. Select **File>>Configure>>Custom Fields**. The **User Defined Fields** dialog box appears.
2. Select **New**. The **User Defined Field Profile** dialog box appears.
3. Type a unique name, beginning with U, in the **Field Name** text box (it can be up to 9 alphanumeric characters in length, including the U). The field name should not contain spaces or special characters, such as asterisks (*) or percent signs (%); however, you can use the underscore (_).

   Tip: The Field Name appears when inserting fields into Microsoft Word; therefore, make the field name user-friendly and identifiable.

4. In the **Description** text box, type the field label to appear in the Contact record.
5. From the **Field Type** options select either:
   - **Character:** Formats data as a text string.
   - **Numeric:** Formats data as numbers to run mathematical functions against.
   - **Date:** Formats data as a date, month/day/year.

6. In the **Len** field, type or select a field data length. The maximum length for a character field is 256, numeric is 16.
7. The **Dec** field is available when creating a numeric field. Sets the number of decimal places within the field. GoldMine assigns one character place to the decimal point in determining field length. For example, create a field that can accept hold values up to 9.99 by assigning a Len value of 4 and a Dec value of 2. This field applies to numeric data types.
8. Click **OK**. The **User Defined Fields** dialog box reappears with your new field added to the list. Next, add the field to your custom screen.

Important: After fields are created, GoldMine rebuilds the database for the fields to be physically placed in the Contact2 table. Review help topics regarding maintaining Firebird and SQL. See the support site for information on rebuilding.

Editing Field Properties

Field Properties determine the field type, label and data appearance, field location, label and data field size, and field security.

1. Right-click the field label and select **Properties**. The **Field Properties** dialog box appears.
2. Configure settings on these tabs:
   - **Profile:** Field label and field data options.
   - **Color:** Colors displaying on the Contact record for the field label and field data.
   - **Layout:** Field size, position, and tab order.
   - **Security:** Fields requiring data, users having read and update rights to the field, and options to update the log on the History tab.

3. Click **OK** after configuring the Field Properties.

Customizing Field Typing

Use field typing to customize the look of field labels and values, including changing the label or data color in a field based on the value in that field or another field, hide labels and values, assign a generic field use name to a field that may have different labels and values. Create custom views for different users or user groups, or let users switch between customized views. Field typing is the first level of customization you can add to primary field views and record types.

To customize field types, right-click on the field label and select **Properties**. The **Field Properties** dialog box appears. Select the Profile or Color tab as needed. The Profile tab holds the settings for the field label and data. The Color tab holds settings for the label color and field data color.

Examples

Field Type

Change the text of the label depending on the value in that field or in another field. The following example displays the field label as all capital letters if the field is blank and as initial capital if it contains a value. This expression is added to the Field Label Expression box on the Profile tab for the Key1 field.

```
iif((len(trim(contact1->key1))=0), "ACCT TYPE:","Acct Type:")
```

Change the label depending on the value in another field. In the following example the country field is evaluated to determine what is displayed as the Zip field label. This expression is added to the Field Label Expression text box on the Profile tab for the Zip field.

```
iif((upper(contact1-
>country)="U.S.A.").or.(len(trim(contact1-
>country))=0),"Zip:","PostCode:")
```

Field Color

GoldMine provides several predefined color choices or you can specify the Windows profile color number. Add the expressions to the Label Color Expression text box to affect the label or to the Data Color Expression text box to affect the data color.

Using Predefined Colors

```
iif(contact1->key1=" ", color("red"),color("black"))
```

Using Windows Color Profile Codes

```
iif((len(trim(contact1->key1))=0),255,0)
```

Hiding Field Labels and Values

Hide the label and the value based on the value in the field or in another field using the Label Color Expression and the Data Color Expression text boxes. In the following example, the label and data for the Source field are hidden if the Key1 field value is Employee.

To hide both the label and the data, add the expression to the Label Color Expression text box and the Data Color Expression text box in the Field Properties of the Source field.

```
iif((Contact1->key1)="Employee",-2,-1)
```

Note: In this example the expression looks for an exact match with Employee. If the Key1 field data is entered as employee, the expression fails and the Source field and data remain visible. Force valid data with F2 Lookup lists to keep data entry consistent.

Combining Hiding and Color

To effectively use color and hiding, add expressions in several Field Property areas. Add this data to the Field Properties of the Source field:

1. Right-click on the Source field and select **Properties**. The **Field Properties** dialog box appears.
2. On the **Profile** tab, select **Expression** in the **Field Label** area.
3. Copy this into the Expression text box:

```
iif((len(trim(contact1->source))=0).and.(trim(contact1-
>key1)<>"Employee"),"SOURCE:", "Source:")
```

3. Select the **Color** tab.
4. Select **Expression** in the **Label Color** area.
5. Copy this into the Expression text box:

```
iif((len(trim(contact1->source))=0).and.trim(contact1-
>key1)<>"Employee",255,iif(contact1->key1="Employee",-2,-1))
```

6. Select **Expression** in the **Data Color** area and copy the following:

```
iif((len(trim(contact1->source))=0).and.trim(contact1-
>key1)<>"Employee",255,iif(contact1->key1="Employee",-2,-1))
```

7. Click **OK** to save the changes.

Results: If the Key1 field contains the value Employee, the Source field label and value are hidden. If the Key1 field does not contain Employee, and the Source field is empty, the Source field label displays SOURCE:; if there is a value, the field label displays Source: in the default color.

Saving the Field Typing in Your Primary Fields Views

After customizing field typing (saved to your current view), save the customizations as a new Primary Fields View.

Creating GM+View Templates

About GM+View Templates

GM+View templates are HTML-based custom pages or views of your contacts, including text, graphics, and other rich content. Create templates, set rules for when the templates display, and set a default template to display for records not meeting the rules.

Note: Creation of GM+View Templates is restricted to users with Master Rights.

Working with GM+View Templates

Creating GM+View Templates

Users with Master Rights can create HTML templates with different designs or formats.

Note: The Microsoft Internet Explorer embedded in the GM+View does not support the Framesets tags. To use IFrames, enable the Internet Explorer security settings for IFrame.

1. Select **File>>Configure>>GM+View Tab**. The **GM+View Tab Settings** dialog box appears.
2. In the **Template List** area, click **New**. The **Edit GM+View** dialog box appears.

Note: Select **Edit** to change an existing template, or **Rules** to set the display rules.

3. Type a **Template Name**.
4. Click in the design box to activate the template design toolbar.
5. Design using these toolbar options (or right-click>>select):
   - **Font:** Format fonts.
   - **Paragraph:** Set alignment and check spelling.
   - **Style:** Select from Normal, Formatted, Address, Heading.
   - **Insert:**
   - **Picture:** Inserts images stored in shared directories.
   - **Link:** Inserts a hyperlink to a Web site.
   - **Fields:** Inserts GoldMine fields (user name and contact information), linked images, or linked documents.
   - **Insert Background Image:** Browses to the location of the .bmp file.
   - **Remove Background Image:** Deletes the background.

- **Spell check:** Checks spelling.
- **Save as file:** Saves to a location.
- **Print:** Prints.
- **Edit HTML Source:** Edits the template directly in the HTML code.

Examples:
Hyperlink in Template   Display Full Web Page

This code example configures a GM+View template to display the FrontRange Solutions Web site as a GM+View template:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML><HEAD>
<STYLE type=text/css> P, UL, OL, DL, DIR, MENU, PRE { margin: 0
auto;}</STYLE>
<META content="MSHTML 6.00.2800.1264" name=GENERATOR></HEAD>
<BODY leftMargin=1 topMargin=1 rightMargin=1><FONT face="MS Sans
Serif" color=#ff0000 size=4>
<DIV>Please wait while the FrontRange Solutions Web Site
```

```
loads.......</DIV>
<SCRIPT>
window.location.href = "http://www.frontrange.com/"
</SCRIPT>
</FONT></BODY></HTML>
```

To insert a fixed hyperlink by typing the following in the HTML code: <A href="http://www.frontrange.com">FRS</A>. This inserts a hyperlink to the FrontRange Solutions Web site with FRS as the label.

6. Right-click in the design box and select **Save**.

Deleting GM+View Templates

1. Select **File>>Configure>>GM+View Tab**. The **GM+View Tab Settings** dialog box appears.
2. In the **Template List** area, select a Templates.
3. Click **Delete**.

Editing GM+View Templates

After creating templates, edit them as needed. There are several ways to access the . The dialog box is used when you are creating a new template and when you are editing an existing template.

1. Open the **Edit <template name> GM+View** dialog box.
   - Select **File>>Configure>>GM+View Tab**. The **GM+View Tab Settings** dialog box appears. Click **Edit**. The **Edit <template name> GM+View** dialog box appears.
   - Select **File>>Configure>>Record Types Administration Center**. The **Record Types Administration Center** appears. Expand **Record Types Details**>>**GM+Views**. Right-click the GM+View name. Select **Edit**. The **Edit <template name> GM+View** dialog box appears.

2. In the **Template Name** text box, change the template name.
3. Click in the design box to activate the template design toolbar.
4. To edit the template, use the toolbar options:
   - **Font:** Formats fonts.
   - **Paragraph:** Set alignment and check spelling.
   - **Style:** Select from Normal, Formatted, Address, Heading.

- **Insert:**
- **Picture:** Inserts images stored in shared directories.
- **Link:** Inserts a hyperlink to a Web site.
- **Fields:** Inserts GoldMine fields (user name, contact information), linked images, or linked documents.

   - **Insert Background Image:** Browses to the location of the .bmp file.
   - **Remove Background Image:** Deletes the background.
   - **Spell check:** Checks spelling.
   - **Save as file:** Saves to a specific location.
   - **Print:** Prints.
   - **Edit HTML Source:** Edits the template directly in the HTML code.

Example: To insert a fixed hyperlink by typing the following in the HTML code: <A href="http://www.frontrange.com">FRS</A>. This inserts a hyperlink to the FrontRange Solutions, Inc. Web site with FRS as the label.

5. Right-click in the design box and select **Save**.

Setting GM+View Default Templates

Set a default GM+View template to display for Records not meeting template rules.

1. Select **File>>Configure>>GM+View Tab**. The **GM+View Tab Settings** dialog box appears.
2. In the **Set Default GM+View** area, select the default template.
3. Click **OK**.

Note: To see the new template, users on other workstations must log out and back in.

Creating F2 Lookup Lists

Working with F2 Lookup Lists

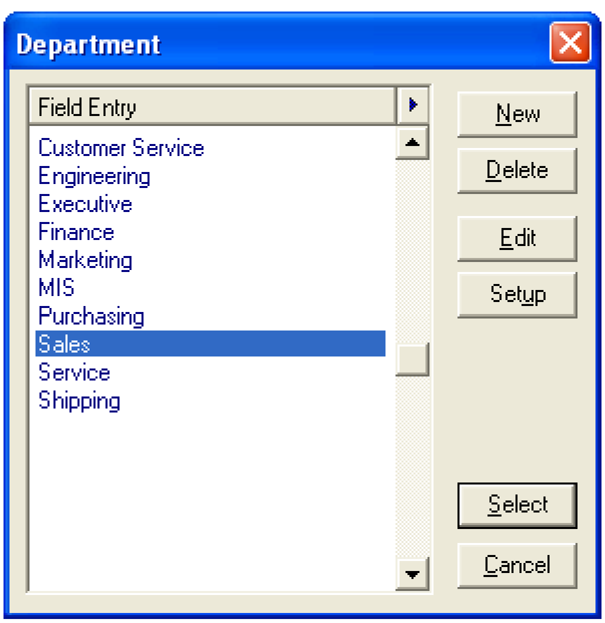
Using F2 Lookup to Update Fields

The F2 Lookup lists appear in a variety of locations throughout GoldMine. Some fields may be configured to only accept values from the lookup while other fields may allow free-form inputting. Still others may be clocks or calendars.

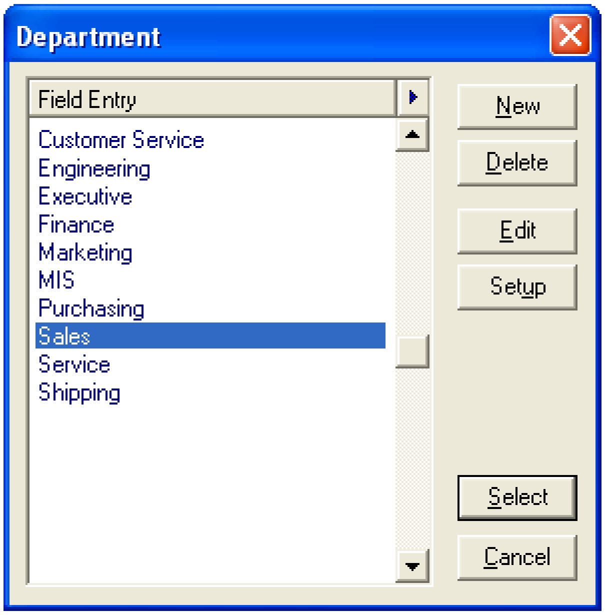
These steps apply when choosing a value from an F2 Lookup list.

1. To display the F2 Lookup for a field, select the field and then do one of these:
   - Click the right-facing arrow. The F2 pop-up menu appears.

   - Press **[F2]**. The **Field Lookup** dialog box appears.



- Right-click on the field. The **Field Lookup** dialog box appears



2. Highlight the value, and click once if in the pop-up menu, or twice if you are in the dialog box. The selected value populates the field. Several special handling options can be applied to the values.

Note: If you cannot locate the value to populate the field, add values to the list if security is configured to let users add new entries.

Using the Lookup.ini

About the Lookup.ini

Lookup.ini does not exist in GoldMine until you create it using a text editor. It writes as a standard configuration file, similar to the **Win.ini** and **System.ini** files and stores in the GoldMine directory.

Lookup.ini performs functions based on a trigger and resulting action:

- Update a Contact1 or Contact2 field based on an entry in another Contact1 or Contact2 field.
- Update Contact1 or Contact2 field based on an expression.
- Launch an external application based on an expression or the occurrence of a specified field entry.
- Apply an activity color code to calendar activities based on either an activity type, an activity code, or both.
- Launch an external application when a new record is created.

Note: If the Lookup.ini script updates a field based on updates to another field, the update of the second field does not follow the update access security for the second field set in the **Field Properties** dialog box. Example: use a Lookup.ini to update Key2 based on updates to Key1. The user has update rights to Key1, but not to Key2 – but can update Key1 and the Lookup.ini updates Key2.

Lookup.ini includes:

- **[AutoUpdate]:** Specifies trigger fields (fields that create an update if modified) and the resulting field to be updated. The second section comprises the specific instructions and parameters used when updating the GoldMine field.
- **[OnNewRun]** and **[OnEditRun]:** Determines the external application to launch when a new record is created (a contact record or a supplemental file record adding a new calendar activity).
- **[CalClrCode]:** Specifies the color to assign to the activity being scheduled.

Examples:

Entering Data in One Field Updates Another

A company requires that the Salesperson field, **USalesRep**, automatically update **[AutoUpdate]** when the GoldMine user typing data populates the City field.

The **Lookup.ini** is headed **[AutoUpdate]**. It is where the trigger and update fields are defined in the format: **Trigger field=Update field**.

There is no need to prefix field names with a database (Contact1->City) because no two fields in the Contact1 or Contact2 data files (except AccountNo) have the same field name.

This example is automatically updating field data.

```
[AutoUpdate]
City=USalesRep
```

When the trigger field **(City)** is updated, the **Lookup.ini** evaluates the subroutine of the same update field name **(USalesRep)**. The result of this evaluation determines what is entered into the **USalesRep** field.

In this example, the subroutine **(USalesRep)** contains a reference to the trigger field **(City)** and a list of potential values that could be contained within the **City** field **(Seattle, Aspen, Kansas City)**.

```
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
```

If a match is found, for example, the **City** field contains **Seattle**, **Lookup.ini** populates the **USalesRep** field with **Janice Parks** (**Seattle=Janice Parks**).

For every possible entry in the **City** field, a Lookup must be listed if it is to update another field.

Checking a Sequence of Fields to Update Field

A company requires the Salesperson field **(USalesRep)** automatically update when the GoldMine user entering data populates the **City** field. If no city is matched, the **State** field (or other geographic boundary) must be evaluated so a second attempt is made at populating the **Salesperson** field.

Apply a second Lookup command. If GoldMine cannot match the City field with one of the listed values, it moves on to the next Lookup, which in this case is **State**. If required, a maximum of 9 different Lookups can be defined.

```
[AutoUpdate]
City=USalesRep
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
Lookup2=Contact1->State
WA=Janice Parks
CO=Danny Davis
MO=Ken Linden
```

If the **City** field does not contain **Seattle**, **Aspen**, or **KansasCity**, the **State** field is evaluated. If the **State** returns a value of **CO**, the **USalesRep** field populates with **Danny Davis**. Set every parameter to update the field correctly.

If no Match is Found

A company requires the **Salesperson** field **(USalesRep)** automatically update **[AutoUpdate]** when the GoldMine user typing data populates the **City** field. If no state is entered or if an erroneous entry is made, the Salesperson field updates with **Unallocated**.

The **Lookup.ini** can update a field with a set entry if no matches are found. The otherwise statement is included after all Lookups 1-9 are listed.

If the **City** field does not contain **Seattle**, **Aspen**, or **KansasCity**, **USalesRep** populates with **Unallocated**.

```
[AutoUpdate]
City=USalesRep
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
Otherwise=Unallocated
```

Updating Two Fields from One Trigger Field

A company requires the **Salesperson** field **(USalesRep)** and the **Region** field **(URegion)** populate when the **City** field populates.

The trigger field launches two subroutines rather than one. Note the **[AutoUpdate]** section containing a reference to both fields, separated by a comma, and the existence of two separate subroutines.

The order of referencing is important if one field must be updated first because its new value affects the entry in the second field.

If updating both the **City** and the **Salesperson** field affected the update of the **Region**, the **USalesRep** section must be referenced first under **[AutoUpdate]**.

If updating the **Region** and the **City** would affect the **Salesperson**, the **URegion** field must be referenced first in the **[AutoUpdate]** section. If the fields are to be updated independently, either can be referenced first.

```
[AutoUpdate]
City=USalesRep, URegion
```

```
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
[URegion]
Lookup1=Contact1->City
Seattle=Northwest
Aspen=Mountain
Kansas City=Midwest
```

If the Field to Update is Pre-Populated

GoldMine does not automatically overwrite an existing value in a field to be updated unless it specified to do so. The **OverWrite** statement is a toggle statement (**On/Off** or **True/False**). If:

- **Overwrite=0:** Existing values in the update field are not overwritten.
- **Overwrite=1:** Existing values in the update field are overwritten.

The statement is placed at the end of the subroutine.

```
[AutoUpdate]
City=USalesRep
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
Otherwise=Unallocated
OverWrite=1
```

Update a Field Based on an Expression

The **Lookup.ini**, by way of expression, returns an actual value to a field that can be used like every other field within GoldMine. The **[AutoUpdate]** section contains a trigger field and a reference to a subsection to execute.

The subroutine contains an expression rather than a list of returned values from a Lookup1; however, the subroutine must be written in a standard way, and therefore a dummy Lookup1 must be inserted—although it is set to not return any values—so the Otherwise command is invoked.

Use the expression with the **Otherwise** command, but prefix it with an ampersand (&).

The Calculation of Numeric Fields

A Company has quarterly sales figures (**USales Qtr1-USalesQtr4**) for each customer. It requires a Total (**UTotal**) field summing business quarters one through four and returns a value.

The **[AutoUpdate]** section includes four trigger fields: **Usales Qtr1-4**. When any one of these fields updates, the **Lookup.ini** runs the subroutine **UTotal**.

The **Lookup1** command looks in a placeholder field. In the example, **Contact1->Company** is referenced. No values are listed under Lookup1; therefore, no match is found. The **Lookup.ini** progresses to the **Otherwise** command.

```
[AutoUpdate]
UsalesQtr1=UTotal
UsalesQtr2=UTotal
UsalesQtr3=UTotal
UsalesQtr4=UTotal
[UTotal]
Lookup1=Contact->Company
Otherwise=&(Contact2->UsalesQtr1+Contact2
->UsalesQtr2+Contact2->UsalesQtr3+
Contact2-> UsalesQtr4)
Overwrite=1
```

Calculation Fields Using Decimal Places

For the **Lookup.ini** to calculate a value that includes a decimal place, each field referenced when calculating must contain the same amount of decimal places whether needed.

The **Otherwise** command must include a String statement (**STR**) in order to calculate to x decimal places.

```
[AutoUpdate]
UsalesQtr1=UTotal
UsalesQtr2=UTotal
UsalesQtr3=UTotal
UsalesQtr4=UTotal
[UTotal]
Lookup1=Contact->Company
Otherwise=&STR(Contact2->UsalesQtr1+Contact2->UsalesQtr2+Contact2->UsalesQtr3+Contact2->UsalesQtr4,2,10)
Overwrite=1
```

The **Otherwise** statement ends in **2,10** where **2** indicates the number of decimal places and **10** the length of the field.

Averaging Blank and Filled Fields Using Hypothesis Values

If the **Otherwise** command holds an expression that calculates the sum of the contents of all fields, then divides the total by the number of fields, those empty fields (set to zero) are also included.

```
Otherwise=&((Contact2>Ufield1+Contact2->Ufield2+Contact2-
>Ufield3)/3)
```

If the field values were:

- **10**, **20** and **30**, the **Lookup.ini** returns a value of **20** (**60** divided by **3**).
- **10**, **20** and **0**, the **Lookup.ini** returns a value of **10** (**30** divided by **3**).

Inclusion of the blank or zero fields may be inappropriate. In our example the final calculation should be divided by **2** not **3**, resulting in an average of 15.

True/False fields calculate using an if statement followed by the value indicating whether the value is true, then are suffixed with a value to replace if true, and then a value to replace if false:

```
(iif(field=value,true[x],false[y]))
```

The expression **otherwise=&(iif (contact2 ->ufield1=0,0,1))** states the value in **Ufield1** should equal **0**. If it does (true), the **count** field populates with **0**. If the field is not equal to **0** (it contains either a higher or lower value), the count field populates with **1** for false (not true). Each field evaluated must have its own count field.

The **Utotal** section then calculates the sum of all counter fields and uses that figure to divide the total of the fields **Ufield1-Ufield3**.

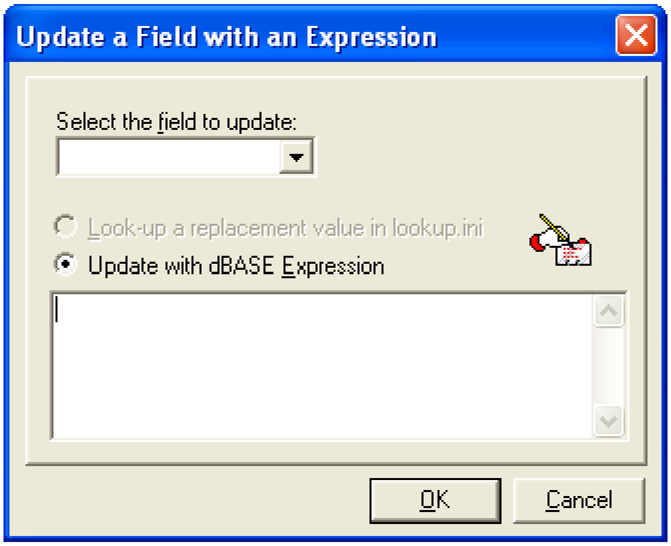
The programming standard of **0 = false** and **1 = true** has no bearing in this example.

```
[AutoUpdate]
UField1=ucount1, utotal
UField2=ucount2, utotal
UField3=ucount3, utotal
utotal=utotal
[ucount1]
Lookup1=contact1->company
otherwise=&(iif(contact2->ufield1=0,0,1))
Overwrite=1
[ucount2]
```

```
Lookup1=contact1->company
otherwise=&(iif(contact2->ufield2=0,0,1))
Overwrite=1
[ucount3]
Lookup1=contact1->company
otherwise=&(iif(contact2->ufield3=0,0,1))
Overwrite=1
[UTOTAL]
Lookup1=contact1->company
otherwise=&((contact2->ufield1+contact2> ufield2+contact2-
>ufield3)/(contact2> ucount1+contact2->ucount2->+contact2>
ucount3))
Overwrite=1
```

Update a Field with an Expression Dialog Box

View



1. From the drop-down list, **select the field to update**.
2. Select **Look-up a replacement value in the Lookup.ini** if you have an existing subsection in the Lookup.ini that updates this field.
3. Select **Update with dBASE Expression** and type a dBASE expression in the text box. Example, "Updated 5/15/2003".
4. Click **OK**.

Using the Lookup.ini to Launch External Applications

Automatically launch external applications for further processing to occur outside of GoldMine after record data is changed.

- **[OnNewRun]:** Sets up external applications for each type of contact-related record.
- **[OnEditRun]:** Launches applications when a record is changed.

Records in Contact1, Contact2, Cal, ContHist, and ContSupp can be considered by the [OnNewRun] and [OnEditRun] sections. Set up specific record types in Cal, ContHist, and ContSupp to launch different applications by appending the rectype to the table name.

Example:

[OnNewRun]

```
Cal-S=SaleCApp.exe
Cal-C=CallCApp.exe
Cal=CalApp.exe
ContHist-S=SaleHApp.exe
ContHist-CI=InCallHApp.exe
ContHist=HistApp.exe
ContSupp-P=ProfileApp.exe
Contact1=NewContact.exe
Otherwise=AnyApp.exe
AppendRecNo=1
DisableFromAP=1
```

Or, specify entries under [OnNewRun] and [OnEditRun] for each contact-related record and record type. GoldMine first checks for a specific Rectype entry, then for a general table entry not suffixed with a Rectype. Example: when a sale is completed, check for ContHist-S=. If no ContHist-S=, check for the general ContHist=. If no ContHist= entry, check for Otherwise=. Thus, GoldMine launches ProfileApp.exe if a detail record is added.

Add to end of scripts:

- **AppendRecNo=1:** Append the RecNo of new record to the command line. Example: a completed incoming call from the example launches a command=InCallApp.exe 1234 (where 1234=the record number of the completed record in the ContHist file). With this entry, use a DDE command to query GoldMine for the new record's data.
- **DisableFromAP=1:** Disable the [OnNewRun] options if an activity is processed by Automated Processes.
- **Otherwise=:** Entry is suffixed with the File+RecType, such as "AnyApp Cal-A 1234".

When a contact record is created and the [AutoUpdate] NewRecord option is specified, that option is executed first so the resulting updates can be used by a subsequent [OnNewRun] Contact1=NewContact.exe entry.

Using Calendar Color Codes

Lookup.ini can assign colors to activity types (such as calls and appointments) and activity codes. The Activity type (**RecType**) must be specified with the activity code (optional) and the color to be assigned. These details store under a section in **Lookup.ini** called **[CalClrCode]**.

The **RecType** field is held in the Calendar and History databases and defines the type of activity record in those databases.

Calendar RecTypes

Rec Type	Description	Rec Type	Description
A	Appointment	C	Call Back
T	Next Action	D	To-Do
M	Message	S	Forecasted Sale
O	Other	E	Event

Calendar Color Codes

Code	Color	Code	Color
0	Bright Blue	8	Gray

1	Bright Purple	9	Red
2	Bright Red	10	Green
3	Bright Cyan	11	Yellow
4	Bright Green	12	Blue
5	Bright Yellow	13	Purple
6	Cyan	14	Dark Gray
7	White	15	Black

Example: Appointments are bright green **(A=4)**. Calls are bright purple **(C=1)**. Appointments with an activity code of HOT are bright yellow **(A-HOT=5)**. Calls with an activity code of CCA are bright red **(C-CCA=2)**.

[CalClrCode]
A-Hot=5
C-CCA=2
A=4
C=1

Using Macros

About Macros

In GoldMine, a macro is a button or hot key shortcut representing an instruction, action, or a series of instructions, actions, or text inputs. For example, create a macro to launch the **Schedule a Call** window with a code, color reference, notes predefined, and the cursor waiting in the date field for you to finish editing the activity and save.

Tip: Record a macro using keystrokes rather than mouse-clicks. To use the GoldMine menus, type **CTRL+F10**. Use the arrow keys to navigate the menu options.

- **Record a Macro**
- **Add a Macro to the Toolbar**
- **Add a Macro to the Taskbar**
- **Delete a Macro**
- **Use the Macros of other users**

About DDE Macros

Facilitate DDEAUTO fields by selecting a macro as the service item. A DDE service item starts with an ampersand (&). When encountered, GoldMine searches an internal table of macro names. If a match is found, the macro processes and the result returns, as if a DDE function or expression was used.

Most macros are sensitive to the setting of the RECORDOBJ function's SETRECORD subfunction. This function gains access to contacts and supplementary information.

- When the SETRECORD type is set to PRIMARY, macros return the value from the corresponding fields in the primary information portion of the contact record.
- When set to CONTACTS (additional contacts), or another supplementary record type, macros return the value from the corresponding field in the supplementary file (CONTSUPP).

These macros can be used as DDE service items:

- &Address

  Returns a string containing the values of &ADDRESS1 and &ADDRESS2, separated by a carriage return and line feed character. If &ADDRESS1 or &ADDRESS2 do not contain data, a single line of data returns, without the carriage return and line feed character.

  Use this macro to perform rudimentary blank line suppression within linked applications that do not support blank address line suppression internally.

  Use the &ADDRESS macro to return an additional contact address using the RECORDOBJ SETRECORD subfunction.

- &Address1

  Returns the first Address field from the active Contact Record. Typically, this value is extracted from the Address1 field in the primary display portion of the contact record; however, when using the RECORDOBJ SETRECORD subfunction to change the returned record type to CONTACTS, GoldMine returns the value from the Address1 field on the additional contact record, if a value is entered. When the Address1 field on the additional contact record is blank, the &Address1 macro returns the value in the Address1 field in the primary display portion of the contact record. When the RECORDOBJ SETRECORD type is set to return a record type other than CONTACTS, the &Address1 macro returns the value in Address1 field of the primary display portion of the contact record.

- &Address2

  Returns the second Address field from the active Contact Record. Typically, this value is extracted from the Address2 field in the primary display portion of the contact record; however, when using the RECORDOBJ SETRECORD subfunction to change the returned record type to ADDITIONAL, GoldMine returns the value from the Address2 field on the additional contact record, if an entry exists in the Address2 field on the additional contact record. When the Address2 field on the additional contact record is blank, the &ADDRESS2 macro returns the value in the Address2 field in the primary display portion of the contact record. When the RECORDOBJ SETRECORD type is set to return record types other than PRIMARY or ADDITIONAL, the &Address2 macro returns the value in the Address2 field of the primary display portion of the contact record.

- &BrowseRecNo

  dBASE: Returns the record number of the last selected record in a browse window.

  SQL: Returns the record ID of the last selected record in a browse window.

- &CalRefresh

  Refreshes the graphical calendar display. Set up GoldMine to run this macro after adding calendar records using DDE.

- &City

  Returns the City field from the active contact record (similar to the action of the &Address1). Use the &City macro to return an additional contact city using the RECORDOBJ SETRECORD subfunction.

- &CityStateZip

  Returns a format string of text containing the City, State and Zip fields from the active contact record. This string returns in this format:

  City, State ZIP

  The action of this macro string is similar to the action of the &Address1. Use the &CityStateZIP macro to return an additional contact city, state, and ZIP Code using the RECORDOBJ SETRECORD subfunction.

- &CommonDir

  dBASE: Returns the path information for the directory where the contact sets are located.

  SQL: Returns the BDE alias where the contact sets are located.

- &Contact

  Returns a contact name from the active Contact Record. Typically, this value is extracted from the Contact field in the primary display portion of the contact record; however, use the RECORDOBJ SETRECORD subfunction to change the returned record type to additional contact or another type of supplementary record. When the RECORDOBJ SETRECORD type is set to return record types other than PRIMARY, the &Contact macro returns the value in Contact field in CONTSUPP for the current supplementary record.

- &Country

Returns the Country field from the active Contact Record (similar to the action of the &Address1 macro). Use the &Country macro to return an additional contact country using the RECORDOBJ SETRECORD subfunction.

- &Dial1

  Returns the Phone1 entry from the active Contact Record. The returned phone number is formatted for dialing. GoldMine applies the same rules used to dial the phone via TAPI. If selected, PREDIAL.INI settings are applied to phone number selection.

- &Dial2

  Returns the Phone2 entry from the active Contact Record. For details, see &Dial1 above.

- &Dial3

  Returns the Phone3 entry from the active Contact Record. For details, see &Dial1 above.

- &DialFax

  Returns the FAX entry from the active Contact Record. For details, see &Dial1 above.

- &EmailAddress

  Returns the primary e-mail address for the selected contact.

- &Fax

  Returns the fax number as it is sent to an auto-dialer for automatic fax transmission.

- &Filter

  Returns the activated filter expression.

- &FirstName

  Returns the first name of the current contact.

- &FullAddress

  Returns a string containing the address for the Contact Record, composed of values of &Address1, &Address2, &City, &State, and &ZIP.

  The action of this macro string is similar to the action of the &Address1. Use the &FullAddress macro to return an additional contact address using the RECORDOBJ SETRECORD subfunction.

- &GetRoTabID

  Returns the ID of the currently selected tab. Typically, this value verifies that the correct tab is selected when a user starts a custom application.

The following values are valid:

Value Tab

0 Summary

1 Fields

2 Notes

3 Contacts

4 Details

5 Referral

6 Pending

7 History

8 Links

9 Members

10 Tracks

11 Opps

12 Projects

13 Tickets

Example (The following example tests the selection of the Details tab):

