

# GoldMine Corporate Edition What's New Guide

Version 7.6



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# What's New in GoldMine Corporate Edition 7.6

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## New Supported Operating Systems and Applications

### Updated Windows Operating System Support

#### **GoldMine Corporate Edition Servers**

- Microsoft Windows Server 2008 R2 (64-bit)
- Microsoft Windows Server 2008 (32-bit)

#### **GoldMine Corporate Edition Clients**

- Microsoft Windows 7 (32-bit)



**NOTE:** Microsoft SQL Server 2008 SP1 (32-bit and 64-bit) is now supported for GoldMine Corporate Edition Servers.

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**NOTE:** Microsoft Internet Explorer 8 is now supported for all supported operating systems.

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### Updated Microsoft Office Support

In addition to support for Microsoft Office 2003 and 2007, GoldMine now supports Microsoft Office 2010. For more information, see ["GoldMine Integration with Microsoft Office 2010" on page 10](#).

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## New Features in GoldMine

The following new features have been added to GoldMine Corporate Edition 7.6:

- Cross-field validation enables an F2 lookup list to change based on the value in another field. For more information, see ["Setting Dependency Between Lookup Lists" on page 4](#).
- Option to "Show contact name on activity tabs" to make account roll-up more useful. For more information, see ["Show the Contact Name on Activity Tabs" on page 7](#).
- Simultaneous Alarms Displayed within a Single Screen. For more information, see ["View Simultaneous Alarms on a Single Pop-up Box" on page 8](#).
- Import a One-Button-sync profile without using GoldMine User-to-User Messaging. For more information, see ["Import a One-Button-Sync profile using Outlook" on page 9](#).

## Setting Dependency Between Lookup Lists

You can set up lookup values that are dependent on values from other fields. Also, you can create, change, or delete a relationship.

For example, you can create a dependency between the fields **State** and **City**. This enhancement allows you to choose a city from a list that is valid within a selected state.

### *To Set Up a Dependency*

To set up a dependence, you must first configure the field.

1. Open a F2 Lookup dialog box and click **Setup**.

**F2 Field Setup**

GoldMine allows you to add frequently used data entry values. To help you track this information for reporting purposes, security options may be set to ensure standardized data entry.

Field Name:

**Field Settings**

<input checked="" type="checkbox"/> Allow blank input	<input type="checkbox"/> List existing data
<input type="checkbox"/> Force valid input	<input checked="" type="checkbox"/> Allow adding
<input type="checkbox"/> Insert closest match	<input checked="" type="checkbox"/> Allow editing
<input type="checkbox"/> Capitalize first letter	<input checked="" type="checkbox"/> Allow deleting
<input type="checkbox"/> Pop-up when selected	<input type="checkbox"/> Auto Fill

☐ Import lookup entries from another field

**Context-dependent F2 lookup list**

☒ Lookup list depends on another field:

☒ Contact (CONTACT1) field

Field name:

OK Cancel

The F2 Field Setup dialog box opens; this is where you change the dependency for F2 lookup values.

2. In the **Context-dependent F2 lookup list** area, click on the **Lookup list depends on another field** check box.



**NOTE:** This checkbox must be selected. If left unchecked then the lookup values do not depend on any other fields.

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3. Choose a “master field” that it used to determine the valid options for the current field. First, select the radio button corresponding to the database table in which the master field is stored. Then select the master field in the drop-down list.
4. Select the **Contact (CONTACT1)** button to select a master field from the Contact1 table.

If you are configuring a field that is not stored in the Contact1 database table, you will have the option of selecting another field from the same table.

For example you can set an activities Result Code, which depends on the **KEY1** (record type) field in the corresponding contact. If you select the **Contact (CONTACT1)** button, then the Contact1 fields appear in the drop-down box. If you select the button for a different table, fields from the corresponding table appear. For Activities it is the CAL table; for Cases it is the CASES table.



**NOTE:** After changing this field all lookup values will not update. Manually edit each field in the list. See ["To Manually Edit Dependencies" on page 6](#).

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For a list of dependency tables, see ["Available Dependency Tables" on page 5](#).

