GoldMine

GoldMine Premium Edition Administrators Guide

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Welcome to GoldMine Premium Edition

Introduction

GoldMine® is a powerful tool designed to automate and manage your day-to-day business activities. Maintain business relationships, manage time, establish and achieve goals more easily than ever before with new features and enhancements in GoldMine Premium Edition.

GoldMine automates key areas of daily business activity:

- Client/contact management
- Time and task management
- Document and email management
- Sales Management
- Service Management

For additional support, please visit: http://www.frontrange.com and http://support.frontrange.com.

What's New Overview

GoldMine supports a variety of business processes with improved efficiency and automated administration. New features and enhancements make GoldMine Premium Edition more powerful and easy to use than ever.

- **New User Interface:** GoldMine Premium Edition has been designed with a sleek, modern look and feel. Navigation, automation, and communication are now more streamlined and uniform, for improved workflow efficiency and ease-of-use.
- **Customer Service Module (Service Center):** GoldMine Premium Edition includes a Customer Service Center module for tracking, resolving, and reporting customer service cases for GoldMine contacts.
  - **Tabbed View** provides a quicker navigation between open windows is now possible in GoldMine Premium Edition, thanks to a new tabbed view that utilizes available screen space more effectively. To enter the tabbed view, simply maximize any open window in the GoldMine workspace.
  - **Auto-complete** capability has been added, improving speed and accuracy during such tasks as entering field data, or adding recipients to e-mail messages.
  - **Tip of the day** offers helpful information about various features in GoldMine each time you open the application.

What's New in the Premium Edition

GoldMine Premium Edition features a number of significant improvements designed to make interacting with GoldMine faster and more productive.

New User Interface

GoldMine Premier Edition is more efficient and easier to use than ever, thanks to a new user interface designed for pure efficiency and ease-of-use. Menus and toolbars are incorporated consistently throughout each section of the application, for faster and more intuitive operation.

Toolbars

The pre-set toolbars familiar to users of GoldMine Corporate Edition have been replaced with a single, customizable Global Toolbar, along with streamlined toolbars built into each window in your GoldMine workspace. As always, local menus are accessible via toolbar buttons or by right-clicking elements on your screen. Less time searching for menu items or often-used functions means more time spent running your business.

Navigation Pane

In place of the Taskbar feature in GoldMine Corporate Edition, a newly designed Navigation Pane has been added, with a contextual view window that will be the most precious real-estate on your screen, thanks to its seamless integration with GoldMine functions in the main workspace. Browse activities and e-mail, move around your calendar with ease, and access dynamic lists of recently viewed items, all in one convenient location. Simple, one-button access to the most important features in GoldMine has also been added, along with a search field for instant access to GoldMine's powerful **Contact Search Center.**

Contact List

A new option for viewing Contact Records has been added, called the **Contact List.** Now, most functions in the contact window can be accessed without opening individual contact records, saving you valuable time and effort.

For more information on GoldMine Premium Edition's new user interface, see "Getting Started" on page 23.

Service Center

Case management functionality in GoldMine® Premium Edition provides customer service agents the ability to capture service requests, then filter and access the details of each case. The customer service center enables your entire service division to pursue, arrange and filter all service requests and optimize work flow throughout the day.

GoldMine Premium Edition case management features allow your service professionals to assign, escalate and resolve customer service requests quickly and efficiently. Quickly access customer service issues, route them to the service agent who can best solve the problem, and keep clients informed of their service request progress, all within your customized GoldMine environment.

Your GoldMine users can now accept incoming customer service requests from multiple sources, be alerted to upcoming and urgent cases, and get details for any open or closed service request. Individual agents and customer service managers can filter their daily case activities, improving work efficiency and enabling optimal customer care.

Contact Record Organizational Charts are now Contact Relationships Trees

Customers familiar with **Organization Charts (Org Charts)** from GoldMine Corporate Edition will find these same features within each contact record, consolidated in the **Relationships Tab.** The organizational charts have been replaced with **relationship trees.**

Relational functions built into contact records are easier and more intuitive to use, and allow for greater definition between relationship and organization types.

Universal Search

Universal Search is a one-box search engine that allows you to quickly access a summary view of the information you are looking for, along with links to more detailed information.

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Getting Started

Overview

Now that you have installed GoldMine Premium Edition, this chapter will help you get started using the application.

For more information and procedures, see the *GoldMine 8.5 User Guide*.

Key Terms and Concepts

The following is a list of GoldMine 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 (also Contact). 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.

Universal Search. A one-box search to give you a summary view of the information along with links to more detailed information.

Launching GoldMine

Use the following procedure to launch GoldMine Premium Edition on your desktop computer.

1. On the Windows desktop, select **Start>>Programs>>GoldMine** or double-click the GoldMine desktop icon.

   The GoldMine Premium Edition login window appears.

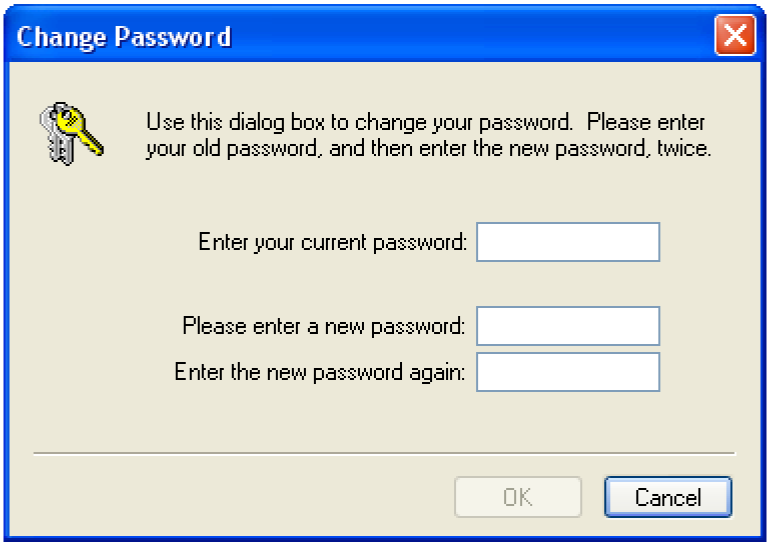
2. Type your user name in the **Username** field, type your password in the **Password** field and then click **OK**.

Changing the Default Login

Use the following procedure to change the username and/or the password of your login.

1. Login to GoldMine using the default login.
2. To change the username, navigate to **Tools>>Options** and select the **Login** tab.
3. At the **Default Login user** field, select the new username from the drop-down menu.
4. To change the password, navigate to **Tools>>Options** and select the Personal tab.
5. Click **Change Password.**

   The **Change Password dialog box** opens.



6. Type in the old password and then the new password (twice) in the appropriate fields and then click **OK.**

Viewing Information About GoldMine Premium Edition

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

Use the following procedure to view information about GoldMine.

1. Select **Help>>About GoldMine.** The **About GoldMine** window opens.
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.**

About the GoldMine Architecture

The GoldMine File System

GoldMine stores information in one or more databases in which related records are logically organized. Storing information in a database provides advantages such as a common point of access for multiple users, applications, and data security.

Network applications managing information typically organize shared data in a relational database structure, supervised by a Database Management System (DBMS). The DBMS supervises maintenance of and access to the database. It has a database engine that defines the database structure, stores data, and responds to requests by retrieving data from the stored locations. The DBMS can organize data in one large database that stores all system data or in multiple unique databases in the same system.

Information systems today facilitate quick and reliable data management and retrieval using the relational database. At the most basic level, a relational database consists of tables organizing data in columns and rows. The cell at any column/row can contain only one value. Columns and rows work together to define the type of information a cell contains.

GoldMine, acting as a DBMS, uses a number of different files to store various elements of the data it collects:

- In GoldMine Standard, the default installation places the GoldMine files, Contact files, and System files in folders under the main GoldMine folder.
- In a GoldMine Premium Edition installation, the shared database files and Contact files are hosted on the server database while licensing and user files remain local to the GoldMine folder.

In a network environment, you can run workstations from the executable on the server. You can also install GoldMine's executable files locally to a workstation if the data files are centrally located and accessible to all GoldMine users. The physical configuration of GoldMine on the hard drive is important. The main GoldMine executables should always be one level deep in a directory structure. The path to GoldMine should be x:\GoldMine, where x is the network drive where GoldMine is installed. Installing by using Universal Naming Convention (UNC) paths, the server path should be **\\server\GoldMine\GoldMine or \\server\sharename\GoldMine.**

File Server and Client/Server Architecture

Networks require configuration that manages shared data stored in a central location. Users need a way of accessing information from the central file(s), and the organization needs a way of protecting data integrity and controlling traffic to maintain the availability of shared resources. These needs are met using file server and client/server architecture.

Client/Server Architecture

GoldMine Premium Edition utilizes a client/server architecture:

- The client/server uses network resources more efficiently to reduce network traffic and respond to requests for data while maintaining data security.
- The client/server architecture effectively divides the functions of the DBMS between the client and the server.
- The server acts as the database engine maintaining and administering access to the data.
- When the server receives a request from a client, the server scans the database for data on the server and returns only the requested piece rather than a whole block.
- Processing occurs at the server, so the server sends back the data in final form as the response to the query.
- Structured Query Language (SQL) is the tool enabling the application user interface to communicate with the server database engine.

User Administration

Setting Up User Groups, Users, and Resources

GoldMine's security is based on user groups and users, which must be set up to make the security effective.