```
ch=DDEInitiate("GoldMine", "Data")If DDERequest$(Ch, "&GetRoTabID") <> "4"
ThenMsgBox "You must select a detail record first"End If
```

- &GetRoTabPos

  Returns the currently selected tab position. Since the tabs can be rearranged, this method is not always reliable for determining the currently selected tab. For more information, see &GetRoTabID above.

- &GoldDir

  dBASE: Returns path information for the GoldMine installation directory.

  SQL: Returns path information for BDE alias in which GoldMine is installed.

- &LastFirstName

Returns the name of the current contact in the format: last name, first name.

- &LicUsers

  Returns the number of concurrent users allowed to log in to the installed copy of GoldMine.

- &LicUsersAvailable

  Returns the number of users allowed to log in to the installed GoldMine license copy.

- &NameAddress

  Returns a string containing the contact name, company, and complete address of the active Contact Record. Each address line is separated by a carriage return and line feed, and the string is formatted so it can be inserted into a merge template. Any empty address lines on the Contact Record are suppressed. Use this macro to perform rudimentary blank line suppression within linked applications that do not support blank address line suppression internally.

  The action of this macro string is similar to the action of the &Address macros, and the &NameAddress macro can be used to return an additional contact address using the RECORDOBJ SETRECORD subfunction.

- &NameTitleAddress

  Returns a string containing the contact name, title, department, company, and complete address of the active Contact Record. Each line is separated by a carriage return and line feed, and the string is formatted so it can be inserted into a merge template. Any empty lines on the contact record are suppressed. Use this macro to perform rudimentary blank line suppression within linked applications that do not support blank address line suppression internally.

  The action of this macro string is similar to the action of the &Address macros, and the &NameTitleAddress macro can be used to return an additional contact address using the RECORDOBJ SETRECORD subfunction.

- &NewRecID

  Returns a unique record ID, which can be used when creating records.

- &Notes

  Returns the Notes from the active Contact Record. Typically, this value is extracted from the Notes field in the primary display portion of the Contact Record; however, use the RECORDOBJ SETRECORD subfunction to change the returned record type to additional contact or another type of supplementary record. When the RECORDOBJ SETRECORD type is set to return record types other than PRIMARY, the &Title macro returns the value in Notes field in CONTSUPP for the current supplementary record.

- &Phone

Returns a telephone number from the currently selected Contact Record (similar to the action of the &Address1 macro).

Use the &Phone macro to return an additional contact telephone number using the RECORDOBJ SETRECORD subfunction.

- &Profile(s)

  Includes two related macros:

  - **&Profile:** Returns the first matching detail record for the selected contact.
  - **&Profiles:** Returns detail records for the selected contact.

  These macros take optional parameters. Each parameter must be separated by a period (.). Although GoldMine does not typically pass parameters with a DDE macro, the structure of &Profiles must be different for DDE fields in Microsoft Word document templates, which do not take DDE commands.

  These examples show the syntax for the &Profile(s) macros:

  &Profile Example 1

  &Profile.ProfileName.Reference.Flags

  Retrieves the first profile that matches the ProfilleName and Reference.

  &Profiles Example 1

  &Profiles.ProfileName.Reference.Flags

  Retrieves all profiles matching the ProfileName and Reference.

  In both of these examples, the Reference parameter is optional. If passed, it acts as a "begin with" condition on the profile reference. If the Reference parameter is not passed, all ProfileName profiles are evaluated.

  Flag Parameters

  The Flags parameter is also optional; it has these values:

  2 returns the extended profile fields

  4 returns the ProfileName and Reference

  The &Profile(s) macro can easily fill in a Word table with the selected contact's profile information because tabs separate each field value, and a CR/LF separates each profile record.

  &Profile Example 2

  This example returns the first e-mail address of the contact:

&Profile.E-mail Address

&Profiles Example 2

This example returns computer profiles beginning with the word notebook:

&Profiles.Computer.Notebook

&Profile Example 3

These examples use the Flag parameter to specify the profile fields to return:

&Profiles.Computer.NotebookNotebook ThinkPad 770|Notebook Compaq Elite|Notebook Dell 1200|

&Profiles.Computer.Notebook.2Computer|Notebook ThinkPad 770|Computer|Notebook Compaq Elite|Computer|Notebook Dell 1200||

&Profiles.Computer.Notebook.4Computer|Notebook ThinkPad 770|IBM|233Mz|Computer|Notebook Compaq Elite|Compaq|200mz|Computer|Notebook Dell 1200|Dell|166mz|

- &RoTabPage

  Returns the selected tab. Typically, this value verifies that the correct tab is selected when a user starts a custom application. Values between 1–9 represent tabs in the first row of tabs; for example, 1 represents the Summary tab. Values between 10–18 represent tabs in the second row, and 19–27 represent tabs in the third row.

  This example tests the selection of the fifth (Details) tab:

  ch=DDEInitiate("GoldMine", "Data")If DDERequest$(Ch, "&RoTabPage") <> "5" ThenMsgBox "You must select a profile record first"End If

- &SerialNo

  Returns the serial number of the installed GoldMine program.

- &ShutDown

  Logs out the currently logged user, and quits GoldMine.

- &State

  Returns the State field from the active Contact Record (similar to the action of the &ADDRESS1). Use the &State macro to return an additional contact state using the RECORDOBJ SETRECORD subfunction.

- &SysDir

  Returns the GoldMine system directory.

- &SysInfo

  Displays system information as returned by **Help>About GoldMine>System** information.

- &Title

  Returns the Title from the active Contact Record. Normally, this value is extracted from the Title field in the primary display portion of the contact record; however, use the RECORDOBJ SETRECORD subfunction to change the returned record type to additional contact or another type of supplementary record. When the RECORDOBJ SETRECORD type is set to return record types other than PRIMARY, the &Title macro returns the value in the Title field in CONTSUPP for the current supplementary record.

- &User_Var

  Returns the defined field value from all users, a specified user, or the currently logged user.

  The &User_Var macro allows GoldMine users to store specific data that can be retrieved later into applications that are linked via DDE with GoldMine. This macro can be defined in the [user_var] section of both the GM.INI and the username.INI of GoldMine.

  - **Usage Syntax:** &User_Var.<variable name>.<GoldMine username>
  - **Example:** &User_Var.Territory.Dan

    where<variable name>is a descriptive name of the macro and <GoldMine username> assigns a defined value to a specific GoldMine user. <GoldMine username> is optional, as GoldMine will assign these values to the current GoldMine user.

- &UserFullName

  Returns the full name of the logged in GoldMine user as it appears in the FullName field in the Users Master File.

- &UserName

  Returns the name of the logged in GoldMine user.

- &Version

  Returns the version number of the installed GoldMine program.

- &WebSite

  Returns http://<web site> for the active contact.

- &ZIP

  Returns the ZIP field from the active Contact Record (similar to the action of the &ADDRESS1). Use the &ZIP macro to return an additional contact ZIP Code using the RECORDOBJ SETRECORD subfunction.

Recording Macros

1. Select **Edit>>Toolbars>>Record Macro**. The macro recording buttons appear and the macro is ready to record. Also start the recording process by typing **CTRL+SHIFT+HOME**.

> **Tip:** Record a macro using keystrokes rather than mouse-clicks. To use the GoldMine menus, type **CTRL+F10**. Use the arrow keys to navigate the menu options.

2. Begin the steps to record. When finished, click **Stop** on the macro control bar or press **CTRL+SHIFT+END**. The **Define Macro** dialog box appears.
3. Select the button to assign as the macro button. In the **Pop-up Quick Help** text box, type the name serving as the button and pop-up label.
4. In the **Status Bar Description** text box, type a description of the macro to display in the lower left corner of the GoldMine status bar.
5. The **Optional Hot Key** is optional. Type the hot keys you are assigning to the macro; for example, to use ALT+9 as the hot key, hold down the ALT key and the 9 key. The Optional Hot Key box displays Alt+9.

> **Important:** Define hot keys carefully. SHIFT and a letter runs the macro every time it is typed. For example, using SHIFT+ g as your hot key, and then trying to type a company or contact name that begins with G in a new Contact record, the capital letter will not work. In other areas, such as the Contact Search Center, it runs the macro rather than searching for contacts beginning with capital G.

6. From the **Playback** drop-down list, select the playback speed for the macro. Select **Full Speed** to launch or run the macro quickly, or **Recorded Speed** to run the macro at the speed it was recorded.

Contact Management

About Contact Records

GoldMine uses the Contact Record as the core component to which all information is tied. When a contact is added to GoldMine's database, a Contact Record is created. The Contact Record contains such basic information as name, address, and telephone information about a person or company you keep in contact with. The record's many fields record pertinent and updated information, always making the newest information available to GoldMine users working with the contact.

The Contact Record has two parts:

- **Upper four panes:** Contains standard contact information such as name, address and telephone numbers, and five user-definable fields. This part of the screen is the primary contact information because it displays the company's name and the name of the company's primary contact. It is common to complete the rest of the Contact Record with information related to the primary contact of that company.
- **Lower part:** Organizes secondary information, such as notes, pending activities, and history records, into Contact tabs storing information linked to the Contact Record.

Each record also has a set of associated customizable properties:

- **Record-related Settings:** Phone number format, record ownership, and alerts.
- **Contact Details:** Occasions, free/busy, and digital IDs.

About Creating Contact Records

Create Contact Records several ways:

- Create a new record for a new company.
- Create a new contact with a new organizational chart.
- Create a new contact linked to an existing organizational chart,
- Create a new contact based on a record type.

Creating Contact Records

This method creates a new record for a new company. Also create a new contact with a new organizational chart, create a new contact linked to an existing organizational chart, or create a new contact based on a record type.

1. Select **File>>New Record>>New Company and Contact**. The **New Company and Contact** dialog box appears.
2. Type the appropriate information into these text boxes:

Note: For best display results in GoldMine, type upper- and lower-case characters in field entries. Using all upper-case characters requires almost twice as much display area, and prevents you from seeing as much information on the Contact Record as is possible when the information is in upper- and lower-case.

- **Company:** Name of the contact's organization.

Tip: After entering data in a text box, press **TAB** to advance to the next text box.

- **Name:** Name of the primary contact at the company.

- **Phone Number:** Main telephone number for the primary contact.
- **Ext:** Telephone extension for the phone number.
- **International Format:** If blank, GoldMine applies United States and Canadian formatting to the telephone number. If selected, telephone number are not formatted. The International Format box is selected by default if the country setting in the WIN.INI is not the United States.
- **E-mail Address:** Internet e-mail address for the contact. The e-mail address stores in the Details tab and displays in the primary contact panes.
- **Web Site:** Web site associated with the contact or the contact's organization. A typical Web site address appears in the format http://www.something.com; for example, http://www.frontrange.com. GoldMine stores this address as a Details tab.

3. In the **Creation Method** area, select desired options:
    - **Create duplicate record:** Creates a Contact Record with the primary field entries copied from the active record; however, the Contact name and E-mail Address fields are not copied. Use this option to use an existing contact record as a "template" for a new record to avoid having to type the same entries in primary fields.

Tip: To create a completely new Contact record, do not select this option.

- **View in new window:** Displays the new record in a separate window appearing in front of the current Contact Record, which remains in your work area. The new record becomes the active record.

4. In the **Duplicate Checking** area, you can select the fields to be checked when checking for duplicate contact records. If GoldMine finds a match, you receive a warning that the record already exists and it asks you whether to proceed.
    - **Phone number:** Checks the Phone1 field if an existing record has the same telephone number as the one you entered for the new contact.
    - **E-mail address:** Checks the e-mail address and displays a warning if it already exists.

- **Contact name:** Checks the contact name and displays a warning if it already exists.
- **Company name:** Checks the company name and displays a warning if it already exists.

5. After completing the form with available information, click **OK**. Add or edit all other data on the Contact record. Required fields display with a surrounding red box. If one of the fields is a required field and you do not have data in the field, the Required **Fields Alert** dialog box appears.

Adding Additional Contacts

Add additional contacts to existing contact records. These display on the **Contacts** tab.

1. Select **File>>New Record>>Add New Contact to an Existing Company**. The Contact Search Center appears.
2. Locate the contact to add the additional contact to. Double-click the contact name to auto-populate the **Company** field in the **New Contact to an Existing Company** dialog box.
3. Type the appropriate information in these text boxes:

- **Name:** Name of the additional contact at the company.

- **Phone Number:** Main telephone number for the additional contact.
- **Ext:** Telephone extension for the phone number.
- **International Format:** Clear the box to apply USA and Canadian formatting to the telephone number. If checkbox is selected, the number is not formatted. The International Format checkbox is the default if the Country setting in the WIN.INI file is not the United States.
- **E-mail Address**: Internet e-mail address for the contact. This address stores in the Details tab.

4. Click **OK**.

Adding Detail Records

Define a new **Detail** record to track basic information on topics meaningful to your business. Detail records add to the Detail Lookup list. Every Detail created also has its own Reference Lookup list.

1. Right-click under the **Details** tab and select **New**, or select **Contact>>Add a Detail**. The **Detail Properties** dialog box appears.

2. From the **Detail tab>>Detail** field, select a predefined value from the Detail F2 Lookup list.
3. In the **Reference** field, type or select a value from the Reference F2 Lookup.
4. If entering an e-mail address, select **Primary Address** for this address to be the default.
5. In the **Notes** field, type additional information (up to 64,000 characters). Notes are unique to each detail record.
6. Add further information by selecting the **Info** tab, or click **OK**.

> **Note:** On the **Info** tab, update up to eight fields. Customize the field labels through the **Setup** tab. Each field can be controlled by the F2 Lookup, requiring users to input consistent information.

Displaying Multiple Contact Records

Display many Contact records in the GoldMine work area. Only one record can be active on the screen.

1. Select **View>>New Contact Window**. A new contact window appears with the same information as the first contact window.
2. Scroll through the contacts, or search using the Contact Search Center, to locate the new contact to display.

Note: Each new contact window you open is a duplicate of the active window.

Editing Contact Records

Update Contact Records whenever information changes or new information is available.

1. Position the mouse cursor inside the field to edit and click to activate a cursor.

> **Tip:** Also access the editing menu by typing **ALT+E.** Select **Edit Contact**. The cursor appears in either the Company field or the last edited field.

2. Type your changes in the selected field, or edit based on F2 Lookup values. To edit based on the F2 Lookup list, click the right-facing arrow or press **F2** to display the predefined field values. Select the value to update the field with. You can add values to the F2 Lookups.
3. To advance between fields, press the **Tab** key.

> **Note:** The **Tab** key goes through fields in the order set in the **Field Order** area of the **Layout** tab of the **Field Properties** dialog box. Change the order by changing the Position Number. This does note affect where the fields display in the Contact record.

4. After editing the contact fields, press **ESC** or go to the next Contact Record to edit.

Note: Some fields, such as the **Last Update** field on the **Summary** tab, are display-only. GoldMine generates the value of these fields automatically, and prevents the user from making changes. If you click on one of these fields with the left mouse button, no action will take place.

Linking Files to a Contact Record

GoldMine stores linked document records under the Links tab. For example, if a prospect calls to discuss a bid you sent, retrieve the document by double-clicking the link stored with the prospect's record.

Use linked documents as the basis of building a group.

Also manually link documents using the local menu in the Links tab or by dragging and dropping files from Windows Explorer into GoldMine. In addition to file links, link any Windows folder to a Contact Record.

About Record-Related Settings

Define or view **Record-related Settings** for the active contact record. To access the Record-related Settings dialog box, select **Edit>>Record Properties>>Record-related Settings** and select a tab:

- **Phone Formatting:** Select the USA Format, which applies the standard telephone number format for the United States and Canada, or the No-USA Format, which does not apply formatting.
- **Ownership:** Control what information can be viewed and updated by other users.
- **Alerts:** Assign a code to an active contact record to alert other GoldMine users of a special status or situation regarding the contact.

About Contact Record Tabs

The tab bar divides the upper portion of the Record from the lower. It contains a series of tab folders for organizing information related to the contact. Access the tabs using:

- **GoldMine Menu**: Select **Edit>>Record Details**. Select a tab.
- **Shortcut keys:** Type a shortcut key to launch the tab.
- **Mouse:** Scroll through tabs using left/right arrows to the right of the tabs. Click a tab to view.

Summary	**Fields**	**GM+View**	**Notes**	**Contacts**
Details	**Referrals**	**Pending**	**History**	**Links**
Members	**Tracks**	**Opptys**	**Projects**	**Tickets**

A selected tab moves to the front and changes color. The lower part of the Record displays information specific to the tab. Use the scroll bars or resize the window to view all the information. Or change the displayed tabs based on User Preferences.

Tabs have local menus. Right-click to display. To apply a command to a listed record, select the record, then right-click to display the local menu.

Deleting Contact Records

Delete Contact Records from your database using the **Delete Contact** option or the Delete Wizard. To use the Delete Wizard, you must have Master Rights.

1. Select the Contact Record to delete.
2. Select **Edit>>Delete Contact**. The **Delete Contact Record** dialog box appears.
3. Select an option:
    - **Delete this contact record:** Deletes the current Contact Record, including its related additional contacts, detail entries, and referrals. History records for the contact are not deleted, but become unlinked activities.
    - **Delete contact's scheduled activities:** Deletes all pending activities for the current contact.
    - **Delete contact's history records:** Deletes all history of activities for the current Contact Record. Since the same history file is used for viewing the Completed Activities history for a specific user, deleting the history of a contact record affects the activity analysis statistics for all the users who have completed those activities.
    - **Delete contact's opportunity/project records:** Deletes all opportunity and/or projects linked to a contact. These records are removed from the Opptys tab and/or the Projects tab. Selecting this option does not delete the opportunity or project from the Opportunity/Project Manager.
    - **Synchronize this record's deletions:** Lets deletions associated with this contact record be synchronized with remote sites.

> **Note:** By default, **Delete this contact record** is selected. Since you can select more than one option, review selected boxes before selecting **Delete**. You cannot undo deletions.

4. Click **Delete**. The Contact Record deletes.

Working with Contact Details

About Contact Details

Define or view **Contact Details** for the active contact record. To access the Contact Details dialog box, select **Edit>>Record Properties>>Contact Details** and select a tab:

- **Occasions:** Create occasions recurring occasions for contacts.
- **Free/Busy:** Access a contact's free/busy file (.ifb) to a file, ftp site, or http site so GoldMine can read it.
- **Digital IDs:** Import a contact's digital ID file (.p7b and .cer) to use enhanced security on signatures and encryption.

Setting Digital IDs in Contact Details

If a contact uses a digital ID when sending you e-mail, configure the contact's record with the ID information.

(More information about Digital IDs)

1. With the Contact Record active in GoldMine, select **Edit>>Record Properties>>Contact Details**. The **Contact Details** dialog box appears.
2. Select the **Digital IDs** tab.
3. Click **Import** to add a contact's digital ID file to the GoldMine Contact Record. The **Import Digital ID** dialog box appears.
4. In the **Filename** text box type or browse to the *.p7b or *.cer certificate file you are importing.
5. In the **Name** text box, type the name to display.
6. Click **OK** to return to the Digital IDs tab.
7. To export the file to another location, click **Export**.
8. To review the certificate details, click **View**.
9. To remove a digital ID, highlight the ID and click **Delete**.

Setting Free/Busy Times in Contact Details

For GoldMine to read a contact's published free/busy times, configure the contact's Contact Details to access the file. After setting the path, you should see the contact's free/busy times when using the Free/Busy tab while scheduling an activity.

(More information about sharing Free/Busy times)

1. With the Contact Record active in GoldMine, select **Edit>>Record Properties>>Contact Details** The **Contact Details** dialog box appears.
2. Select the **Free/Busy** tab.
3. In the **Contact's name** drop-down list, leave the primary contact name or select an additional contact's name.
4. In the **Free/Busy URL** drop-down list, select file, ftp, or http. In the text box type or browse to the location where the file is published. If you select ftp, type the **Username** and **Password** in the text boxes.
5. The configured URLs appear in the Contact pane.
6. To add a new contact to the Contact list, click **New**. Complete the various drop-down boxes and text boxes as needed.
7. To remove a URL from the pane, select the contact and click **Delete**.
8. Click **OK** to close and save the URL.

Important: If accessing a contact's free/busy time on an http location, you must configure the Internet Information Services to accept .ifb. (More...)

Searching for Contacts

About Searching for Contact Records

When working in a large database, trying to locate a contact or for information on a Contact Record by scrolling through the Contact Records one at a time is inefficient and time-consuming.

To facilitate efficient searching, use these options:

- **Contact Search Center:** Locate Contact Records using features of the Contact Search Center.
- **Lookup Menu:** Search using options on the Lookup menu:
- Indexed fields
- E-mail addresses
- Additional Contact Names
- Detail fields
- Filters
- SQL Queries
- Values in primary contact fields
- Values in all fields
- Values in fields below tabs
- Values in the Notes
- Location of the record
- Record number (displays **n/a** by default)

Tip: A search using a Lookup menu command depends on the label assigned to the field. For example, if you change the label on the Company field to Corporation, the Lookup menu command to search this field appears as Corporation.

Drilling Down Within a Saved Search

Limit the results of a saved filter or group being previewed by creating and adding additional criteria. Compare this to optimizing a search.

1. From the Center, click **View Saved Searches** . The **Saved Search** pane expands.
2. Select a filter or group, right-click and select **Preview**. The filter or group results display.
3. Add drill-down criteria by selecting a field from the **Lookup** list.
4. In the **that** field, select the filter expression operator from the list.
5. In the value text box, type a search **value** after the filter expression operator.
6. Click **Insert Condition**. The criteria displays.
7. Click **Drill Down** . The new criteria runs against the previewed search with "AND" as the Boolean operator. The results return in the browser columns.

Performing Searches

Searching All Fields

Search all fields, the primary contact fields, details, and fields tab fields, using the **All Fields** option.

Note: Text Search can take longer than other methods of locating a contact because GoldMine searches each record in the database sequentially for the Search Value. The time required to search for a record increases based on the number of records in the database. However, searches using indexes take less time, regardless of the number of records.

Tip: If you search frequently on a non-indexed field, use an indexed key field for this data. Use GoldMine's **Global Replace Wizard** to exchange data between fields.

1. Select **Lookup>>Text Search>>All Fields**. The **Searching All Fields** dialog box appears.
2. Type the complete or partial search value in the **Find What** text box. When you start typing, the dialog box expands to display a status meter and a **Search** button.
3. Click **Search**. GoldMine searches fields beginning with the typed value. When a match is found, it adds the record to an internal list of matches. To stop the search at any time, click **Cancel**. When the search is completed, the dialog box returns to the smaller size.
4. Click **Next** or **Previous** to move through the Records matching the **Find What** value.

Searching for Contact Records

Search based on indexed fields, primary and additional contacts, e-mail addresses, and user-defined fields.

1. In the Record, double-click on an indexed **field label**, such as company or contact. The **Contact Search Center** appears with the selected field in the Lookup text box.
2. From the **Lookup** drop-down list, select the contact or user-defined field to be searched. Or select:
   - **Contact (primary):** Searches the primary contacts based on the search criteria.
   - **Name (additional):** Searches for additional contacts based on the search criteria.
   - **E-mail:** Searches for e-mail addresses based on the search criteria.

> **Note:** Type ALT+O to select Additional Contacts.

3. In **that** field, select the filter expression operator from the drop-down list.
4. In the value text box, type the **value** after the filter expression operator.

5. If necessary, change the displayed columns.

> **Note**: Change the width of a column to optimize the display. Change the size of a column using typical Windows mouse functions on the border of the column at the heading level.

6. To print the contacts displayed, right-click and select **Output to>>Printer**.
7. Click **Shrink** to display an smaller version of the Center. Click **Unshrink** to return to full size.

8. Select **Sync Contact** if you want the Contact window to display the selected contact in the Center.

> **Tip:** Schedule an activity by working with the Center and the GoldMine Calendar. Select a contact to be scheduled and drag it to the open Calendar. When you release the mouse button, GoldMine displays the Schedule an Appointment window. Use it to schedule an appointment or other activity for the selected contact.

9. Right-click in the browse columns to access other functions. The browser columns local menu appears.
10. Search the Center using saved search and power search options.

About the Contact Search Center

Provides a central search window. Find one or groups of records based on criteria you create or saved searches.

Launch the **Contact Search Center** by:

- Selecting an option from the **Lookup** menu: Company, Name, Last, Phone1, and other indexed fields.
- Double-clicking an indexed **field label**. Launches the Center with the selected field as the Lookup option.
- Clicking the **Find Contact** toolbar button. Launches the Center with Contact (primary) as the selected Lookup field.

Searching for Contacts

- **Searching for Contact Records**
- **Searching for Contact Records Using the Advanced Contact Search Center**
- **Searching for Contact Records Using the Contact Search Center Power Search**

Contact Search Center Display Options

- **Contact Search Center (simple)**
- **Contact Search Center (saved searches)**
- **Contact Search Center (power search)**

Saving Searches

After creating and running searches, save the searches using these options:

- Saving search as a filter
- Saving search results as a group
- Saving as both a filter and a group

Configuring the Contact Search Center

Use the User's Preferences **Lookup** tab.

Using Filters, Queries, and Groups

About Filters and Groups

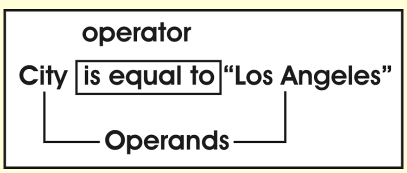
To create a subset for longer-term use, build a filter or group. Both options create subsets based on selected criteria, but differ in how they handle these subsets.

Filters

GoldMine's filters are based on Boolean expressions (logical statements that have 2 possible outcomes: true or false). When activating a filter, the entire database evaluates based on the Boolean expression. The Contact Records matching the Boolean expression are selected. The filter ignores records that do not match.

Example: For a project or campaign, you decide to work with your corporate clients located in Los Angeles. You create this Boolean expression:

Contact1->City= "Los Angeles"



A Boolean expression consists of 2 parts: operators and operands. Operands act as the data to be evaluated, while the operator determines the comparison method deciding whether the statement is true or false. In the example, the operands are City and Los Angeles and are equal to the operator.

When this filter is activated, pressing PAGE UP and PAGE DOWN displays only those Contact Records in the database that are evaluated as true for this statement. The filter evaluates each Contact Record. If the record does not meet the condition(s) of the statement, GoldMine continues to the next record and repeats the process to find a Contact Record that does meet the conditions. GoldMine then selects the record. The filter shrinks your database to present a subset of only those contacts with addresses in Los Angeles.

By constructing Boolean expressions, build and maintain an unlimited number of filters to categorize the records in your database.

Access filters by selecting **Lookup>>Filters**. The **Filters and Groups** dialog box appears. Use the **View Filters** drop-down list to select a user name. Each filter associated with that user name lists alphabetically by the **Filter Name** assigned when it was created. **Activate**, **Release**, **Delete**, or create a **New** filter.

Groups

A group is a fixed set of records that meets a specified set of conditions and allows instantaneous access to member records.

Access groups by selecting **View>>Contact Groups**. The **Groups** tab of the **Filters and Groups** dialog box appears. The upper pane lists groups "owned" by the user. The lower pane lists members of the group highlighted in the upper pane. GoldMine orders member records by the Sort code, defined while building the group.

How Groups Differ from Filters

Working with groups can be more efficient than applying a filter. When you activate a filter, GoldMine searches through the database for Contact Records meeting the criteria.

Once a group is created, membership is fixed and you can work with the group members without performing the search again.

Each member Contact Record remains in the group until removed. However, since each record evaluates when the filter is activated, a selected filter displays new Contact Records added to the database if they match the filter’s criteria.

Groups also have optional sort capabilities, letting you list member records in the order best fitting your needs.

Using Filters and Groups

When you have a large number of contact records in your database, create subsets based on criteria to categorize groups of records to access for special activities.

Example: Create a subset of contacts you telephoned in the past week, and send a mass mailing only to those contacts.

Create and manage subsets of data using filters and groups and the **Filters and Groups** dialog box.

1. Select **Lookup>>Filters**. The **Filters and Groups** dialog box appears.
2. Click a tab:
   - **Filters:** Create and delete filters. Also activate and release filters.
   - **Preview:** Preview filter results.
   - **Groups:** Build groups and review members. Also activate and release groups.
   - **SQL Query:** Write and save a SQL query from scratch or using the Lookup wizard.

Optimizing Search Filters in the Contact Search Center

Optimize search filters to limit the results of a filter that returns a large number of records, especially when working with a large database. Compare this to drilling down on a previewed filter.

To access the **Filter Optimization Wizard**:

- Click **Find** when using the filter Power Search to create a search filter. The **Contact Search Center Filter Optimization Warning** dialog box appears. Click **Yes**.
- To limit results after creating and running a filtered Power Search, click the **Optimize** button 

1. After creating a filter search, click the **Optimize the search filter** button . The **Filter Optimization Wizard** appears.
2. To sort on an indexed field, select the field from the **sort order** drop-down list.
3. Click **Next**. The **Beginning** and **Ending** limits dialog box appears.
4. In the **Beginning limit** text box, type the start limit value.
5. In the **Ending limit** text box, type the final limit value.
6. Click **Next**. The review dialog box appears.
7. Make necessary adjustments to the Sort Order, Beginning, and Ending values.
8. Click **Finish**. The filter runs and the results appear in the browser columns.

Creating Saved Filter Searches

1. If the Saved Search pane is not visible, click the View Saved  button on the Center toolbar. The **Saved Search** pane appears.
2. Expand the tree view to display saved searches.
3. Right-click one **<Filters of:>** and select **New**. The **New Filter** dialog box appears.
4. In the **Filter Name** text box, type a descriptive name.
5. Select an owning user from the **User** drop-down list. The default is the logged-in user.
6. Select **Build the Filter** to create the filter within the Center.
7. Click **OK**. The enter displays the expanded filter building options.
8. From the **Lookup** drop-down list, select the field you are basing the filter expression.
9. In the **that** field, select the filter expression operator from the drop-down list.
10. In the third text box, type a search **value** after the filter expression operator.
11. Click **Insert Condition**. The expression is added to the open text box below Lookup.
12. Further define the filter using:
    - **And:** Inserted as a Boolean operator.
    - **Or:** Inserted as a Boolean operator.
    - **(:** Inserts a left parentheses.
    - **):** Inserts a right parentheses.
    - **Undo:** Removes the last expression added.
    - **Clear** Removes the entire filter.

13. Click **Activate** to apply the filter to the Records displayed. or click **Release** to remove the filter and view all available Records.
14. In the **Edit Filter In** area, select:
    - **English:** Displays the filter with the language used to create it.
    - **SQL:** Displays the filter in an SQL format.
    - **xBase:** Displays the filter in a dBASE format.

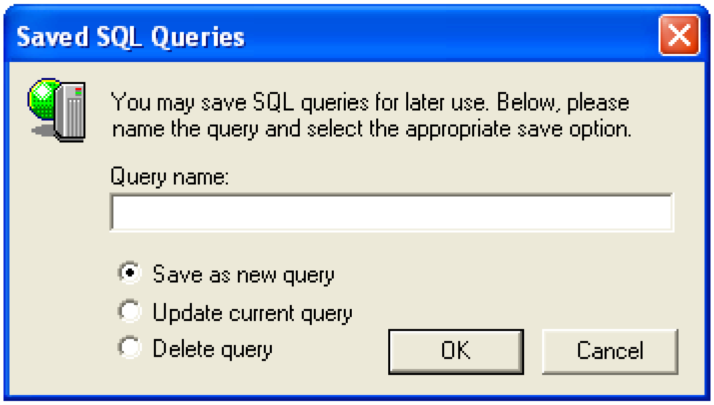
15. Click **Find** to run the filter. The **Contact Search Center Filter Optimization Warning** dialog box appears. If you wish to immediately optimize the search, limiting the displayed records, click **Yes**. The **Filter Optimization Wizard** appears. If you click **No**, the search results are displayed in the browser columns.
16. To save the search, click:
    - Save Search Criteria as a Filter.
    - Save Search Results as a Group.
    - Save both Search Criteria and Results.

Editing Filters