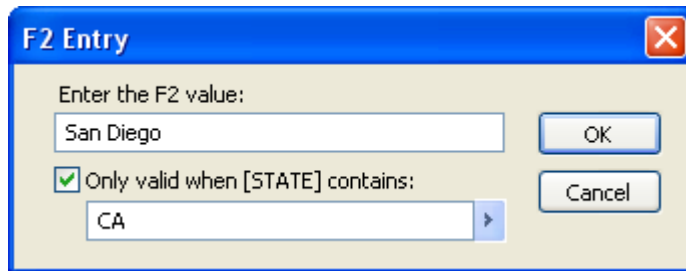
### Available Dependency Tables

Depending on the field being configured, there are different options available for the master field, as shown below.

Dependent field type	Master field location in database
Contact record fields	CONTACT1 table
Use defined contact fields	CONTACT1 and CONTACT2
Pending activity fields	CONTACT1 and CAL tables
History activity fields	CONTACT1 and CONTHIST tables
Opportunity and Project fields	CONTACT1 and OPMGR tables
Case fields	CONTACT1 and CASES tables

## To Manually Edit Dependencies

1. Open the F2 Lookup dialog box for the dependency field and select a value.
2. Click **Edit**.



The F2 Entry dialog box has a blue title bar with the text 'F2 Entry' and a red close button. The main area is light beige. It contains a text input field with 'San Diego' and an 'OK' button. Below this is a checked checkbox labeled 'Only valid when [STATE] contains:' followed by a dropdown menu showing 'CA' and a right-pointing arrow. A 'Cancel' button is to the right of the dropdown.

3. Click on the **Only valid when** check box.

A *valid* value means that the master field has the appropriate value. In the example of city and state, the State value is CA (California) and when the **Only valid when** check box is checked, the City values returned are all cities in California.

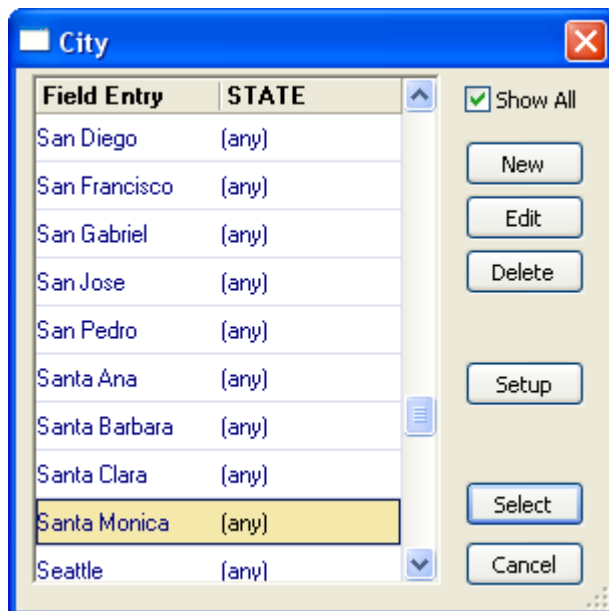
4. At the drop-down box, select a value and then click **OK**.

The F2 Lookup dialog box now have a **Show All** check box.

## To Select an Entry by Ignoring Dependency Settings

After setting up all the dependencies, you can select them from the F2 lookup lists.

1. Open an F2 Lookup dialog box.



The City F2 Lookup dialog box has a blue title bar with the text 'City' and a red close button. The main area is light beige. It features a table with two columns: 'Field Entry' and 'STATE'. The table lists cities: San Diego, San Francisco, San Gabriel, San Jose, San Pedro, Santa Ana, Santa Barbara, Santa Clara, Santa Monica (highlighted), and Seattle. Each city has '(any)' in the STATE column. To the right of the table is a checked checkbox labeled 'Show All'. Below the checkbox are buttons for 'New', 'Edit', 'Delete', 'Setup', 'Select', and 'Cancel'.