Each GoldMine user should have a unique user name and password. This is the first level of security. The GoldMine administrator assigns each user the minimum level of necessary access without restricting the functionality related to the user's job performance.

Define user groups according to the function users perform. User and user group security access applies to:

- **GoldMine Functions.** The administrator can permit or deny access to GoldMine functions. For example, permit or deny a user or user group the ability to create new Contact Records, delete records, or access other users' Calendars.
- **Menu Commands, Toolbar, and Taskbar Settings.** Remove menu items from the user's menu customizing the selection of available menu options and customize toolbars and the Taskbar.
- **Contact Databases.** Assign user groups access to databases. If a database is assigned to a user or user group, only members of the group can open the database in GoldMine. Each database can have different access restrictions.
- **Screens and Fields.** Restrict access rights to user-defined screens attached to particular contact databases. If a screen is public, all GoldMine users may view the information. If access is set to a user group, only members of the group may see the screen.
- **Record Ownership.** Each Contact Record is assigned an owner. The default owner is public; however, assign a record or group of records to a user or user group. If a record is owned by a group, each group member is treated as the owner of the record. Ownership determines whether a user who is not an owner can read all or part of the Contact Record or whether a user can edit the record.

The GoldMine administrator can also restrict access to such items as the Relationship Trees, InfoCenter entries, and the ability to launch HEAT from GoldMine Premium Edition.

Users with Master Rights can access all parts of the system and bypass all the security settings except for the user’s:

- **Personal Contacts**
- **PersonalBase files in the InfoCenter**
- **Encrypted email**

Master Rights users are the only users permitted to access and modify user settings. GoldMine administrators should have Master Rights.

About Record Ownership

Contact records can be owned by everyone (public), by a user, or by user groups. Ownership determines security on contact records. Consider the following when setting record ownership:

- Records owned by (public) can be viewed and edited by all users.

NOTE: Viewing and editing security can be set on individual fields.

- Record Ownership is used when record curtaining is applied.

NOTE: Ownership is stored in the Owner field in the Contact1 table.

- Ownership can be set when you create a contact record. See “Setting the User Profile” on page 29.

Users Security

Control a user's security access in GoldMine through the **User Properties.**

- **Profile Tab.** Defines security, automatic record ownership, and forced log-out for a user.
- **Membership Tab.** Assigns or removes a user from a group.
- **Access Tab.** Sets general security to control user access to GoldMine features.
- **Menu Tab.** Configures menu options available to the user.
- **Time Clock Tab.** Displays a log showing the user’s activity in GoldMine.

Setting the User Profile

Use the Profile tab to create and set basic user information such as a user name, initial security, and force log out (forcing users out at a particular time or when inactive for a period of time

Use the following procedure to set up a user profile.

1. Select **Tools>>Users' Settings.**
2. At the Users' Master File dialog box, click **New** to create a new user, or select an existing user and click **Properties.**
3. At the user's Properties dialog box, click the **Profile tab.**
4. Type the **Username** (up to 8 characters; must begin with a letter).
5. Type the user's **Full Name.**
6. In the **Security area** configure these settings:
   - **Master Rights.** Select to give the user unrestricted access to all of GoldMine.
   - **Password.**Type the password assigned to the user. You must provide the user name and password you created so the user can log into GoldMine.
   - **Valid for days.** In the drop-down list, select the number of days the user’s password is valid, or accept the default (Always).
   - **Next change.** If you change the **Valid for days** field, select the date the password becomes invalid and the user cannot launch GoldMine.
   - **Ownership.** Displays the New Record Ownership dialog box. Ownership lets you specify whether the new Contact Records the user adds to the database are public records or owned by a specific user or user group.
7. In the **Forced log out** area, select:
   - **Log out user and terminate GoldMine when idle for a period of time.** Click this box to automatically log the user out of GoldMine.
   - **When idle for.** Select the period of inactivity for users before they are automatically logged out of GoldMine
   - **Forced logout only after this time.** Select the time for a forced logout.

NOTE: These fields are useful for making your system available for nightly maintenance, without forcing users to log out during the business day.

TIP: For an administrator, the Force log out options are important in managing a limited number of licenses. Also, many maintenance functions can be performed only if all users are logged out of GoldMine.

8. Click **OK** to save the user's Profile settings without configuring the detailed user security settings, or click the **Membership** tab to continue configuring the user’s properties

Setting Up User Membership

Users can belong to several groups, allowing them access to the group’s contacts for collaboration. Groups must be created before assigning a user to a user group. If user groups were not created, click User Groups Setup to add the user to a group or to create a group(s). See “Setting Up User Groups” on page 30.

Use the following procedure to set up a user membership

1. Select **Tools>>Users' Settings**.

   Select the user and click **Properties.**

2. Click the **Membership** tab.

   The **Member of Groups** list indicates which groups the user already belongs to. The Excluded from list indicates which groups the user is not a member of. To change the user's membership, double-click the user name to move the user from one column to the other.

3. To create user groups or refine the membership, click **User Groups Setup.**
4. At the User Groups Setup dialog box, highlight the group to which to add the user.
5. Click **Member Setup** to launch the **Group Membership Setup dialog box.**
6. Double-click the user's name in the **Users' List** box to add the user to the **Group Members** list.
7. To add the user to other groups, return to the User Groups Setup dialog box and highlight the new group.

   Click **Member Setup t**o launch the Group Membership Setup dialog box and double-click the user's name in the Users' List box.

   NOTE: You can create User Groups while adding the user to a group. On the User Groups Setup dialog box, click **New** and follow the steps.

8. Click **OK** and then click **Close.**

   The Member of Groups list displays the groups of which the user is a member.

9. Click **OK** to return to the Users' Master File, or click the **Access** tab to continue configuring the user’s properties.

Setting Up User Groups

It is recommended that you logically group users according to functions they perform. User group names store in the Lookup table; user group members are encrypted in the **User.dbt** table.

Use the following procedure to set up user groups.

1. Select **Tools>>User Groups.**
2. At the User Groups Setup dialog box, click **New**.
3. Type the **User Group's name** in the field and click **OK.**

   The user group displays in the **User Groups** box.

4. To add users, click **Members Setup.**

The Group Membership Setup dialog box opens.

5. To add individual users or all members of an existing group to the **Group Members** box, double-click the user in the **User List,** or the group in the **Group List**, to add users to the **Group Members** list.
6. Click **OK.**
7. After creating groups and adding members, click **Close.**

Setting User Access

Use the **Access** tab to configure a user's access rights on Contact Records, access to information of other users, and miscellaneous access rights. If an item is selected, the user can perform the action in GoldMine.

1. Select **Tools>>Users' Settings.**

   Select the user's name and click **Properties.**
2. Click the **Access** tab.
3. In the Contact Record area, select:
   - **Add New.** Add a contact record.
   - **Edit Fields.** Edit fields in the top half of the contact record, the user-defined fields in the **Fields** tab, and the **Notes** tab.

   NOTE: Without Edit Fields rights, users cannot edit fields on any contact records, including the records they own.

   - **Delete.** Delete contact records.
   - **Required field override.** Authorize an override on a required field.
   - **Assign Owner.** Assign Contact Record ownership to other users.
   - **Edit Tab Folders.** Edit data in the tabs.

   NOTE: Without Edit Tab folders rights, users cannot edit tab folders on any contact records, including the records the they own.

   - **Schedule Process.** Assigns an automated process to a contact.
4. In the **General Access** area, select:
   - **Build Groups.** Build their own groups of Contact records in the Filters and Groups dialog box.

- **'Output to' menu.** Enable the Output to option in the local menus in GoldMine to allow output to printer, Word, Excel, and clipboard.

NOTE: Non-Master users cannot select Printer in the Output to menu because of Reports security considerations.

- **Issue SQL Queries.** Write and send SQL queries to retrieve data for display.
- **Toolbar settings.** Add and remove toolbar icons.
- **Net-Update connections.** Run a version update on the live system using the Internet.

CAUTION: This option should be carefully controlled by the GoldMine administrator.

- **Real-Time Tab.** View the Real-Time tab in the Activity List. Displays all users' completed activities.

NOTE: When applied to many users, this option can affect network performance.

- **SQL Logon name and SQL Password.** If using GoldMine with a SQL database and you assigned the user an individual or group logon name and password in SQL, type the information in the text boxes. This launches GoldMine without requiring the user's SQL logon name and password each time.

5. In the **Notes Access** area, select:
   - **Insert Notes.** Allow endusers to add notes.
   - **Edit/Delete.** Allow endusers to edit or delete their own notes.
   - **Edit/Delete others' notes.** Allow endusers to edit or delete notes from other users.
6. In the **Access to Others** area, select the options as needed:
   - **Calendar.** Select this option to do the following:
     - Designate the available options from the User drop-down on either the Calendar or Activity List window.
     - Designate if the **Edit** function will be available from the popup menu for activities owned by another user.

       If this option is not selected, the user cannot edit the activities on the Pending tab. Therefore the Edit and Delete options are not available to the user in the pop up menu.

- **History.** Select this option to do the following:
    - View other users’ completed activities in the Closed or Filed tab of the **Activity List.**
    - Edit or delete history records in the History tab on the contact record or the Real-Time tab in the **Activity List.**
    - Build contact groups based on another users’ completed activities, or view other users’ completed sales activities in the Completed Activities Analysis dialog box.
- **Forecast.** Select this option to designate the users available when you click the **Select User(s)** button on the Forecasted Sales Analysis window. **(Go To >> Analysis >> Forecast Analysis)**. Checking (or unchecking) this option will change what is viewed on the Pending tab.
- **Reports.** Access other users’ reports.
- **Template.** Access other users’ templates in the Document Management Center.
- **Links.** Access and launch other users’ linked documents.
- **Filters.** Access other users’ Contact record filters.
- **Groups.** Access other users' groups of contacts.
- **Opp/projects.** View opportunities and projects assigned to other users.
- **Cases.** View cases (on the Cases tab and in the Service Center) assigned to other users.