1. In the **Saved Search** pane of the Contact Search Center, right-click a filter and select **Edit**. The **Filter: filter name** dialog box appears. The **Properties**, **Build**, and **Optimize** tabs display.
2. See Creating Filters for steps.

Saving Query Parameters

1. To save a manually created SQL query, or one created using Lookup Wizard, click **Save**. The **Saved SQL Queries** dialog box appears.



2. Enter a **Query name**.
3. Select **Save as new query**, **Update current query**, or **Delete query**.
4. Click **OK**.

Note: Output the query results by right-clicking on the result and selecting a printer, Microsoft Excel, Microsoft Word, or the clipboard.

Using the Lookup Wizard

Rather than manually creating a SQL query, use the Lookup wizard—a search tool—to build SQL query strings for locating records and contact information across GoldMine. The wizard generates and runs a SQL query based on user-provided inputs. It lets users customize query parameters to locate information and then launch actions and campaigns from those results. Querying storage features lets users save and reuse custom query parameters.

1. Select **Lookup>>SQL Queries**. The **SQL Query** tab appears.

- **Save:** Saves the query.
- **Build:** Opens the Lookup wizard.
- **Query:** Runs the query.
- **<< >>:** Scrolls through saved queries.

Note: If you never generated an SQL query, the query content box is blank.

2. Click **Build**. The **GoldMine Lookup Wizard** appears. Base your search on **Contact information**, **Pending activities**, or **Completed activities**.

3. If you select **Contact information**, the **Contact Information Options** page appears. Select the criteria the contacts must match. Options depend on the selected criteria:

   - **Contacts with Field based conditions:** Click **Next**; the **Field conditions** dialog box appears. Include contacts **matching ANY of the specified criteria** or **ALL specified criteria**. These options appear:
   - **New:** Create a condition. Selecting this option opens the **Field condition** dialog box with **Field** and **Operator** drop-down lists and a **Value** text box where you specify values by typing them or using the **Lookup** window.
   - **Edit:** Edit a condition.
   - **Delete:** Delete a condition.

   - **Contact containing the following Details tab information:** The **Detail condition** dialog box appears. Select **Detail name** and **Value** in the **Lookup** window or type the name/value. Select the **Operator** in the drop-down list.

   - **Contacts with Additional Contacts' field based condition:** The **Field condition** dialog box appears. Select the **Field** and **Operator** in the drop-down list. Select the **Value** in the Lookup window or type it.

4. If you select **Pending activities (Calls, Forecasted Sales, E-mails, etc.)** from the main **Lookup Wizard** page, the **Pending Activity Options** dialog box appears.

   Specify the pending activities to include as part of your search: **Include pending activities matching ANY of the specified criteria** or **Only include pending activities matching ALL of the specified criteria**. Also specify the completed activities to include as part of your search:

- **Scheduled User(s):** User or user group.
- **Activity Type(s):** Activity type(s).

- **Date Range:** Date parameters for your activity search.
- **Activity Codes:** Activity code value.
- **Reference:** Reference field search options.

5. If you select **Completed activities (Calls, Sales, E-mails, etc.)** from the main **Lookup Wizard** page, the **Completed Activity Options** dialog box appears.

   Specify the completed activities to include as part of your search: **Include completed activities matching ANY of the specified criteria** or **Only include completed activities matching ALL of the specified criteria**. Also specify the completed activities to include as part of your search:

   - **Completed User(s):** User or user group.
   - **Activity Type(s):** Activity type(s).
   - **Date Range:** Date parameters for your activity search.
   - **Activity Codes:** Activity code value.
   - **Result Codes:** Result code value.
   - **Reference:** Reference field search options.

6. Click **Next**. The **Activity Search Options** page appears.
7. Select how search options are applied:

   - **All calendar activities** (this option is available for Pending activities)
   - **All history activities** (this option is available from Completed activities)
   - **Unlinked activities**
   - **Linked activities:** The **Specify contact match options** check box activates. Select to specify contact match options using the **Contact Information Options** dialog box. See step 3 for information on the check box options.

8. Click **Next**. The **GoldMine Lookup Wizard: Summary** dialog box appears containing the generated SQL query.
9. If necessary, edit the SQL query by clicking **Edit SQL**. The SQL statement in the Summary area opens for editing.

10. Select the **Activate SQL statement** check box to automatically run the query after finishing the wizard.
11. Click **Finish**.

Working with Saved Searches

Previewing Saved Search Results

Preview saved filter searches and saved group searches. Previewing lets you review results before activating and using a filter or group.

1. In the Contact Search Center, display saved searches.
2. Right-click a saved filter or group and select **Preview**. The results of the filter or group display in the browser columns, providing easy navigation.

Activating Saved Search Results

Activate saved filter searches and saved group searches using the Center to limit the records to display.

1. In the Contact Search Center, display saved searches.
2. Right-click on a saved filter or group and select **Activate** on the local menu. The results of the filter or group are displayed in the browser columns, providing easy navigation.
3. The name of the activated filter or group is displayed on the title bar of the Contact Record window. Activate a new filter or group or release an activated saved search.

Working with Organization Charts

About Organization Charts

The GoldMine organization chart (Org Chart) graphically displays organizational relationships and contact information in a tree structure. It appears in an optional pane on the left side of the Contact Record. Display it by:

- Selecting **Edit>>Record Details>>Organization**.
- Pressing **CTRL+Q**.
- Clicking on the blue expansion lines on left side of the Contact Record.

Navigate the Org Chart using its local menu or toolbar. Use the Org Chart to:

- Create Organizations, Sections, and Contacts.
- Set read and update access on organizations, sections, and contacts.
- Activate groups based on the Org Chart hierarchy.
- Copy data to a group of contacts based on the Org Chart.

Creating Organization Charts

Organizations are linked to the specified contact record. The organization's name is taken from the Company field of the selected contact record. Create up to 5 subsidiary levels under each organization and link contacts to any section.

1. To expand the Org Chart pane, select **Edit>>Contact Details>>Organization**.
2. Right-click and select **Create a new Organization** (if the pane is empty), or **New Org Chart** (if you are adding a new organization). The **New Org Chart Options** dialog box appears.
3. Select:
    - **Lookup another contact and create an Org Chart:** Launches the Contact Search Center and lets you add a new Org Chart to another Contact Record.
    - **Create an Org Chart based on:** Creates the Org Chart based on the current Contact Record.

4. Add sections and contacts to existing Org Charts.

Contact Communication

About Communicating with Contacts

Use GoldMine to print and fax correspondence, send e-mail, send pages, and distribute literature. GoldMine integrates the functionality of your word processor and e-mail software to communicate with contacts and coworkers.

- **E-mail:** Send, retrieve, and manage Internet e-mail. Individuals within an organization can use GoldMine e-mail, providing the same features as Internet e-mail, but not requiring an online connection.
- **Printing and Faxing Correspondence:** GoldMine works with Microsoft Word to merge contact information from GoldMine into templates, generating personalized correspondence. GoldMine's Document Management Center provides a central location to access and manage correspondence.
- **Distributing Literature:** Organizations can manage requests for printed material, such as brochures and price lists, using GoldMine's Literature Fulfillment Center.
- **Paging:** Send a pager message by dialing or sending e-mail.

Using the Document Management Center

About the Document Management Center

Use the Document Management Center's merge form capability to generate letters, memos, and e-mails. GoldMine lets you print a letter for one contact or a group of contacts, print labels and envelopes, and fax documents (provided your word processor supports facsimile transmission).

The Document Management Center works with a link to Microsoft Word®.

Use the Document Management Center to:

- Create Document Templates
- Create E-mail Templates
- Clone Document Templates
- Clone E-mail Templates
- Edit Document Templates
- Edit E-mail Templates
- Mail Merge Documents
- Mail Merge E-mail Messages
- Print Documents
- Send E-mail Messages
- Add Subfolders

Also specify, in the GM.ini, the default destination and file name format for templates, merged documents, or linked documents saved by GoldMine users.

Adding Document Templates

Although GoldMine installs predefined templates, you can create your own.

A template is a document created in an application, such as Microsoft Word, that links to GoldMine and contains embedded DDE link fields. The DDE fields link contact information to the document; merging to one or more contacts with the template produces a printable document.

Note: Use the Document Management Center to link to a template and edit as needed; the template must exist as a file. The most common options for creating a document are using WordPad and Microsoft Word with the GoldMine Link to Word installed.

(Information about creating document templates in Word)

Tip: If you are unfamiliar with adding DDE linkage fields to documents in your word processor, clone an existing template and then make changed to it.

1. Select **View>>Document Management Center**. The **Document Management Center** appears.
2. Select the **User** from the drop-down list.
3. Right-click on **Document Templates** and select **New**. The **Document Template Properties** dialog box appears.
4. Type the **Document Name** in the format to appear in the Document Management Center and in the template drop-down list on the Merge Form dialog box.
5. Select the owning user from the **Document User** drop-down list.
6. In the **Template Filename** text box, type or browse to the location of the template.
7. Click **Edit** to open the document and make changes.
8. In the **Document Management** area, select from:
   - **Link to Doc:** Creates a linked document when the document is merged.
   - **Save History:** Creates a history record when this template is merged.
   - **Allow Hot Link:** Enables linking to this document. If clear, the Link command is unavailable.

9. In the **Document Type** area, select from:
   - **Document**
   - **Spreadsheet**
   - **Envelope**
   - **Label**

10. In the **DDE Launch Options** area, type or select the **App Identifier** from the F2 Lookup list. The App Identifier must be the name a valid application identifier. GoldMine's word processing links use this App Identifier:

Application	App Identifier
Word 97/2000	Word.Document.8
WordPad 1.0	WordPad

11. In the **DDE Command** text box, type the name of the command to initiate the document merge for the linked application. GoldMine's word Processing links uses these DDE Command values:

Application	DDE Command
Word 97/2000	[GoldMineLink()]

12. Click **OK**.

Editing Document Templates

1. Select **View>>Document Management Center**. The **Document Management Center** appears.
2. Select the **User** from the drop-down list.
3. Right-click a template and select **Properties**. The **Document Template Properties** dialog box appears.
4. Click **Edit**. The document opens in the application used to create it. (See also Updating Templates)

Note: Steps here use Word as the example.

5. Use your Word functionality to add, delete, or edit the text.
6. To add GoldMine fields to the document, select **GoldMine>>Insert GoldMine Field** from the Word main menu. The **Insert GoldMine Field** dialog box appears.
7. Select the field or field macro from the drop-down list. &Contact is an example of the field macro format.
8. To save the edited template to the same file, select **GoldMine>>Update GoldMine Form**.
9. To save the edited template as a new template, select **GoldMine>>Save as GoldMine Form**. Type a new **Title** and click **OK**.

Faxing Correspondence

Fax from GoldMine if you install one of these applications:

- Symantec WinFax PRO 7.01 or later. Check the version of WinFax PRO by selecting the WinFax main menu command **Help>>About**. To use Symantec WinFax PRO, you must have Microsoft Word version 7.0 or later installed with the WinFax PRO printer driver.
- RightFax, a network faxing system. To use RightFax, you must install a printer driver in Windows named RightFax configured to print to the RightFax server.
- Zetafax 7.5 or later.

Note: Third-party add-on OmniRush provides an integrated fax support solution. For details, visit **www.frontrange.com** or the Z-Firm LLC Web site at **www.zfirmllc.com**.

Fax correspondence by selecting either:

- One of the templates available in GoldMine’s Document Management Center or
- Your default fax template.

GoldMine opens the application used to create the template, such as Microsoft Word, then displays the template with information merged from the contact’s record.

Add headings and text as needed and send the fax from the word processor. For example, if you used Microsoft Word, from Word’s main menu, select **File>>Send To>>GoldMine Contact via WinFax** (or your installed fax application).

Faxing Correspondence from the Document Management Center

Select **View>>Document Management Center** and right-click the fax template. Select **Fax**. The **Mail Merge Properties** dialog box appears.

Faxing your Default Fax Sheet

With a default fax template, generate the fax sheet to fax telephone number entered for the active Contact Record.

Select **Contact>>Write>>FAX to Contact**.

Printing Documents from the Document Management Center

Print documents for one contact or for a filtered group or group of contacts.

1. Select **View>>Document Management Center**. The **Document Management Center** appears.
2. Select the **User** from the drop-down list.
3. Highlight the document template you are printing and right-click.
4. Select either:
    - **Merge & Edit:** Opens the document on the screen with the inserted GoldMine fields populated with information for the current Contact Record. Edit the document as needed and print using the program's print command.
    - **Print:** Opens the Mail Merge Properties dialog box.

5. If you print immediately, a record of what was sent to the contact is filed on the History tab.

Printing Envelopes and Labels

Use the same method as for printing letters, memos, and faxes. Set up GoldMine to print envelopes or labels for documents waiting in a print queue on the same date GoldMine generates the queued documents.

To check on queued correspondence in GoldMine's Literature Fulfillment Center, select **View>>Literature Fulfillment**.

To print envelopes or labels when queued documents are printed, select **View>>Literature Fulfillment**.

Select the folder under **Queued Documents** corresponding to the date the queued correspondence is scheduled to be sent. For example, if the letters are scheduled to be printed later in the current week, select **This Week**.

In the upper-right area, right-click each queued document for which to print an envelope or label. From the local menu, select **Print Envelopes** or **Print Labels**. GoldMine displays the **Print Envelopes** dialog box or the **Print Labels** dialog box that contain the same commands.

In the **Print Envelopes** dialog box, select the contacts for whom to print envelopes, then select the envelope template to use. By default, GoldMine displays your templates. However, look in the User drop-down list and select a (public) template or another user's template.

Creating E-mail Templates

1. Select **View>>Document Management Center**. The **Document Management Center** appears.
2. From the **User** drop-down list on the toolbar, select the user to create the template for. If the template is for all users, select **(public)**.
3. Right-click on **E-mail Templates** and select **New**. The **Edit E-mail** window appears.
4. The cursor is automatically on the **Subject** line. Type the subject of the e-mail.

> **Note:** The subject you type becomes the subject line when using the template; consider what you are sending to contacts. The subject is also the template name appearing in the Document Management Center, so it must be unique.

5. On the **Attachments** tab, right-click and select **Attach**. Browse to locate the file you are attaching to the template.
6. Select the **Options** tab to configure template formatting and encoding options.
7. Select **Send as MIME** to encode you e-mail message with MIME; the recipient of your e-mail must be able to support MIME to receive the message intact, rather than as meaningless characters.

> **Note:** Select Send as MIME to select the Rich text (HTML) or Send VCard options.

8. Select **Rich text (HTML)** to send the message in HTML. The Rich text format options lets you use specialized fonts and insert .bmp files.

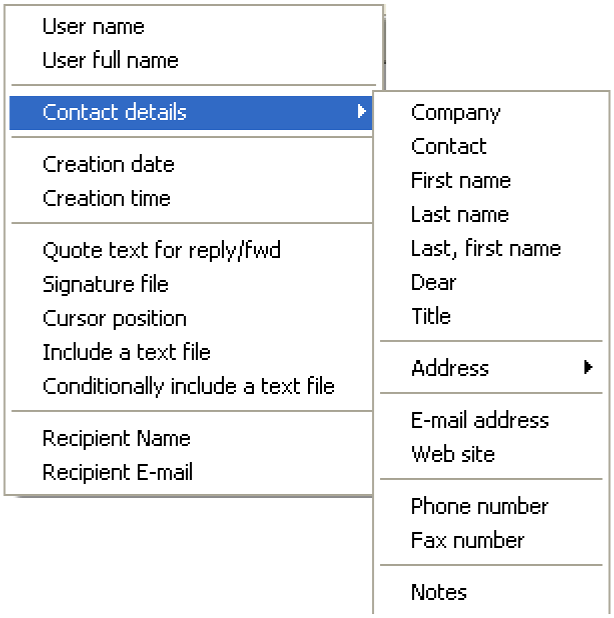
> **Note:** If your recipient's system does not support HTML, leave the check box blank to send the message as plain ASCII text.

9. Wrap lines is the default. When a word is typed at the end of a line, the next word is placed at the beginning of the following line.

> **Note:** When creating a template, you cannot change this option.

10. Select **Attach VCard** to include a .vcf file with your message. The VCard contains basic contact information.
11. Select **Request a return receipt** to receive an e-mail acknowledgement from the recipient upon receipt. This option returns results only if the recipient's e-mail system supports the return receipt feature.
12. Click in the lower pane and begin creating the body of the message. Use these editing options to create the message:
    - HTML Toolbar
    - Local Menu

13. If desired, insert GoldMine fields into the message body, creating a dynamic e-mail message using data from the Contact Record in the merged document. Right-click in the message box and select **Actions>>Insert GoldMine Field**. Click here to see the field options.



Tip: Insert Key1-Key5 fields by placing the cursor at the location to insert the field and type. For example, <<key1>>, to insert the data from the Key1 field in the merged e-mail. Insert user-defined fields by placing the cursor and typing <<Contact2->Ufieldname>>.

14. To save the template, right-click and select **Actions>>Save template**.

Sending E-mails from the Document Management Center

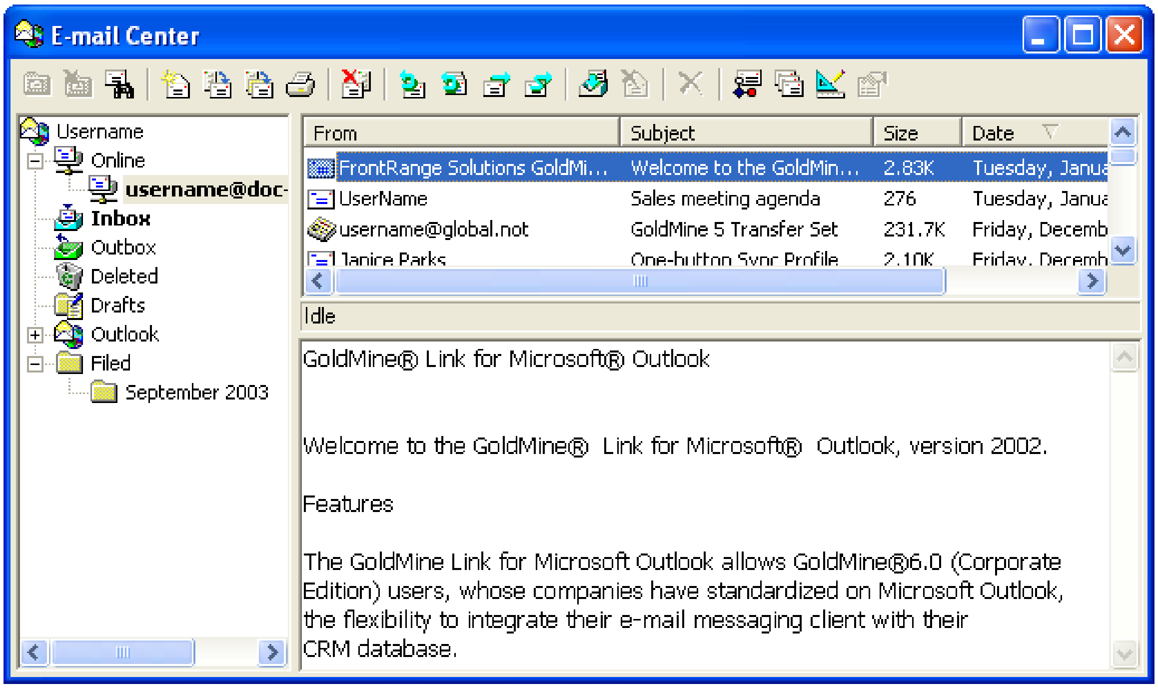
1. Select **View>>Document Management Center**. The **Document Management Center** appears.
2. Select the **User** from the drop-down list.
3. Highlight the e-mail template you are sending and right-click.
4. Select **Merge**. The **Mail Merge Properties** dialog box appears.

5. If you send immediately, a record of what was sent to the contact is filed on the History tab.

Using the E-mail Center

About the E-mail Center

Use GoldMine's E-mail Center to view, organize, and send your queued Internet e-mail. If you subscribe to more than one Post Office Protocol version 3 (POP3) mail server, you can set up the E-mail Center to retrieve mail from multiple Internet mail servers.



Select **View>>E-mail Center**.

- E-mail Center Toolbar: Provides quick access to E-mail Center functions.
- **E-mail Center tree:** Connect to your mail server and organize incoming, outgoing, and filed messages.
- **E-mail message listing browse window:** Display messages available in the in-box, out-box, or selected folder.
- **Text display:** Preview the body of a message selected in the listing browse window. To turn the preview option on and off, right-click the E-mail Center tree and select **Options>>Show Preview**.

> **Note:** Set **Show Preview** as the default in the **[Internet]** section of the Username.ini using this command: **ShowPreview=1**.

Use the E-mail Center to:

- Edit Internet e-mail preferences
- Create and send e-mail messages
- Retrieve e-mail messages
- Link e-mail messages to contacts
- Create and use e-mail templates
- Set e-mail rules
- Create distribution lists

Configuring E-mail

Use GoldMine for your Internet e-mail by acquiring an Internet e-mail account and setting up your system to access the Internet account. After set up, configure settings to:

- Format outgoing messages.
- Handle incoming messages.
- Add Internet e-mail accounts.
- Customize GoldMine's E-mail Center.
- Define advanced settings to apply globally to the E-mail Center, existing attachment files, message operations, and data imported from a World Wide Web (www) site.

Note: You must have an account with an ISP providing true Internet mail access. The ISP must support Post Office Protocol version 3 (POP3) and Simple Mail Transport Protocol (SMTP) to send and receive e-mail through the Internet using GoldMine.

Configuring Your Computer to Access Your ISP:

Depending on your setup, dial by either of these methods:

- **Manually:** The default configuration in Windows requires manual dialing. From the Windows taskbar, click **Start**, then select **Programs>>Accessories>>Dial-up Networking**. In the **Dial-Up Networking** window, double-click the icon for your service provider. In the **Connect To** window, ensure settings are correct; click **Connect**. After your computer connects successfully, start or switch to GoldMine, then send Internet e-mail.
- **Automatically:** Use Microsoft Internet Explorer to configure Windows to automatically dial your ISP when sending Internet e-mail.

Note: Default modem and dialing properties are set up in the **Telephony** tab of the Windows Control Panel; however, select special modem and dialing settings for use only with GoldMine in the **Preferences** dialog box under the **Telephony** tab.

Creating and Sending E-mail

Use the same **Edit E-mail** dialog box when creating an Internet e-mail message or a GoldMine e-mail message.

Create an e-mail message by:

- Clicking the Send Internet E-mail button included on most toolbars.
- Selecting **Contact>>Create E-mail>>Message to Contact**.
- Clicking the Send Internet E-mail button on the E-mail Center toolbar.
- Replying to pending activities.

1. On the **Edit E-mail** dialog box, the **From** text box uses the logged in user's name and e-mail. To change to a different e-mail account for the logged in user, select the account in the drop-down list.
2. The **To** text box populates with the name and e-mail address of the current Contact Record. To change to an alternative name and e-mail address associated with the current contact, select the name from the drop- down list.
3. To send the e-mail to alternative recipients, click the right-facing arrow and select one:
   - **To: Contact:** Displays the **Contact Search Center** to locate a new contact.
   - **To: Manual recipient:** Displays the **Manual Recipients Entry** dialog box. Type a manual e-mail address.
   - **To: GoldMine user or group:** Displays the **GoldMine User Recipient** dialog box. Select a GoldMine user or user group.
   - **To: Distribution list:** Displays the **Distribution List** dialog box. Select a predefined distribution list.
   - **To: Outlook (MAPI) recipient:** Launches your local or network Outlook address book.

4. Select **Link** to link the e-mail message to the current contact and file the message in the History tab when sent.
5. To add recipients, click **Cc:**. A popup menu appears. Select one:

- **To:** Adds recipients to the To list.
- Cc: Sends copies to other recipients.
- Bcc: Sends a blind copy to other recipients.

6. Click the right-facing arrow again and select one of the recipient types listed above. Multiple types of recipients are allowed.
7. Type a subject in the **Subject** text box or select a template in the **Subject** drop-down list.
8. Type a message in the message text box. To use HTML formatting in the message, select Rich text (HTML) in the **Options** tab. Check your spelling by right-clicking and selecting **Actions>>Spell check**.
9. Configure settings for:

- **Attachments tab**
- **Options tab**
- **Mail merge tab**

10. Click **Send** to send the message immediately or **Queue** to queue it for sending at the times defined in the Server Agents Administrator.

Spell Checking E-mail

Use the E-mail Center to check the spelling in the message, improve professional presentation, and customize the spell-checker. Use the Speller tab of the User Preferences dialog box for basic customization; however, you can customize the speller as you work, adding words and creating individual or company dictionaries.

1. After creating your e-mail, click the **Check Spelling** button on the E-mail Center toolbar. The **Check Spelling** dialog box appears.
2. The questionable word appears in the **Not in Dictionary** text box.
3. Suggestions are listed in the **Suggestions** list. The words displayed are based on the options selected on the Speller tab.
4. Select one option:
   - **Ignore:** Skips this occurrence of the questionable word; if the word comes up again, it will be tagged and displayed.
   - **Ignore All:** Skips this and all subsequent occurrences of the word in this document.
   - **Add:** The word is added to the dictionary displayed in the Add words to text box.
   - **Change:** Replaces the questionable word with the one highlighted in the Suggestions list; or, if the word is edited, the edited word is used as the replacement.
   - **Change All:** Changes this and all subsequent occurrences of the word in the document. The selected word in the Suggestions list is used unless the word is edited, in which case the edited word is used.
   - **Suggest:** Searches more thoroughly for a suggested replacement word for the questionable word. Each time you press the Suggestion button, a "deeper" search is made. When the spell checker exhausts all possibilities, the Suggest button is disabled.

5. To edit a questionable word type a revised version of the word in the **Not in Dictionary** text box. The **Ignore** button changes to **Undo edit**. Clicking **Undo edit** returns the edited word to the original form.
6. Use the **Check Spelling** dialog box to change the Options and Dictionaries.
7. Select **Undo** if you made changes to a document with Ignore or Change and wish to undo the changes. The **Undo** button takes you back one word at a time.
8. Click **Cancel** to stop the spell checker and close the window.

Retrieving E-mail

To retrieve Internet e-mail within GoldMine, you must use a service provider with true Internet mail access. Internet access provided by most commercial online services, such as CompuServe and Microsoft Network, will not work with the GoldMine Internet e-mail feature. You must configure Windows dial-up networking to connect to your Internet service provider.

Note: For assistance with setting up Windows to communicate with your Internet service provider, contact your service provider.

Retrieve e-mail manually or automatically. Your Internet Preference must be configured properly in the User's Preferences.

Using the Microsoft Internet Explorer, you can configure Windows to automatically dial your Internet service provider when you retrieve Internet e-mail.

The default configuration in Windows requires manual dialing. From the Windows status bar, click **Start**, then select **Programs>>Accessories>>Dial-up Networking.** In the **Dial-Up Networking** window, double-click the icon for your service provider. In the **Connect To** window, ensure all settings are correct, then select **Connect**. Once your PC connects successfully, start or switch to GoldMine, then retrieve Internet e-mail.

Note: To set GoldMine to decode UU-encoded MIME attachments in incoming messages, add UUEncodeScan=1 to the [Internet] section of your Username.ini file.

1. Select **View>>E-mail Center**, or **View>>E-mail Waiting Online** to jump directly to the **POP Password** dialog box for retrieving from your primary account.
2. If you are in the E-mail Center, click the e-mail account to retrieve. The **POP Password** dialog box appears if you do not have your Internet e-mail password configured in the Internet tab of your User's Preferences.
3. Type the Password and click **OK**.
4. GoldMine downloads the waiting e-mail from your POP3 server e-mail account.
5. Read and process your e-mail while connected online or move it to your GoldMine **Inbox** and disconnect from your e-mail server. To read e-mail in the E-mail Center, double-click the message.

Note: When you move messages from Online to Inbox, the **Attach E-mail to Contact** dialog box appears. Select how to link messages to contacts.

6. To process the message, right click the message in the **E-mail re:** text box and select **Actions**.

Note: You can also read retrieved e-mail by selecting **Read** from the local menu in the **Activity List** or on the **Pending** tab of the Contact Record.

Reading E-mail

The E-mail Reader window is the primary way you work with individual e-mail messages. The E-mail Reader launches when double-clicking a message in the E-mail Center or the Contact Record.

Note: On the **Retrieval** tab of the **Internet Preferences** dialog box, select **Open 'Read E-mail'** dialog and GoldMine opens e-mail upon retrieval.

The E-mail Reader window displays the full message with selected header information . Use the toolbar or right-click the message body and select an option from the local menu.

Note: GoldMine decodes and displays e-mail messages and attachments created in the MS RTF (Rich Text Format) sent as winmail.dat files rather than displaying them as attachments. This creates smooth interoperability between Outlook messages created in Outlook 2000 in workgroup mode or any newer versions of Outlook and GoldMine.

Using E-mail Templates

After creating an e-mail template in the Document Management Center, select it when creating an e-mail.

1. Select **Contact>>Create E-mail>>Message to Contact**. The **Edit E-mail** dialog box appears.
2. Select the template in the **Subject** drop-down list.
3. To select the template of another user, click **Select Template User**.
4. Edit the message as needed.
5. Can click **Send** to send the message immediately or **Queue** to queue it for sending at the times defined in the Server Agents Administrator.

Creating E-mail Rules

Create an e-mail rule set to specify conditions and actions for handling e-mail.

Example: Use e-mail rules to filter incoming messages, minimizing the amount of unwanted e-mail.

1. In the **E-mail Center**, right-click and select **Setup>>Set up E-mail rules**. The **E-mail Rules Center** appears.
2. Right-click the left pane and select **New Rule Set**. The **E-mail Rules Wizard** appears.
3. Type a name in the text box.
4. To apply the rules to different types of messages, select from:
   - **Incoming E-mail**
   - **Outgoing E-mail**
   - **Incoming and Outgoing**

5. Click **Next**. The **Edit "Rule" Conditions** dialog box appears.
6. Select **ALL of the following conditions must be true** or **ANY ONE of the following conditions may be true**.
7. To define or change a condition, click **New** or **Edit**. The **E-mail Rule: Condition** dialog box appears. To delete a selected rule condition, click **Delete**.
8. Click **Next**. The **E-mail Rules: Actions** dialog box appears.
9. After configuring actions, click **Finish**. GoldMine adds the rule to the selected rule set. The name of the rule appears in the left pane under the rule set. The selected conditions and actions of the rule set appear in the right pane.

Using Encryption and Digital IDs

Using Digital IDs with E-mail Messages

If you and your contact use digital IDs to verify signatures and send encrypted e-mail messages, use GoldMine to configure your **Internet Preferences** and the **Record Properties>>Contact Details>>Digital IDs** to include necessary information for S/MIME-enabled e-mail.

Your digital ID, also known as a digital certificate, is a file sent with an e-mail message identifying you as the authentic sender. Digital ID certificates are files issued by a certified security authority such as VeriSign, Inc., or from your Microsoft Exchange Server administrator. Digital IDs have an expiration date and must be renewed periodically to remain valid. A digital ID typically contains:

- Your name and e-mail address as a digital signature
- Your public key
- Expiration date of the public key
- Name of the Certification Authority (CA) who issued your Digital ID
- Serial number of the Digital ID
- Digital signature of the CA

Using Digital IDs

A digital signature provides security by verifying the message originated from a specific person and that the message has not been altered. A digital ID also works as a message encryption method. Digital ID encryption scrambles a message with a recipient-specific algorithm.

Public and Private Keys

The digital ID encryption uses a system of key pairs that include a public key used to encrypt a message and a private key used to decrypt a message. The sender of a secure e-mail must have the recipient's public key to encrypt the message. When the message is received, it is decrypted using the recipient's matching private key.

Using GoldMine you can exchange encrypted e-mail messages with a contact. You must have the contact's digital ID that includes his or her public key and the contact must have your digital ID that includes your public key. In GoldMine, you must then import the contact's Digital ID using the contact's **Record Properties>>Contact Details>>Digital IDs** tab and import your Digital ID using your **Internet Preferences>>Security** tab.

For example, when you send an encrypted message to a contact, it is encrypted in GoldMine using the public key the contact provided you. When he or she receives the message, it is decrypted by the contact's e-mail application using his or her private key. Conversely, when a contact sends you an encrypted message it is encrypted by the sender's e-mail application with your public key (provided earlier). When you receive the message, it is decrypted using your private key.

Levels of Security

- **Signed:** The message is signed with the sender's private key. Sending a message with a digital signature confirms the message was sent by the sender listed in the From address.
- **Encrypted:** The message is sent with the recipient's public key. The recipient provides you with his or her public key before you send the message. When a message is

encrypted, the body and attachments are hidden from anyone who does not have the recipient's private key. Only the recipient should have the recipient's private key. An encrypted message does not guarantee to the recipient that the sender is the name in the From address.

- **Signed and Encrypted:** The message is signed with the sender's private key, confirming for the recipient the message was sent by the sender in the From address, and it is encrypted with the recipient's public key and then decrypted with the recipient's private key when he or she receives the message.

Sharing Public Keys

For security reasons do not share your private key. You can share your public key with contacts two ways:

- **Digital ID Signature:** Your Digital ID is attached to any message that includes a Digital ID Signature. The recipient can then extract it and import it into his or her e-mail application. For example, in Outlook the user can right-click the sender's name on a message and add the contact to his or her existing contacts. The digital ID certificate is included.
- **Export:** Export your Digital ID send it to a contact who can then import the file into his or her e-mail application. For example, in Outlook the file is imported on the contact's Certificate tab.

Using Digital IDs in GoldMine

- **Configuring Contacts' Digital IDs**: Imports a contact's digital ID into the Contact Record.
- **Configuring GoldMine Users' Digital IDs**: Imports your digital ID into GoldMine. You determine the signature and encryption settings.
- **Sending Digitally Signed E-mail Messages:** Sends a message with your Digital ID signature.
- **Sending Encrypted E-mail Messages:** Sends individual messages with a digital ID signature or GoldMine encryption.
- **Reading E-mail Messages Sent with Digital IDs**: Reading digitally signed, encrypted, or signed and encrypted e-mail messages.

Sending Encrypted E-mail

Protect e-mail messages with encryption. Messages encrypted with **Encrypt using GoldMine** can only be read by GoldMine users with the correct password. Messages sent as **Encrypt using Digital ID** can only be sent using the recipient's public key and can only be decrypted and read using the recipient's private key.

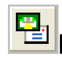
- Sending Encrypted Messages Using GoldMine
- Sending Encrypted Messages Using Digital ID

To automatically encrypt outgoing messages with digital IDs, configure your settings on the Security tab in your Internet Preferences. Use the **Encrypt Message** toolbar button drop-down menu to select **Do not Encrypt** and send a message without encryption.

Sending Digitally Signed E-mail

When digitally signing a message, you must have a digital ID configured in GoldMine. The digital signature contains your private key and confirms for the recipient your From address matches the signature. Configure your Internet Security settings to automatically sign all outgoing messages with your digital ID.

(About Digital IDs)

On the toolbar, click the **Sign with Digital ID** button or select **Actions>>Encrypt>>Sign with Digital ID** on the local menu. Your digital signature adds to the outgoing message.