Field Entry	STATE
San Diego	(any)
San Francisco	(any)
San Gabriel	(any)
San Jose	(any)
San Pedro	(any)
Santa Ana	(any)
Santa Barbara	(any)
Santa Clara	(any)
Santa Monica	(any)
Seattle	(any)

2. Click the **Show All** check box.

This shows all values independent from the Master field value.

Deselect the **Show All** check box to show only valid values for the dependency.

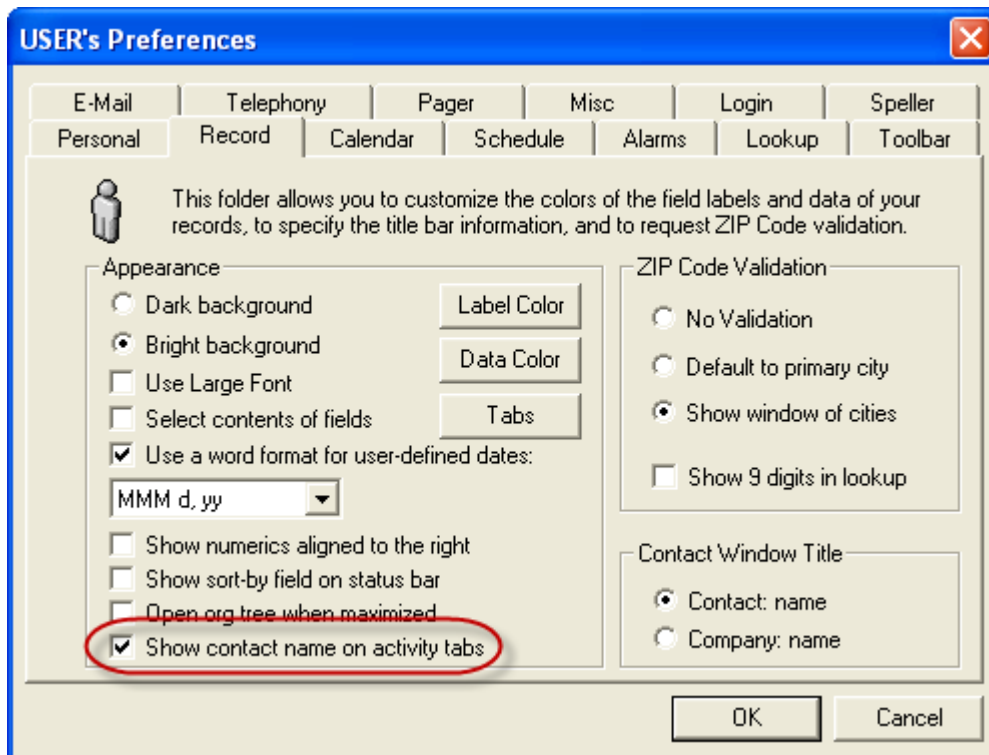


## Show the Contact Name on Activity Tabs

GoldMine now provides the option to display the contact name on the Pending and History tabs. This is useful when viewing a rolled-up list of activities related to different contacts.