7. Click **OK** to return to the Users' Master File, or click the **Menu** tab to continue configuring the user’s properties.

Setting User Menus

Use the Menu tab to configure menu options available to users. This is another way of setting security and controlling user access to features. Also create templates of menu options to apply to users as you create their properties.

Use the following procedure to set up a user menu.

1. Select **Tools>>Users' Settings.**
2. Highlight the user and click **Properties.**
3. Click the **Menu** tab in the User Properties dialog box.
4. To use a menu, select one option:
    - Apply a menu template you created by selecting the template name in the drop-down list.
    - Click **Expand** to display all menu options.

      To expand the menu display, click the icon next to each option to change the status. When the icon is red, the option is unavailable to the user. When the icon is green, the option is available.

> **NOTE:** If the Resize menu option located under **Edit>>Record Details>>Resize** is restricted, the custom screens in the Fields tab display as GoldMine menu options.

5. Click **OK** to save the **Menu** configuration and return to the Users' Master File, or click the **Time Clock** tab to continue configuring the user’s properties

Creating User Menu Templates

Save User Property Menu configurations as a template and apply the template to other users.

Use the following procedure to set up a user menu template.

1. Select **Tools>>Users' Settings.**

   Highlight the user and click **Properties.**
2. Click the **Menu** tab in the User Properties dialog box.
3. Click **Expand** to display menu options.
4. Click the icon beside the option to change the status.

   When the icon is red, the menu option is unavailable to the user. When the icon is green, it is available.
5. Click **Save** to save the setup as a menu template.
6. At the Save Menu Template dialog box, type the name of the template.
7. Click **OK** to save the template.

NOTE: To delete a Menu template, select it in the drop-down list and click **Delete.**

Viewing the User Time Clock

The Time Clock tab is a management tool rather than a configuration option.

1. View the user's activities in GoldMine.
   - **Date.** Date of the logged activity by the selected user.
   - **Login.** Time the user logged into GoldMine.
   - **Logout.** Time the user logged out of GoldMine.
   - **Logged.** Total time the user was logged into GoldMine, including any time logged away.
   - **In.** Total number of times the user logged into GoldMine.
   - **Keys.** Number of keystrokes pressed by the user while working in GoldMine.
   - **Clicks.** Number of mouse clicks performed by the user while working in GoldMine.
   - **CRC.** Indicates whether the data in the user log was modified outside of GoldMine. This column displays *OK* for every log entry that is free of tampering; that is, external.

NOTE: Create one or several ideal users to reflect basic settings applicable to many users. For example, you may have two prototype users: Sales Staff and Supervisor. Each of these user types has different rights and menus in GoldMine. Allow the Sales Staff to add and edit new contacts but not to delete contacts or view other’s calendars. The Supervisor can add and delete contacts and view anyone’s calendar. After the ideal user or users are created, clone the user’s settings for each actual user with the same rights.

Cloning User Settings

After creating an ideal user with settings applying to many users, clone the user's Properties. All security settings in the User Properties apply to the new user except the Username, Full Name, and Password on the **Profile** tab.

Use the following procedure to clone a user setting.

1. Select **Tools>>Users' Settings.**
2. Right-click the user whose settings to clone and select **Clone.**
3. At the New User Properties dialog box, type Username, Full Name, and Password; select the other Profile settings.

   The Membership, Access, and Menu settings apply to the new user.
4. Change the individual user properties as needed.
5. Click **OK.**

About User Options

Define GoldMine settings unique to you. GoldMine saves User Preference settings in your user's initialization file (username.ini).

NOTE: While **User Options** let users customize their work environment, many GoldMine administrators configure these settings for users and then restrict their ability to change the Options.

TIP: For Administrators: To restrict the user's access to the User Options dialog box, select **Tools>>Users' Settings.** Select a user from the list, and click **Properties**, then select **Menu.** Choose available main menu items for the selected user and click **Save.** Menu layouts can be saved for instant recall for any user.

Set up user options on the following tabs:

- **Personal.** Change your password and add personal information. See "Setting Options on the Personal Tab" on page 36.
- **Record.** Control the appearance of Contact records, tab displays, and zip code validation. See "Setting Options for the Record Tab" on page 37.
- **Calendar.** Determine calender appearance and functions. See "Setting Options for the Calendar Tab" on page 39
- **Schedule.** Set parameters for scheduling and working with activities. See "Setting Options for the Schedule Tab" on page 42.
- **Alarms.** Configure GoldMine alarms. See "Setting Options for the Alarms Tab" on page 43.
- **Lookup.** Set display options for Contact records and the Contact Search Center. See "Setting Options for the Lookup Tab" on page 43.

- **Email.** Configure settings for your e-mail server, login information, and rules to apply when sending and receiving email. See “Setting Options for the E-mail Tab” on page 44.
- **Telephony.** Control settings for your computer's modem and dialing options and SoftPhone advanced settings in GoldMine. See “Setting Options for the Telephony Tab” on page 58.
- **Pager.** Identify your pager's telephone number and PIN number. See “Setting Options for the Lookup Tab” on page 64.
- **Login.** Determine the locations of the GoldMine default databases and system files, and other system settings. This tab is available only to users with Master Rights. See “Setting Options for the Lookup Tab” on page 64.
- **Speller.** Specify GoldMine spell checking options. See
- **System.** Set date and time settings. Select classic navigation and taskbar settings, and specify an Outlook username, if different than your GoldMine username. See “Setting Options for the System Tab” on page 66.

Setting Options on the Personal Tab

Use the following procedure to set up user personal information.

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select **Personal.**

   The **Personal** tab displays User Name and Full Name.

   NOTE: A Master Rights user can change the Full Name in the User Profile.

   ---

3. Click **Change Password t**o change your GoldMine Password.
4. In the **Title** field, type your professional title.

   NOTE: For Title and following Department, Phone, and FAX text boxes, selecting the Select contents of field option chooses the entire contents of a field. If this option if selected and your screen saver is set to On, you may inadvertently delete the contents of the field when you clear the screen saver. If you press ESC before leaving the field, the data is replaced.

   ---

5. In the **Department** field, type the name of the organization or group you are affiliated with.
6. In the **Phone** field, type your primary telephone number.
7. In the **FAX** field type your fax number.
8. Click **OK** to save the settings and close the dialog box.

Changing Your Password

To change your GoldMine Login password, you must be the user logged into GoldMine.

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select the **Personal** tab.
3. Click **Change Password.**
4. At the Change Password dialog box, type your current password in the **Enter your current password** field.
5. Type your new password in the **Please enter a new password** field, and then type it again in the next text box.
6. Click **OK** to save the new password and return to the **Personal** tab.

Setting Options for the Record Tab

Use the Record tab to customize the display of the contact record and set the ZIP code validation and title appearing on the contact window.

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select **Record.**
3. In the **Appearance** area select:
   - **Dark background.** Browse windows appear with a gray background.
   - **Bright background.** Browse windows appear with a white background.
   - **Use Large Font.** Displays dialog box text in a large font.

     This setting is designed for use with monitor display resolution of 1024x768 or higher using Windows' small font option. It is not available if your display is set to a resolution of 640x480 or if using Windows' large font option.
     The Use Large Font option does not apply to the GM+View tab. To increase the display font size in IE 6.0, select **View>>Text Size** and select the appropriate size.
   - **Label Color.** Displays the Color dialog box to select a color for all field labels displayed in Contact Records.
   - **Data Color.** Displays the Color dialog box to select a color for all field data displayed in Contact Records.
   - **Tabs.** Displays the Display Tabs dialog box to select the tabs to appear in the contact record and the tab order.
   - **Select contents of fields.** Selects or highlights data entered in a field when you click inside it.
   - **Use a word format for user-defined dates.** Displays dates in text form based on the format selected in the drop-down list.

NOTE: Typically, this setting affects fields in the Fields tab of the Contact Record, but the selected format affects user-defined fields placed anywhere in the Contact Record. The user-defined date format you select from this tab overrides the Show dates format of the local settings option if selected in the Misc tab.

- **Show numerics aligned to the right.** Right-aligns numbers.
- **Show sort-by field on status bar.** Displays the sort field on the left side of the status bar.
- **Open org tree when maximized.** Displays the organization tree automatically when you maximize a contact record.

4. In the **ZIP Code Validation** area, select.

- **No Validation.** GoldMine does not perform ZIP Code validation. When adding a new Contact Record or editing an existing record, the City field is edited first, followed by the State and Zip fields.
- **Default to primary city.** GoldMine automatically validates ZIP Code entries on the contact record. When adding a new record or editing an existing record, the Zip field is edited first. If the entered ZIP code is found in the ZIP Code file, the city and state from the first matching ZIP Code record is placed automatically in the City and State fields on the Contact Record.
- **Show window of cities.** When more than one city exists for a particular ZIP Code, GoldMine displays a browse window containing all the cities that ZIP Code is valid for. To select the appropriate city from the window, highlight the record, then press ENTER or double-click the entry.
- **Show 9 digits in lookup.** Enlarges the ZIP column in the All ZIP Codes Lookup list to display a ZIP plus four entry.