Reading E-mail Sent with Digital IDs

Receive e-mail messages digitally signed and encrypted from non-GoldMine users. To send you a signed e-mail message, the sender must have a Digital ID from a valid Certificate Authority. To send you an encrypted e-mail message, the sender must have your Digital ID public key from a valid Certificate Authority. When receiving the message, GoldMine asks you for your password in the **Private Key Password** dialog box.

(About Digital IDs)

Signed Icon in Inbox

Signed with a Digital ID: When receiving a digitally signed message, the message includes the sender's digital signature and public key.

When the message signature is verified, the Inbox displays a signature icon next to the message. When you open the message, you are notified if the signature is verified or if the signature verification failed.

Automatically add a new or updated signature file to the contact's Digital IDs.

Encrypted Icon in Inbox

Encrypted: When receiving a digitally encrypted message, the message was encrypted with your public key (supplied to the sender at an earlier time). The message is decrypted using your private key (configured in GoldMine). You are asked to supply the password to your private key to read the message.

Signed and Encrypted Icon in Inbox

Signed and Encrypted: When receiving a digitally signed and encrypted message, the message includes the sender's digital signature and a message encrypted with your public key (supplied to the sender at an earlier time).

The message signature is verified and the message decrypted using your private key (configured in GoldMine). You are asked to supply the password to your private key in order to read the message.

Signature Verified Banner on Message

Note: This and the following template will not display if **Enable IE as E-mail Viewer** is not selected in your Edit>>User Preferences>>Internet>>More Options>>Advanced tab.

Failed Encrypted and Signed Icon in Inbox

Signature Verification Failed Banner on Message

Note: Reasons signatures can fail.

- The sender and signature do not match.
- The digital signature is expired.
- The Certificate Authority is not configured in GoldMine.

Using the Literature Fulfillment Center

About the Literature Fulfillment Center

Use the **Literature Fulfillment Center** to manage and track brochures, price lists, and other publications sent to your contacts. The Literature Fulfillment Center stores and processes literature requests in one easy-to-view and manage location. New publications can be added to a list for other users to select for their contacts.

Merging is done in the Document Management Center; however, you can merge documents in the Document Management Center and then queue them. Also:

- Add documents
- Edit document properties
- Fulfill or reject scheduled requests
- Edit scheduled requests
- Fulfill or reject queued documents
- Edit scheduled documents

General management displays in the left pane and specific requests in the upper right pane. The lower right pane displays associated attachments or a preview window of the document that was printed.

Select **View>>Literature Fulfillment**. The **Literature Fulfillment Center** appears. Use the toolbar to you execute commands or local menu options in the left pane to manage:

- **Literature List:** Predefined literature list that varies depending on which user created the literature packet. Available when you schedule a Literature Request. When selecting Literature List in the left-hand pane, the literature options display in the right pane. Right-click **Literature List** to access the local menu.

  Literature List Local Menu

  Refresh: Refresh the Literature List.

  Refresh All: Refresh everything in the left pane.

  New: Add a new document to the Literature List.

- **Literature Requests:** Requests by date. When you select a date, the literature requests scheduled for that date or date range are displayed in the upper right pane. The literature requests are added by scheduling a Literature Request. Right-click on Literature Requests to access the local menu.

  Literature Requests Local Menu

  Refresh: Refresh the Literature List.

  Refresh All: Refresh everything in the left pane.

Expand: Expand the date options.

- **Queued Documents:** Queued requests by date. When selecting a date, the literature requests scheduled for that date or date range display in the upper right pane. Queued documents are added to the Literature Fulfillment Center when configuring Mail Merge Properties through the Document Management Center. Queued documents can be manually fulfilled through the Literature Fulfillment Center or automatically executed at the selected time if you configured the Server Agents to Print/FAX. Right-click Queued Documents to access the local menu.

  Queued Documents Local Menu

  Refresh: Refresh the Literature List.

  Refresh All: Refresh everything in the left pane.

  New: Add a new document to the Literature List.

- **Printed Documents:** Documents and literature requests you fulfilled. Right-click **Printed Documents** to access the local menu.

  Printed Documents Local Menu

  Refresh: Refresh the Literature List.

  Refresh All: Refresh everything in the left pane.

  Expand: Expand the date options.

  Purge All: Delete all information from the Printed Documents list.

Adding Documents to the Literature Fulfillment Center

Add an existing publication or file to the Literature List.

1. Select **View>>Literature Fulfillment**. The **Literature Fulfillment Center** appears.
2. Highlight **Literature List** in the left pane and right-click. Select **New** from the local menu. The **Literature** dialog box appears.
3. In the **Output To** drop-down list you can select one of the following:
   - **Stock:** Literature that is printed and available as shelved stock.
   - **Printer:** Literature that is to be printed from a file.
   - **FAX:** Literature that is to be sent via fax.

4. In the **Type** text box, type or select the literature type from the F2 Lookup list.
5. In the **Description** text box, type or select a brief description of the literature from the F2 Lookup list.
6. In the **Filename** text box, available only if you select Printer or FAX, type or browse to the location of the form that you are printing or sending.
7. Select **Allow File to Synchronize**, available only if you select Printer or FAX, if you want the attached file to synchronize to remote users.
8. Click **OK**.

Editing Documents in the Literature Fulfillment Center

1. Select **View>>Literature Fulfillment**. The **Literature Fulfillment Center** appears.
2. Highlight **Literature List** in the left pane. The documents are listed in the upper right pane.
3. Right-click the document to edit and select **Edit** from the local menu. The **Literature** dialog box appears.
4. In the **Output To** drop-down list, select one:
    - **Stock:** Printed literature available as shelved stock.
    - **Printer:** Literature to print from a file. Select the file path and click **Edit** to make changes.
    - **FAX:** Literature to fax. Select the file path needed and click **Edit** to make changes.

4. In the **Type** text box, type or select the literature type from the F2 Lookup list.
5. In the **Description** text box, type or select a brief description of the literature from the F2 Lookup list.
6. In the **Filename** text box (available only if you select Printer or FAX), type or browse to the location of the form to print or send.
7. Select **Allow File to Synchronize** (available only if you select Printer or FAX) to synchronize the attached file to remote users.
8. Click **OK**.

Fulfilling or Rejecting Scheduled Literature Requests

When a Literature Request is assigned to you, the request appears on your calendar as "Lit" in the Task pane. To fulfill or reject the request, open the Literature Fulfillment Center.

1. Select **View>>Literature Fulfillment**. The **Literature Fulfillment Center** appears.
2. Select your name in the **User** drop-down list to view requests assigned to you.
3. Select the **Literature Requests** date or date range for the request. The literature request appears in the upper right pane.
4. Highlight the literature request and right-click. Select options in the local menu.
    - To fulfill the request, note the attachments to send and select **Fulfill**. If a literature request is to be printed or faxed, the document is printed or faxed. Attachments are not sent automatically and must be handled as per your usual office procedure.
    - To reject the request, select **Reject**. The **Rejection of Literature Requests** dialog box appears. Type or select the reason in the F2 Lookup list. If this activity was scheduled with an RSVP, GoldMine notifies the person who assigned it to you stating why it was rejected.

5. Fulfilled requests are moved from Pending to the History tab; the request appears in the **Printed Documents** area of the Literature Fulfillment Center.

Fulfilling or Rejecting Queued Documents

Queued Documents in the Literature Fulfillment Center are from the Document Management Center and were merged with one or more contacts. For multiple contacts, each contact is listed separately in the upper right pane when you select the assigned user and date the document was queued for.

Queued documents are fulfilled when using the Print/FAX Server Agent; to send the document immediately or remove it from the queue, use the Queued Documents area of the Literature Fulfillment Center.

1. Select **View>>Literature Fulfillment**. The **Literature Fulfillment Center** appears.
2. Select your name in the **User** drop-down list to view requests assigned to you.
3. Select the **Queued Documents** date or date range for the request . The queued document appears in the upper right pane.
4. Highlight the document and right-click. Select options in the local menu.
    - To fulfill the print or fax request, right-click and select **Fulfill**. The document will print or send, depending on the settings configured.
    - To reject the request, right-click and select **Reject**. The **Rejection of Queued Document** dialog box appears. Type or select the reason in the F2 Lookup list.

5. Fulfilled requests are written to the History tab; the request appears in the **Printed Documents** area of the Literature Fulfillment Center.

Editing Scheduled Literature Requests

To edit a Literature Request assigned to you:

1. Select **View>>Literature Fulfillment**. The **Literature Fulfillment Center** appears.
2. Select your name in the **User** drop-down list to view requests assigned to you.
3. Select the Literature Requests date or date range for the request to act on. The literature request appears in the upper right pane.
4. Highlight the literature request, right-click, and select **Edit**. The **Schedule a Literature Request** dialog box appears.
5. See Scheduling Literature Requests for editing options.

Using Telemarketing Scripts

About Telemarketing Scripts

Using GoldMine's branching scripts, a user can gather information by working through a series of interactive questions. Branching scripts organize questions in a flowchart-type format.

Use scripts to automate a variety of tasks such as guiding telemarketers through sales calls, collecting survey information, and training new salespeople.

Branching scripts are GoldMine's version of online questionnaires. With a branching script, telemarketers can deliver structured information to a prospect and, based on the prospect's response, work through a predefined dialog of related information.

Additional information can be designed to answer the customer's anticipated inquiries or provide requested information, so an accurate response to the customer's needs is readily available.

Each script question can contain an unlimited number of possible answers, and each answer can branch out to a different question. A script can contain up to 99 questions.

While the script is being executed, information on the prospect's responses can be saved in the Notes field of the active contact record or placed directly into one of the fields of the contact's record. Once this data is entered, filter expressions can be used to select contacts who responded similarly to script questions.

Getting Started

Before attempting to enter a branching script in GoldMine, map the entire script structure on paper. This strategy can be helpful in creating a branching script:

1. Decide what questions to ask and the possible responses. List questions with all the related responses directly below them. Draw lines connecting each response to the appropriate follow-up question. Note each question can have several response lines leading to it. However, no response should have more than one line leading from it (each response can only branch to one question).
2. Number each question. Try to select a numbering scheme that keeps questions in a natural sequence. If there are sub-branches within the script, you will have to jump numbers. A good rule to follow is to number the questions in a way that no answer leads to a lower-valued question. Number questions in intervals of 5 or 10 so additional questions can be inserted later in the script without having to change the numbering scheme.
3. When all the questions are numbered, follow each question back to the preceding answer, and enter the question number next to the response. These numbers are the Goto values entered into GoldMine.
4. Determine if any questions should be omitted from the dialog. Mark them on the worksheet.
5. To store the text of a selected response in a field, enter the name of the field to be used next to the question number on the worksheet. Most fields in the contact record can be used to store script responses.

Now you are ready to enter the script in GoldMine.

Creating Telemarketing Scripts

1. Select **View>>Sales Tools>>Scripts**. The **Telemarketing Script** dialog box appears.
2. Click **Maintain Scripts**. The **Branching Scripts Listing** dialog box appears.

Using Telemarketing Scripts

Use telemarketing scripts to construct structured dialogs with customers.

1. Select **View>>Sales Tools>>Scripts**. The **Telemarketing Script** dialog box appears.

> **Note:** All the responses you log while using the script are applied to the current Contact Record.

2. Select the script in the **Script** drop-down list and begin asking questions. Update fields as needed.

Customizing Auto-dialer Settings

With the advent of multiple area codes in metropolitan areas and telephone dialing capabilities in computers, GoldMine developed a method for differentiating between local and long distance calls, letting GoldMine users dial the phone using the modem in a computer without entering special dialing codes.

A user-created, configuration settings file called **predial.ini** that is placed in the GoldMine folder handles the differentiation between local and long-distance calls. The file consists of four sections: **[City]**, **[Prefix]**, **[Suffix]**, and **[PBX]**. Each section is scanned in the listed order until a match is found. This terminates the search, and GoldMine uses the values found to dial the phone ignoring settings in lower sections of the **predial.ini**. The exception is the **[Suffix]** section; GoldMine checks this section for a match, thus terminating the search when a match is found.

Set auto-dialer to recognize differing telephone number types, prefixes, and suffixes by creating an **Exception List** in a **predial.ini** file. An exception list provides a set of conditions GoldMine checks when processing telephone numbers formatted for North America. For example, you may need to set up your auto-dialer to recognize different types of telephone numbers, such as local and long distance. Upon finding a match to specified conditions, GoldMine processes telephone numbers according to the formatting entered for the condition.

Note: See Technical Document 387, “Using and Setting up GoldMine’s PREDIAL.INI for Special Dialing Needs” at **support.frontrange.com**.

Making and Answering Calls with SoftPhone

About SoftPhone

SoftPhone integration with GoldMine uses SIP (Session Initiation Protocol) and VoIP (Voice over IP) technology to place and answer contact calls. The SIP Proxy (not included with GoldMine) must be configured and its functionality verified by an administrator. The administrator can then configure GoldMine to make and receive calls through the SIP Proxy Server by setting SoftPhone preferences.

Tip for administrators: If a SIP Proxy Server is being unused in the environment, edit user properties to remove **Launch SoftPhone** from the GoldMine menu. This avoids attempts to call through this feature when a SIP Proxy Server is not present.

Important: You may record phone calls through the use of the Licensed Software. The law on recording phone calls varies from country to country and state to state. FrontRange recommends that you inform the other party or parties to your phone call that you are recording their conversation. However, it is your responsibility to comply with all applicable laws and regulations in your use of the Licensed Software. You agree to abide by all applicable communication, privacy and similar rules, directives and other laws in your use of the Licensed Software. In no event will FrontRange be liable for any action or inaction on your part which leads to or causes you to break the law.

Using SoftPhone

1. Select **Contact>>Dial Phone>>Launch SoftPhone**. The SoftPhone control dialog box appears.

2. Use SoftPhone to **Answer** incoming calls, manually **Dial** phone numbers, **Transfer** calls, **Hang up**, place calls on **Hold**, and make **Blind Transfer** calls to another number or GoldMine user.
3. GoldMine reads the **phone1**, **phone2**, and **phone3** fields and pulls those numbers into the Contact Numbers area. Click a number to dial it.

Note: UPHONE fields are user-defined fields GoldMine users can create and use as extra phone fields. If the name starts with UPHONE, GoldMine recognizes the field as an extra phone field.

4. After placing or receiving a call, adjust the speaker and microphone volume.
5. To use SoftPhone by default, select **Edit>>Preferences>>Telephony** and select **Use SoftPhone by default**.

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Using the Personal Rolodex

About the Personal Contacts

To keep a separate phone log for other important or commonly used telephone numbers, use the Personal Contacts feature to maintain a private file you can access easily while working in GoldMine. Only the user who created the file can access a Personal Contacts.

1. Select **View>>Personal Contacts**. Your **Personal Contacts** dialog box appears.
2. Click **Dial** to use the Phone Dialer.
3. Click **New** to add a new entry.
4. Click **Edit** to change the selected entry.
5. Click **Delete** to remove the selected entry.
6. Click **OK** to close.

Important: The Contact field must be limited to 30 characters.

Activities

About Activities

Activities are time-specific or event-based actions linked to contacts. Schedule, view, and complete activities. Activities scheduled for a future date and time store as records in GoldMine's Calendar. Information about completed calls, appointments kept, and messages received transfers from the Calendar and the related contact's Pending tab to the History tab, where it stores as a completed activity record.

View activities for users, user groups, for a particular date, or for a contact. Use the Calendar to view activities by date, the Activity List to view by activity type, and the Pending tab on the Contact Record to view the contact's activities for the contact.

Each activity record, whether still pending on the Calendar or completed in the history file, is linked to a Contact Record. Connecting activities to contacts establishes a relational link to track the progress of customer relationships.

Benefits of Using Activities

- **Track pending activities:** List activities that need to be performed. Control the scope of these listings; they can be daily, weekly, or monthly. View activities pending for a contact or view only those calls that must be made on a specific day. Also view pending activities of other users.
- **Set up reminders:** Remind yourself about important activities. Alarms can be set for activities GoldMine supports.
- **Record an electronic paper trail:** When activities are completed, GoldMine maintains a record of what was done, when it was done, and by whom—providing powerful information for subsequent follow-up with contacts.
- **Schedule meetings:** When your activities are scheduled in GoldMine, other GoldMine users can determine the times you are available for meetings, conference calls, or appointments.
- **Delegate:** Use the Calendar to assign scheduled activities to others and track their progress.
- **Link activities with your contacts:** Create linked activities and unlinked activities. Linked activities associate with a Contact Record. By default, created activities link to the active Contact Record. GoldMine updates the information on a linked Contact Record to show the progress of these activities. When scheduling an activity not linked to a contact, clear the Link to selected contact option to remove the active contact's name from the Contact field.

Unlinked activities are not connected to any contact and are generally used for incidental events. We recommend use of unlinked activities be limited, since many of GoldMine's features will not operate when the activity is not linked to a Contact Record.

Scheduling and Completing Activities

About Scheduling Activities

Activities are time-specific or event-based actions linked to contacts (calls, appointments, letters) or other types of activities (To Do tasks or events assigned to users). GoldMine is designed to link contacts with scheduled activities which lets you schedule the activity on your calendar and on the contact's Pending tab. When you complete the activity, it is moved to the contact's History tab, creating a record of communication and activity.

Schedule activities using:

- The Calendar
- The Pending Tab
- The Schedule Menu

Activity types:

- **Call**
- **Next Action**
- **Appointment**
- **Literature Request**
- **Forecasted Sale**
- **Other Action**
- **To-Do**
- **Event**

Use the Schedule dialog box for Calls, Next Actions, Appointments, Other Actions, and Events to configure:

- **Details:** Update activity Name, Notes, Date, and Time.
- **Users:** Delegate a user or user group activity .
- **Resources:** Schedule configured resources such as conference rooms or company automobiles.
- **Free/Busy:** Scan the schedule for available time of the users selected in the Users tab.
- **Recurring:** Configure the activity as an ongoing event that occurs on a particular day of the week, month, or year, at the same time.
- **Filter/Group:** Select contacts you are scheduling the activity for based on a filter or group.

Use the Schedule dialog boxes for **Literature Requests**, **Forecasted Sales**, and **To-Dos** to configure each activity.

GoldAlarm can run and notify you of scheduled activities even when GoldMine is not open on your computer.

About Completing Activities

After completing a scheduled activity, the Calendar record is removed and a record is posted to the linked contact's history file indicating what was accomplished. Complete a scheduled activity from:

- The Contact record's Pending tab
- An Activity List's tabs
- The Calendar
- The Complete menu

Note: Use the Complete menu, to record any activity you complete, whether scheduled or unscheduled. For example, if a contact calls unexpectedly, make a notation in the history file, even though a call was unscheduled. In this situation, select the type of activity to complete from the Complete menu.

- Scheduled Calls
- Unscheduled Calls
- Message
- Next Action
- Appointment
- Sale
- Other Action
- Event
- To-do
- Correspondence
- Pending Activities

If more than one than one activity is of the same type, the **Complete Activity** dialog box appears to select the activity to complete.

Tip: Configure your Calendar to display completed activities. Right-click to display the local menu, then select **Activities**, or click the **Select Activities** button. The **Select Activities to View** dialog box appears. In the **Completed Activities** column, select each activity type to display.

About GoldAlarm

The GoldAlarm runs the alarm options in GoldMine even when you are not logged into the application. When scheduling an activity, you can select the Alarm option. Configure alarm settings in the **User Preferences>>Alarm** tab to pop up a window or post the alarm on the taskbar.

Two GoldAlarm options are available in the **Alarms** tab in **User Preferences**:

- **Place GoldAlarm icon on my desktop:** Lets you run the GoldAlarm.exe. The GoldAlarm monitors alarmed activities and notifies you even when GoldMine is closed.
- **Run GoldAlarm when Windows starts:** Runs the GoldAlarm.exe when Windows starts.

When GoldAlarm is running you see a taskbar notice if an activity is due and a GoldMine icon in the System Tray.

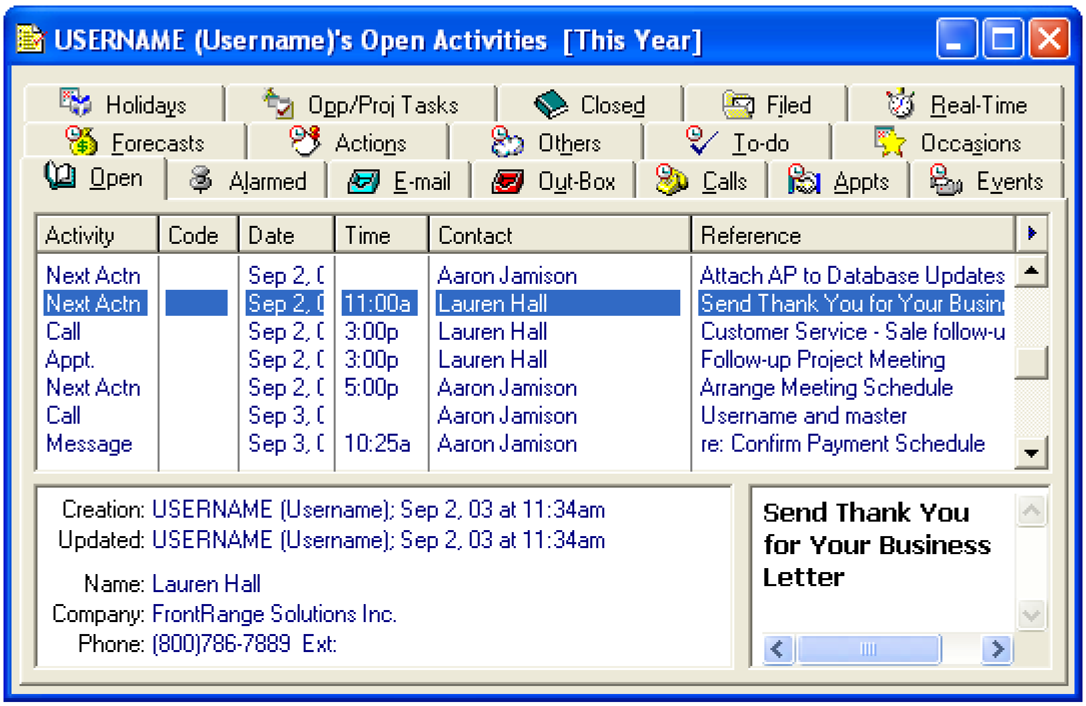
A B

A Taskbar notification of a GoldAlarm.
B GoldAlarm in the System Tray.

Using the Activity List

About the Activity List

The Activity List provides an alternative view for activities. View the pertinent details of an activity, display the contact record linked to a particular activity, use the auto-dialer to call the contact, complete the activity, and save vital reference information in the history file.



The Activity List displays activities related to a GoldMine user. Use it to view and modify your own activities and view and modify scheduled activities, completed activities, and e-mail for other GoldMine users.

You can leave the Activity List on the screen while working with other GoldMine functions. Select the **Window** menu to manage the size, position and arrangement of objects in GoldMine's work area.

- **Holidays:** Lists holidays selected in the Calendar tab of your User Preferences.
- **Opp/Proj Tasks:** Pending tasks in the Opportunity and Project Managers.
- **Closed:** Completed activities for the selected user.
- **Filed:** Completed GoldMine e-mail and Internet e-mail.
- **Real-Time:** Displays users' completed activities in the order they were completed. Useful for viewing the productivity of your entire staff in real time.
- **Forecasts:** Selected user's forecasted sales. The default date range for this display is All Dates.
- **Actions:** Selected user's Next Actions.
- **Others:** Selected user's Other Actions.
- **To-do:** Selected user's To-dos.
- **Occasions:** Lists special dates defined in your Calendar.
- **Open:** Types of pending scheduled activities.
- **Alarmed:** Displays pending, alarmed activities with available information about activity, code, date, time, contact, and reference for a specified date range.
- **E-mail:** Selected user's unanswered e-mail.
- **Out-Box:** Messages the user created but has not sent to recipients.
- **Calls:** Displays only the selected user's calls.
- **Appts:** Displays only the selected user's appointments.
- **Events:** Scheduled events with available information about date, days, contact, code, and reference.

Using the Activity List

The **Activity List** displays activities as a categorized list. Control actions to perform on activities through the local menus.

1. Select **View>>Activity List**. The **Activity list** window displays.

2. Select an activity:

- **Holidays:** Holidays selected in the Calendar tab of User Preferences.
- **Opp/ Proj Tasks:** Pending tasks in the Opportunity and Project Managers.
- **Closed:** All completed activities for the selected user.
- **Filed:** All completed GoldMine e-mail and Internet e-mail.
- **Real-Time:** All users' completed activities in the order they were completed. View staff productivity in real time.
- **Open:** All types of pending scheduled activities.
- **Alarmed:** Pending and alarmed activities, with associated information about activity, code, date, time, contact, and reference for a specified date range.
- **E-mail:** Only the selected user's unanswered e-mail.
- **Out-Box:** Only messages the user created but has not sent to the receiver(s).
- **Calls:** Only the selected user's calls.
- **Appts:** Only the selected user's appointments.
- **Events:** Scheduled events with available information about date, days, contact, code, and reference.
- **Forecasts:** Only the selected user's forecasted sales.
- **Actions:** Only the selected user's Next Actions.
- **Others:** Only the selected user's Other Actions.
- **To-do:** Only the selected user's To-dos.
- **Occasions:** Lists special dates defined in your Calendar.

3. To perform an action, such as completing a call or replying to an e-mail, select and activity and right-click. The local menu appears.
4. Select the action.
5. Reverse the sort order of the activities on the screen, click on the column title (exception is the Contact column).
6. Click **X** to close the window.

Sales Management

About Sales

Plan, schedule, and record sales. Individuals can forecast sales they are responsible to close. Managers can assign and track sales quotas.

GoldMine also provides the Opportunity Manager for a sales team to manage a complex sale composed of multiple components and participants.

Understanding Sales

A forecasted sale is an estimate to record the anticipated close date of a pending sale with one of your contacts. GoldMine stores potential sales information in the same database where it stores contact information.

When closing the sale, GoldMine moves the record into the contact's History tab. Scheduling and completing a forecasted sale is similar to scheduling and completing other types of activities. However, forecasted sales differ from other activities because they involve a product or service, an anticipated sale amount, and the probability of closing the sale.

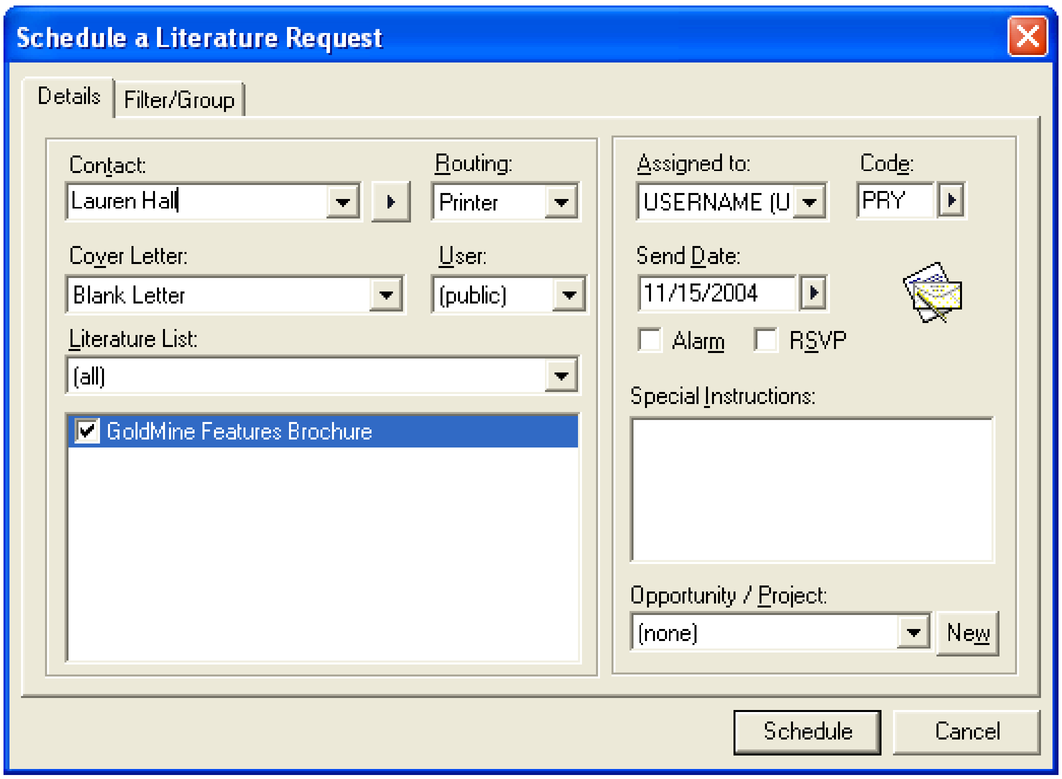
Some transactions involve one salesperson and one client for a relatively brief period, while others involve multiple components and require the coordinated efforts of a team over a relatively long sales cycle. View sales on these levels:

- **Individual sales:** Assigned to a single user and involve the sale of a product or service to a single contact. GoldMine provides tools to schedule, or forecast, an individual sale. The tools also help managers assign and analyze sales quotas.
- **Complex sales:** Involve multiple participants over a longer period and typically involve multiple components of products or services bundled as a package; individual sales can be planned, tracked, and recorded as part of a complex sale. A complex sale is known as an opportunity.

Scheduling Forecasted Sales

A forecasted sale is an estimate to record the anticipated close date of a pending sale with one of your contacts. Forecasted sales are different from other activities because they include a product or service, an anticipated sale amount, and the probability of the sale closing.

1. With the contact to scheduling for active on the screen, select **Schedule>>Forecasted Sale**. The Schedule a Forecasted Sale dialog box appears.



2. Click the **Contact** drop-down arrow to select from additional contacts; or click the right-facing arrow to launch the **Contact Search Center** and search for a new contact.
3. In the drop-down list, select the **Opportunity/Project** to associate the sale with; or click **New** to create a new opportunity or project.
4. Select the **Product** in the F2 Lookup list.
5. Select the **Code** in the F2 Lookup list.

Note: Activity codes can be used later to analyze specific sales activities. For example, if you code all your forecasted sales that were referrals with an activity Code of REF, you can determine how many referred sales you made during a specific period of time.

6. Select the **User** to schedule the forecasted sale for. The forecasted sale appears on the user's calendar.
7. Type the number of product **Units** the customer is expected to purchase.
8. Type the **Price** of each unit.
9. The **Amount** field calculates the total based on entries in the Units and Price.
10. Select the **Probability** in the F2 Lookup list. This field is expressed as a percentage.

Example: If the customer is evaluating the product, select 50%. If the customer is purchasing, select 90%.

11. Select the expected **Sale Date** in F2 Lookup graphical calendar.
12. Type special **Notes** related to the forecasted sale.
13. In the **Options** area, select **Link** to link to the current contact.
14. Select **RSVP** to be notified when the assigned user completes the sale.

Note: GoldMine posts RSVP messages on the Activity List when the sale completes by the assigned user. The RSVP record provides information about the outcome of the sale.

15. Select **Alarm** to warn you when the activity is due. After selecting this option, set the time using the F2 Lookup graphical clock. Select the alarm date on the lower text box.
16. Click **OK** to save and close the dialog box; or select the **Filter/Group** tab to schedule a forecasted sale to a selected group of records based on a filter or existing group.

Completing Forecasted Sales

Complete forecasted sales from the contact's Pending tab or the Activity List.

1. Right-click the sale and select **Complete**. The **Complete a Sale** dialog box appears.
2. Click the **Contact** drop-down arrow to select from additional contacts; or click the right-facing arrow to launch the **Contact Search Center** and search for a new contact.
3. Select the **Sale Date** using the F2 graphical calendar.
4. Select the **User** completing the action.
5. Select **Private** if the completed action will be available only to the selected user.
6. Select the **Product** in the F2 Lookup list.
7. In the drop-down list, select the **Opportunity/Project** to associate the sale with.
8. Select the **Code** from the F2 Lookup list.
9. Select the **Result** code from the F2 Lookup list.
10. Type the number of product **Units** sold.
11. Type the **Price** of each unit.
12. The **Amount** field automatically calculates the total based on the entries in the Units and Price.
13. Select **Closed Sale** or **Lost Sale** in the **Success** drop-down list.
14. Type any **Notes** related to the sale.
15. Select **Schedule a Follow-up** and the follow-up activity in the drop-down list.
16. Click **OK**. After completing a sale, GoldMine changes the forecasted sales record into a history record. View the record in one of these:
    - **Contact Record:** The sales record moves from the Pending tab to the History tab.
    - **Activity List:** The sales record moves from the Forecasts tab to the Closed tab. Also see the completed sales record in the Real-Time tab.
    - **Calendar:** If you configure the Calendar to show completed forecasted sales, the sale record appears in the Day tab or the Week tab on the date completed.

Using Analysis Tools

Using Forecasted Sales Analysis

Generate an analysis of forecasted sales activities in the database. To access this analytical data, select the **Forecast** tab of an open **Activity List**, and right-click. Select **Analyze**. The **Forecasted Sales Analysis** dialog box appears.

Also access the Forecasted Sales Analysis dialog box by selecting **View>>Analysis>>Forecast Analysis**.

The **Forecasted Sales Analysis** dialog box provides this information about projected sales or cash flows for individuals, groups of individuals, or the entire organization:

- **Analyze Users:** The users included in the analysis; your username displays by default. To add or change the analyzed users, click Select User(s).
- **Period:** Forecasted sales statistics divided into several periods. The top portion of the analysis screen shows forecasted sales statistics by week, for the next four weeks. Total amounts for the four week period display below the weekly section. Below the weekly section, forecasted sales for the next four months are broken down by month. The Beyond line includes forecasted sales scheduled to close after the next four months. Grand totals for the lower section display at the bottom of the screen.
- **# of Sales:** The total number of forecasted sales activities scheduled on the calendar for the period.
- **Forecasted:** The total dollar amount of sales scheduled on the calendar for the period.
- **% Prob.:** The average probability of a sale closing in this period (calculates by averaging values in the Probability field for all Forecasted Sales activities scheduled in the period).
- **Potential:** The expected value (or weighted value) of sales closing in this period. This value is determined by multiplying the total forecasted sales amount (Forecasted) by the average close probability (% Prob).
- **Select User(s):** The Select Users dialog box, from which you can select GoldMine users for activity analysis.
- **Code:** Forecasted sales with the entered activity code. Use wild cards to select multiple activity codes. By default, this field is blank to include all activity codes in the analysis.
- **Analyze:** Calculates the totals in the display.
- **Close:** Closes the dialog box.

Using Graphical Analysis

GoldMine's **Graphical Analysis** generates summary graphs of user activity data based criteria. Display data as a bar graph or a line graph. GoldMine can represent all activity for a period of time, or one of several types of activities. Graphs can also represent total activities, a comparison of all users, or selected users.

1. Select **View>>Analysis>>Graphical Analysis**. The **Graphical Analysis Options** dialog box appears.
2. The **Graphical Analysis Options** dialog box contains options determining the time range and activities to include in the graph:
    - **Completed:** Completed activities.
    - **Scheduled:** Scheduled activities.
    - **Totals:** Total activity data for specified users.
    - **Comparison:** Activity data for individual users as specified.
    - **Bar Graph:** Comparison of different periods or users.
    - **Line Graph:** Trends over time.
    - **Select User(s):** Accesses a list of users. If the Comparison option is selected under Graph Type and more than one user is selected, data for these users displays on one graph with color-coded entries to differentiate users.
    - **All Activities:** Scheduled or completed data for the activity types described below.