### ***To Display the Contact Name on the Pending and History Tabs***

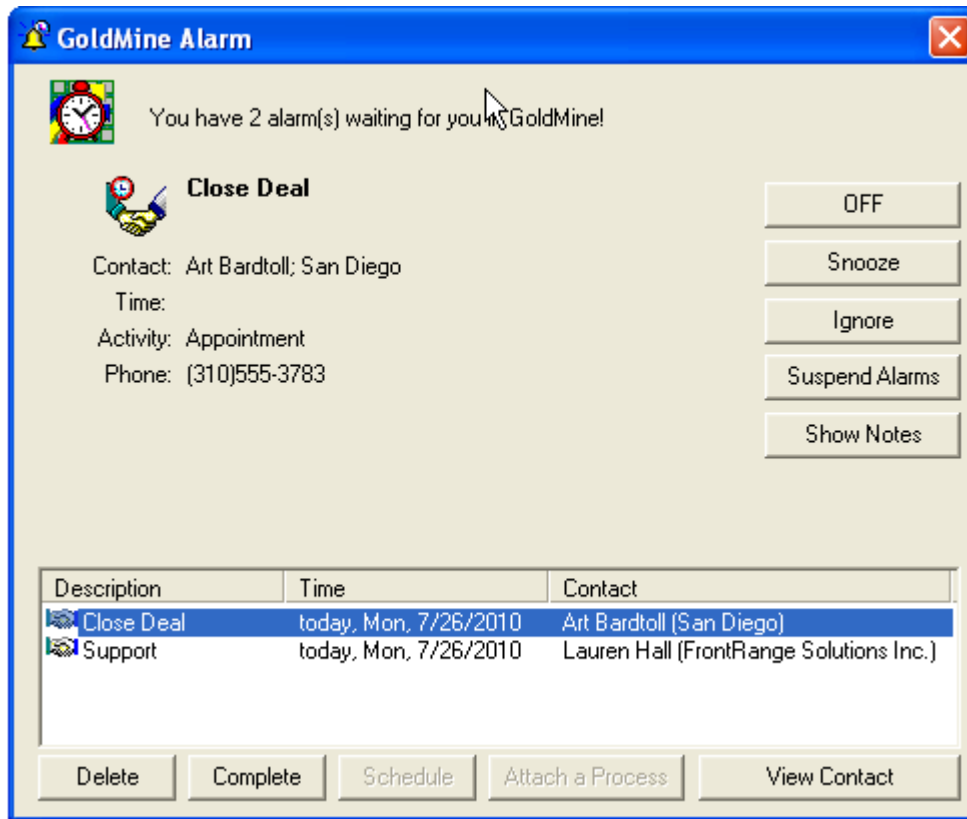
1. Open the **Edit** menu and select **Preferences**.
2. Select the **Record** tab.



3. Check the **Show contact name on activity tabs** option.
4. Click **OK** to apply the changes.

## View Simultaneous Alarms on a Single Pop-up Box

GoldMine now displays simultaneously scheduled alarms in a single pop-up box.



This improved functionality helps prevent multiple alarm pop-ups from getting buried beneath other windows in GoldMine.

The new GoldMine Alarm pop-up box contains the following functionality:

● <b>Off</b>	Turns off the selected alarm and does not display it again.
● <b>Snooze</b>	Dismisses the alarm and displays the Snooze Alarm dialog box. Make a snooze duration selection for when you would like the alarm to display again.
● <b>Ignore</b>	Snoozes the alarm for one minute.
● <b>Suspend Alarms</b>	Turns off all alarms for the duration of your current GoldMine session. To reactivate the alarms, log out and log back in.
● <b>Show Notes</b> ● <b>Hide Notes</b>	Toggles the display of the Notes details for the selected alarm.
● <b>Delete</b>	Deletes the scheduled activity and closes the GoldMine Alarm dialog box.
● <b>Complete</b>	Completes the activity and files it on the History tab.
● <b>Schedule</b>	Schedule an activity for the occasion for the contact.
● <b>Attach a Process</b>	Attach an automated process to the contact.
● <b>View Contact</b>	Opens the contact record that the activity is scheduled for and removes the alarm from the list.

## Import a One-Button-Sync profile using Outlook

The GoldSync administrator can now send a new one-button sync profile to an undocked user via e-mail and an end-user can apply the profile even when using Outlook for e-mail.

The one-button sync profile is still sent through e-mail, as in previous versions of GoldMine. Now, if you receive the one-button sync profile as an attachment in Outlook, you can save it to your hard drive, and then import it into GoldMine.

### ***To Retrieve One-Button Synchronization Profiles From Another E-mail Client***

If an undocked user is using another e-mail client (such as Outlook), the One-Button Synchronization Profile appears as an attachment. The attachment can be saved to the hard drive and retrieved through the Synchronization Settings dialog.

1. Save the One-Button Synchronization Profile attachment to your hard drive (for example: create a \Profile directory in the \GoldMine directory).
2. In GoldMine, open the **File** menu and select **Configure > Synchronization Settings**.
3. On the **One-Button Sync** tab, enter the location or browse to the location of the saved One-Button Synchronization Profile transfer set file.
4. Click **Update** to retrieve the transfer set.