NOTE: A complete ZIP Code database is available. Call your local FrontRange Solutions Partner or FrontRange Solutions Inc. for information.

5. In the **Contact Window Title** area, select:

- **Contact name.** Displays the name of the contact in the title bar of each Contact Record. For example, if the contact name entry is John Doe, the title bar displays John Doe for that Contact Record.

NOTE: Whether this option displays Contact name or another name depends on the field label in GoldMine. If the field name is Contact, the label can be customized by the administrator.

- **Company name.** Displays the company name in the title bar of the contact record.

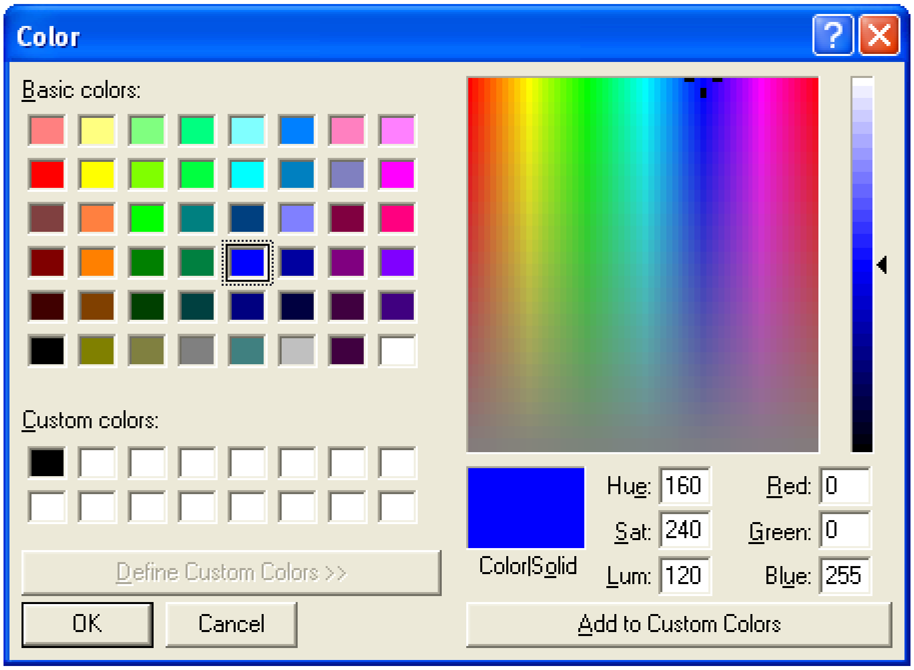
NOTE: Whether this option displays Company name or another name depends on the field label in GoldMine. If the field name is Company, the label can be customized by the administrator.

6. Click **OK** to save the settings and close the dialog box.

Color Dialog Box

Use this dialog box to select from a predefined palate of colors or customize the color selection.

1. Click **Define Custom Colors** to view the full customization window.



2. Select or define the custom color, and click **OK**.

Setting Options for the Calendar Tab

Use the Calendar tab to set up your calender appearance and functions.

1. Select **Tools>>Options.**
2. At the **User's Options** dialog box, select **Calendar.**
3. At the **Calendar Settings** area, select:
   - **Set Work day starts at.** Type the time or using the F2 graphical clock to indicate the time you typically arrive at the office. This information is used to set up your available time on the calendar.
   - **Set Work day ends at.** Type the time or using the F2 graphical clock to indicate the time you typically leave the office each day.
   - **Select the Increment time by.** In the drop-down list. This option sets the minutes in your displayed calendar. The default is 30 minutes. If you select 10 minutes, for example, the daily and weekly calendar will be broken into 10-minute increments.
   - **Set color as.** At the drop-down list, select your calendar color.
   - **Font size.** Select the font size in the drop-down list.
4. Click **More Options.**

   The Calendar Options dialog box opens with the **Activity Details** tab active.

5. Click **Holidays.**

   The Calendar Options dialog box opens with the **Holiday** tab active.

6. In the **Work Days** area, select the days of the week you work.

   Days selected display as a lighter shade in the calendar. Days cleared display as a darker shade and are not considered work days.

7. In the **Auto Roll-over a**rea, select the types of activities to automatically roll the activity to the next day if it is not completed.

   NOTE: Auto Roll-over is not normally set for Appointments or Forecasted Sales because users cannot make today's 10:00 appointment tomorrow or the next day at the same time. They should reschedule.

8. Select **Sync Roll-overs** for the new roll-over date to synchronize to remote users. Clear the box to preserve the original date.

9. Set the **calendar refresh rate (sec):** by typing the number of seconds or scrolling through the numbers in the text box.

   GoldMine updates the Calendar entries at the end of the interval you specify in number of seconds. The default entry 0 disables the option so GoldMine will not automatically update the calendar.

   NOTE: Increasing the Calendar refresh rate sends a signal to the server to update every x seconds and sends you the same data again if no changes are made to your Calendar. Setting this option to update too frequently might increase the network load unnecessarily.

10. Click **OK** to save the settings and close the dialog box.

Configuring Calendar Options Dialog Box, Activity Details Tab

Use the Activity Details tab to configure how scheduled and completed activities display on your calendar.

1. Select **Tools>>Options>>Calendar.**
2. Click **More Options.**
3. At the Calendar Options dialog box, select the **Activity Details** tab.
4. In the Scheduled Activity Detail Display area and the Completed Activity Detail Display area, select:
   - **Show 'Contact's Name. Reference'.** Displays the name of the contact before the activity reference information in the calendar entry on the Day tab, Week tab, and Month tab. This is the default display option.
   - **Show 'Reference. Contact's Name'.** Displays the activity reference information before the name of the contact in the calendar entry on the Day tab, Week tab, and Month tab.

- **Show results of an xBase expression.** Lets users specify text appearing for each activity in the calendar on the Day tab, Week tab, and Month tab. Type the expression in the text box. For example, to display an entry listing the contact's city then reference information, type this expression:

  ```
  Trim(Contact1->City)+ ":"
  ```

5. Select **Show Activity Code** to display the three-character activity code as the first part of the calendar entry on the Day tab, Week tab, and Month tab.

   The activity code appears first, if available, when selected with any other format option; that is, with Contact's Name: Reference, Reference: Contact's Name, and xBase expression.

Configuring Calendar Options Dialog Box, Holidays Tab

Use the following procedure to add predefined holidays to your calendar display, or create your own.

NOTE: Only users with Master Rights can add or edit Holiday Categories. The Holiday Categories are available to all users with access to their User Options. They can select the categories appearing on their individual calendars.

---

1. Select **Tools>>Options>>Calendar.**
2. On the **Calendar tab, click Holidays.**

   The Calendar Options dialog box opens with the Holiday tab active.
3. In the **Holiday Categories** list, select any predefined holidays you are adding to your calendar display.

   Holidays for the selected categories display in the Holidays list. Predefined sets include both fixed holidays such as New Year's Day and variable holidays such as Easter.
4. To create a new holiday category, click **New.**
5. At the **Add a Holiday Category dialog box,** type the name in the field and click **OK.**

   The new category adds to the list.
6. Manage the **Holiday Categories** with these options:
   - **Import.** Imports iCalendar (.ics) holidays.
   - **Export.** Exports holidays to iCalendar.
   - **Reset.** Removes user-defined categories and adds predefined categories previously removed.
   - **New.** The Add a Holiday Category dialog box opens.
   - **Remove.** Removes the select category.
   - **Edit.** The Add a Holiday Category dialog box opens. Edit the category name.

Adding or Editing Holidays

1. At the **Holiday** area, click **New.**
2. At the **Add a Holiday dialog box, t**ype a name of the holiday in the **Holiday** field.
3. In the **Repeats** area, type or select how often the holiday repeats in the **Every: x year(s)** field.
4. In the **Duration area,** type or select the number of days the holiday lasts in the **# Days:** field.
5. Select the holiday either by:
   - **Specific Date.** Select the month and day in the drop-down lists.
   - **Day of the Week.** Select the week, the day of the week, and the month in the drop-down lists.
6. Click **OK.**

Adding and Editing Holidays to Categories

1. Highlight the holiday category to which you are adding the holiday.
2. In the Holidays area, click **New.**

   The Add a Holiday dialog box opens.
3. To change the settings for a holiday, highlight the holiday and click **Edit.**

   The Edit a Holiday dialog box opens. The editing options are the same as the Add a Holiday dialog box options.
4. To remove a holiday, select the holiday and click **Remove.**

Setting Options for the Schedule Tab

Use the Schedule tab to set parameters for scheduling and working w activities.

1. Select **Tools>>Options.**
2. At the **User's Options dialog box**, select **Schedule.**
3. To configure the Schedule, select:
   - **Check for timing conflicts while scheduling.** Notifies you of a scheduling conflict.
   - **Carry over completion notes when scheduling follow-up calls.** The notes are carried over from the completed activity to the follow-up activity.

     Selecting this option means the notes from a completed call are available in the scheduled follow-up call. This allows for consistency when working with the customer by providing information about previous conversations.
   - **Start timer when completing activities.** Helps managers review team member activities in Statistical Analysis. If not activated, numbers do not appear in analysis features. Users do not need to know this is turned on.
   - **Show the details section in the Activity Listing window.** Displays two detail panes in the Activity List that include the contact, company, create on, as well as notes and related information for the activity.
   - **Sync the Contact window with the Activity Listing window.** Displays the contact record for the selected activity in the Activity Listing window.
4. Click **OK** to save the settings and close the dialog box.