Activity types (graphical representations depend on whether Completed or Scheduled is selected under Graph Type):

- **Call Backs:** Graph for completed or scheduled Call Backs.
- **Messages:** Graph for completed or scheduled Messages.
- **Next Actions:** Graph for completed or scheduled Next Actions.
- **Appointment:** Graph for completed or scheduled appointments.
- **Sales:** Graph for completed or scheduled sales.
- **Others:** Graph for completed or scheduled other actions.

- **High End:** Type a numeric value corresponding to the uppermost number to display on the graph's vertical axis. For example, if experience shows users rarely schedule more than 30 appointments per week, entering 30 in the High End field generates a graph with a vertical axis ending at 30. The default, zero (0), lets GoldMine generate the high end value based on included data.
- **Low End:** Type a numeric value corresponding to the smallest number to display on the graph's vertical axis. For example, if experience shows that users have never scheduled fewer than five call backs per week, entering 5 in the Low End field generates a graph with a vertical axis starting at 5.0. The default is zero (0).
- **Activity Cd:** Generates the graph from activity records with the specified Activity Code. Use wild cards to select multiple activity codes. By default, this field is blank to include all activity codes in the graph.

Using Wild Cards in Activity and Result Code Fields

When making an entry in the Activity Code or Result Code fields on an analysis screen, GoldMine recognizes the asterisk * character as a wild card. When placed in these fields, an asterisk tells GoldMine "this position can contain any character." For example, entering S*S in the Activity Code field makes GoldMine calculate the analysis based on any activity code with S in the first and last positions of the Activity Code field. The second character in this field can be any character in the history or calendar records being analyzed. To calculate all activity codes that begin with S, enter S** in the Activity Code field.

- **Result Cd:** Type a Result Code to use as the basis for graph data. Only activity records with this Result Code are included in the graph. Use wild cards to select multiple activity codes. The default value for this field is blank to include all result codes in the generated graph. This field is available only if Completed is selected for Graph Type.

Using Wild Cards in Activity and Result Code Fields

When making an entry in the Activity Code or Result Code fields on an analysis screen, GoldMine recognizes the asterisk * character as a wild card. When placed in these fields, an asterisk tells GoldMine "this position can contain any character." For example, entering S*S in the Activity Code field makes GoldMine calculate the analysis based on any activity code with S in the first and last positions of the Activity Code field. The second character in this field can be any character in the history or calendar records being analyzed. To calculate all activity codes that begin with S, enter S** in the Activity Code field.

- **From Date:** Beginning date from which data is graphed. The default is the current date. This field is available only for a graph of scheduled activities; the ending date for scheduled activity graphs is always the current date.
- **To Date:** Ending date of data being graphed. The default is today's date. This field is available only for a graph of completed activities; the beginning date for completed activity graphs is always today's date.
- **From Time:** Beginning time included in the graph. The default is 12:00 am. When combined with the default To Time entry of 12:00 am, the graph displays data for a 24-hour period. This field is unavailable when generating hourly graphs for completed activities.
- **To Time:** Ending time included in the graph. The default is 12:00 am. When combined with the default From Time entry of 12:00 am, the graph displays data for a 24-hour period. This field is unavailable when generating hourly graphs for scheduled activities.
- **Show Grid:** Displays lines representing the horizontal axis of the graph (default). To generate a graph without this grid, clear the option.

3. Click **Graphs** to generate a graph. Based on your selection in the Graph Type area of the **Graphical Analysis Option** dialog box, you see a bar or line graph.
4. To print a graph, press **PRINT SCRN** to save the graph to the Windows Clipboard. Then use Paste to import the screen capture into another Windows application.
5. To return to the **Graphical Analysis Options** dialog box from the graph display, click **Options**.

Using Quota Analysis

Review the status of sales efforts by analyzing how sales team members are meeting quota for a specified period. This analysis uses data about the assigned quota, forecast sales, completed sales, and lost sales to derive a percentage of quota or a percentage of forecast sales attained by a salesperson. Because GoldMine analyzes data by period, a "track record" for each salesperson can be seen via listings over multiple periods.

1. Select **View>>Analysis>>Quota Analysis**. The **Quota Listing** dialog box appears.
2. The **Quota Listing** dialog box contains:
   - **User:** An entry for each user assigned a quota in the Quota Profile dialog box. Users have an entry for each period they were assigned a quota.
   - **Period:** The range of dates comprising the quota period. By default, GoldMine defines a quota period as one month, but the period can be changed in the Quota Profile dialog box.
   - **Quota:** The dollar amount of expected sales assigned to the user for the period.
   - **Forecast:** The total dollar amount of sales scheduled on the calendar for the period.
   - **Closed Sales:** The total dollar amount of sales recorded as Closed Sales when the forecasted sales activities are completed.
   - **Lost Sales:** The total dollar amount of sales recorded as Lost Sales when the forecasted sales activities are completed.
   - **Quota Period:** By default, GoldMine sorts quota entries by the calendar period for quota assignments. When a user has entries for multiple quota periods, the listings appear in chronological order (the oldest quota assignment appears first, and the most current quota assignment appears last).
   - **User:** Alphabetize quota entries by username. Multiple quota entries for a User appear in chronological order.
   - **Quota:** By default, GoldMine uses data in the Quota, Forecast, Closed Sales, and Lost Sales columns to calculate the percentage of quota achieved by the salesperson during the period. The percentage of successfully completed sales to assigned quota appears in the Closed Sales column, while the percentage of unsuccessful sales appears in the Lost Sales column.
   - **Forecast:** Calculates the percentage of forecasted sales against sales already completed during the period. The percentage of successfully completed sales to forecasted sales appears in the Closed Sales column. The percentage of unsuccessful sales appears in the Lost Sales column.
   - **New:** Access the **Assign new quota** dialog box to assign a quota to a user for a defined period.
   - **Delete:** Deletes the highlighted record for the salesperson.
   - **Edit:** Access the **Quota Profile** dialog box to modify a previously assigned quota.

3. Select **Close** to exit the dialog box.

Using Sales Analysis

GoldMine can generate a summary analysis of sales performance by one or more individuals or by sales teams. This analysis displays actual numbers and percentage-of-goal figures for quotas, forecast sales, and closed sales for a specified period of time.

1. Select **View>>Analysis>>Sales Analysis**. The **Sales Analysis** dialog box appears.
2. The **Select Users** dialog box appears on top of the **Sales Analysis** dialog box to select the users to analyze. Select users or groups of users if necessary.
3. Configure these options:
    - **From Date:** Sets the first date of the period to include in the analysis.
    - **To Date:** Sets the last date of the period to include in the analysis.

Note: To reflect an accurate quota amount, type From and To dates corresponding to the quota periods defined in the Quota Profile.

- **Activity Cd:** When an activity code is entered in this field, GoldMine includes only those forecasted sales and closed sales with the specified activity code. When the field is left blank, GoldMine includes forecasted sales and closed sales.
- **Result Cd:** When a result code is entered in this field, GoldMine includes only those forecasted sales and closed sales with the specified result code. When the field is left blank, GoldMine includes those forecasted sales and closed sales.
- **Select User(s):** Displays the Select Users dialog box to select GoldMine users for another analysis.
- **Analyze:** Calculates the totals in the display.

4. Click **Close** to close the Sales Analysis dialog box.

Using Statistical Analysis

The **Statistical Analysis of Completed Activities** dialog box displays completed activity information for an individual user, a group of users, or on a system-wide basis. The analysis of completed activities can provide useful insight into your performance or the performance of others in your organization.

1. Access the Statistical Analysis either:
   - From a user's completed activities on the **Activity List's Closed** tab. From the local menu, select **Analyze**.
   - By selecting **View>>Analysis>>Statistical Analysis**.

2. The **Statistical Analysis of Completed Activities** dialog box appears with these options:
   - **Select User(s):** Displays the **Select Users** dialog box to select GoldMine users for activity analysis. The list box below the button displays users to include in the analysis; your username displays by default.
   - **From Date:** Sets the first date of the period to include in the analysis.
   - **To Date:** Sets the last date of the period to include in the analysis.
   - **Activity Cd:** When an activity code is entered in this field, GoldMine includes only those completed activities with the specified activity code to be analyzed. When the field is left blank, all completed activities are included. For example, if you code your activities as billable or non-billable, enter the activity code for billable activities and get an analysis of these activities only.
   - **Result Cd:** When a result code is entered in this field, GoldMine includes only those completed activities with the specified result code to be analyzed. When the field is left blank, all completed activities are included.
   - **Phone Calls Analysis:** Total number of completed telephone calls of the specified type in the history file. Call-backs, outgoing calls, incoming calls and returned messages are shown, as well as the total duration of calls in each category. GoldMine displays the average duration of calls below the grand totals line for this section. Successful Calls shows the number and percentage of calls with a satisfactory outcome, while Unsuccessful shows the telephone calls without a satisfactory outcome.
   - **Activities Analysis:** Total number of completed activities in the history file, including to-do actions, received messages, appointments, and other activities.
   - **Sales Analysis:** Completed sales statistics. Closed Sales shows the total number of completed sales activities in the history file. The total value of each sale prints on the right. % of Calls Closed compares the number of completed sales as a percentage of completed call activities. The average sales value per completed call activity also displays.
   - **Analyze:** Calculates the totals in the display.
   - **Close:** Closes the dialog box
   - **Print:** Prints analysis results.

Using Territory Realignment

About Territory Realignment

Use GoldMine to reassign large groups of contacts and scheduled activities from one user to another. Use the **Territory Realignment Wizard** to manage dynamic sales territories, assign existing contacts to a new sales representative based on user-defined criteria, or change the contact base for a sales representative reassigned to a different territory. Then select settings for synchronization, updating the databases of sales representatives working in the field.

Use the Territory Realignment Wizard to:

- Assign a set of existing contacts to users based on a filter or group
- Reassign activities from one user to another user
- Globally update fields relevant to a territory realignment
- Set up synchronization to update the databases of remote users affected by the realignment

Important: We strongly recommend you back up data before performing territory realignment.

Note: To reassign contacts and scheduled activities, build a filter or group containing the contacts associated with the sales territory to be realigned. If no filter or group exists, create one now.

By default, GoldMine tracks and stores the filtered records included in the last synchronization session's transfer set for a remote site based on the Territory Realignment. By performing this filter qualification process, GoldMine automatically includes records with changes affecting Territory Realignment in the current synchronization session. This ensures the remote sites update on the next synchronization.

Using the Territory Realignment Wizard

Use the **Territory Realignment Wizard** to reassign contacts and scheduled activities.

1. Select **Tools>>Territory Realignment**. The **Territory Realignment Wizard** appears.
2. Click **Next**. The **Filter Selection** dialog box appears.
3. Select the filter or group in the drop-down list. To change the filters or groups to those of a different owner, select **<Filters of:>** or **<Groups of:>**. The **Select a User** dialog box appears. Select the user in the drop-down list and click **OK** to return to the filters and groups drop-down list.
4. Select the filter or group and click **Next**. The **Replace** dialog box appears.
5. You can replace the data in up to two fields and change the owner in the third.
6. In the **Replace** drop-down list select the field to replace.
7. In the **with** text box type or select the value to appear in that field.
8. In the third **Replace** field you can reassign record ownership. Select **Owner** in the drop-down list.
9. In the **with** text box select the new user or user group you are assigning ownership of the contacts to.

> **Note:** Territory Realignment changes the owner but not the curtaining level. To globally change record curtaining, see Technical Document 362, “Using the Global Replace Wizard” at **support.frontrange.com**.

10. Click **Next**.
11. To reassign the activities a particular user, select the user's name in the **Reassign the activities of this user** drop-down list.
12. In the **To this user** drop-down list, select the new user who will be responsible for the activities.
13. In the **Activities ranging from date** text box, type or select the starting date from the F2 graphical calendar.
14. In the **to date** text box, type or select the ending date from the F2 graphical calendar.

15. In the **Please select the activity types to reassign to the new user** area, specify the activities to be reassigned. View types.
    - **Call Backs:** Scheduled, outgoing telephone calls to make sometime in the future.
    - **Messages:** Scheduled e-mail messages.
    - **Next Actions:** Scheduled manual tasks such as sending literature, delivering samples, shipping products, and so on.
    - **Appointments:** Scheduled, date-specific meetings with contacts. Can also schedule conference calls.
    - **Literature Requests:** Scheduled fulfillment and shipping of brochures, price lists, and other mass-printed documentation to one or more contacts.
    - **Forecasted Sales:** Scheduled activities indicating the anticipated close date of a pending sale with one of your contacts.
    - **Other Actions:** Miscellaneous activities falling outside the other activity categories defined in GoldMine.
    - **To-do:** Priority-ranked activities without an activity date appear on a separate To-do list, rather than the date-based Scheduled Activities windows.

    Note: By default, GoldMine does not link To-Do activities. Each To-Do activity is forwarded daily.

    - **Event:** Date-specific activities scheduled for one or more days such as conferences and conventions.
16. Select **Reassign unlinked activities** to include the user's scheduled activities not linked to a contact record.
17. Click **Next**.
18. Click **Finish**.

Opportunity and Project Management

About the Opportunity and Project Managers

Sales processes often involve multiple contacts and multiple organizations. GoldMine offers two systems for handling the processes:

- **Project Manager:** Oversees complex, long-term projects with multiple components. Projects are usually not related directly to a particular sale, although they can be converted to an Opportunity when it becomes apparent that a project has become a sale.

  The Project Manager window contains relevant information needed to track a long-term project involving the same components and contacts as a large sales opportunity.

- **Opportunity Manager:** Lends itself to a complex sales process involving a group of users working as a team with multiple organizations and contacts. The sale may involve multiple products or services as a package deal where the customer purchases a part of the package but renegotiates other parts into a different package.

  The Opportunity Manager window contains relevant information needed to track a medium-to-long sales cycle involving multiple contacts, issues, and activities.

Use the Opportunity and Project Manager windows to view details of the opportunity or project from initial contact to a closed sale. The sales team can view summary and detailed information about forecasted sales and activities linked to the opportunity. As the project or opportunity progresses, a complete record of associated activities ensures the team is making a coordinated effort to complete the sale. The team can also see the decision makers and linked contacts in the project and act accordingly.

Customizing the Opportunity and Project Managers Properties

Opportunity and Project share the same table, fields, and user-defined fields. Modify the field labels or reorder and hide tabs of an opportunity listed in the Manager.

1. Select **View>>Sales Tools>>Opportunities**. The **Opportunity Manager** dialog box appears. (To customize Project Manager, click **Toggle to**).
2. Select a listed opportunity.
3. From the toolbar, click **Configure Opportunity/Project Manager**. The **Opportunity/Project Customization Properties** dialog box appears.
4. Click the **Fields** tab. Select from these options:
   - **New:** Create a new user-defined field on the Opportunity/Project Properties dialog box.
   - **Edit:** Edit a user-defined field.
   - **Delete:** Delete a user-defined field.
   - **Move Up:** Reposition the selected field above other fields.
   - **Move Down:** Reposition the selected field below other fields.

5. Click the **Labels** tab. Follow instructions on dialog box.
6. Click the **Tabs** tab. Select from these options:

- For each tab title listed, clear the associated checkbox to hide tab from view.
- **Move Up:** Reposition the selected tab above other tabs.
- **Move Down:** Reposition the selected tab below other tabs.
- **Reset:** Return the tabs to default order.

7. Click the **Options** tab. Select the checkbox to make this option available.
8. Click **OK**.
9. From the toolbar, click **Properties**. The **Opportunity/Project Properties** dialog box appears. Review your modifications.

Working with Opportunities

Using the Opportunity Manager

Use the **Opportunity Manager** to oversee complex sales involving many components. The **Oppty** tab in the lower pane of the Contact Record displays the opportunities associated with the contact.

1. Select **View>>Sales Tools>>Opportunities**. The **Opportunity Manager** window appears.
2. Use the toolbar to perform general actions and the local menu for other actions.
3. To view the opportunities assigned to a user, user group, or (all), select the user in the **Manager** drop-down list.
4. To narrow displaying opportunities, select the **Status** in the drop-down list. The results are based on win/lose processing and not on any user-defined status options assigned to the opportunity.
5. To create a new opportunity, right-click the upper pane and select **New**. See Creating Opportunities.
   - **Influencers:** Contacts associated with the opportunity.
   - **Products**: Products or services you are pursuing as a sales opportunity.
   - **Tasks:** Schedule a plan of action with specific tasks assigned to users or user groups.
   - **Team:** GoldMine users and contacts contributing to the opportunity.
   - **Issues:** Possible roadblocks to the successful completion of the opportunity.
   - **Notes:** Type free-form notes related to the opportunity.
   - **Competitors:** Create a list of companies that are competitors for the sale.
   - **Details/Links:** Simple details and allows you to link documents.
   - **Pending:** Scheduled activities for the opportunity.
   - **History:** Completed activities for the opportunity.

> **Tip:** To sort opportunities or projects in alphanumeric order by one of the column criteria, click the column label. For example, to list records in alphabetical order by company name, click the Company label.

6. To complete an opportunity, select the opportunity, right-click, and select **Win** or **Lose**.
7. To close the window, click the **X** in the upper right-hand corner.

Using the Opportunity Wizard

Use the **Opportunity Wizard** to create a sales opportunity and configure the basic information .

1. Select **View>>Sales Tools>>Opportunities**. The **Opportunity Manager** window appears.
2. Right-click the upper pane and select **New**. The **New Opportunity Prompt** dialog box appears.
3. Select **Yes**. The **Opportunity Wizard: Welcome** dialog box appears. (If you click **No**, the **New Opportunity** dialog box appears.)The Company defaults to the active Contact Record. Click the Search button to launch the **Contact Search Center**. Select the new Contact Record.
4. Contacts and additional contacts available in the **Contacts** drop-down list are associated with the selected company. Select the contact for the opportunity and click **Next**. The **Description** dialog box appears.
    - **Enter or select a description for the opportunity below:** Type or select a name from the F2 Lookup list.
    - **Templates of User:** Select the user or user group in the drop-down list.
    - **Please select a template of the selected user:** Select in the drop-down list. The templates displayed are owned by the user selected in the Templates of Users field.

5. Click **Next**. The **Overview** dialog box appears.
    - **Manager:** Select the owning user or user group in the drop-down list.
    - **Code:** Type or select a code from the F2 Lookup list.
    - **Probability:** Type or select the percent probability of success.
    - **Stage:** Type or select the stage the opportunity is beginning at. This field commonly defaults to 10 - Initial Contact.
    - **Source:** Type or select the source of the opportunity from the F2 Lookup list.
    - **Start Date:** Type or select the starting date from the F2 graphical calendar.
    - **Close by:** Type or select the ending date from the F2 graphical calendar.

6. Click **Next** through the wizard dialog boxes. Click **New** or **Edit** in each.

Dialog box	For configuration details see:
Influencers	Editing Influencers
Forecasted Sales	**Scheduling Forecasted Sales**
Team Members	**Editing Teams**
Issues	**Editing Issues**
Competitors	**Editing Competitors**
Details/Links	**Editing Details/Links**

7.

8. Click **Next**. The **Finish** dialog box appears.
   - **Manager:** Select the user or user group in the drop-down list.
   - **Probability:** Type or select the percent probability of success from the F2 Lookup list.
   - **Total Revenue:** The field auto-populates based on data entered in the **Forecasted Sales** dialog box.
   - **Close by:** Select the closing date from the F2 graphical calendar.

8. Click **Finish**. The opportunity is added to the upper pane of the Opportunity Manager.

Note: For more information see Using the Opportunity Manager.

Creating Opportunities

1. Select **View>>Sales Tools>>Opportunities**. The **Opportunity Manager** dialog box appears.
2. Use the **New** button on the Opportunity Manager toolbar or right-click and select **New** from the local menu. The **New Opportunity Prompt** dialog box appears. If you click:
    - **Yes:** The **Opportunity Wizard** appears. (See Using the Opportunity Wizard)
    - **No:** The **New Opportunity** dialog box appears. (Continues with the next step)

3. Configure these settings:
    - **Company:** The company in the current Contact Record populates this field. To change the contact, click the Search button and select a company from the Contact Search Center.
    - **Contact:** Select the primary or additional contact in the drop-down list. Available contacts are those associated with the selected company.
    - **Type:** Defaults to Opportunity and cannot be changed in this dialog box.
    - **Templates of User:** Select the user who is the owner of the template.
    - **Please select a template of the selected user:** Select a template in the drop-down list. (See Creating Opportunity Templates)

4. Click **OK**. The **Opportunity Properties** dialog box appears.
    - **Opportunity:** Change the opportunity name as needed.
    - **Company:** Defaults to the company selected on the previous dialog box. Type a new company name, as needed.
    - **Manager:** Select the user who will be the opportunity manager in the drop-down list.
    - **Code:** Select the opportunity code by typing or clicking the F2 Lookup arrow.
    - **Status:** Type or select from the F2 Lookup list.
    - **Stage:** Type or select from the F2 Lookup list.
    - **Source:** Type or select the opportunity source from the F2 Lookup list.
    - **Units:** Type the number of units forecast for the opportunity.
    - **Price:** Type the price per unit.
    - **Probability:** Type or select the percentage from the F2 Lookup list.
    - **Forecast:** Automatically calculates a forecasted sale amount based on the Units and Price; or type or select the forecasted sale amount from the F2 Lookup list.
    - **Closed Amt:** Updates with the final amount of a successfully closed sale based on the forecasted amount.
    - **Start Date:** Select the date the opportunity starts from the F2 graphical calendar.
    - **Close by:** Select the date the opportunity should end from the F2 graphical calendar.
    - **Actual Close:** Defaults to the date displayed in End Date. Updates when the opportunity is actually completed.

5. Click **OK**. The display returns to the Opportunity Manager window with your new opportunity in the upper pane.
6. Each tab must be updated manually. See Using the Opportunity Manager.

Working with Projects

Using the Project Manager

Use the **Project Manager** to oversee complex projects involving many components.

1. Select **View>>Projects**. The **Project Manager** window appears.
2. Use the toolbar to perform general actions and the local menu for other actions.
3. To create a project, right-click the upper pane and select **New**. See Creating Projects.
4. Manage project details using the tabs:
    - **Contacts:** Contacts associated with the project.
    - **Tasks:** Schedule a plan of action with specific tasks assigned to users or user groups.
    - **Team:** GoldMine users and contacts contributing to the project.
    - **Issues:** Possible roadblocks to the successful completion of the project.
    - **Notes:** Type free-form notes related to the project.
    - **Details/Links:** Displays simple details; lets you link documents.
    - **Pending:** Scheduled activities for the project.
    - **History:** Completed activities for the project.

5. To close the window, click the **X** in the upper right-hand corner.

Using the Project Wizard

The **Project Wizard** takes you through the process of creating a project, configuring basic information, and setting the initial information in the tabs. The Projects tab on the Contact Record displays the projects associated with the contact.

1. Select **View>>Projects**. The **Project Manager** window appears.
2. Right-click the upper pane and select **New**. The **New Project Prompt** dialog box appears.
3. Select **Yes**. The **Project Wizard: Welcome** dialog box appears. The Company defaults to the active Contact record. Click the search button to launch the **Contact Search Center**. Select the contact.
4. The contacts and additional contacts available in the **Contacts** drop-down list depend on the company selected. Select the contact for the project and click **Next**. The **Description** dialog box appears.
   - **Enter or select a description for the project below:** Type or select a name from the F2 Lookup list.
   - **Templates of User:** Select the user or user group in the drop-down list.
   - **Please select a template of the selected user:** Select in the drop-down list. The templates displayed are owned by the user selected in the above field.

5. Click **Next**. The **Overview** dialog box appears.
   - **Manager:** Select the owning user or user group in the drop-down list.
   - **Code:** Type or select a code from the F2 Lookup list.
   - **Stage:** Type or select from the F2 Lookup list the stage the project begins at.
   - **Source:** Type or select from the F2 Lookup list.
   - **Start Date:** Type or select from the F2 graphical calendar.
   - **Close Date:** Type or select from the F2 graphical calendar.

7. Click **Next**. The **Influencers** dialog box appears. See Editing Influencers for configuration details.
8. Click **Next**. The **Team Members** dialog box appears. See Editing Teams for configuration details.
9. Click **Next**. The **Issues** dialog box appears. See Editing Issues for configuration details.
10. Click **Next**. The **Details/Links** dialog box appears. See Editing Details/Links for configuration details.
11. Click **Next**. The **Finish** dialog box appears.
    - **Manager:** Select the user or user group in the drop-down list.
    - **Code:** Type or select the code from the F2 Lookup list.
    - **Stage:** Type or select the beginning stage from the F2 Lookup.
    - **Close by:** Select the closing date from the F2 graphical calendar.

12. Click **Finish**. The project is added to the upper pane of the Project Manager.
13. For more information see Using the Project manager.

Creating Projects

1. Select **View>>Projects**. The **Project Manager** dialog box appears.
2. Use the New button or right-click and select **New** from the local menu. The **New Project Prompt** dialog box appears. If you click:
   - **Yes:** The **Project Wizard** appears. (See Using the Project Wizard)
   - **No:** The **New Project** dialog box appears.

3. Configure these settings:
   - **Company:** The company in the current Contact Record populates this field. To change the contact, click the Search button to the right and select a company from the Contact Search Center.
   - **Contact:** Select the primary or additional contact in the drop-down list.
   - **Type:** Defaults to Project and cannot be changed in this dialog box.
   - **Templates of User:** Select the user who is the owner of the template to use.
   - **Please select a template of the selected user:** Select a template in the drop-down list. (See Creating Project Templates)

4. Click **OK**. The **Project Properties** dialog box appears.
   - **Project:** Type or select the project name from the F2 Lookup list.
   - **Company:** Type the new company name if the name in the field is not the correct company name.
   - **Manager:** Select the project manager in the drop-down list.
   - **Code:** Select the project code by typing or selecting an entry from the F2 Lookup list.
   - **Status:** Type or select.
   - **Stage:** Type or select.
   - **Source:** Type or select the source of the project from the F2 Lookup list.
   - **Start Date:** Select the date the project starts from the F2 graphical calendar.
   - **End Date:** Select the date the project should end from the F2 graphical calendar.
   - **Actual End:** Defaults to the date displayed in the End Date. Updates when the project is completed.

5. Click **OK**. The display returns to the Project Manager window with your new project listed in the upper pane.
6. Each tab must be updated manually. See Using the Project Manager.

Reporting

About Reporting

GoldMine provides analysis reports for reviewing metrics. For example, calculate statistics based on activities scheduled and completed by GoldMine users.

Select from over 50 standard GoldMine reports or design a custom report tailored to meet your organization's needs. If using GoldMine Corporate Edition with an E-license, you can use Answer Wizard reports.

A report can include data from these tabs:

- **Contact1:** Top four quadrants of the Contact Record and the Summary and Notes tabs.
- **Contact2:** Fields tab and user-defined fields.
- **ContSupp:** Contacts, Details, Referrals, and Links.
- **Cal:** Calendar and Pending tab.
- **ContHist:** History tab.
- **OpMgr:** Opportunity Manager.

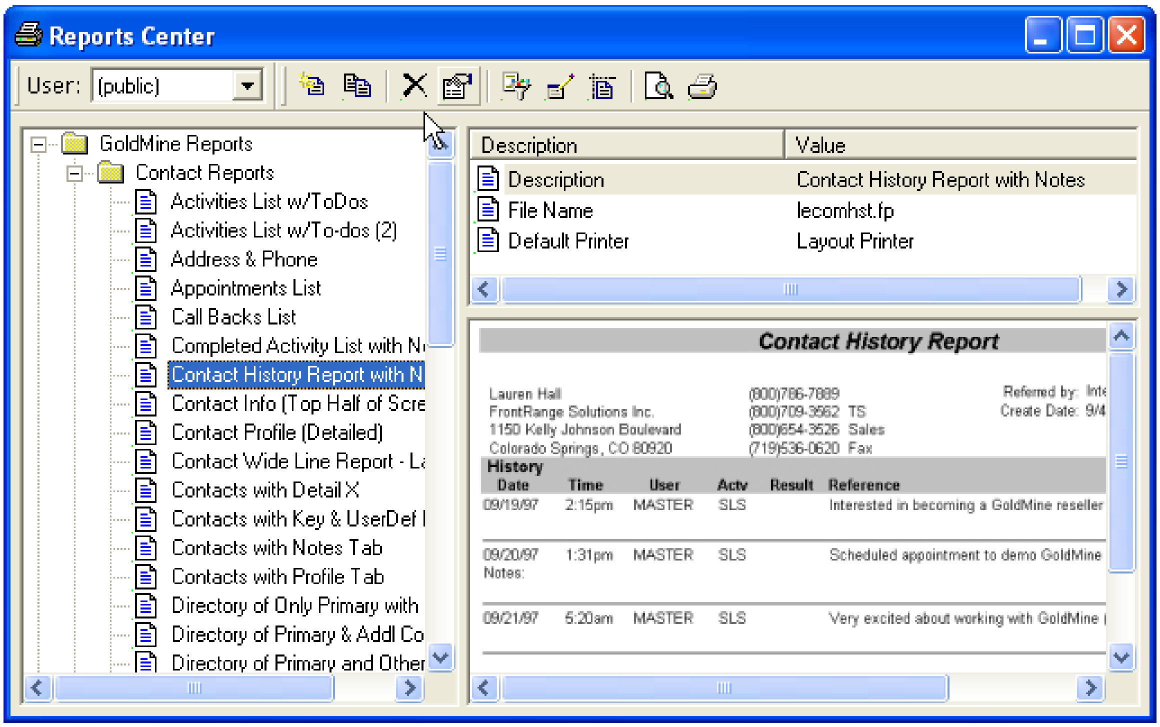
Special fields can include:

- **Dialog:** Prompts users to input data used within the report.
- **Calculations:** Calculates the total or performs other mathematical operations.
- **Macros:** Places multiple fields in the report. Macros are like those used within GoldMine/Microsoft Word templates.

GoldMine Reports

About the Reports Center

The Reports Center provides easy visual access to several reporting options available within GoldMine.



To access the Reports Center, select **File>>Customize Reports**. The Reports Center appears and offers easy-management features:

- Reports Center toolbar
- A tree-view pane listing the selected user's reports
- A description of the selected report
- A .jpg preview of the selected GoldMine Report (system reports do not have .jpg previews)

Report Types

- **GoldMine Reports**: Generate reports from the data in your databases. Using the report generator, select data from your contact database and then present the information in an easy-to-read format for printing or displaying on screen. Approximately 100 reports are included when GoldMine is installed. Use GoldMine reports to generate reports, clone reports, edit reports, and create reports.

The easy to run standard reports, which cover most aspects of the database, are organized in the following categories and access only the listed tables:

- **Contact Reports:** Contact1, Contact2, ContHist, ContSupp, Cal, OpMgr, OpMgrFld.
- **Calendar Printouts:**Cal, Contact1, Contact2, ContHist, Cal, OpMgr, OpMgrFld.
- **Analysis Reports:** Contact1, Contact2, ContHist, Cal, OpMgr, OpMgrFld.
- **Labels and Envelopes:** Contact1, Contact2, ContHist, ContSupp, Cal, OpMgr, OpMgrFld.
- **Other Reports:** Users, Lookup, Filters, Reports, PerPhone, Forms, ScriptsW, OpMgr, OpMgrFld, Mailbox.

Note: We recommend using the Answer Wizard Reports (available through a Corporate Edition custom installation).

- **Crystal Reports**: Crystal Reports you created and linked to GoldMine. The Crystal Reports node on the tree view is available only when you have the necessary Crystal Reports files on your computer. (If you are running Crystal 9 the files needed are different from those needed if running previous versions of Crystal. Contact Support for the current information.)
- **System Reports:** The GoldMine "Output to printer" reports are available from the various GoldMine local menus. The System Reports list is only available on the tree view when the selected user is (public).

Using the Reports Center

GoldMine's report generator organizes data from your contact databases into a report and sends the report to an on-screen display or a selected printer. Select from approximately 100 standard templates provided by GoldMine to meet reporting and printing needs. For special reports, a developer can use GoldMine's form designer to create custom report templates.

1. Select **File>>Customize Reports**. The Reports Center appears.
2. From the **User** drop-down list, select **(public)** to see the standard reports. Select a user if the user has created a custom report.
3. In the report name tree-view area, expand the report types:

- **GoldMine:** GoldMine Reports.
- **Crystal Reports:** Crystal Decisions Crystal Reports created and linked to GoldMine.
- **System Reports:** GoldMine "Output to printer" reports available from GoldMine local menus.

4. In the report tree-view pane, expand report categories:

- **Contact Reports:** Displays Contact Listing reports.
- **Calendar Printouts:** Displays Activity List reports.
- **Analysis Reports:** Displays analytical reports:

Types of Analysis Reports	Description
Contact record	Information about activities scheduled and completed with the contact. These statistics show the state of your relationship with the contact, such as the amount of time you are dedicating to the contact and the amount of sales generated by the contact.
Completed activity	Completed activity information of an individual user, a group of users, or on a system-wide basis. This analysis provides insight into your or others' performance.
Forecasted sales	A summary analysis of sales performance by one or more individuals or sales teams; displays actual numbers and percentage-of-goal figures for quotas, forecast sales, and closed sales for a period of time.
Graphical analysis of activities	Summary graphs, displayed as a bar or line graph, of user activity data based on criteria. Graphs represent activity for a defined period of time or one of several defined types of activity, and also represent total activities, a comparison of all users, or selected users.
Leads	Calculated profitability of marketing sources or groups of campaigns. GoldMine reports the total number of leads generated from each seminar, advertisement, or trade show (source), the total sales volume, and potential sales pending from each source value. Identify the most effective lead sources in terms of total leads or total sales volume generated.