The sync profile includes the date and time of its creation. If an undocked user tries to retrieve an earlier profile the following error message displays:

*"A newer One-button Sync Profile has been found. To change your Profile settings contact the GoldSync administrator."*

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## GoldMine Integration with Microsoft Office 2010

For GoldMine Corporate Edition 7.6, additional support has been provided for Microsoft Office 2010 with regard to GoldMine Plus and the GoldMine Integration Services for Microsoft Outlook. The overall functionality remains the same, but how GoldMine interfaces with Microsoft Office 2010 has been changed compared to previous versions of Microsoft Office.

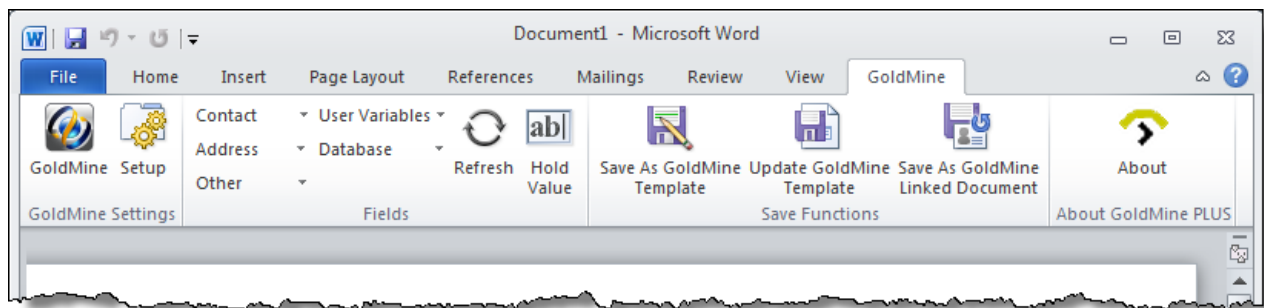


**NOTE:** GoldMine does not support the Microsoft Office 2010 64 bit version.

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### Microsoft Word 2010

In Microsoft Word 2010, the GoldMine functionality added during the installation of GoldMine Plus adds a GoldMine tab to the top of the window to view the GoldMine ribbon menu.



#### GoldMine Settings

- **GoldMine** loads GoldMine (if not already running) or brings GoldMine to the front.
- **Setup** opens the GoldMine PLUS Preferences dialog box to setup GoldMine PLUS for Microsoft Office.

#### Fields

- **Contact** opens a drop-down menu of common Contact macros.
- **Address** opens a drop-down menu of Address macros.
- **Other** opens a drop-down menu of miscellaneous macros.
- **User Variables** opens a drop-down menu of user-created variables.
- **Database** opens a drop-down menu of available database fields to insert into the document.
- **Refresh** refreshes the user variables and database fields.
- **Hold Value:**
  - **ON** field values are copied and pasted from the current record in GoldMine.
  - **OFF** a data element is added that is linked to GoldMine and can be updated as you move between records.

#### Save Functions

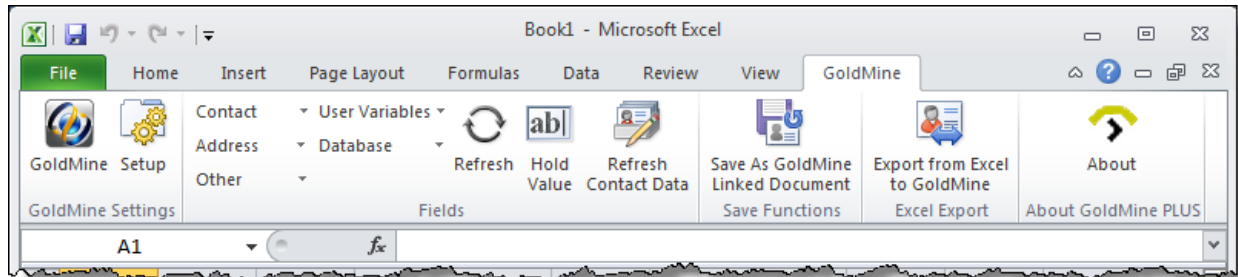
- **Save As GoldMine Template** saves the active document as a GoldMine template.
- **Update GoldMine Template** updates the form fields after you update a template.
- **Save As GoldMine Linked Document** saves the current document to the active GoldMine contact on the **Links** tab.