Setting Options for the Alarms Tab

Use the Alarms tab to select how GoldMine notifies you of an appointment.

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select **Alarms.**
3. Select one of the following:
   - **Disable alarms.** Turns alarms off and disables the remaining alarm options.
   - **Pop-up alarms.** An alarm window pops up on your screen.
   - **Task-bar notification.** The notification alarm displays on the Windows taskbar and an alarm icon appears in the system tray.
4. After you select **Pop-up alarms** or **Task-bar notification,** select the Alarms default lead time. x minutes to specify the number of minutes before an event the alarm pops up.
5. Set the **Scan for alarms every. x seconds** to specify how often GoldMine scans for alarms.
6. Set the **Task-bar notification reminder. x minutes**.

   This option determines the number of minutes before an event the taskbar notice appears. GoldMine also plays an alarm sound if specified.
7. Set the number of minutes on the **When I ignore alarms, snooze the ignored alarm for. x minutes** option.
8. Select **Page me with the alarm** when not acknowledged within x minutes and set the time. This only works if you configured the Pager tab notify you if an alarm is not acknowledged.
9. Select **Play alarm sound file** and browse to the sound file to play as an alarm signal.
10. Select **Place GoldAlarm icon on my desktop** to place a shortcut to the GoldAlarm.exe on the desktop and place the icon in the system tray when GoldAlarm is running in the background.

NOTE: GoldAlarm notifies you about alarms even when GoldMine is not running.

---

11. Select **Run GoldAlarm** when Windows starts to automatically launch the GoldAlarm.exe as soon as Windows starts.
12. Click **OK** to save the settings and close the dialog box.

Setting Options for the Lookup Tab

Configure display attributes for the Contact Search Center.

1. Select **Tools>>Options.**
2. At the **User's Options** dialog box, select **Alarms**.
3. Select **Sync the Contact window with the Search Center window** to display the selected record in the Contact Search Center as the active record in the work area.

4. Type or select the **Lookup alignment delay while typing (1/10 sec).**

   This specifies the delay in tenths of a second between when you type an entry in the **Find Value** field of the Contact Search and when the Contact Search Center window displays a record that matches the entry.

5. At the **Default Lookup by** field, select, **Contact, Company, or Remember Lookup by.**

   The Contact Search Center window defaults to this field when selected on the toolbar or the menu.

6. In the **Once a record is selected from the Search Center** area, select one of the following:
   - **Move the Search Center window to the back.** GoldMine brings the Contact Record to the front and places the Contact Search Center behind the contact record.
   - **Close the Search Center window.** GoldMine closes the Contact Search Center.
   - **Minimize the Search Center window.** GoldMine minimizes the Contact Search Center.

7. Click **OK** to save the settings and close the dialog box.

Setting Options for the E-mail Tab

To send and retrieve e-mail through GoldMine, configure e-mail options on the E-mail tab.

NOTE: You cannot edit E-mail Options while the E-mail Center window is active on the screen.

---

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select **E-mail.**
3. In the **Getting Mail** area, complete the fields:
   - Server.
     - Select either the **POP3** or the **IMAP** protocol radio button.
     - Type your email server name or IP address. It can be your local Exchange server or the POP3 or IMAP server for your ISP.

     NOTE: POP3 and IMAP are two types of protocols for receiving e-mail. They are not compatible with each other, and use different port numbers on the server side. Contact your network administrator or ISP if you are unsure of which protocol to use.

   - **Username.** Type your login for the Exchange server or ISP email account.
   - **Password.** Type your password on the Exchange server or your ISP e-mail account.

- **Use encrypted connection (SSL).** Select this checkbox to use a secure connection. This ensures the privacy of the connection between your account and the server. Enabling SSL does not verify the identity of your account or the e-mail server, but does prevent a third party from listening or recording messages sent between them.

NOTE: Select Over SSL changes port numbers on the server side. Servers usually have dedicated ports for secure connections.

4. Select **Use GoldMine as Explorer's e-mail client s**o Microsoft Internet Explorer (IE) recognizes GoldMine as your Internet e-mail application.
5. In the **Sending Mail** area, complete the fields:
   - **SMTP server.** Type your e-mail server name or IP address. It can be your local Exchange server or the SMTP server for your ISP.
   - **Your return address.** Type your complete e-mail address on the Exchange server or your ISP.
   - **Use encrypted connection (SSL).** The same protocol used for retrieving e-mail securely. Choosing this option will also cause a switch to a dedicated secure connection port number on the SMTP server.
6. In the **Network connection** area, select:
   - **User Dial-up networking.** Dials your Internet provider automatically when you send and retrieve Internet e-mail. If you subscribe to more than one Internet provider, select the provider you want GoldMine to dial by selecting the Internet account in the drop-down list next to the field that appears below this option.
   - **Hang up when done.** Terminates the telephone connection after finishing sending and retrieving Internet email.
7. Click **More Options** to configure Internet settings in more detail:
   - Composing
   - Retrieval
   - Accounts
   - Security
   - E-mail Center
   - Advanced
8. The **Accounts** button takes you directly to the Accounts tab that is also available through **More Options**.

Setting Internet Options on the Composing Tab

Define settings for GoldMine to apply when writing an Internet e-mail.

1. Select **Tools>>Options.**
2. At the **User's Options** dialog box, select **E-mail** and then click **More Options.**
3. At the **Internet Options dialog box,** select **Composing.**
4. In the **General** area, select:
   - **Show public E-mail templates.** The drop-down list in the email Subject line lists all email templates saved to (public) in the **E-mail Templates dialog box.**
   - **Attach VCard to outgoing E-mail.** Attaches your VCard (.VCF file) to each email message. A VCard contains information similar to a contact record. If the receiving system has VCard capabilities, the system will decipher the .VCF file to import this information.
   - **Use signature file.** Attaches a signature file (a text file containing information about you, your organization, telephone number quotations, and so on) to messages for the single account or for the default account if additional Internet accounts were defined in the Accounts tab. This entry overrides an entry for the default account made in the Accounts tab; however, the entry has no effect on other accounts. Type or browse to the signature file in the field below the option label.
   - **When forcing line wrap, wrap at column x.** Specifies how many characters GoldMine includes before the text wraps to the next line.
   - **Send attachments as links for GM users.** Provides the link to each attached file for GoldMine users instead of sending the files to each recipient. This is a space saver for users on the same shared network.
5. In the **Replies** area, select:
   - **Complete original message.** Places the original message in the History tab when you reply or forward a message. If you do not want to designate the original message as a completed activity when you respond, clear the check box.
   - **Use line quote style with prefix.** Specifies the characters GoldMine uses to identify lines quoted from the original message when you copy those lines into your reply. By default, GoldMine uses >>**.**
   - **Quote entire message by default.** GoldMine copies the entire text of the original message in your reply, using the characters entered in Use line quote style with prefix.
   - **Wrap quoted lines in replies at column x:.** Specifies the number of characters GoldMine uses before wrapping to the next line of quoted text. You can use this option to create an indented block for text quoted from the original message.

6. In the **Misc.** area, select:
   - **Use 8 bit encoding.** Converts 7-bit encoding into 8-bit encoding. Useful for international GoldMine users.
   - **Always send a Bcc to myself.** Sends a blind courtesy copy (bcc) of each outgoing message to your e-mail account.
   - **Use user supplied VCard**. Ensures the VCard attached to your outgoing e-mail includes updates.
   - **Encode E-mail using character set.** To encode your messages with a special character set, type the character set in the field. For example, to use the Western European character code, type iso-8859-1. If left blank, GoldMine uses the local default character set for encoding.
7. In the **Default templates** area, select Public or your user-defined templates in the drop-down lists:
   - For new outgoing E-mail messages
   - For replies
   - For forwarded messages

NOTE: Templates must be created before they are available in the drop-down lists.

---

8. Click **OK** to save the settings and close the window, or click the next Internet Options tab to configure.

Setting Internet Options on the Retrieval Tab

Specify a variety of Internet email retrieval options to define attachment locations, scan intervals, and the criteria GoldMine uses to select messages for retrieval.

1. Select **Tools>>Options.**
2. At the **User's Options dialog box, select E-mail.**
3. Click **More Options.**
4. At the **Internet Options dialog box,** select **Retrieval.**
5. In the **Retrieval Options** area, select:
   - **Open ‘Read E-mail’ dialog on retrieval.** After the email is retrieved, GoldMine opens and displays the first retrieved message.
   - **Use date from mail header.** Sets the date of incoming mail to the date sent as indicated in the header information of the message and posts email in true chronological order on your calendar.

     If you do not retrieve e-mail frequently, you may want to clear the check box corresponding to this option.
   - **Scan mail for UUEncoded data.** GoldMine scans the Internet mail server for any e-mail messages that contain UUEncoded attachments. Selecting this option does not affect the retrieval of MIME-encoded files.

- **Prompt if E-mail address is not on file.** GoldMine displays the **Attach E-mail** to Contact dialog box upon retrieving an unlinked email message. Options are available for linking the message.
- **Preview x lines of the message.** Specifies the number of lines of text GoldMine displays in the lower pane of the E-mail Center. By default, GoldMine displays 15 lines.
- **Do not retrieve VCard attachments.** If you select this option, GoldMine will not retrieve VCards with incoming email.
- **Mark incoming messages as private.** Limits the information available to other users about your incoming messages and prevents unauthorized users from reading the text.

  Example: On the Pending tab, received messages are marked (Private); Master users can read the messages, but other users cannot.