Quota	The actual performance of individuals against assigned quotas for a specified period. This analysis uses data about the assigned quota, forecast sales, completed sales, and lost sales to derive a percentage of quota or a percentage of forecast sales attained by a salesperson. A track record for each salesperson can be seen via listings over multiple periods.

- **Labels and Envelopes:** Displays templates that print data on special paper sizes.
- **Other Reports:** Displays six special report templates.

5. Select the report to generate.

Note: Depending on the selections made in the Reports Categories area, reports available in the Report Description list vary. Access a local menu for each report. Highlight the report and right-click. The Reports Center local menu appears. (Also use the Reports Center toolbar.)

6. Within the Reports Center, work with reports using these functions:
   - Report Properties
   - Creating Reports
   - Cloning Reports
   - Editing Report Layouts
   - Previewing GoldMine Reports
   - Printing Reports
   - Viewing Saved Reports

7. Click **X** to close the Reports Center.

About Report Properties

Use the Report Properties dialog box to specify descriptive and file names, select sorting fields and levels, and set data and date options. The Sorting and Options information can be altered before running or printing a report and will change the information in the report based on changes made on these tabs.

Click the **Report Properties** button on the Reports Center toolbar for these tabs:

- **Profile:** Report's name, owner, notes, file name, and printer.
- **Sorting:** Report's sort levels and fields.
- **Options:** Report's data and date inclusion options.

Running Crystal Reports from the GoldMine Reports Center

To use the Crystal Reports in the Reports Center, perform the following:

- Add Crystal Reports to the Reports Center
- Configure Crystal Reports Data Source Names

Then:

1. Select **File>>Customize Reports**. The **Reports Center** appears.
2. Select the owner of the report in the **User** drop-down list.
3. In the tree-view report list, expand **Crystal Report**.
4. To configure the report sorting, right click the report name and select **Sorts**. The **Report Properties** dialog box, **Sorting** tab appears. Select the sort field for your report. Crystal Reports limits to one sort level.
5. To configure the report option, right click the report name and select **Options**. The **Report Properties** dialog box, Options tab appears. Add the Crystal Record Selection Expression and Group Selection Expression to filter results before running the report.
6. To review the report before printing, right-click and select **Print**. The **Print Report** dialog box appears.
7. Select **Window** in the **Print Report Output to** area and click **OK**. The report opens in an abbreviated Crystal window.
8. To update the values in the report based on sorting or options settings, click **Refresh** .
9. Click **Print** .
10. Click the **X** to close the report window.

Working with Reports

Creating Reports

Create GoldMine Reports from a blank template or clone the template closest to your desired results and edit it. Creating a report from a blank template is not recommended for beginners, but cloning reports and editing reports is.

1. Select **File>>Customize Reports**. The **Reports Center** appears.
2. Click the **New Report** button  or right-click inside the report name tree-view pane and select **New**. The **Report Properties** dialog box appears.
3. When creating a report, click the Profile tab:
   - **Report Description:** The name to display in the Report Center.
   - **Owner:** Select the report owner in the drop-down list.
   - **Notes:** Type extra details about the report and report variables.
   - **Report Filename:** Type or select the file name of the report template. The reports store in the Reports folder of the main GoldMine directory. Report templates should end with the extension .fp. For example, MyReport.fp.

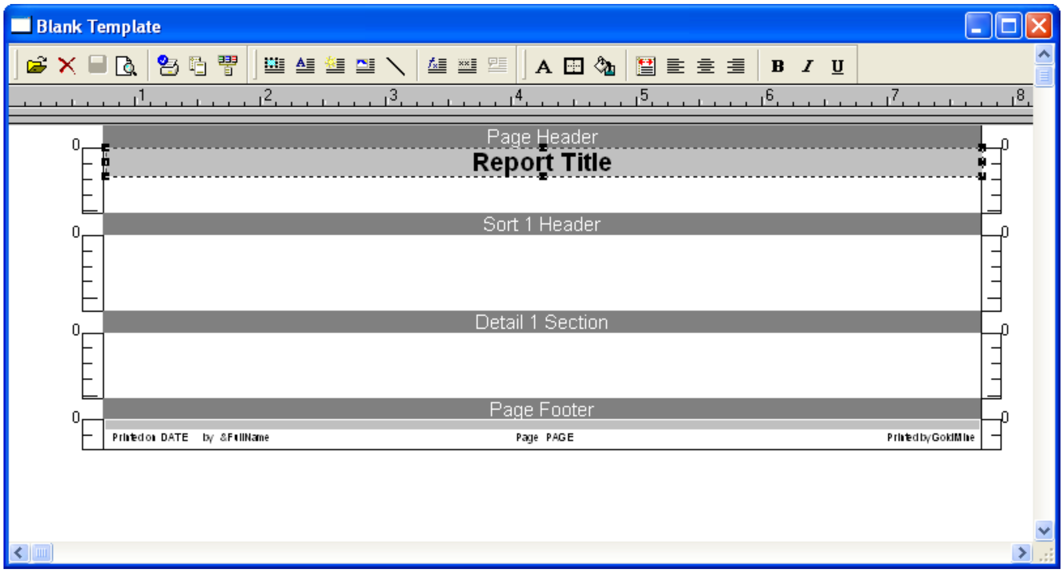
Important: If you do not give the report a unique file name at this stage of the process, it does not save.

- **Default Printer:** Select one:

- **Selected Printer:** The device designated in the Output to section of the Reports Menu
- **Layout Printer:** The special printer selected in GoldMine’s layout mode

4. Click **OK** on the **Profile** tab to return to the **Reports Center**. The new report is now listed in the report list.

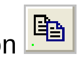
5. Highlight the new report and click the **Layout** button  or right-click and select **Layout**. A blank template appears.



6. Use the **Report Layout** local menu and the **Layout** toolbar to format your GoldMine Report. See Editing Reports.

Cloning Reports

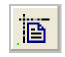
Identifying an existing report that is closest to meeting your needs and then cloning it is the most efficient way to create new GoldMine reports. We recommend you clone existing reports before modifying them so you always have a clean copy available for future edits.

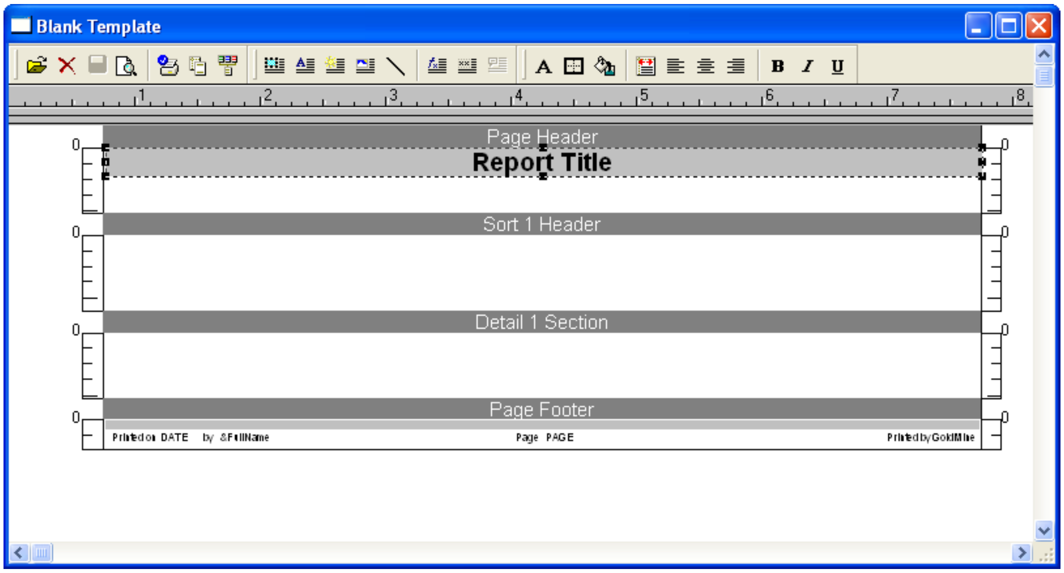
1. Select **File>>Customize Reports**. The **Reports Center** appears.
2. Select the user whose report you are cloning in the **User** drop-down list. Select **(public)** if the report is publicly owned.
3. Select the report to clone and click the **Clone Report** button  or right-click the report name tree-view pane and select **Clone**. The **Report Properties** dialog box appears.
4. Select the Profile tab and configure:
    - **Report Description:** When cloning a report, the description defaults to Copy of <report name>. Type a new and unique name for the report to replace the default.
    - **Owner:** Select the report owner in the drop-down list.
    - **Notes:** Type extra details about the report and the report variables.
    - **Report Filename:** Type a new, unique name for the report template. Reports store in the Reports folder of the main GoldMine directory. Report templates should end with the extension .fp.

Important: If you do not give the report a unique file name at this stage of the process, it does not save.

- **Default Printer:** Select one:
    - **Selected Printer:** The device designated in the Output to section of the Reports Menu
    - **Layout Printer:** The special printer selected in GoldMine's layout mode.

5. Click **OK** on the **Profile** tab to return to the **Reports Center**. The new report is now listed in the report list.

6. Highlight the new report and click the **Layout** button  or right-click and select **Layout**. The report layout appears.



7. Use the **Report Layout** local menu and **Layout** toolbar to format your GoldMine Report. See Editing Reports in the online Help.

Editing Report Layouts

The reports layout window displays a report's existing labels, fields, and sections for editing. Edit the report parameters, pages, filters, and break fields. Within the report layout, add, remove, or change parts of the report.

Tip: Before changing standard GoldMine reports, clone the report to preserve original settings.

To edit a field, label, or section, right-click on it and select **Edit**. Available options depend on the type of item you are editing.

Tip: When editing, the default report layout displays XXXX instead of field names. To display the field names and facilitate editing, right-click and select **Edit>>Show Field Names**. The fields names display in the layout window.

To quickly edit Reports, use the GoldMine Reports Shortcut Keys and the Layout local menu or the Layout toolbar.

Customize the GoldMine Reports by:

- **Cloning a Template**
- **Creating a New Template**

Refine the reports by:

- **Editing Report Parameters**
- **Editing Report Pages**
- **Inserting Sections**

- **Inserting Fields**
- **Editing Fields**

These settings also determine the information and the order it displays in the report:

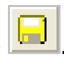
- **Filters:** Determines the information included in the report; apply filters on a global level or to a report section.
- **Break Fields:** Manages the grouping of report information.

Previewing GoldMine Reports

Previewing a GoldMine Report to check report results before printing or to view information without printing the entire report.

1. Use one of these methods:
   - In the Reports Center, configure the Report Properties to return the desired results and click the **Print** button on Reports Center toolbar. The **Print Report** dialog box appears. Configure the dialog box and select **Print Report Output to Window**. The Preview window appears with the data in the report.
   - When working in the GoldMine Report layout, click the **Preview** button on the toolbar. The Preview window appears with data in the report.

2. To print the report, right-click and select **Print**. The **Print Pages** dialog box appears. Type the first and last pages to print and click **OK**.

3. To save a report with the previewed data, click **Save** .

Printing Reports

Select and print an existing report by:

- Selecting **File>>Print a Report**. The **Print Report** dialog box appears.
- Selecting **File>>Customize Reports**. The **Reports Center** dialog box appears. Select the report to print and click **Print** on the **Reports Center** toolbar. The **Print Report** dialog box appears.

1. In the **Print Report** dialog box, select the report **Type** in the drop-down list. Select **GoldMine** or **Crystal Reports**.
2. In the **Category** drop-down list, select the report category to select from:
   - Contact Reports
   - Calendar Reports
   - Analysis Reports
   - Labels and Envelopes
   - Other Reports

3. In the **User** drop-down list, select the owning user of the report to print. If it is a public report, select (public) in the drop-down list.
4. In the **Report** drop-down list, select the report name.
5. Determine the contacts against which the report is run:
   - **Current Contact Only:** Prints the report based on the active Contact Record.
   - **All contacts in the following filter or group:** Selects ALL Contact Records to generate the report for the entire database (this can be time consuming), or select a predefined filter or group.

6. In the **Print Report Output To** area, select from:
   - **Window:** Generates the report and displays data in a report Preview window.
   - **Printer:** Generates the report and sends it to your designated printer.

7. Click **OK** to generate the report.

Saving Reports with Data

After previewing a report with specified Report Properties, save report results as a file and access the information later.

1. In the Report Center, configure the Report Properties and preview the report.
2. Click **Save** . The **Save the Report to a Disk File** dialog box appears.
3. Select the location.
4. Type a **File name**.
5. Select **Native Format (*.FRC)** in the **Save as type** drop-down list.
6. Click **OK**. The report saves to that location.
7. To view a saved report, click **View saved report** on the **Report Center** toolbar.

Sorting Report Data

Present data in order of selected field(s). GoldMine provides 3 levels of sorting for each report. For example, if you select Company as the first sort field, GoldMine orders all the records in the report alphabetically by company name. However, if you select Zip as the first sort field, GoldMine lists records by ZIP code.

GoldMine queries the database in the most efficient way available. If you set up a multilevel sort, or a single-level sort on a field not already indexed, GoldMine builds a report sort table. This additional step lets other users access GoldMine data while the report is printing and also speeds the printing process.

Note: The **Sorts** option is only available for Contact Reports, Analysis Reports, and Other Reports.

1. In the **Reports Menu** dialog box, highlight the report, then click **Report Sorts**.
2. The **Report Properties** dialog box appears. Select the **Sort Orders** tab.
3. Select a second level of sorting for those records having the same primary sort field. For example, if you select **Company** for the Primary Sort, and the Secondary Sort is **Contact**, GoldMine first orders records by company name. When 2 records have the same company name, GoldMine sorts them alphabetically by contact name.
4. Select a Tertiary Sort field to order records by the third sort field when the first and second level sort fields are identical. For example, if the first and second-level sorts are **State** and **City**, and the third level sort is **Zip**, GoldMine orders records by Zip entries only when 2 or more records have the same City and State values.

   Note: Without a second- or third-level sort, GoldMine orders records with the same first-level sort values by the records' creation date and time. Listing records by entry order is known as the natural order of records.

5. In the **Start at** field, specify the beginning value of a range defining record order within the selected sort level.
6. In the **End at** field, specify the end of the range.

   If **Start at** and **End at** are blank, **(all)** appears to the right of the sort level database and field, and GoldMine sorts all records in ascending order.

   Example:

   Primary Sort: Contact1->Lastname (all): The first level sort is ordering all records by the Lastname field of the Contact1 database in alphabetical order. When selecting a Start at value and an End at value, GoldMine displays (range) to the right of the sort level database and field.

7. Click **OK**.

Viewing Saved Reports

Save reports with data (.frc) and view them later.

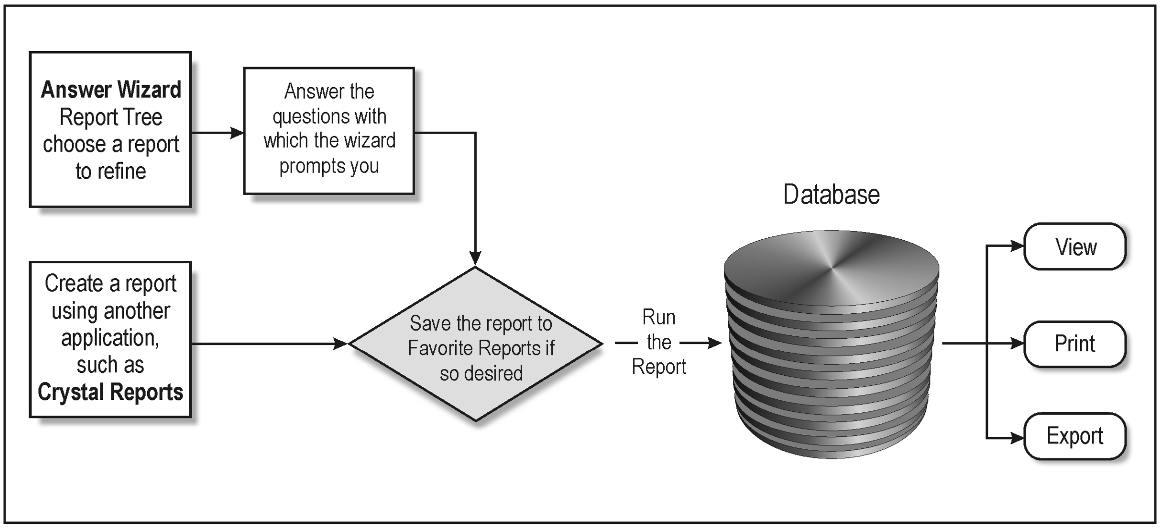
1. In the Reports Center, click **View saved report** . The **Open** dialog box appears.
2. Browse to the location of the *.frc file you are viewing.
3. Select the file and click **Open**. The report opens in a GoldMine report preview window.

Answer Wizard Reports

About Answer Wizard Reports

Important: Information about using the Console is available from the Help menu in the application.

Answer Wizard is a reporting tool letting users run detailed reports about company issues and trends. When selecting a report from the Answer Wizard tree, the wizard prompts you to answer questions related to the output of your report, such as content parameters and printing options. Answer Wizard may prompt you to answer report-specific questions, such as date and time ranges, priorities, and so on. The wizard then runs these specifications against information in your database and returns the results.



If using GoldMine with a SQL database, Answer Wizard reports provide a quicker way to produce reports based on GoldMine data. Select from a variety of predefined Answer Wizard reports. The Answer Wizard is installed when you select Management Intelligence during a custom installation of GoldMine using an E-license.

Note: Also install Crystal Reports and create your own reports. The Crystal Reports installation file is on your GoldMine Corporate Edition CD-ROM.

The Answer Wizard provides independent online Help for configuring and using it.

Select from these report categories:

- Account/Contact Information
- Personal and Team Calendars
- Past Activities
- Sales Analysis
- Other Analysis

Note: In a network environment, Answer Wizard must be installed locally (on the computer of those individuals using the reports).

To launch the Answer Wizard, click **Start** on the Window taskbar and select **Programs>>GoldMine>>Answer Wizard**.

Using Answer Wizard

Important: Information about using the Console is available from the Help menu in the application.

1. Click **Start** on the Windows taskbar and select **Programs>>GoldMine>>Answer Wizard**. The **Answer Wizard** appears.
2. If necessary, click **Preferences** to configure database settings and login information.
3. Expand the tree and select the report you are running. Click **Next** to work through the wizard.

Synchronization

About Synchronization

Synchronization is a process where one GoldMine system exchanges information with another GoldMine system through a Local Area Network (LAN), Wide Area Network (WAN), or the Internet. Organizations with employees in distant offices and in the field who can link their GoldMine systems to communicate effectively and remain dynamically connected.

Synchronization is also used when exchanging data between a GoldMine system and Microsoft Outlook, Palm/Treo, or Pocket PC. (More...)

To synchronize, each GoldMine system must have a unique license number. However, a user working on a GoldMine network can create a GoldMine sublicense to work on an undocked basis.

Running the same version of GoldMine on all systems is recommended. To maintain the current version on all systems, users can update their copies via Net-Update.

Synchronization involves the creation, distribution, and retrieval of transfer sets:

- **Stage 1:** The transfer set is created based on changes to the data since the specified date.
- **Stage 2:** The systems connect and exchange data.
- **Stage 3:** The retrieving system incorporates the updates into the databases.

During remote synchronization, GoldMine creates a transfer set which is a database of all the changes made to a GoldMine database during a specified time frame. The receiving GoldMine system uses data in the transfer set to update the resident GoldMine system's database and retains only data from the transfer set that is newer than the information in its own GoldMine database.

Note: The transfer set does not contain every change ever made to a GoldMine database. Records go back only far enough to include changes made to the database since a specified cut-off date.

Since the transfer set contains only records from the originating GoldMine system's database modified within a specified time frame, only those changed records are updated on the GoldMine system that retrieves the transfer set.

GoldSync uses a system of unique record identifiers and time stamps to track when a record was created, when it was last successfully synchronized, and which update is the most current. During synchronization, GoldSync:

- Evaluates the database to determine what records to include in the transfer set based on Send Options and the cutoff date.
- Sends the transfer set.
- Evaluates the contents of the transfer set to determine what data to retrieved based on the Retrieve Options.
- Compares the date and time stamp of a field in the transfer set with the date and time stamp of the same field in the database to determine which record is more recent and will overwrite the older data.

GoldSync uses Tlogs to keep track of changes to each field in the database and to track new records. Changes you make to your GoldMine data are tracked to the millisecond and stored in the Tlogs. This ensures that if two users update the same field on a record, the most recent change saves.

Important: When creating a new remote site, do not copy tables from one system to another since this causes problems with synchronization. Remote sites should be set up with a fresh installation of GoldMine, and the data should be synchronized with the main GoldMine site.

Configure specialized settings in the Synchronization Settings.

Use synchronization in these ways:

- **One-button Sync with GoldSync Server**
- **Synchronization Wizard**
- **GoldSync Administration Center**
- **Synchronization with Outlook**
- **Synchronization with Palm/Treo**
- **Synchronization with Pocket PC**
- **Copy/Move Records**

Synchronization Scenario

ABC Company is a medium-sized manufacturer employing about 100 people. It has departments handling sales, order processing, customer service, and support. Ideally, these departments collaborate to accomplish ABC's goals.

Whenever a prospect calls to inquire about ABC's products, the inside sales representative adds the prospect to the database, including name, address, telephone, how the prospect heard about ABC Company, and the products in which the prospect is interested.

The literature fulfillment department uses this information to send the requested product information to the prospect. They inform the outside sales representative of the date the information was sent.

The outside representative assigned to the prospect's territory follows up with a call to the customer a week or so after the product information was sent from the home office. Several subsequent, qualifying sales calls are made to secure the sale of an ABC product. During this period, the salesperson is responsible for updating ABC's sales management on sales activity including related calls and forecasts.

After a sale is completed, the accounting department generates an invoice the shipping department uses to fill the customer's order. If the customer fails to pay the invoice, the collections department sends a delinquent letter to the customer to indicate payment is due for the ABC product.

Meanwhile, the customer service department records the date the merchandise was received by the customer and initiates the warranty period. Then, when the customer requires support, the customer service department determines and notes the nature of the problem for future reference. If necessary, a follow-up support call is scheduled at the customer's location.

ABC Company's field technicians handle support calls. A field technician uses the customer information gathered by sales and customer service to locate a customer's office and to determine the nature of the problem. When the problem has been corrected, the technician creates a support record for future reference, then prepares an invoice based on whether the product is within its warranty period.

In this scenario, several employees access the same customer information at the same time, and, in some cases, these individuals work in locations that do not allow direct access to the office. The remote staff, such as the outside sales representatives and field technicians, need access to the same information available to inside ABC Company staff.

To share critical account information, they must be able to transfer this contact data between the office staff and the mobile staff. With synchronization, ABC Company transfers sales leads to outside salespeople, sends support requests to service technicians, and collects follow-up reports from staff in the field. Without remote synchronization, this information would probably have to be printed, sent by facsimile to the remote location, and re-entered into GoldMine by the salesperson or service technician. Synchronization automatically sends updated information to ensure timely, accurate communications for organizations with mobile or distributed personnel.

About Synchronizing with Microsoft Outlook, Palm/Treo, or a Pocket PC Device

Synchronize data between GoldMine and these applications or devices:

- Microsoft Outlook

> **Note:** Outlook must be installed on the GoldMine workstation you are synchronizing.

- PDA (Palm™/Treo®)
- Pocket PC

> **Note:** If using Outlook with a Palm/Treo or a Pocket PC, do not synchronize both applications with GoldMine. Separate synchronization results in duplicate data. Instead, synchronize your device with Outlook and then synchronize Outlook with GoldMine.

Synchronize to and from GoldMine and the other applications or devices, or transfer data in one direction. Configure the synchronization process for each option using synchronization wizards.

Configuring Synchronization Settings

The **Synchronization Settings** dialog box is available only to users with Master Rights. Define the synchronization options for instant sync, retrieving linked documents, running GoldSync as a service, and the overrides to the default time-out settings.

1. Select **File>>Configure>>Synchronization Settings**. The **Synchronization Settings** dialog box appears. Configure the tabs:
    - **Instant Sync:** This tab is available when you retrieve a one-button synchronization profile. The Instant Sync option is included in the profile.

      If the **Check for a GoldSync connection every minute** option is selected, GoldMine checks for network connections 15 seconds after login and prompts the user to synchronize if a network connection and the specified IP address are reachable; however, the GoldSync server may not be listening.

      In the **Instant Sync Connection** dialog box, you can synchronize, be prompted again in one minute, or turn off the prompt for the session duration.

      Clear the **Check for a GoldSync connection every minute** checkbox if you do not want GoldMine to query you about synchronizing whenever it detects your GoldSync server.
    - **Linked Documents:** Configures how linked documents are handled in the synchronization process. Configure these options in the **Attempt to retrieve linked files** to drop-down list:

> **Note:** If running GoldSync as a service, you must use UNC paths for the folder location. Mapped drives are not recognized properly by Windows Services.

- Select **File's original drive and folder** for GoldSync to place the linked documents in the original drive or location. If not found there, GoldSync searches available alternate drives. Then specify **alternative drives** in the text box below, telling GoldMine where to retrieve linked documents. For multiple drive entries or shares, separate each drive or share entry by a semicolon (;). For example, C;\\SERVER\DOCS;D;F;. If the linked documents are not found in the original or alternate drives, GoldSync retrieves the document into the default directory. If you did not assign a directory in **default drive and folder**, the default directory is the x:\SYSDIR directory\TmpLinks\; typically, the SYSDIR directory is the GoldMine directory.
- Select **Specified default drive and folder for** GoldMine to retrieve linked documents only to the default directory. If you did not assign a directory in the **default drive and folder**, the default directory is the x:\SYSDIR directory\TmpLinks\; typically, the SYSDIR directory is the GoldMine directory.

- Continue configuring the linked document settings by selecting **Allow new linked documents to sync by default** for new linked documents to automatically synchronize.
- Select **Backup existing files prior to overwriting them during retrieval (As .BAK files)** for GoldSync to place a document in a directory where there is already a file with the same name; this option instructs GoldSync to rename the existing file with an extension of .bak. After the old file is renamed, the new file is saved.

- **Timeouts:** Configure the Internet timeout settings.
- Type or select the **Handshake timeout (sec)**. The handshake setting determines the number of seconds GoldMine or GoldSync waits to complete a handshake routine before disconnecting. The default value is 20 seconds.

- Type or select the **Connection timeout (sec)**. The connection setting determines the number of seconds GoldMine or GoldSync waits after an interruption in the transmission to continue receiving status data before disconnecting. The default value is 60 seconds, or one minute.
- Click set **Set Defaults** to return all time-out settings to their original default settings.
- **GoldSync:** This tab is available only when GoldSync is installed on your computer. Configures the notification settings if GoldSync appears to fail.

- **Send an E-mail if a synchronization error occurred:** Activates the e-mail notification options.
- **E-mail error messages to this address:** Type the e-mail address of the person to notify. Use your address or the address of the GoldSync administrator.
- **GoldSync Service:** When your GoldSync server is running on computer with a Windows 2003 Server, Windows XP, or Windows 2000 Server, you can run GoldSync as a Service. A service is an application type that runs in the background.

  Running GoldSync as a service provides added security by eliminating the need to log onto the computer to start GoldSync. It also saves administrative time since the service can be configured to restart whenever the operating system on the computer starts, thus avoiding the task of manually starting GoldSync.

  Install, start, and configure the GoldSync Service from the GoldSync Administration Center toolbar, but use the GoldSync Service tab to manage the service without launching the GoldSync Administration Center.
- **Set up GoldSync as Service:** Installs the service.
- **Uninstall GoldSync Service:** Removes the service.
- **Configure GoldSync Service:** Launches the **GoldSync Services Settings** dialog box where you start, stop, and automatically start the service.

2. Click **OK** to save the **Synchronization Settings**.

Using Copy/Move Records

Move a single record or a group of contact records to another database. The Copy/Move options within GoldMine let you do this while maintaining synchronization integrity. Copy/Move is a synchronization process. To copy or move only some of the records, build the appropriate filter or group first.

Important: Back up your database before moving data.

For example, move contacts into an archive database, or copy records from a leads database to a customer database once the lead becomes a customer.

1. Select **File>>Synchronize>>Copy/Move Records**. The **Copy/Move Records Between Contact Sets** dialog box appears.
2. From the **Select Target Contact Set** drop-down list, select the destination database. The records copy or move from the open database.
3. In the **Record Selection** area, select either:
    - **Current Record:** Copies or moves the active contact record.
    - **Group of Contact Records:** Copies or moves all records in the filter or group selected from the drop-down list.
4. In the **Transfer Method** area, select either:
    - **Copy Records:** Creates a duplicate of the records in the target contact set. The duplicate records have the same account numbers as the original records, and all associated notes, history, additional contacts, detail, and referral records also copy.
    - **Move Records:** Moves records from the current Contact Set to the target file. Records delete from the original file.

Tip: We recommend using the copy feature only. Copy and verify the data in the new contact set, and delete the data in the originating data set.

5. If you selected **Move Records**, select **Sync Deletions** to mark moved records as deleted. Selecting this option marks the Tlogs for the records as deleted and GoldMine does not recognize attempts by another GoldMine system to resynchronize the records.
6. Click **Details** to read a description of the Sync Deletions option.
7. Click **Go**. The Copy/Move begins. The **Process Monitor** displays progress in the process.

Using the Sync Spy

When synchronizing records you may need to use the **Sync Spy** to check the records updating in the sync logs. Use Sync Spy to view the sync stamp, log stamp, field name, and user.

Note: With Sync Spy you determine if there is a sync stamp for the field and whether you set the cutoff date back far enough.

The **Sync Spy** window contains an upper and lower pane. The upper pane is summary information for the active Contact Record. The lower pane reflects the information stored in the Contact file Tlogs (ContTlog). This log file holds synchronization information for the contact set. Each contact database has its own ContTlog file.

1. Select **Tools>>Sync Spy**. The **Sync Spy** window opens.
2. On the Contact Record for which you are checking the updates, click the field in question.
    - **Database:** Name of the database you are currently evaluating.
    - **Sync Stamp:** The date and time when the field was synchronized from the remote site and the date and time the field was modified by a user local to this system.

    Note: On the transfer set creation side, the Sync Stamp is used with the cut-off date and time to determine if the field-level change should be included in the transfer set.

    - **Log Stamp:** The date and time when the field was modified by a user local to the system the Sync Spy is run on.

    Note: On the retrieval system, the Log Stamp is used to compare which system has the latest change.

    - **Field Name:** Field modified in the selected database.

    Note: Curtained fields are viewable in the Sync Spy. If this is a security concern for your organization, disable the Sync Spy option for non-Master Rights users you do not want viewing the fields. Select **File>>Configure>>User Settings**. Highlight the user and click **Properties**. Click the **Menu** tab and expand **Tools**. Disable the **Sync Spy** menu option for the user.

    - **User:** User who made the modification to the field. Also shows if the modification was made by a remote or local user. If the name includes a ~ (tilde) character, it indicates the field was updated locally.

3. To select a database for the Sync Spy to display if values for the tab are stored in more than one database, select the **Database** in the drop-down list. For example, the Fields tab information is stored in Contact2. Select Contact2 from the drop-down list to view the values.
4. To view field values stored in another database, click the tab containing the values to view.
5. To display data in the Sync Spy for another contact, click the Contact Record and scroll through the database.
6. Use the local menu to access Find and Output options.

Using the Synchronization Wizard

About the Synchronization Wizard

Use the GoldMine Synchronization Wizard to synchronize with another remote GoldMine system using an IP/Network connection or Internet e-mail. GoldMine can initiate or accept a connection from a remote GoldMine system and perform the synchronization by transferring data across the selected carrier. Save settings in a profile for use in future synchronization sessions.

The wizard lets you specify the settings needed to synchronize with another site. Synchronize data in one direction to send new leads to a salesperson or synchronize bidirectionally to let a traveling salesperson exchange data with the home office.

To use the Synchronization Wizard, you must:

- Have Internet e-mail configured in GoldMine if sending and retrieving transfer sets by e-mail.
- Subscribe to a dynamic Internet Protocol (IP), or, for frequent synching via the Internet, a static address. A dynamic IP address is the standard type of address randomly assigned by an Internet Service Provider (ISP) to subscribers. A static IP address must be specially requested. To set up a static IP account, contact your ISP.

Using the Synchronization Wizard

Define a variety of data and communication options to synchronize with a remote GoldMine or GoldSync system. Define the settings needed to create a transfer set or immediately start a synchronization session.

1. Select **File>>Synchronize>>Synchronization Wizard**. The **GoldMine Synchronization Wizard** dialog box appears.
2. Select one option:
   - **Start a new session:** Define settings for a synchronization session. Use these settings once or save for future use.
   - **Sync using the settings of a Sync Profile:** Synchronizes according to the settings already defined in a profile selected in the drop-down list.
   - **Sync using the settings of a GoldSync Site:** Synchronizes according to the previously defined settings for the site selected in the drop-down list. The site settings are defined in the GoldSync Administration Center. GoldMine uses only the send and retrieve options for the selected site configuration.
   - **Use the following profile/site settings:** Specifies the synchronization profile to use during the current session. This option is available only if you select Sync using the settings of a Sync Profile or Sync using the settings of a GoldSync Site.

Note: You can delete a synchronization profile selected in the drop-down list.

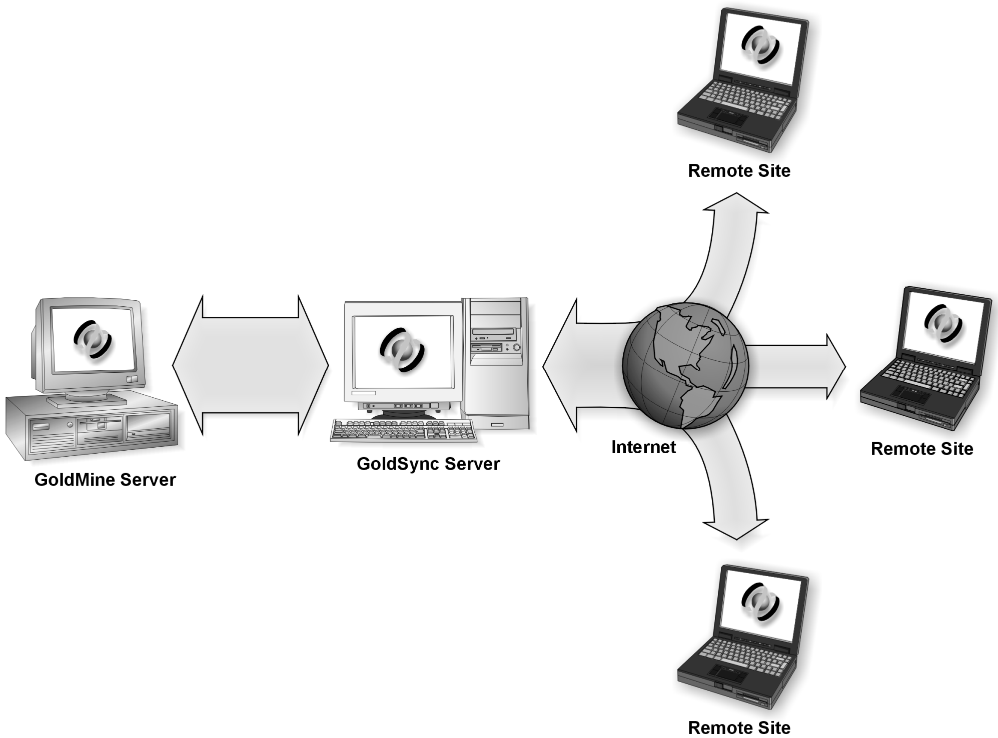
3. If you selected Sync using the settings of a Sync Profile or the settings of a GoldSync Site, click **Finish** to synchronize according to existing settings. The GoldMine Process Monitor appears.
4. To verify or change existing settings, click **Next** to continue to the connection method dialog box.

Using GoldSync

About GoldSync

GoldSync provides unattended and automated remote synchronization for 2 or more GoldMine systems. GoldSync remote synchronization includes multilevel security and administrative controls and enhanced flexibility over GoldMine's one-to-one remote synchronization.

[(GoldSync Key Terms and Concepts)]



GoldSync licenses are included with GoldMine Corporate Edition and can be added to your GoldMine Personal Edition D-license. Contact your Solutions Partner for details.

GoldSync can simultaneously update multiple GoldMine systems with added or changed information in other GoldMine systems. Messages and Calendar updates can be sent to as many users as are configured for the synchronization.

Although most users are not responsible for configuring or maintaining GoldSync, they may be required to synchronize their GoldMine with a GoldSync server. If so, they can use the GoldMine Synchronization Wizard to set up and run a GoldSync profile with settings provided by their GoldSync administrator.

GoldSync administrators choose connection methods, session intervals, and the sending/retrieving data options that work best for their remote-to-host scenarios.

Tip: To maximize potential for success, we recommend that a certified GoldSync administrator perform administrative duties.

(Planning a GoldSync System)

Systems using GoldSync to synchronize enjoy the added convenience of One-button Sync with GoldSync Server synchronization. Users can employ click-and-go synchronization using a profile defined by the GoldSync administrator. In some cases, users can install GoldMine and the One-button synchronization profile in one operation.

GoldSync Implementation Considerations

To understand how to make synchronization part of your business process, analyze:

- The anticipated number of records in the database.
- The volume of changes you expect to make to the data.
- Whether the entire database or a filtered subset of data is to be synchronized with remote sites.
- The number of remote sites.
- Whether the sync model is dynamic (several synchronizes per site per day) or static (once per week for reporting and data archive purposes).
- The expected future growth of the overall implementation (additional records/databases, users, remote sites).

To understand the technology issues, consider:

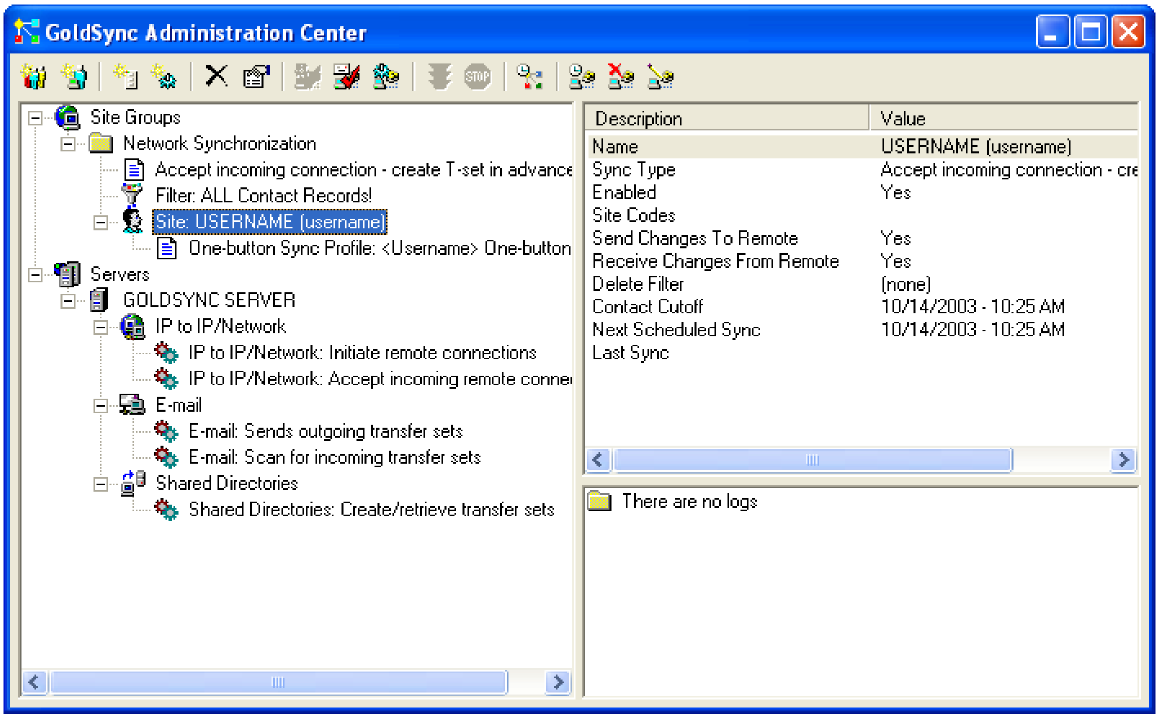
- Bandwidth currently available between potential remote sites and all synchronization servers.