## About GoldMine PLUS

- **About** displays summary information, credits, installation details, or contact information for FrontRange Solutions.

## Microsoft Excel 2010

In Microsoft Excel 2010, the GoldMine functionality added during the installation of GoldMine Plus adds a GoldMine tab to the top of the window to view the GoldMine ribbon menu.



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- **Address** opens a drop-down menu of Address macros.
- **Other** opens a drop-down menu of miscellaneous macros.
- **User Variables** opens a drop-down menu of user-created variables.
- **Database** opens a drop-down menu of available database fields to insert into the document.
- **Refresh Contact Data** recalculates field data based on the current contact.
- **Hold Value:**
  - **ON** field values are copied and pasted from the current record in GoldMine.
  - **OFF** a data element is added that is linked to GoldMine and can be updated as you move between records.

### Save Functions

- **Save As GoldMine Linked Document** saves the current document to the active GoldMine contact on the **Links** tab.

### Excel Export

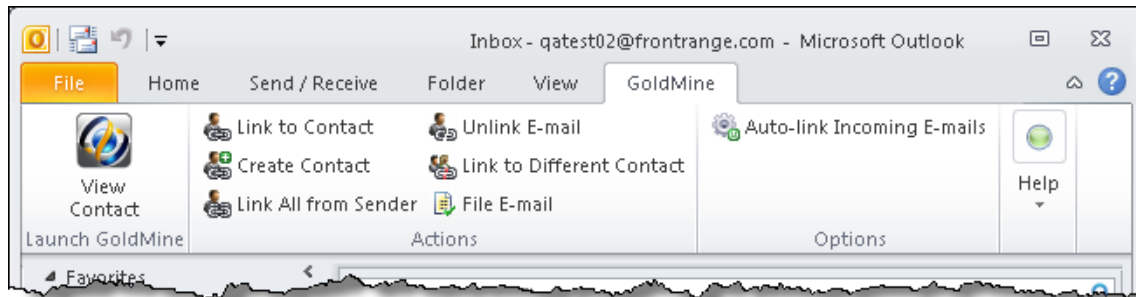
- **Export from Excel to GoldMine** starts an export of contact data from Excel to GoldMine.

### About GoldMine PLUS

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## Microsoft Outlook 2010

The integration of GoldMine and Microsoft Outlook 2010 requires that you run the **GoldMine Integration Services for Microsoft Outlook** application. After installation, a GoldMine tab is added to the top of the window to view the GoldMine ribbon menu.



### Launch GoldMine

- **View Contact** opens the contact record in GoldMine.

### Actions

- **Link to Contact** links the selected message to a GoldMine contact.
- **Create Contact** creates a new GoldMine contract and links the message.
- **Link All from Sender** links all message from the current sender.
- **Unlink E-mail** unlinks the selected message from GoldMine.
- **Link to Different Contact** re-links the selected message from GoldMine to a different contact.
- **File E-mail** files the message in GoldMine.

### Options

- **Auto-link Incoming E-mails** automatically links any messages received in Outlook to that sender's GoldMine Contact Record, which must exist in the GoldMine database.

### Help

- **Help** opens a drop-down list with the following options:
  - **About GoldMine Integration Services for Microsoft Outlook** displays version and copyright information for GoldMine Integration Services, GoldMine serial number and number of users, installed operating system, and GoldMine system and data folders configured for GoldMine Integration Services for Microsoft Outlook.
  - **GoldMine Integration Services for Microsoft Outlook Help** launches the Online Help.



**NOTE:** Additional add-in options are accessible by selecting **File > Options > Add-Ins > Add-In Options**.

# Resources

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## Additional Documentation

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

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



**NOTE:** Guides are available in PDF format from the Installation kit for maintenance customers at <http://www.frontrange.com/support>.

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

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## Contact Us

### Support Site

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