6. In the **Background E-mail Retrieval** area, select:
   - **Retrieve mail every x minutes.** GoldMine connects with your POP3 mail server to check for new mail at the interval you specified. For example, to retrieve waiting Internet e-mail every 2 hours, type 120 in this field. The default value of 15 sets GoldMine to scan for and retrieve waiting e-mail every 15 minutes. If you do not select Auto-retrieve on the Accounts tab but select Retrieve mail every x minutes and Send queued messages, GoldMine sends queued mail only.

     The following options are available only if you select Retrieve mail automatically every x minutes.

     - **Skip read mail (recommended).** Bypasses displaying e-mail messages you already read.
     - **Skip mail larger than x KB.** GoldMine retrieves only Internet email messages that are equal to or smaller than the kilobyte (KB) value in this field.
     - **Skip messages from contacts not on file.** GoldMine retrieves only e-mail from those contacts who have Internet e-mail addresses in their detail records.
     - **Send queued messages.** GoldMine sends all queued messages when automatically retrieving mail.
7. Type or browse to the location of the **Attachments** directory. This is the destination folder for retrieved e-mail attachments.

NOTE: These directories should be shared so other users can access the attachments.

---

8. Select **Save attachments as linked documents** to link files attached to incoming e-mail to the senders' contact records.

   To prevent linking attachments to your contacts, clear this option.
9. Click **OK** to save the settings and close the window, or click the **Internet Options** tab to configure.

Setting Internet Options on the Accounts Tab

Add and edit additional Internet accounts for sending e-mail from GoldMine. Establish a non-standard authentication protocol for your primary account.

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select **E-mail.**
3. Click **More Options.**
4. At the Internet Options dialog box, select **Accounts.**

   The accounts are listed in the field.
5. To add an account, click **New**.
6. At the **E-mail Account Properties dialog box**, define properties for an Internet email account.

   A user can log in and retrieve mail for up to 256 separate accounts.
7. To edit an existing account, select the account and click **Edit.**

   At the **E-mail Account Properties dialog box,** make changes to the Internet email account.
8. To remove an Internet account, select the account and click **Delete.**

WARNING: No confirmation prompt appears to verify the deletion.

---

9. With multiple accounts, set one account as your primary account by highlighting it and clicking **Set as Default.**

   The default account is indicated by a green ball or dot in the accounts display box.
10. Select **Show only the default account in the E-mail Center i**f you have multiple accounts but only want the default account to display in the E-mail Center.

    The accounts set to display in the E-mail Center are indicated by eyeglasses to the left of the account name in the Accounts display box.

NOTE: By default, GoldMine shows all accounts in the E-mail Center letting you check Internet accounts from one location in GoldMine.

---

11. Change the order of the accounts displayed in the E-mail Center.

    Click **Move Up** to move the highlighted account up one line. Click **Move Down** to move the highlighted account down one line.
12. Click **OK** to save the settings and close the window, or click the next Internet Options tab to configure.

Setting Internet Options on the Security Tab

If you have a digital ID (digital certificate) to verify your signature and receive encrypted e-mail messages, GoldMine lets you configure your Internet Options to include the information when sending a message.

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select **E-mail.**
3. Click **More Options.**
4. At the **Internet Options** dialog box, select **Security.**
5. Click **Digital ID(s)** to configure your IDs.

   The **Manage Digital IDs dialog box** opens.
6. In the **Signature Settings** area, you can select one option:
   - **Sign ALL outgoing E-mail with a Digital ID, by default.** Sends all your e-mail messages with your digital ID. If you do not select this option, you can still encrypt individual messages by selecting **Encrypt Messages** on the Edit E-mail toolbar. The message is sent with a signature but is not encoded (clear), allowing recipients who cannot support S/MIME to read the message.
   - **Encode any outgoing E-mail signed with a Digital ID (Recipients required to have S/MIME to read 'opaque' messages).** Sends outgoing e-mail messages signed with your digital ID as S/MIME encoded (opaque). Older email clients that do not support S/MIME cannot read the body of this type of e-mail message.
7. To encrypt all outgoing messages by default, select **Encrypt ALL outgoing E-mail, by default** (Recipients' Certificates are required in advance).

   Selecting this option sets the encryption to digital IDs on outgoing messages. With this option selected, you can still select **Do not Encrypt** on the encryption menu on the Edit E-mail toolbar.
8. In th**e Other Settings** area, select:
   - **Import new/updated certificates for ALL incoming signed E-mails, by default.** Automatically imports the digital ID on all signed incoming messages into the contact's **Record Properties>>Contact Details>>Digital IDs** tab.
   - **Save ALL incoming S/MIME e-mails as 'clear' messages.** Saves all S/MIME encoded (opaque) messages and all encrypted messages as clear, or not encoded. As clear-text messages, all GoldMine users with access to the e-mail record can read the messages. If this option is not selected, the messages are saved as they were received. Whenever GoldMine users want to read the e-mail message, they must enter the password for the private key of the GoldMine recipient.

   NOTE: If you do not select this setting, encrypted messages from contacts are unreadable by other users on the History and Pending tabs. Carefully consider the consequences before clearing this option.
9. Click another tab or click **OK** to save and close the dialog box.

Using Digital IDs with Email Messages

If you and your contact use digital IDs to verify signatures and send encrypted email messages, use GoldMine to configure your **Internet E-mail Options** and the **Edit>>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 Edit>>Record Properties>>Contact Details>>Digital IDs tab and import your Digital ID using your **Internet E-mail Options>>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. See “Setting Digital IDs in Contact Details” on page 53.

Configuring GoldMine Users' Digital IDs. Imports your digital ID into GoldMine. You determine the signature and encryption settings. See “Setting Internet Options on the Security Tab” on page 50.

Sending Digitally Signed E-mail Messages. Sends a message with your Digital ID signature. See “Sending Digitally Signed E-mail” on page 53.

Sending Encrypted E-mail Messages. Sends individual messages with a digital ID signature or GoldMine encryption. See “Sending Encrypted Email” on page 53.

Reading E-mail Messages Sent with Digital IDs. Reading digitally signed, encrypted, or signed and encrypted e-mail messages. See “Reading E-mail Sent with Digital IDs” on page 54.

Setting Digital IDs in Contact Details

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

1. With the contact record active in GoldMine, select **Edit>>Record Properties>>Contact Details.**
2. At the **Contact Details dialog box,** select the **Digital IDs** tab.
3. Click **Import t**o add a contact's digital ID file to the GoldMine contact record.

   The **Import Digital ID dialog box** opens.
4. In the **Filename** field, type or browse to the ***.p7b or *.cer** certificate file you are importing.
5. In the **Name** field, 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.**

Sending Digitally Signed E-mail

When digitally signing a message, you must have a digital ID configured in GoldMine (see “Setting Internet Options on the Security Tab” on page 50). 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.

On the toolbar, click the **Sign with Digital ID**  button. Your digital signature is added to the outgoing message.

Sending Encrypted Email

Protect email 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. See “Sending Email Messages Encrypted Using GoldMine” on page 54.

Sending Encrypted Messages Using Digital ID. See “Sending E-mail Messages Encrypted Using Digital ID” on page 54.

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 Email Messages Encrypted Using GoldMine

You can protect email messages with encryption. Messages encrypted with Encrypt using GoldMine can be read only by other GoldMine users with the correct password.

1. On the toolbar, click the **Encrypt Message** button (if you are reading a message and want to encrypt it before sending it to other GoldMine users or filing the message, automatically encrypt using GoldMine; otherwise, select Encrypt using GoldMine).

   The Encryption Settings dialog box opens.
2. Select **Encrypt the message**.
3. In the **Password** field, type the password you are using on the message.
4. In the **Encryption mode** drop-down list, select the encryption level.
5. Click **OK** to save your settings.

   Now only users with the proper password and working in GoldMine can open the message.

Sending E-mail Messages Encrypted Using Digital ID

When you encrypt a message using a digital ID, you must have the contact/recipient's digital ID configured in the Record Properties>>Contact Details. Encrypting a message to a recipient with a digital ID encrypts the message using the recipient's public key. When the recipient receives the message, he or she decrypts it using his or her private key. You can configure your Internet Security settings to automatically encrypt all outgoing messages with a Digital ID.

1. On the tool bar, click the **Encrypt Message** drop-down arrow button and select Encrypt using Digital ID. The outgoing message will be sent encrypted.
2. If a Digital ID is not configured for the contact, a warning box states GoldMine cannot encrypt the message.
   - Click **OK** to return to the unsent message window.
   - Configure the contact's Digital ID or remove the encryption from the message by clicking the Encrypt Message drop-down arrow and toggling the Encrypt using Digital ID option off.

Reading E-mail Sent with Digital IDs

Receive email messages digitally signed and encrypted from non-GoldMine users. To send a signed email 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.

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. (See “Setting Internet Options on the Security Tab” on page 50.)
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** 
Failed Encrypted and Signed Icon in Inbox 	**Signature Verification Failed Banner on Message**  Reasons signatures can fail: • The sender and signature do not match. • The digital signature is expired. • The Certificate Authority is not configured in GoldMine

Setting Internet Options on the E-mail Center Tab

Configure the E-mail Center using the E-mail Center tab of the Internet Options dialog box.