- Future plans for enhancing bandwidth (for example, VPN, corporate WAN, and so on).
- Firewall and network security may limit synchronization options.
- Personnel resources available to administer and maintain synchronization.

Using the GoldSync Administration Center

To start the GoldSync Administration Center, you must have GoldMine installed, running, and licensed with the correct licenses (E-license, S- and Y-licenses, D- and G-licenses). Systems with U-licenses do not have access to the GoldSync Administration Center.

The GoldSync Administration Center is the point of access for the site groups, sites, servers, and processes servers perform as defined for each site group.

(View...)



1. Select **File>>Synchronize>>GoldSync Administration Center**. The **GoldSync Administration Center** window appears.
2. Configure or edit these settings using the wizards:
   - **Site Group Wizard:** Creates a site group with the connection method and transfer set you select.
   - **Site Group Member Wizard:** Adds members to the newly created site group.
   - **Server Wizard:** Adds servers synchronizing with remote sites.
   - **Process Wizard:** Defines the processes performed for the site.

3. After configuring various aspects of the GoldSync Administration Center, use the toolbar, the Site local menu, and the Servers local menu to manage and edit the functions.
4. For synchronization to work automatically, you must start the processes. Expand **Servers**, the server name, and the server process. Highlight the process to start, right-click, and select **Start** to initiate the selected process or **AutoStart On** for GoldSync to run automatically during the times designated in the Server Agents Administrator.

> **Note:** You must start the processes in the GoldSync Administration Center of the computer running the synchronization processes.

5. GoldSync can be also be run as a service.
6. To close the window, click the **X** in the upper right-hand corner.

Working with GoldSync

Creating Sites

Sites are Site Group Members. They commonly have the same communication method and similar settings in the Site Group. Customize site send and retrieve options and filters.

There are two ways to create sites in the GoldSync Administration Center: after you create the Site Group or from the local menu.

1. In the **GoldSync Administration Center**, right-click a site group folder and select **New**. The **New Site Group Member** dialog box appears.
2. Select one of these options:
   - **Undocked User:** Select the undocked user from the drop-down list. The list includes undocked users created in the License Manager. If the undocked user does not exist, click Create Undocked User(s)/Sub-License.
   - **Sub-License:** Select the site from the drop-down list. The list includes sites created in the License Manager. If the site does not exist, click Create Undocked User(s)/Sub-License.
   - **Other License:** Type the license serial number in the text boxes.

3. Click **OK**. The **Welcome to the GoldSync Site Wizard** dialog box appears.
4. Type a name for the site.
5. Select **Allow this site to synchronize** to make the site active for synchronization after configuring it.
6. Click **Next**. The **Site Group** dialog box appears.
7. To make the site belong to a different group, select the **Site Group** from the drop-down list.
8. Click **Next**. The **Cutoff Date/Time** dialog box appears.
9. Select **Ignore cutoff time (send all records)** to send records. This option is available if you selected **ALL changed contact records** on the **Send Contact-related Options** dialog box.
10. Select **ALL contact records' cutoff** date and time to include new and changed data from the cutoff date you type or select from the F2 Lookup graphical calendar and clock. This option is available if you select **ALL changed contact records** or **All filtered records and user-scheduled activities' records** on the **Send Contact-related Options** dialog box.
11. Select **Contact records linked to Activities cutoff** date and time to include new and changed data linked to activities scheduled from the cutoff date and time. This option is available if you select **Contact records linked to the 'Send users' calendar list** or **All filtered records and user-scheduled activities' records** on the **Send Contact-related Options** dialog box.
12. Select the **Deletion-Filter** from the drop-down list. This option applies the deletion filter for a single synchronization and then clears the filter selection.

> **Note:** When deleting a record on the remote site through a deletion filter, the deletion is not recorded as a change in the database. This prevents the deletion from synchronizing back to the host and lets the record synchronize back to the remote, if necessary.

13. Click **Next**. The **Override Options** dialog box appears, unless configuring a shared directory site (in this case, the **Next Synchronization Options** dialog box appears).

Creating Site Groups

Use the Site Group Wizard to set up site groups (the first step in configuring GoldSync). Configuration options you set for the group are inherited by each group member you add to the group. Using the Site Group Wizard, set the connection method, synchronization method and intervals, and the method by which transfer set data communicates between the remote site and the server and vice versa.

1. Select **File>>Synchronize>>GoldSync Administration Center**. The **GoldSync Administration Center** appears.
2. Right-click on **Site Groups** and select **New**. The **Welcome to the Site Group Wizard** dialog box appears.
3. Type a descriptive name for the site group and click **Next**. The **Synchronization Method** dialog box appears.
4. Select either:
    - In the **Connected Methods (IP to IP/Network)** area, select an option:

- **Accept an incoming connection:** The server accepts the initial request for data via modem, Internet direct, or network.
- **Initiate an outgoing connection at set intervals:** The server transfers data at a specified time. The interval is set by the user.

    - In the **Non-connected Methods (Internet: E-mail, Shared Directories)** area, select an option. Data transfer occurs without an active connection between the GoldSync Administration Center and the remote sites, using an Internet e-mail account or shared directory to transfer information:

- **Send and retrieve transfer sets via E-mail:** The transfer set creates in advance and transfers by e-mail.
- **Synchronize with another GoldSync server via shared directories:** Uses defined paths to directories for depositing and retrieving transfer sets.

5. Click **Next**. The **General Options** dialog box appears.

Creating Servers

A GoldSync Server is any computer handling the synchronization processes. It can be any computer on the network running a network copy of GoldMine.

For example, your main GoldMine Server may not have a modem. Rather than installing a modem, assign another computer on the network that does have a modem as the GoldSync Server. Each GoldSync Server assumes the computer name as the server name.

You can designate more than one computer on your network as a GoldSync Server. Have one server for IP/Network synchronization and one for e-mail synchronization.

Note: The GoldSync Server computers must have proper resources for the processes they are running.

Tip: Because GoldSync is resource-intensive, we recommend dedicating a server to executing GoldSync processes, especially when many users are synchronizing throughout the day. Creating transfers for multiple users and managing multiple connections uses a significant amount of the system's memory, processor, and hard disk capacity.

1. In the **GoldSync Administration Center**, right-click on **Servers** and select **New**. The **Welcome to the Server Wizard** dialog box appears.
2. Type or browse to the name of the server to make a GoldSync Server.
3. Click **Next**. The available processes dialog box appears.
4. Select the processes to assign to the server.
    - **IP to IP/Network:** Accepts incoming remote connections
    - **IP to IP/Network:** Initiates remote connections.
    - **E-mail:** Scans for incoming transfer sets.
    - **E-mail:** Sends outgoing transfer sets.
    - **Shared Paths:** Creates/retrieves transfer sets created in advance.
5. Click **Next**. The **Finish** dialog box appears.
6. Click **Finish** and the **Welcome to the Process Wizard** dialog box appears; or right-click on the server name and select **New**. The **Welcome to the Process Wizard** dialog box appears.

Creating Server Processes

Use the Process Wizard to configure processes you are running on the GoldSync Server.

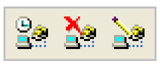
1. In the **GoldSync Administration Center**, right-click on the server name and select **New** from the local menu. The **New Process** dialog box appears.
2. Select the **Server** and the **Process Type** from the drop-down lists.
3. Click **OK**. The **Welcome to the Process Wizard** dialog box appears.
4. The **Welcome to the Process Wizard** dialog box displays the Server Name and the Process Type you are configuring. (If you are continuing from the Server Wizard, you start on this dialog box.)
5. The **Process Name** displays the process you are configuring. Click **Next**.
   - If configuring **IP to IP/Network** or **Shared Directories**, the **Number of Connections** dialog box appears.
   - If configuring **E-mail: Scan for incoming transfer sets**, the **Incoming E-mail Settings** dialog box appears.
   - If configuring **E-mail: Sends outgoing transfer sets**, the **Outgoing E-mail Settings** dialog box appears.

Running GoldSync as a Service

When your GoldSync server is running on a computer with a Windows 2003 Server, Windows XP, or Windows 2000 Server operating system, run GoldSync as a Service. A service runs an application in the background.

Running GoldSync as a service provides added security by eliminating the need to log on to the computer to start GoldSync. Saves administrative time by configuring the service restart whenever the operating system on the computer starts.

Use the GoldSync Administration Center toolbar options for installing, starting and configuring, and uninstalling the service. Also configure GoldSync as a service in the Synchronization Settings dialog box.



1. On the GoldSync Administration Center toolbar, click the Set up GoldSync as a service button.
2. A dialog box appears indicating the GoldSync Service was created successfully.

> **IMPORTANT:** After installing GoldSync as a service, but before starting the service, change the GoldSync Service logon from **Local System account** to **This account**. In the Services management window, right-click **GoldSync Service** and select **Properties>>Log On**. Select **This account** and configure the logon information using a Windows account with full access rights on the GoldSync computer and to the shared mapped or UNC locations where your linked documents are stored.

Configuring GoldSync as a Service

1. On the GoldSync Administration Center toolbar, click the Configure GoldSync service button. The **GoldSync Services Settings** dialog box appears.
2. Configure the settings.

Uninstallingl GoldSync as a Service

1. On the GoldSync Administration Center toolbar, click the Uninstall GoldSync service button.
2. A dialog box appears indicating the GoldSync Service was successfully uninstalled.

Using One-Button Synchronization

About One-Button Synchronization

When enabled on the remote GoldMine system, one-button synchronization gives the undocked, remote user a single-step synchronize process. Because the remote user cannot modify synchronization settings, the organization increases data security and enhances control of information access for each synchronizing remote system. One-button synchronization lets the GoldSync administrator:

- Create one-button synchronization profiles for each remote system running one-button synchronization.
- E-mail the one-button synchronization profiles to remote, undocked users.
- Create an undocked installer to install GoldMine on the remote system with the one-button synchronization profile (new GoldMine user).

Once created and sent, the remote user can:

- Retrieve the one-button synchronization profile.
- Retrieve the undocked installer file.
- Synchronize using one-button synchronization.

Working with One-Button Synchronization

Synchronizing Using One-Button Synchronization

The GoldSync administrator configures one-button synchronization profiles and sends them to remote users. Once installed, the profile streamlines your remote, undocked user synchronization process.

1. Select **File>>Synchronize>>One-button sync with GoldSync Server**. The **One-button Synchronization** dialog box appears, indicating the GoldSync administrator has configured your system for One-button Synchronization.
2. Click **Sync**. The **Process Monitor** appears, indicating synchronization status.

Creating One-Button Synchronization Profiles

Use the **One-button Sync Profile Wizard** option after creating site group members or from the GoldSync Administration Center Sites local menu. One-button synchronization profiles include the Instant Sync option to remind undocked users to synchronize when it detects a network connection.

1. In the GoldSync Administration Center, highlight the site, right-click and select **New One-button Sync Profile**. The **Welcome to the GoldSync Site One-button Sync Profile Wizard** dialog box appears.
2. Type the descriptive name of the profile in the text box. Click **Next**. The **Connection Method** dialog box appears.
3. Select a connection method:
   - **Connect to remote using IP to IP/Network method**.
   - **Send a transfer set to remote by E-mail**.

4. Click **Next**. The **Connect/Send E-mail to Remote** dialog box appears for **Connect to remote using IP to IP/Network** or **Send transfer set to remote by E-mail**.

Retrieving One-Button Synchronization Profiles

When the GoldSync administrator creates or makes changes to your One-Button Synchronization Profile, he can e-mail you the profile. One-button synchronization profiles include the Instant Sync option to remind undocked users to synchronize when it detects a network connection.

1. In the GoldMine E-mail Center, double-click on the e-mail message with the subject line of **One-button Sync Profile**.
2. A GoldMine message box appears, indicating the message has a sync profile attached. Click **Yes**.
3. The profile installs. The **One-button Sync with GoldSync Server** menu option becomes active. Use **One-button Sync with the GoldSync Server**.

InfoCenter

About the InfoCenter

The InfoCenter provides a resource for maintaining any type of information useful to an organization or an individual. It can provide easily accessible storage for graphics, multimedia files, and/or program applications. This information can then be linked to a Contact Record (displays the record whenever you access that topic).

The InfoCenter consists of the **KnowledgeBase**, **Personal Base**, and **What's new**? Configure them to present newly added information to the user, control user reading and updating privileges, and search for specific entries based on user-defined criteria. Topic pages are arranged in outline format. Locate information by navigating through different sections, conducting a search, or opening a linked file.

InfoCenter material is stored in the InfoMine table.

Note: Users with Master Rights can set up user access to the KnowledgeBase; each connected user can set up information in his or her PersonalBase.

Using the InfoCenter

1. Select **View>>InfoCenter**. The **InfoCenter** window appears.
2. Use the InfoCenter toolbar to navigate and manage.
3. View information by selecting a tab:
    - **KnowledgeBase:** Maintains information created by, for, and about an organization and available to multiple users.

Note: Depending on rights, all users can potentially view all KnowledgeBase topics. However, only users with Master Rights can add, edit, or delete KnowledgeBase items.

- **PersonalBase:** Maintains information useful to an individual user that only the user can view and update. The only way to access a PersonalBase is to log in to GoldMine as the user who created the PersonalBase.
- **What's new?:** Presents KnowledgeBase items in reverse chronological order, keeping users aware of current material.

Note: GoldMine automatically adds topics to **What's new?** as users add the topics to the KnowledgeBase. This tab lists most recent KnowledgeBase topics first. A user can view every topic to which read access rights are granted. A user with Master Rights can open and edit a **What's new?** topic. To display **What's New** when logging on to GoldMine, select **Edit>>Preferences**, click the **Misc** tab, then select **Show What's New in the InfoCenter when logging in**.

4. Create, edit, and search the InfoCenter. Set security and notification for users.
5. Create and edit topic text and linked files. See Adding HTML Text and Adding Attached Files.
6. Click **X** to close.

Calendars

About the Calendar

The Calendar works as a time management tool. Quickly determine what is scheduled and review available times for new appointments and activities.

The Calendar displays day, week, month, year, planner, and outline calendars for a single user or for a group of users.

You can launch the calendar and leave running in the GoldMine work area.

Using the Calendar

The Calendar displays scheduled activities for the selected user or user group.

1. Select **View>>Calendar**. Your Calendar appears.
2. To see calendars of other users, select the user or user group in the **User** drop-down list.
3. To change your view, click a tab:
   - **Day**
   - **Week**
   - **Month**
   - **Year**
   - **Planner**
   - **Outline**
   - **Peg Board**

4. Click the toolbar options to schedule and complete activities, move through the calendar, set the display, delete and edit the scheduled activities.
5. Right-click and select the local menu options to manage specific activities, synchronize and set the output to options, change users, and access other options.
6. Right-click **Tasks** or **Occasions** to manage displayed activities related to the task or occasion.

Using the Task List in the Calendar

1. Select **View>>Calendar**. The **Calendar** window appears.
2. The **Task** list is available on the Day, Week, or Planner calendar and displays pending Forecasted Sales, Literature Requests, Events, and To-Do items.
3. Use the local menu to manage tasks. Highlight the item and right-click.
   - **Schedule:** Schedules an activity.
   - **Complete:** Removes task from the Task list and saves it as history.
   - **Reply:** Opens an e-mail message addressed to the owning user of the task.
   - **Delete:** Deletes the task from the list.
   - **Edit:** Opens the appropriate dialog box for the selected task. Edit the contents.

Using Occasions in the Calendar

Occasions are one-time or recurring events to display on your calendar. Link the occasion to a contact or leave it unlinked. Or set an alarm on the occasion to remind you in advance.

Occasions displayed in the Calendar on the day of creation. View all occasions on the Occasions tab of the Activity List. Occasions are not linked to a contact's Pending tab until you schedule an activity from the activated GoldMine Occasion Alarm.

On the **Day** or **Week** tab in the Calendar, select an occasion and right-click the **Occasions** list. The Occasions local menu appears. Select one option:

- **New:** Displays the Edit an Occasion dialog box . Add an occasion.
- **Delete:** Deletes the selected occasion.
- **Edit:** Displays the Edit an Occasion dialog box. Edit the information.

Configuring Free/Busy Options

Configure the free/busy options to determine what displays on the **Free/Busy** tab of the Schedule an activity dialog box.

1. Click **Options** on the **Schedule an activity Free/Busy** tab. The **Options** dialog box appears.
2. In the **Scan Activities** area, select the type of activities to display as busy in the busy time pane:
   - Appointments
   - Call backs
   - Next actions
   - Other actions
   - Events

3. In the **Display Options** area, select what displays in the busy time pane:
   - **Show User(s)/Resource(s):** Free and busy times for the Users and Resources selected on their respective tabs.
   - **Show Contacts:** Linked contact's free and busy times.
   - **Show 24h day(s):** Time from 12 A.M. to midnight. If not selected, the default display is 6 A.M. to 9 P.M.

4. Select **User work day hours** for the busy time to scan work day hours when looking for a mutually compatible time for an activity.
5. Select **Save as default** to save the settings as your default display.

Configuring Free/Busy URLs

If contacts publishes their free/busy time, use this dialog box to link GoldMine to the URL the contact provides. This lets GoldMine scan the contact's published schedule and helps schedule activities with the contact more efficiently.

1. If the message "**Internet Free/Busy information is not available, click here for help**" appears on the contact's schedule line, click the link and the **Add Free/Busy URL** dialog box appears.
2. In the **Contact's Name** text box, type the name.
3. Select the **Contact's Free/Busy URL** type in the drop-down list (file, ftp, or http).

> **IMPORTANT:** If accessing a contact's free/busy time on an http location, you must configure the Internet Information Services to accept .ifb. More information.

4. In the text box following the file type, type or browse to the URL.
5. Click **OK** .

Working with Meeting Requests

About Scheduling from Meeting Requests

The GoldMine Meeting Request option e-mails meeting request to GoldMine, Outlook, and other iCalendar-enabled applications.

You can:

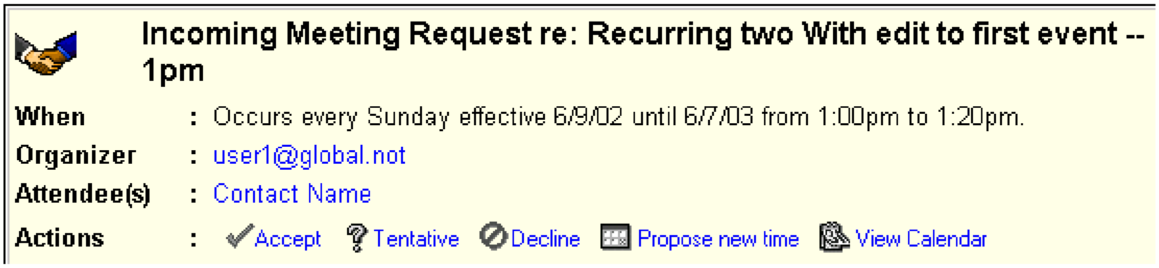
- Be the meeting organizer or the recipient of the e-mail meeting request.
- Schedule an activity from a Meeting Request received in your e-mail from a contact, whether the sender created the activity in GoldMine or another iCalendar-enabled contact management application.
- Retrieve the meeting notice as you would in other Internet e-mail. After retrieving the notice, if you accept, GoldMine records the activity in your Calendar.

GoldMine decrypts the winmail.dat meeting requests created by Outlook and displays them to users, making it easier to work with Outlook-generated meeting requests.

Note: To display Meeting Requests with HTML formatting, you may need to change your GoldMine setup to **Enable IE as E-mail viewer**. From GoldMine's Main Menu, select **Edit>>Preferences**. Click the **Internet** tab. Select **More Options** and click the **Advanced** tab. Select **Enable IE as E-mail viewer**.

When retrieving e-mail messages from GoldMine's E-mail Center, the incoming messages look like one of the following figures, depending on whether you selected to **Enable IE as E-mail viewer** in your GoldMine preferences.

IE Enabled as Viewer



IE as Viewer is not Enabled

Creating Meeting Requests

As organizer of an activity, you can send a meeting request for the activity to a user or contact who has iCalendar enabled.

1. Select **Schedule>>an activity**. The **Schedule an activity** dialog box appears.
2. Complete the **Details** tab with the appropriate information.
3. On the **Details** tab, select **Send a Meeting Request to the contact**.
4. On the **Users** tab, select the GoldMine users to include in the activity.
5. On the **Resources** tab, select the resource(s) to schedule with the activity.
6. On the **Recurring** tab, select the date span, frequency, and monthly schedule of a recurring activity.

> **Note:** Outlook is unable to resolve the **Skip Weekends** option in GoldMine. If you are sending a recurring meeting request to Outlook users, do not select skip weekends in GoldMine.

7. In the **Group Schedule** tab, select the group of contacts to send the meeting request to.
8. After configuring scheduling options, click **Schedule**. A meeting request is sent to all participants.

Responding to Meeting Requests

You can respond to a meeting request in your e-mail you can respond several ways.

1. In your GoldMine E-mail Center, double-click to display the message in a window.
2. From the e-mail header, select one option:
    - **Accept:** Accepts the meeting date and time and creates the activity in your calendar. Displays the Meeting Request Reply dialog box.
    - **Tentative:** Tentatively accepts the date and time. Displays the Meeting Request Reply dialog box.
    - **Decline:** Declines the meeting. Displays the Meeting Request Reply dialog box.

    Note: When the Meeting Request Reply dialog box appears, select **Send reply**, **Edit reply before sending**, or **Don't send reply**.

- **Propose new time:** Sends a counter-proposal to the meeting organizer. Displays the activity editing dialog box where you change the date and time of the meeting, then send an updated Meeting Request to the contact.
- **View Calendar:** Displays your calendar for the date of the received meeting notice so you can check your schedule before accepting. If you accept, the new activity appears in your Calendar.

3. GoldMine updates according to the option selected.

Sharing Calendar Information

About Sharing Calendar Information

GoldMine enables several calendaring options including sharing your free/busy times or publishing your entire calendar. Also access a contact's shared calendar.

Sharing GoldMine User Calendars

- To publish your calendar as .ics and .htm, select **Preferences>>Calendar>>More Options>>Publishing** tab. To automate with Server Agents select **Tools>>Server Agents>>Agents Administrator>>Calendar**. Manually publish by selecting **Tools>>Publish Calendar>>Publish Calendar(s)**.
- To publish your free/busy time as .ifb, select **Preferences>>Calendar>>More Options>>Free/Busy** tab. Manually publish by selecting **Tools>>Publish Calendar>>Publish Free/Busy Times**; .ifb is an iCalendar standard extension.
- To export your calendar as .ics, select **Tools>>Import/Export Wizard>>Export to an iCalendar File**.

Accessing Shared Calendars

- To read a contact's published .ifb, select **Edit>>Record Properties>>Contact Details>>Free/Busy** tab.
- To use the Contact's published .ifb in the Schedule an activity dialog box, select **Schedule>>activity>>Free/Busy** tab.
- To importing a contact's .isc and link to a GoldMine Contact Record (iCalendar), select **Tools>>Import/Export Wizard>>Import from an iCalendar File**.

About Sharing Free/Busy Times

Scheduling becomes more dynamic and efficient when you and your contacts share free/busy times. As a GoldMine user you can publish your free/busy time in an iCalendar recognized format, making it available to non-GoldMine users for easy scheduling and to save time when proposing and counter-proposing meeting times between participants.

GoldMine users can view a contact's published free/busy time in the GoldMine calendar when scheduling an activity.

Shared Free/Busy Times Example

GoldMine's ability to publish and to read calendar data provides efficient collaboration with non-GoldMine users. Here are some scenarios where you may use the various options to improve your ability to work with outside contacts and with users who may not have immediate access to GoldMine:

Using Free/Busy Times (.ifb)

You are working closely with a contact on an ongoing basis and need to stop the time-consuming process of sending e-mails back and forth when trying to schedule calls or appointments with each other. The contact uses Outlook to manage his time and publishes his free/busy time to his Web site so he can access it when he is out of the office. The contact indicated he would like to know your free/busy times as well and asks you where you publish them.

You configure GoldMine and the contact configures Outlook so you can quickly evaluate each others available time when scheduling activities with each other.

- Your contact publishes his Outlook free/busy time to a file, ftp, or http location.
- You publish your GoldMine free/busy time to a file, ftp, or http location.
- Your contact configures his entry for you in his Outlook Contacts to access the URL location you publish your GoldMine free/busy time to.
- You configure the Record Properties free/busy time to access the URL location your contact publishes his free/busy time to.

Using a Contact's Free/Busy Time when Scheduling in GoldMine

Note: For this scenario, the contact publishes her free/busy time and provides you with the published location.

1. Configure the contact's free/busy settings.
2. With the contact active in GoldMine, select **Schedule>>Appointment**. The **Schedule an Appointment** dialog box appears.
3. Configure the Detail tab. Select a date, time, and duration.
4. Configure the Resource tab. Selected resources display on the Free/Busy tab.
5. Configure the Free/Busy tab. Click **Options** and select **Show Contact(s)** to display the contact's free/busy time on the Free/Busy tab. Change the **Scan Dates** and use **Find Time** to easily locate a compatible time for both parties without time-consuming phone calls, meeting requests, or e-mail messages.

This example shows the GoldMine settings and uses Outlook as the contact's default calendaring program:

Action	GoldMine	Outlook
Configuring user free/busy settings	**Edit>>Preferences>>Calendar>>More Options>>Free/Busy** (.ifb)	Tools>>Options>>Calendar Options>>Free/Busy Options (.vfb) **Note:** See the **Outlook online Help** for more detailed information.
Initializing user free/busy publishing	**Automatically:** After the Free/Busy tab is configured, GoldMine begins publishing based on a specified time. **Manually:** **Tools>>Publish Calendar>>Publish Free/Busy Times**.	**Automatically:** After the Free/Busy Options are configured, Outlook begins publishing based on a specified time. **Manually:** Tools>>Send/Receive>>Free/Busy
Reading a contact's published free/busy time	Select Contact Record and then **Edit>>Record Properties>>Contact Details>>Free/Busy tab** (.ifb)	Select Contact and click the Details tab. Complete the Internet Free-Busy Address.
Scheduling based on free/busy times	Select Schedule>>select activity and configure Detail, Resources, and Free/Busy. Click **Options** and select **Show Contacts**.	In Calendar, select Actions>>select activity. Select Attendee Availability>>Invite Others. Select contact with published free/busy information.
Distributing your free/busy URL to others	Copy and paste the URL into an e-mail message to send to a contact.	Add to the Details tab of your Contact record and save as vCard (.vcf). When you send a vCard with your signature, the free/busy URL is included.

Configuring Calendar Publishing in the Server Agents Administrator

Use the **Server Agents Administrator** to publish your calendar on the days and times specified. Use the Server Agents to publish your calendar information to the Web as HTML or in an iCalendar format. You must configure the Publishing tab in your Calendar Options dialog box.

1. Select **Tools>>Server Agents>>Agents Administrator**. The **Server Agents Administrator** dialog box appears.
2. Click the **Calendar Publishing** tab.
3. If allowing only one user to publish his or her calendar using the Server Agent, select the user in the drop-down list in the **User's Settings** area.
4. To allow other users to use the Server Agent capability, select **Apply to other users** to enable the **Select Users** button. Click **Select Users** to select one or more users or user groups.
5. In the **Active Period** area, select the days of the week the agent will be active.
6. Type or select the active time period for each day from the F2 graphical clock.

> **Note:** Because the times are set on a daily basis, the earliest time is 12:00 A.M. and the latest is 11:59 P.M. The latest time cannot be 12:00 A.M. When setting the times, consider the full range of Server Agents you are running and what activities can take place after regular business hours. For example, configuring the Server Agent to run after regular business hours keeps other processes running smoothly.

7. Click **OK**.

Note: You must start the Server Agents to begin processing.

Publishing Calendar Information

In addition to publishing your calendar using the Server Agents, publish your calendar on-demand using the Tools menu.

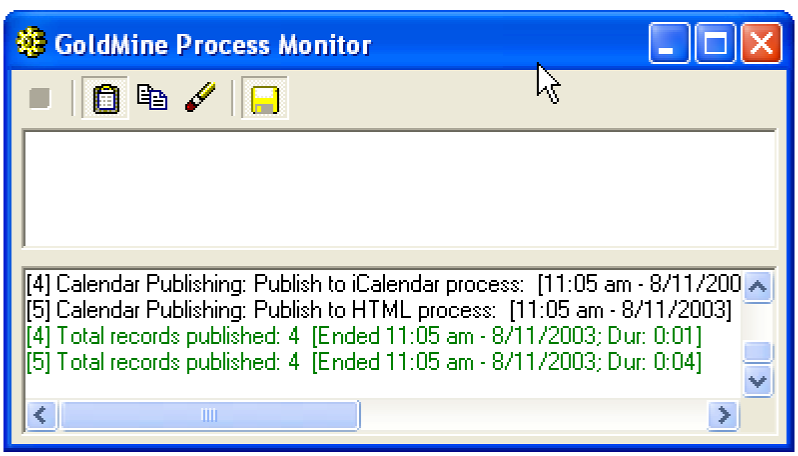
Publishing your calendar as iCalendar or HTML provides your schedule information to customers you work with or to non-GoldMine users. This is another part of shared calendar information options offered in GoldMine.

Using GoldMine, configure and publish in an iCalendar format (.ics), an html format (.htm, .html), and free/busy times (.ifb) by configuring the GoldMine settings.

- Configuring Publishing the Calendar as an iCalendar file
- Configuring Publishing the Calendar as a Web (HTML) Pages
- Configuring Publishing Busy Time

Note: Before publishing your calendar, configure the settings in the Calendar Options dialog box. Options include publishing iCalendar or Web publishing and publishing to a file, an ftp address, or an .html page.

1. Select **Tools>>Publish Calendars>>Publish Calendar(s)**. The **Calendar Publishing Settings** dialog box appears.
2. Review the data in the text box. If it is not correct, click **Edit Options** to change the Calendar Options for Publishing. Click **OK** to return to the Calendar Publishing Settings.
3. Click **OK** when the settings are correct. The GoldMine Process Monitor displays the publishing status.



Publishing Free/Busy Times

Publish your free/busy times to a network, ftp, or html location. The publishing parameters are set in the calendar preferences. (Edit>>Preferences>>Calendar tab>>More Options>>Free/Busy tab)

1. Select **Tools>>Publish Calendars>>Publish Free/Busy Times**. The **Free/Busy Publishing Settings** dialog box appears.
2. Review the settings in the text box. To alter the settings, click **Edit Options**. The Calendar Options Free/Busy tab appears. Make changes and click **OK**.
3. Click **OK** on the **Free/Busy Publishing Settings** dialog box and your schedule publishes to the .ifb file specified on the **Free/Busy** tab.

Automated Processes

About Automated Processes

Automate routine tasks by setting up a series of predefined actions to perform on contacts in the database including:

- Administrative and tracking duties
- Generating direct mail
- Validating data

Example: Print introductory letters to new contacts whenever a Contact Record is created. After printing the letter, the Automated Process can schedule a follow-up activity (such as a call back) on the calendar or a GoldMine user.

Designing Automated Processes

Automated process components:

- **Tracks:** A sequence of two or more events used as the step-by-step instructions GoldMine evaluates to perform a defined series of activities. Also known as an Automated Process. Link several events to form a track.
- **Events:** Step-by-step instructions contained in an Automated Process, or track, GoldMine evaluates to perform a series of activities. An event consists of a trigger and an action. An Automated Process consists of a sequence of one or more events.

Events within each track perform an action when triggered by a condition.

Use the **Automated Processes Center** to create and edit tracks and events and to execute tracks.

Manage tracks attached to contacts on each record with the **Tracks** tab.

Use menu options available when selecting **Tools>>Automated Processes** to Execute Processes and Remove Tracks.

Designing Automated Processes

Before creating Automated Processes, draw the idea for the process, then use the Automated Process Wizard to create it.

Preemptive and Sequential Events

When each event is created, it is assigned a preemptive or sequential number. GoldMine evaluates preemptive events first and then sequential events.

When creating preemptive events you generally set the condition to eliminate the scanned record rather than confirm this process is appropriate. For example, a sales rep and territory is designated in the Sales Rep and Territory fields, then remove this track from the record; otherwise populate these two fields with the defined criteria.

Preemptive events are numbered from 0 to 99. GoldMine processes all of the preemptive events of a track first before moving on to sequential events. If the Preemptive event “if” statements is:

- **True:** Perform the action and go to the next event.
- **False:** Do not perform the action but still go to the next event.

Preemptive events should be numbered 5, 10, 15, and so on. Keep space between the events to insert additional events.

Sequential events perform actions such as printing a letter, sending an e-mail, or scheduling a call. They are numbered from 100 to 999. Sequential events should be numbered 100, 110, 120, and so on to add other events between existing events.

After completing all preemptive events, GoldMine runs the first sequential event and processes sequential events. If the statement is:

- **True:** Perform the action and go to the next sequential event.
- **False:** Do not perform the action and do not proceed to the next sequential event.

Once GoldMine completes the sequential events, it processes the next track for the Contact Record, or if there is no track to process, GoldMine goes to the next Contact Record.

When creating an Automated Process, define the track, then allocate the events, triggers, and actions to the track.

Example of the planning to do:

New Prospect Welcome
- 1x per Contact
- Immediately Execute
- Anyone can Attach

Update Territory/Rep Field
- Preemptive
- Condition
- Update Field

Sold - Attach Customer Welcome Track
- Preemptive
- History will trigger
- Attach Track

Send Auto E-mail
- Sequential
- Immediate

Print 'Thank You for Interest' Letter
- Sequential
- Immediate
- Print

Schedule TeleSales Rep Call
- Sequential
- 5 Days
- Schedule

Send Literature
- Sequential
- History
- Schedule

Using the Automated Processes Center

View

1. Select **Tools>>Automated Processes>>Automated Processes Center**. The **Automated Processes Center** appears.
2. Create or modify processes using tool and menu options:
   - **Toolbar**
   - **Tracks Local Menu**
   - **Events Local Menu**
   - **Process Options Update**

3. Manage processes using these options:
   - **Creating Tracks**
   - **Creating Events**
   - **Editing Tracks**
   - **Editing Events**
   - **Attaching Tracks**
   - **Executing Tracks**
   - **Deleting Tracks or Events**

Working with Automated Processes

Creating Tracks

Create, clone, or modify Automated Process **Tracks** with the GoldMine Automated Processes Wizard.

Note: Planning is key. Take time to determine what you want to accomplish, how the triggers and actions work together for each preemptive or sequential event, and how the series of events, the track, will fit together.

1. Select **Tools>>Automated Processes>>Automated Processes Center**. The **Automated Processes Center** appears.
2. From the drop-down list, select the **User** who owns this Automated Process.
3. Right-click **Automated Processes** in the left pane and select **New**, or click the **New Automated Process** button. The **Welcome to the Automated Process Wizard** dialog box appears.
4. In the **Process Name** text box, type a descriptive name.
5. Type or select the **Process Code** from the F2 Lookup list.
6. Select the **Owner**. By default, the user name selected in the Automated Process Center displays.
7. Click **Next**. The **GoldMine Automated Process Wizard: Options** dialog box appears.
8. Select:
   - **Allow only one attachment of this process per contact:** Prevents multiple attachment of the same track to a contact's record.
   - **Execute this process immediately upon attachment:** Starts processing the track as soon as a user attaches the track to one or more contact records.
   - **Execute this process only when scanning for processes:** Prevents GoldMine from executing a track attached to a single contact record. This option is useful to restrict track execution to a specific system. Example: if a print action requires a designated workstation printer, selecting this option and **Execute this process immediately upon attachment** prevents the printing track from running from any other workstation.
   - **Restart this process each time that it ends:** Reattaches the track as soon as the processing of the track completes.
   - **Allow users to attach this process:** Permits other users to select and attach the track.
   - **Attach this process to all new contact records:** Automatically attaches the track to each new contact record. Apply only to one Automated Process (can only be applied to one Automated Process).

9. Click **Next**. The **GoldMine Automated Process Wizard: Events** dialog box appears. The dialog box displays the **Seq** (Sequence), **Event**, **Trigger**, and **Action** for each event. While creating a new track, the display is empty.
10. Select from:
    - **New:** A blank **Event Properties** dialog box appears. Lets you create an event.
    - **Delete:** Deletes the selected.
    - **Edit:** The **Event Properties** dialog box displays the selected event's settings. Edit and save.

11. Click **OK**. The **GoldMine Automated Process Wizard: Events** dialog box appears.
12. Click **New** to add another event, or when you finish adding events, click **Next**. The **Finish** dialog box appears.
13. Click **Finish**. For the Automated Process to work, attach the track and process the track.

Creating Events

Events are the triggered actions that take place in a specific order. Each Automated Process, or track, can have up to 900 sequential events and 100 preemptive events. Create or edit events using:

- **Automated Process Event Wizard:** Available when right-clicking and select **New**.
- **Event Properties dialog box:** Available while creating or editing an Automated Process.

Attaching Tracks to a Contact

Before an Automated Process can be executed, the track must be attached to selected Contact Records. One record can have multiple tracks assigned to it. GoldMine stores the attached tracks on the **Tracks** tab. Build tracks in the Automated Processes Center, then manually attach a track to a record.

Attaching Tracks to a Single Contact Record:

1. Right-click in the **Tracks** tab and select **Attach a Process**. The **Attach an Automated Process** dialog box appears.
2. Select the track to add from the **Code** and **Process Name** list.
3. Select **Attaching User** from the drop-down list.
4. Click **OK** to attach the track and continue.

Attaching Tracks to Multiple Contact Records:

1. Select **Tools>>Automated Processes>>Execute Processes**. The **Automated Processes Execution** dialog box appears.
2. Select either:
   - **Scan current contact:** GoldMine processes only the active contact, then returns to an idle mode.
   - **Scan a group of contacts:** Select **ALL Contact Records!** or a filter or group as the basis for selecting contacts. GoldMine processes the contacts in the filter or group, then returns to idle mode.

3. GoldMine scans to evaluate and execute attached tracks. In the **Scan Method** area, select from:
   - **Scan once:** Executes the track as you attach it.
   - **Scan continuously:** Scans the database continuously as configured in the Server Agents Administrator.
   - **Do not scan:** Attaches the track, but does not evaluate it for execution (available only when selecting **Attach Track to selected contacts**).

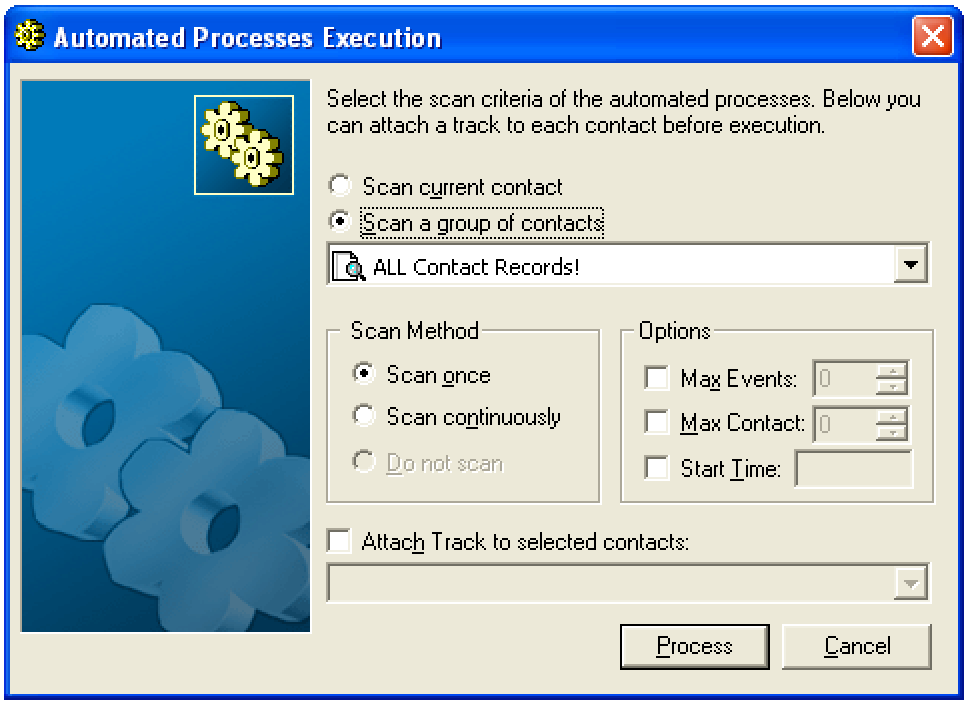
4. Select **Attach Track to selected contacts**.
5. Select the track to be attached from the drop-down list.

6. Click **Process**. The **Process Monitor** appears, tracking the attachments and the events triggered.

Executing Tracks

Execute a track for a single contact, a group of records based on a filter or group, or for all contacts. Execute a track manually whenever necessary, or set GoldMine to scan the database continuously, or use the Automated Process Server Agent.

1. Select **Tools>>Automated Processes>>Execute Processes**. The **Automated Processes Execution** dialog box appears.



2. Select one:
   - **Scan current contact:** GoldMine processes only the active contact, then returns to an idle mode.
   - **Scan a group of contacts:** Select ALL Contact Records, or select a filter or group from the drop-down list.

3. In the **Scan Method** area, select one:
   - **Scan once:** GoldMine scans the contact database, or the contacts selected by a filter or group, and processes all tracks. When complete, it returns to an idle mode, unless you have the Automated Processes Server Agent running. If running, the Automated Process scans again in the timeframe designated.
   - **Scan continuously:** GoldMine scans the contact database and processes all tracks, then repeats the process continuously. This allows you to set up a workstation on the network that continuously scans for triggered events and immediately performs the event actions. It can be interrupted by selecting Stop in the GoldMine Process Monitor dialog box.

Note: The option **Do not scan** is available only when you select **Attach Track to selected contacts**, which lets you attach tracks without scanning the database for tracks to execute.

4. In the **Options** area, configure:
   - **Max Events:** Maximum number of events (up to 99,999) to be processed during this scan.

Tip: To control the number of letters printed at one time, set the Max Contact to process only 25 records per day, or queue the print job to print manually or in off hours using the Print/Fax Server Agent.

- **Max Contact:** Maximum number of contact records (up to 99,999) evaluated.
- **Start Time:** Sets a time to start processing the track. Use this option to take advantage of periods of lower demand to run the process. To set the time using the graphical clock, press **F2**.

5. Click **Process**. The Process Monitor appears, displaying the number of contacts scanned and triggered.

Removing Attached Automated Process Tracks

After attaching a track to an individual or many Contact Records, you may need to remove the attached track.

To Manually Remove a Single Track

1. Select the **Tracks** tab.
2. Right-click the track to be removed and select **Remove Process**.
3. Click **Yes**.

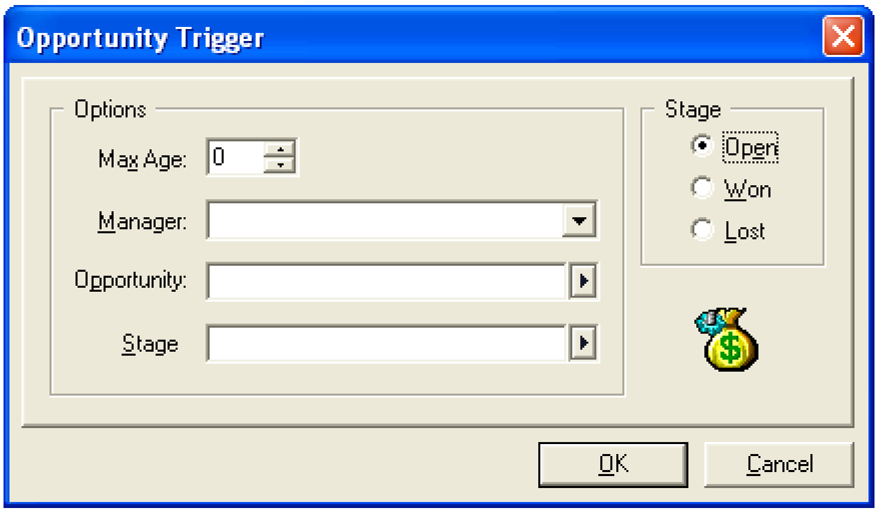
To Remove a Track from One or More Contact Records

1. Select **Tools>>Automated Processes>>Remove Track**. The **Automated Process Track Removal** dialog box appears.
2. Select the **Track Owner**.
3. Select the **Track Name**.
4. Select one:
   - **Remove track from current contact:** Select to remove the track from the currently active Contact Record.
   - **Remove track from a group of contacts:** Select to remove the track from ALL Contact Records or from the filtered group.

5. Click **OK**.

Opportunity Trigger Dialog Box

View



Automated Process events can be triggered based on the opportunity information selected. Trigger based on a single opportunity setting or a combination.

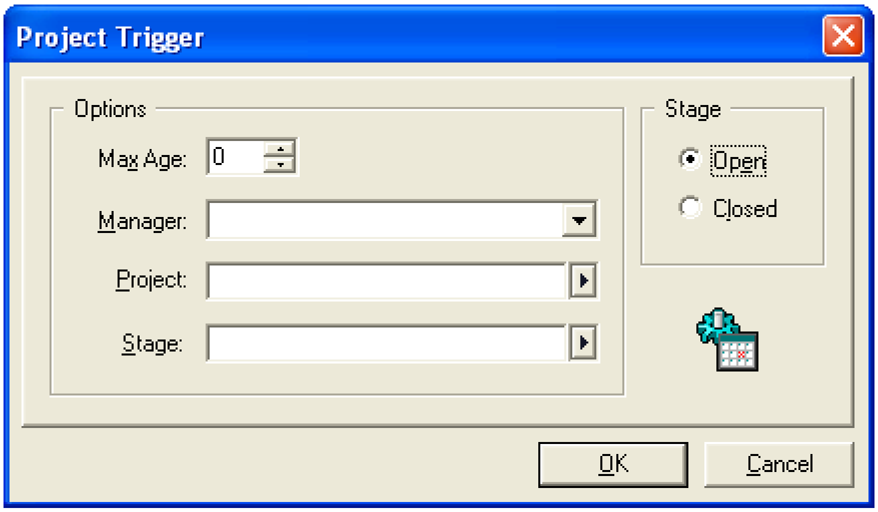
1. In the **Options** area, configure:
    - **Max Age:** Select the age of the project (in days).
    - **Manager:** Select the manager.
    - **Opportunity:** Select the opportunity name.
    - **Stage:** Select the stage of the opportunity.

2. In the **Status** area, select either **Open** or **Closed**.

3. Click **OK**.

Project Trigger Dialog Box

Automated Process events can be triggered based on the project information you select in the Project Trigger dialog box. You can trigger on a single project setting or a combination of settings.



To Configure the Project Trigger

1. In the **Options** area, select or configure one or more of the following:
   - **Max Age:** Select the age of the project (in days).
   - **Manager:** Select the manager.
   - **Project:** Select the project name.
   - **Stage:** Select the stage of the project.

2. In the **Status** area, select either **Open** or **Closed**.

3. Click **OK**.

Marketing Tools

About the Leads Management Center

The Center provides a sequence of activities to help manage marketing activities related to the base of contacts and potential leads. Identify and track who brings in the lead, who and how contact is made, and the lead's progress through the sales cycle.

Select **View>>Marketing Tools>>Leads Management Center**, or click **Administer leads** on the Getting Started toolbar.

Use the Leads Management Center along with the Campaign Management Center and Web Import to design, test, and implement customer treatment strategies and campaigns to improve marketing efficiency and measure effectiveness.

About the Campaign Management Center

One of GoldMine's marketing tools, this interface lets you view customer interactions from initial contact to closing the first sale to future purchases.

Use the Campaign Management Center, Web Import, and the Leads Management Center to design, test, and implement customer treatment strategies and campaigns to improve marketing efficiency and measure effectiveness. By tying sales and marketing promotions with customer data you can provide consistent, personalized customer experiences.

Select **View>>Marketing Tools>>Campaign Manager**, or click the **View and manage Campaigns** button on the Getting Started toolbar.

The Center interface contains three panes, a menu, and a toolbar. The navigation pane (tree view) displays each campaign. Expand a campaign in the tree to reveal its Open, Completed and Contacts folders. Select a folder to display details and contact names (in the right panes).

The Center tracks open/completed activities and which customers have been contacted. When you complete a scheduled activity generated from a campaign, GoldMine tracks the activity and records it as completed in the Completed folder. A completed campaign activity is also noted in the Contract Record History tab.

The Campaign Creation Wizard provides a checklist of activities for conducting a campaign. Use the Wizard to import data, schedule calls, perform mail merges, and run Automated Processes.

Click the **Configure Web Import** button on the toolbar. A wizard appears. Use it to create the HTML form and the script for Web imports. Web import capabilities help you collect contact information from interested visitors directly from your Web site, to feed that into marketing campaigns.

Using the Campaign Management Center

Create, modify, or delete campaigns using the Campaign Management Center. Use the Toolbar or Navigation Pane Menu to access actions.

1. Select **View>>Marketing Tools>>Campaign Manager** (or click **View and manage Campaigns** on the Getting Started toolbar). The **Campaign Management Center** information page appears.
2. Click **OK**. The **Campaign Management Center** dialog box appears.
3. Options:
    - Create Campaigns.

- Clone Campaigns.
- Rename Campaigns.
- Create a New Campaign Task.
- Complete a Campaign Task.
- Delete Campaigns.
- Delete Campaign Tasks.
- Modify Campaign Properties.

Using the Campaign Creation Wizard

Provides an organized stream of activities for conducting a marketing campaign. Options are:

- **Importing Data:** Import leads and contacts from a variety of data sources.
- **Mail Merge:** Communicate with contacts using GoldMine's document, envelope, and label templates.
- **E-mail Merge:** Communicate with contacts using predefined e-mail templates through queued Internet e-mail messages.
- **Call:** Schedule outgoing telephone calls to initiate contact or follow-up in the future.
- **Automated Processes:** Use predefined or create new Automated Processes to refine the work flow processes for repetitive marketing and tracking tasks.

See **Creating Campaigns**

Resources

About Resources

Resources are diverse items such as meeting rooms, equipment, or company cars. They can be scheduled and tracked in the calendar. When scheduling an activity, you can also schedule resources.

Auto-Updating Resources

Auto-updating of resources quickly completes or deletes scheduled resources based on your selection criteria.

1. In the **Resources Activity List** dialog box select **Auto-Update**. The **Auto-Update Resources** dialog box appears.
    - **Complete ALL of the Activities currently displayed:** Completes the scheduled resources and updates with the specified result and success.
    - **Complete selected Activities Only:** Completes the scheduled resources selected in the Resource Schedule dialog box based on the specified date range and updates with the specified result and success.
    - **Delete ALL of the Activities currently displayed:** Deletes the scheduled resources in the Resource Schedule dialog box.
    - **Delete selected Activities Only:** Deletes the scheduled resources selected in the Resource Schedule dialog box based on the specified date range.

2. When completing scheduled resources, specify a result code and success level for completed resource activities. Type a result code in the **Result** text box. Select **Successful** or **Unsuccessful** in the **Success** drop-down list.
3. If you selected **Complete** or **Delete selected Activities Only**, select **Date range** and select **From** and **To** dates using the F2 graphical calendar.
4. Click **OK**.

Using the Resources' Master File

To fully use GoldMine's resource scheduling features, enter a resource record for all items in your organization that two or more users may use at the same time. Commonly requested resources include conference rooms, projectors, demonstration products, and company vehicles.

1. Select **File>>Configure>>Resources**. The **Resources' Master File** appears.
   - **Name:** Displays the abbreviated name for the resource such as OVERHEAD or MEETROOM. This is the name used when scheduling the resource. Can be any unique alphanumeric sequence up to eight characters in length. No 2 resources can have the same Name.
   - **Code:** Displays the alphanumeric identification to use for purposes such as the resource location, serial number, or other relevant information. This field is primarily used to group resources together.
   - **Description:** Provides a description of the resource such as Bell and Howell 35mm Film Projector.
   - **Custodian:** Displays the name of the user responsible for the resource.

2. Click **New** or **Edit** to add a resource or edit information about the resource. The **Resource Profile** dialog box appears.
3. Click **Delete** to remove resources.
4. Click **View Schedule** to show current reservations for the resources. The **Resources) Activity List** **dialog box** appears.
5. Click **Close** to save changes and close the dialog box.

Creating Resources

1. Select **File>>Configure>>Resources**. The **Resources' Master File** appears.
2. Click **New**. The **Resources Profile** dialog box appears.
3. Type the **Resource Name** and **Profile**.
4. Type or select the **Code**.

- **Resource Name**

  The **Resource Name** is limited to eight characters.

- **Code**

  The **Code** is customizable and is a good way to group resources by type or location.

5. Select the **Custodian**, or leave as **(public)**.
6. Click **OK**.

Viewing the Resource Schedule

To ensure the availability of equipment, facilities, or other resources, check when a resource is already reserved.

1. Select **File>>Configure>>Resources**. The **Resources' Master File** appears.
2. Select **View Schedule**. The **Resource(s) Activity List** dialog box appears.
   - **Date:** Date of the scheduled activity the resource is reserved for.
   - **Time:** Time of the scheduled activity the resource is reserved for.
   - **Dur:** Duration of the scheduled activity the resource is reserved for.
   - **Contact:** Name of the person who is the target of the activity; for example, the contact with whom a meeting is scheduled requiring the resource.
   - **Code:** Job code or other identifier that categorizes the activity the resource is reserved for.
   - **Reference:** Descriptive information regarding the activity the resource is reserved for.

4. Use the following buttons to manage the resources in the **Resource Schedule** dialog box:
   - **Complete:** Displays the **Complete** dialog box where you enter information to complete the activity.
   - **Delete:** Deletes the scheduled activity. Selecting this option does not delete the resource.
   - **Edit:** Displays the **[Activity]** dialog box, such as Appointment, where you edit basic information for the scheduled activity.
   - **Auto-Update:** Displays the **Auto-Update Resources** dialog box.

5. Alternatively, right-click and select an option from the local menu:
   - **Complete:** Displays the **Complete** dialog box.
   - **Auto-Update:** Displays the **Auto-Update Resources** dialog box.
   - **Find:** Displays the **Find** dialog box.
   - **Output to:** Output the schedule to the printer, Word, Excel, or the clipboard.
   - **Delete:** Deletes the selected scheduled resource.
   - **Edit:** Opens the scheduled activity for editing.

6. Click **Close** to exit the dialog box.

My GoldMine

About My GoldMine

Use My GoldMine to view current information from GoldMine and from the Internet in a customizable window. The My GoldMine desktop contains columns and sections you can personalize to display business-critical content from the Web or from within GoldMine. Personalize My GoldMine layout, content, and refresh rate. Add and remove content from My GoldMine to optimize your efficiency and instantly access information such as stock quotes, e-mail, weather, pending activities, or other relevant information for planning and managing your business.

Add GoldMine information, including your appointments, e-mail inbox, or the day's sales.

Also add Internet sites supporting Rich Site Summary (RSS) which is a simple XML format designed for sharing Web headlines. Sites supporting RSS are usually offering "What's New" information from their site. RSS versions 0.91-2.0 supported.

Note: Your system must be connected to the Internet to display and access Web sites. Set up the appearance, content, and refresh rate for My GoldMine to display the Web site content and GoldMine information.

Configuring My GoldMine

1. Access the My GoldMine configuration options either way:
   - Select **File>>Configure>>My GoldMine**.
   - Select **View>>My GoldMine>>Personalize Content**.

2. The **Configure My GoldMine** dialog box appears. On the **Layout** tab, select the **Page Style** in the drop-down list.
3. Select a 2 or 3 column style in the **Column Scheme** drop-down list.
   - **Default**
   - **Windows**
   - **Newspaper**
   - **XP**
4. For each column, select the **Column Format** in the drop-down list. Select **Tab**, which keeps the contents of the other items in the column hidden when not selected, or **Box**, which displays the information or hyperlink for all items.
   - **Classic Three Columns**
   - **Even Three Columns**
   - **Even Two Columns**
5. Click the **Contents** tab.
6. Select **Column 1, 2,** or **3**. The information in the **Items** pane reflects the active resources for the selected column. To add a resource, click **Add**. The **Select Item to Add** dialog box appears.
7. To change the display order, select the item and click **Move Up** or **Move Down**.
8. Click **Remove** to delete the selected item.
9. Click the **Settings** tab.
10. Select **Refresh only on startup** prevents you from setting a refresh rate. My GoldMine does not refresh while it is open. If you do not select Refresh only on startup, type or select a time in the **Refresh My GoldMine Every x minutes** text box.
11. Click **OK** to save the settings and close.

Using My GoldMine

Use **My GoldMine** as a personalized resource for current information from selected GoldMine and Internet sources.

1. Select **View>>My GoldMine**. The **My GoldMine** window appears.
2. Depending upon the configuration you selected, My GoldMine displays with 2 or 3 columns, as tabs or boxes, and with default, Windows, newspaper, or XP page style. To change the setup, style, and content, select **Personalize Content**. The **Configure My GoldMine** dialog box appears.
3. To add to the content of each column, click **Add Item(s) to Columns**. The **Select Item to Add** dialog box appears.
4. To view the complete information where it is not displayed, clicking the hyperlink expands the view to include the detailed information.

Note: If you selected the Tab format in the **Configure My GoldMine** dialog box, you may need to scroll to the bottom of the column and double-click the resource's title bar. Use the arrow to minimize the view on the tab format. The Box format keeps your resources actively displayed at the top of the column.

5. To copy information from the My GoldMine display, highlight the section and right-click. Select **Copy** from the local menu. Choose **Select All** to copy the entire My GoldMine display to the clipboard. Then paste the selected section or the entire section in your target application.
6. To refresh news feed sites manually rather than wait for the automatic refresh, click **Refresh**.

Glossary

#

.gmb: (The file extension for a backup file created by the Back-Up Wizard)

.ics: (iCalendar file extension)

A

AccountNo: (The Account Number field uniquely identifies a contact record and is the common field value that links the Contact1 table to Contact2, Cal, ContSupp, ContHist, and OpMgr)

Action: (The Automated Process action is the activity performed when triggered)

Activities: (Activities are time-specific or event-based actions linked to contacts; for example calls, appointments, letters, or other types of activities, such as To Do tasks or events that are assigned to users)

Activity list: (A window that displays task or event information. The Activity List displays eleven categories of information in a set of tabs)

Additional Contact: (Individual associated with the primary contact, such as an administrative assistant. GoldMine stores this information in the Contacts tab of the primary contact's record)

Alphanumeric characters: (Letters A - Z and numeric digits)

Attachment: (A file, for example, a Word document, created outside of GoldMine and attached to GoldMine as a linked document, InfoCenter attachment, or e-mail attachment)

Auto-updating: (Allows you complete or delete many activities or resources)

B

Bcc: (Blind Carbon Copy. A copy of a message, usually e-mail, is sent to a recipient that the main recipients cannot see)

BDE: (Borland Database Engine. Serves as a connector between GoldMine and the databases)

Break fields: (Break fields manage the grouping of information, determining how multiple entry information, such as Details, Calendar, and History, is displayed in a report template. The break field ensures that all the details or calendar entries are grouped together before moving on to the next contact record. Break fields can only be used in Sort Headers)

C

Calculated field: (Field containing a mathematical expression rather than data)

Cc: (Carbon Copy. Used in e-mail messages, memos, and letters)

Character string: (Any series of alphanumeric characters (including spaces) that are treated as a group)

Cloning: (The process of copying a user or report settings and configurations in order to quickly create a new user or report)

CommonDir: (Used in the GM.ini, the CommonDir specifies the location of your default contact files)

Contact files: (The tables storing a database's contact information. Also referred to as Common files. The CommonDir line in the GM.ini points to the default contact files)

Contact record: (Standard unit of information in GoldMine. GoldMine's contact record incorporates standard information, such as name, company, phone, and address, and also serves as the basis for all scheduled work in GoldMine, acting as the central link between GoldMine's Calendar and History by maintaining all past and pending events related to the individual contact records in the GoldMine database)

Contact set: (Database consisting of the contact information: Contact1, Contact2, ContSupp, ContHist, ContGrps, ContUdef, Conttlog, and sometimes Lookup. GoldMine allows you to have more than one contact set)

Contact tabs: (Set of tabs located below the main Contact Record containing information associated with the contact, including additional contacts, pending, and history information)

Contacts tab: (Additional contacts associated with the Contact Record)

Curtaining: See Record curtaining

Custodian: (The person responsible for the resource)

D

Database: (A collection of data fields and related tables storing information that facilitates access and retrieval)

Details tab: (Structured, user-defined information associated with each Contact Record)

Dialog field: (A field created to open a dialog box and prompt the user for parameters to include in the report)

Digital ID: (Digital signature and encryption keys sent with e-mail messages)

E

Entity: (Used to refer to a single record type. Consists of a customized combination of primary fields views, custom screens, and GM+Views)

Event: (Step-by-step instructions contained in an Automated Process, or track, that GoldMine must evaluate to perform a specified series of activities. An event consists of a trigger and an action. An Automated Process consists of a sequence of one or more events)

F

F2 Lookup: (Special type of browse window that can be customized to contain frequently used or code-specific entries. Security options can control F2 lookups to ensure user input and allow standardization of data)

Field typing: (Customizing field labels and colors using direct data or dBASE expressions)

Fields tab: (Displays user-defined fields grouped together in user-defined screens)

File code: (The unique 3-character identification assigned to each Contact Set, enabling synchronization and backing up)

Filter: (Sort condition used to select a subset of records from the entire database)

Force log out: (Forces users out at a particular time or when inactive for a period of time)

Free/busy times: (Free and busy calendar times published to file, ftp, or http locations and made available to other users)

G

GM.ini: (A file located in the GoldMine directory containing commands for general GoldMine operation. The most important are the SysDir, GoldDir, and CommonDir)

GM+View tab: (User-defined HTML template-based views)

gmb: (The .gmb file extension for a backup file created by the Back-Up Wizard)

GoldDir: (Used in the GM.ini, the GoldDir specifies the location of your GoldMine files (also called your GMBase files))

GoldMine Business Contact Manager: (An installation of GoldMine using a D-License and a dBASE database)

GoldMine Business Contact Manager Corporate Edition: (An installation of GoldMine using an E-License and an optional SQL database. Includes GoldSync)

GoldMine e-mail: (E-mail message to another GoldMine user or user group)

GoldMine files: (The tables storing other database information. Also referred to as GMBase files. The GoldDir line in the GM.ini points to the shared GoldMine files)

GoldMine link to Excel: (Creates a link between GoldMine and Excel, allowing you to add GoldMine fields to Excel or export data from Excel to GoldMine)

GoldMine link to Word: (Creates a link between GoldMine and Word, allowing you to add GoldMine fields to a Word document or template)

GoldSync Server: (A computer that handles the synchronization processes)

GoldSync Service: (Runs the GoldSync application in the background without requiring a user to launch GoldMine)

Group: (Fixed set of contact records that meet an initial set of conditions. Once selected, member records subsequently have instantaneous access to the subset. Alternate method to filters of maintaining a subset of data)

H

History tab: (Completed activities associated with the Contact Record)

HTML: (HyperText Markup Language. The authoring language used to define the structure and layout of a Web document by using a variety of tags and attributes)

Hyperlink: (An element in an electronic document that links to another place in the same document or to an entirely different document. Click on the hyperlink to follow the link)

I

IIS: (Internet Information Services)

InfoCenter: (A resource used to maintain and display any type of information useful to an organization or an individual. The InfoCenter can archive information in a variety of formats, such as graphics, multimedia files, and program applications. Any of this information can be linked to a Contact Record)

Installing locally: (Installing GoldMine .exes and .dlls on a local workstation in a network environment)

Instant sync: (Automatically reminds undocked users to synchronize whenever a connection GoldSync is detected)

Internet e-mail: (E-mail message to customers using you POP3 e-mail account)

K

Keyboard shortcuts: See Shortcut keys

Keyword: (One or more words that succinctly describe a document's contents)

KnowledgeBase: (Information created by, for, and about an organization and available to multiple users)

L

Linked activities: (Scheduled activities linked to a contact record)

Links tab: (Documents, programs, and other files linked to the Contact Record)

Local menu: (Also known as a shortcut menu, the local menu provides quick access to a set of commands affecting only the current browse window, tab, or pane)

LogStamp: (Contains the time and date that the record was last changed)

M

Macros: (A series of commands and/or keystrokes that launches or runs a action)

Maintaining: (Process to improve performance by regenerating indexes, packing and rebuilding tables, and sorting and verifying data. The maintenance of the database should be performed by the system administrator or manager)

Members tab: (Lists the contact Groups of which the Contact Record is a member)

Merge codes: (Three-character codes used as the basis for e-mail and document merging for mass mailings)

N

Net-Update: (Process of updating GoldMine over the Internet)

Notes tab: (Free text notes associated with each Contact Record)

O

ODBC: (Open Database Connectivity)

Operator: (Specifies the value a field must have to be included in a record selection criteria. Examples of operators include the following: equal to, greater than, lesser than or equal to)

Opportunity: (Involves a group working as a team with multiple organizations and contacts to successfully close a complex sale)

Opptys tab: (Displays the Opportunities associated with the Contact Record)

Organization Chart: (Graphically displays contact information and organizational relationships in a tree structure)

P

Packing: (The process of actually deleting records that were marked for deletion. This process is only necessary for a dBASE database. Periodically packing the database files removes the “dead space” between records)

Pending tab: (Activities scheduled for the Contact Record)

Personal Base: (Information useful to an individual user that only the logged-in user can view and update)

Primary contact: (The name of the contact on the Contact record)

Primary fields views: (Primary field views are customized views of the primary fields. Primary fields are those in the upper four panes of a Contact Record and are Contact1 fields)

Project: (Involves a group working as a team to complete a long-term project that involves multiple component tasks)

Projects tab: (Displays the Projects associated with the Contact Record)

R

Rebuilding: (Creates a new file structure (or table), and copies data, record-by-record, from the old files/tables to the new ones)

Record curtaining: (A Contact record can be curtained so that a user who does not own the record cannot view the record or can view only part of the record)

Record types: (Customized combination of primary fields views, custom screens, and GM+Views. Configured in the Record Types Administration Center)

Record Types Administration Center: (Allows you to create many Record Types based on combinations of your different Primary Field Views, Custom Screens, and GM+Views and to apply them based on your user-defined Record Type Rules)

Record typing: (Customized combinations of Primary Fields Views, Custom Screens, and GM+Views)

Rectype: (A record type code identifying different types of records within the database)

Referrals tab: (Internal referrals within the Contact Set)

Rehost: (Rehosting data is the process where one database is copied or converted to a new database)

Reports Center: (Provides easy visual access to several reporting options available within GoldMine)

Required field: (A field requiring data)

Resources: (Resources that are commonly requested include conference rooms, projectors, demonstration products, company vehicles)

Rich Site Summary: (See RSS)

RSS: (Rich Site Summary -- a simple XML format designed for sharing Web Headlines)

S

Screen design toolbar: (Used when you are designing your primary fields or Fields tab screens)

Seq: (Sequence ordered number for each event in an Automated Process. The sequence number begins with either P for a Preemptive event or S for a Sequential event. Each event is processed in order based on the sequence number)

Shortcut keys: (Shortcut keys are keyboard keys or key combinations that invoke a particular command)

Shortcut menu: See Local Menu

Site code: (Matches a synchronization process to a site)

Sort Header: (A section in a report that holds the labels, filters, and break filters for the section or for the corresponding detail section)

Sort order: (The order that Contact records are displayed based on a specified field. The sort order for the database is determined by the Sort Order you select in the Contact Listing window. If a filter or group is active, the Sort Field you selected takes precedence)

Sorting: (Orders the records in the files/tables by the most-used indexes)

Summary tab: (Displays activity information about the current Contact Record)

Synchronization: (GoldMine's remote synchronization is a process that can update one GoldMine system with new or changed information that has been entered in another GoldMine system)

SyncStamp: (Contains the time and date when the record was last successfully retrieved during synchronization)

SysDir: (Used in the GM.ini, it specifies the location of gmw6.exe)

T

Task group: (A group of task items on the GoldMine Taskbar)

Task item: (An item on a taskbar that launches an action)

Taskbar: (Frequently used GoldMine Menu commands and macros, links to documents and files, and a quick step for launching applications and websites)

Tickets tab: (Displays tickets from HEAT Call Logging when GoldMine/HEAT integration is installed)

Tlogs: (The general name for the two types of logs: ContTlog and GMTlog. They track date and time stamps for changes to fields and the synchronization of the data)

Track: (A sequence of two or more events, which are the step-by-step instructions that GoldMine evaluates to perform a defined series of activities. Also known as an Automated Process.)

Tracks tab: (Lists the Automated Process tracks attached to the Contact Record)

Transfer set: (A database of all the changes made to Contact Records during a specified time frame. The database with the changes is sent to other GoldMine locations and retrieved, updating that database with the new information)

Transformation sheet: (A language for transforming XML documents into other XML documents)

Trigger: (A predefined condition in an Automated Process event that, when the condition is true, causes GoldMine to execute an action)

U

Unlinked activities: (Scheduled activities that are linked to a user but not to a contact)

URL: (Abbreviation of Uniform Resource Locator, the global address of documents and other resources on the World Wide Web)

User groups: (Users can be logically grouped according the functions that they perform)

User Preferences: (Various settings that control how GoldMine looks and acts for each user)

User Properties: (These settings define a user's security and access in GoldMine)

UserID: (Field that contains the name of the user an activity is assigned to. UserID is based on the GoldMine username)

Username: (Use this name to log into GoldMine. Identifies the user's activities)

Username.ini: (An initialization file located in the GoldMine directory that stores user's individual settings)

Username.tbi: (Stores the user's taskbar settings)

V

Verifying: (Ensures that the data is readable and that all sync fields in the synchronization records of the database file(s) are populated, and no unique fields are duplicated)

W

WYSIWYG: (What You See Is What You Get. Pronounced wizzy-wig. A WYSIWYG display allows you to see on the screen exactly what will appear when the document is printed)

X

XML: (Acronym for Extensible Markup Language. XML is a universal format that uses tags for exchanging structured documents and data on the Internet)

Index