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select **E-mail.**
3. Click **More Options.**
4. At the **Internet Options dialog box,** select **E-mail Center.**
5. In the **General Settings** area, select:
   - **Show both E-mail Address and Account Name (if available) for Online accounts**. Select to list the accounts in the E-mail Center by both the **E-mail Address** and the **Account Name.** If the Account Name is left blank, GoldMine uses the e-mail address as the account name. If the Account Name contains an entry and you clear this option, GoldMine lists the account by the Account Name only.
   - **Show Outlook Folder.** Displays the Outlook folder from the local computer in the E-mail Center.
6. In the **Trash Can Settings** area, select:
   - **Move deleted E-mail to Trash Can.** Places deleted mail in the Deleted folder in the E-mail Center. GoldMine holds the mail until you select Empty trash can in the local menu.
   - **Empty Trash Can when closing the E-mail Center.** Automatically deletes any messages placed in the **Deleted** folder when you close the E-mail Center.
   - **Confirm before emptying Trash Can.** Displays a warning prompt for confirmation to delete messages in the Deleted folder.
7. In the **Header Display Options** area, select one option:
   - **Hide Headers.** Shows no header information in the e-mail message.
   - **Show Summary Headers.** Shows relatively high-level information only in the email message such as date, sender, subject, recipient, and so on. This option does not show detailed routing information.
   - **Show ALL Headers.** Shows all header information in the e-mail message including routing information and message ID.
8. In the **Date Display Options** area, select one option:
   - **Long date format.** Spells out the date in the E-mail Center including the day.
   - **Short date format.** Uses numeric format for month, day, year, and transmission time.
   - The **Auto-filed Folders' Storage Options** assign names to the E-mail Center folders storing incoming and outgoing messages. Leave the default settings of **Filed** (incoming e-mail messages) and Sent (outgoing e-mail messages), or overwrite the entries to rename the folders. Select one option:
   - **Organize Auto-filed mail in month-year folders.** Uses one level to store incoming messages by month, year.
   - **Organize Auto-filed mail by year folders first, and by month sub-folders second.** Uses two levels to store incoming messages in month folders under separate folders for each year.

9. Click **More Auto-filed Folders' Options** to change the default month-name labels assigned to folders. The Auto-filed Folders' Month Names dialog box appears. Select Override the default month names and type the new label names to assign to the Filed folders.
10. Click **OK** to return to the E-mail Center tab.
11. Click **OK** to save the settings and close the window, or click the next Internet Options tab to configure.

Setting Internet Options on the Advanced Tab

Define advanced Internet settings to apply globally to your E-mail Center, existing attachment files, message operations, and data imported from a Web site.

Use the following procedure to set up Internet Options on the Advanced tab.

1. Select **Tools>>Options.**
2. At the **User's Options dialog box**, select **E-mail.**
3. Click **More Options.**
4. At the Internet Options dialog box, select **Advanced.**
5. In the **E-mail Center** area, select from:
   - **Enable 'Delete All Server Mail'**. Activate the Delete all messages on the server button on the E-mail Center toolbar to delete all messages on the Internet mail server. By default, GoldMine excludes this icon in the E-mail Center toolbar.
   - **Download old messages first.** Retrieve messages from the mail server in chronological order (oldest to newest). By default, GoldMine retrieves messages in reverse chronological order (newest to oldest).
   - **Suppress file overwrite prompt.** Do not display a warning before overwriting an existing file with an attached file having the same name.
6. In the **Existing attachment default action** area, specify the default method for handling a file of the same name:

NOTE: This option will not work automatically unless the Suppress file overwrite prompt option is also selected.

   - **Overwrite existing file.** Replaces the existing file.
   - **Choose a new file name.** Lets you rename the file.
   - **Auto name assignment.** Appends a number to the file name. If GoldMine cannot append a number (up to 64), a random, unique name assigns to the new file.
   - **Do not save the file.** Deletes the attached file.

7. In the **Message** area, select from:
   - **Use HTML when creating new E-mail.** GoldMine recognizes HTML encoding in incoming messages, and applies HTML formatting to outgoing messages. This option adds an HTML editing toolbar to the Create Internet E-mail dialog box letting you add a formatting attributes, such as color, picture file insertion, and alignment.
   - **Auto spell-check before sending.** Checks the spelling in a message when selecting Send in the Create Internet E-mail dialog box.
   - **Show next message after delete/complete.** After disposing of a selected message, GoldMine displays the next message listed in the E-mail Center.
   - **Link e-mail address to contact record by default.** When retrieving an e-mail message that is linked to a contact record, selecting this option causes the From: address in the message to be linked to the same contact. To link messages to contacts without linking the e-mail address, un-select this option.
   - **Mark attachments for synching by default.** Marks e-mail attachments as linked documents to be synchronized, except for VCards and transfer sets.
   - **Delete attachments when deleting the mail.** Deletes attachments when you delete messages.
8. In the **WebImport** area, select from:
   - Import data when retrieving E-mail Center mail. Imports WebImport data when GoldMine retrieves e-mail messages. To manually import WebImport data, clear this option.
   - **Import data on background e-mail retrieval.** Imports WebImport data when GoldMine performs background e-mail retrieval.
   - **Discard message after importing data.** Deletes the WebImport message from the Web site after GoldMine retrieves the message.
9. In the **Communication timeout** field, type the number of seconds GoldMine remains idle before disconnecting from the mail server (default is 60 seconds).
10. Click **OK** to save the settings and close the window, or click on the next Internet Options tab to configure.

Setting Options for the Telephony Tab

Configure special modem and dialing settings to use with GoldMine's auto-dialer feature.

NOTE: You must have a TAPI modem locally installed and working on your computer before you can successfully configure the modem settings.

Use the following procedure to set up options on the Telephony tab.

1. Select **Tools>>Options.**
2. At the User's Options dialog box, select **Telephony.**

3. In the **Modem Settings** area, configure these settings:
   - **TAPI Line.** Select the TAPI settings in the drop-down list that match your computer's Phone Dialer TAPI settings.
   - **Dialing Properties.** Displays the Phone And Modem Options dialog box.
   - **Line Properties.** Displays the modem Connection Options dialog box.

NOTE: Consult your Windows and modem documentation for configuration details.

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4. In the **Dial Number Formatting** area, configure:
   - **Let TAPI format phone numbers**. Allows TAPI to add numbers required for dialing a phone number such as international access and country codes.
   - **Dial numbers as entered**. Dials the numbers as they are formatted in GoldMine.
   - **Local Area Code.** The area code you are dialing from.
   - **Dial Prefix.** A number sequence accessing a special line or service.
   - **Dial Suffix.** A number sequence after the telephone number to access a special line or service.
   - **Hang up after: x sec.** Specifies the number of seconds before GoldMine tries to reconnect.
5. In the **SoftPhone** area, enter the local extension number and set SoftPhone as the default.

   Access and edit SoftPhone advanced settings by clicking the **Advanced** button.
6. Click **OK** to save the settings and close the dialog box.

Setting Options for the Pager Tab

Enter information about your pager to receive messages from other GoldMine users and alarms set up in GoldMine.

To send a pager message to GoldMine users, select **Actions>>Send Pager Message.** Select the GoldMine user or user group in the drop-down list.

Use the following procedure to set up options on the Telephony tab.

1. Select **Tools>>Options**.
2. At the User's Options dialog box, select **Pager.**
3. Type the **Pager ID (PIN)**.

   This is the identification code identifying your pager. If necessary, contact your service provider for this information.

4. Select one of the following:
   - **Page by sending an Internet E-mail to address.** Type your Internet email address. Select this option to receive a pager message by e-mail instead of receiving a call to the pager's telephone number.
   - **Page by dialing a terminal phone number.** GoldMine sends a message to the pager's telephone number when you provide:
   - **Terminal Number.** Telephone number to the pager. Include prefix or suffix sequences required to access a special line or service. For example, dialing 9 before the telephone number to access an outgoing line.
   - **Terminal's maximum character length.** Greatest number of characters the pager can accept. Most pagers can accept 80–100 characters.

Setting Options for the Speller Tab

Use the E-mail Center to check the spelling in the message, improve professional presentation, and customize the spell-checker.

Open the **User Options>>Speller tab** dialog box for basic customization.

However, you can customize the speller as you work, adding words and creating individual or company dictionaries. For more information, see "Creating Dictionaries" on page 61.

Use the following procedure to spell check an email.

1. After creating your e-mail, click **Check Spelling** button on the E-mail Center toolbar.

   The Check Spelling dialog box opens.

   The questionable word appears in the **Not in Dictionary** text box.

   Suggestions are listed in the **Suggestions** list. The words displayed are based on the options selected on the Speller tab.
2. Select an 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 **Suggest** button, a deeper search is made. When the spell checker exhausts all possibilities, the **Suggest** button is disabled.
3. To edit a questionable word, type a revised version of the word in the **Not in Dictionary** text box. **Ignore** changes to **Undo edit.**

   Clicking **Undo edit** returns the edited word to the original form.

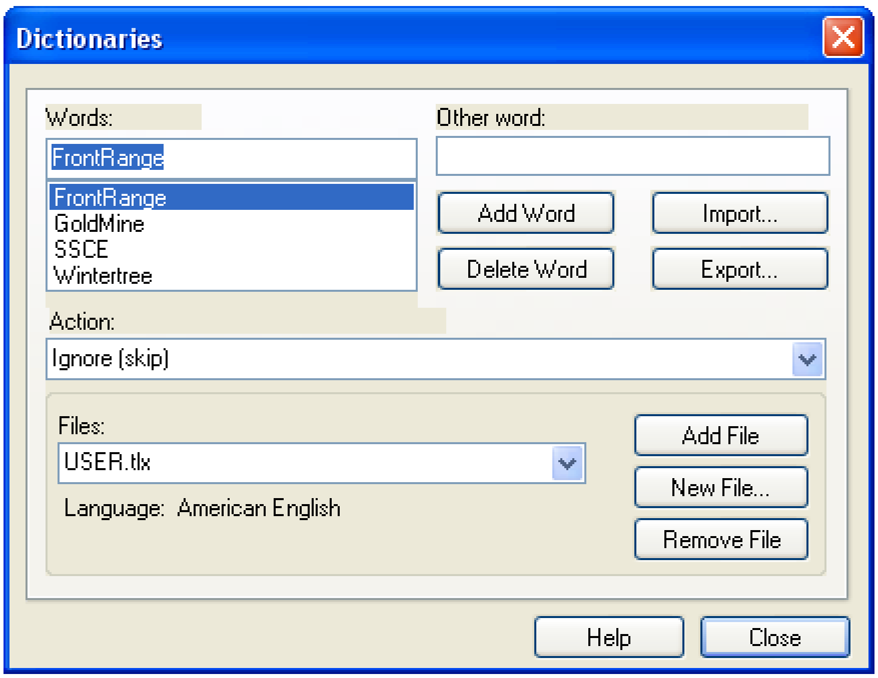
4. Use the Check Spelling dialog box to change the Options and Dictionaries.
5. Select **Undo** if you made changes to a document with Ignore or Change and wish to undo the changes.

   The **Undo** button takes you back one word at a time.
6. Click **Cancel** to stop the spell checker and close the window.

Creating Dictionaries

Use the GoldMine spell checker to configure and customize the dictionary for each user. Add words, import files, and change the action on individual words.

1. Select **Tools>>Options,** and select the Speller tab.
2. Click **Setup Dictionaries.**
3. The Dictionaries dialog box opens.



4. Select from the following options as needed.

   The **Words** text box lets you add a word or edit the highlighted word from the text box. The text box listing displays the words in the Files .tlx file.

   - To add a word, type the word and then click **Add Word.**
   - To edit a word, highlight the word, type the correction and click **Add Word.**
   - To type case variations on a word, at the **Other word** text box type in the word and then click **Add Word.**
5. Click **Delete Word** to remove the word from the dictionary file.

6. Click **Import** to import the words in a .txt file to the current Files .**tlx file**.

NOTE: When files with multiple word phrases are imported, each word adds individually rather than as a phrase.

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7. Click **Export** to export the words in the current Files .tlx file to a .txt file.
8. At the **Action** drop-down list, select an action to apply to individual words:
   - Auto change (use case of checked word)
   - Conditionally change (use case of other word)
   - Conditionally change (use case of checked word)
   - Ignore (skip)
   - Exclude (treat as misspelled)
9. To apply an action to a word:
   - Highlight the word in the **Words** text box listing.
   - Select the action from the Action drop-down list.
   - Click **Add Word.** The action you selected applies to that word.
10. The **Files** drop-down list displays available custom .tlx dictionaries.
11. Click **Add File** to browse to other .tlx files.

NOTE: The **.tlx** files store in user folders in the Speller folder of the main GoldMine directory.

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12. To create a new dictionary:
    - Click **New File.**

      A **.tlx** file is created, and the New Dictionary dialog box opens.
    - Type the new **File Name**. Select the **Language** from the drop-down list and click **OK**.
13. Click **Remove File** to delete the current .tlx file.
14. Click **Close** to save the settings.

Setting Options for the Login Tab

Use the Login tab to set default databases and login information. This tab is available only to users with Master Rights.

WARNING: These settings rewrite the GM.ini file and are global. Note that the changes you make affect all users

1. Navigate to **Tools>>Options.**

   The **Options** dialog box opens.
2. Click on the **Login** tab.
3. At the **GoldMine home directory field,** browse to the GoldMine directory location. for which you want to set the default.

   If you are working on a network, this should be the drive mapped to the main GoldMine directory, for example, g:\Apps\GoldMine.
4. At the **GoldMine database**, select the alias for which you want to set the default from the drop-down list (for example, GoldMine 8.1).
5. At the **Default contact database,** select the alias for the database for which you want to set the default in the drop-down list (for example, MSSQL: GoldMine: dbo).
6. Click on the **Default login user** checkbox to write to the local gm.ini file.

   This is fine for single-user installations but not for network installations. For network installations, each workstation generally has a different user with their own login.

NOTE: On some operating systems, especially NT-based operating systems, the Default login user is not respected and the GoldMine login defaults to the network login name.

On a network workstation where you log in to GoldMine with a login differing from your network login, create a GoldMine shortcut on the desktop. Then right-click the shortcut and select **Properties>>Shortcut.**

In the Target text box, type /u:username (where username is your GoldMine login).
An example of a full path is: GoldMine\gmw 8.1 exe/u:username.
This populates the GoldMine login with your correct GoldMine login name.

7. The **Time Clock** drop-down list contains three options for monitoring the login activity of the user. The information displays on the Time Clock tab in each User Properties dialog box. Select from the following:

   Disable Time Clock. Turns off the login and time tracking.

   Track daily totals. Monitors the total number of times a user logs into GoldMine and displays the cumulative amount of time the user is logged in per day. These statistics appear in the **Time Clock** tab of the User Properties dialog box.

   Track each login. Monitors the amount of time a user is logged in to GoldMine for each login session. These statistics appear in the Time Clock tab of the [Username] Properties dialog box.

8. Click on the **Bypass login banner** checkbox to skip the login banner if there is no password for the user.
9. Click on the **Open files exclusively** checkbox to allow only the currently logged in user to open GoldMine.

> **NOTE:** Open files exclusively is useful for GoldMine administrators working in the database who need to keep other users out. When you are finished using the files exclusively, remove this option so other users can log in. When selected, this option writes the line Exclusive=1 in the [GoldMine] section of the GM.ini file and locks the Flags.bin table. Do not enable this feature if planning to use the GoldMine Backup Wizard.

10. Click **OK** to save the settings and close the dialog box.

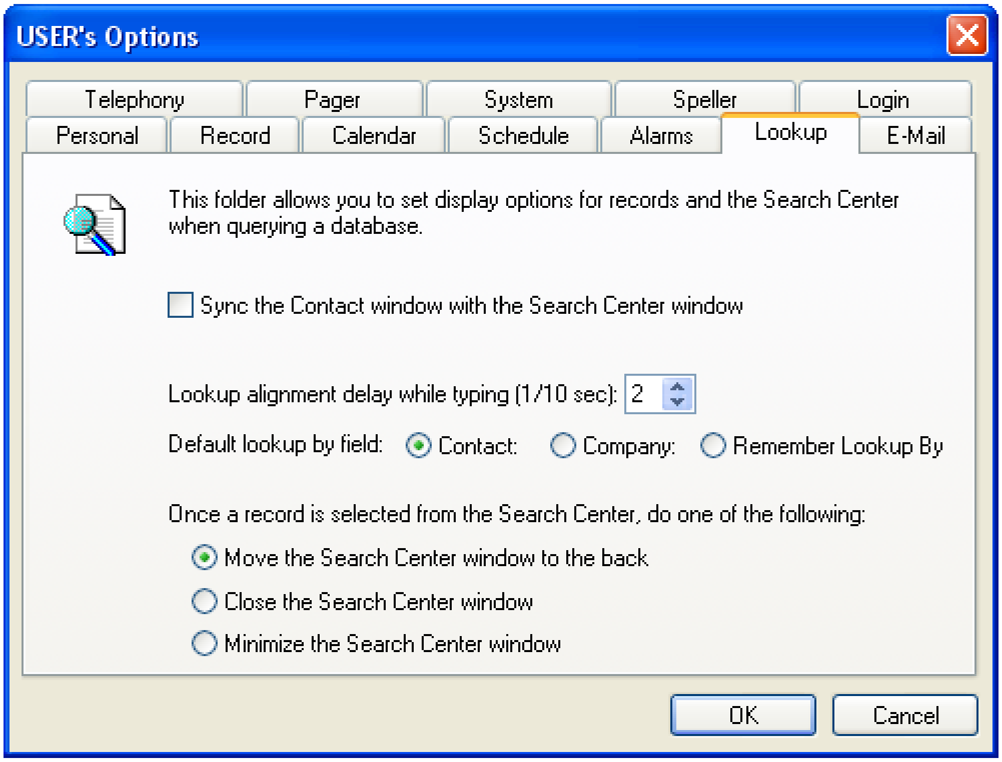
Setting Options for the Lookup Tab

Configure display attributes for the Contact Search Center.

1. Navigate to **Tools>>Options.**

   The **Options** dialog box opens.

2. Click on the **Lookup** tab.



3. Select **Sync the Contact window with the Search Center window** to display the selected record in the Contact Search Center as the active record in the work area.
4. Type or select **Lookup alignment delay while typing (1/10 sec).**

   This specifies the delay in tenths of a second between when you type an entry in the Find Value field of the Contact Search and when the Contact Search Center window displays a record that matches the entry.
5. Select the **Name or Company as the Default Lookup by field** radio button.

   The Contact Search Center window defaults to this field when selected on the toolbar or the menu.
6. In the **Once a record is selected from the Search Center** area, select the following options as needed:
   - **Move the Search Center window to the back**. Select this radio button to bring the contact record to the front and place the Contact Search Center behind the contact.
   - **Close the Search Center window.** Select this radio button to close the Contact Search Center.
   - **Minimize the Search Center window.** Select this radio button to minimize the Contact Search Center.
7. Click **OK** to save the settings and close the dialog box.

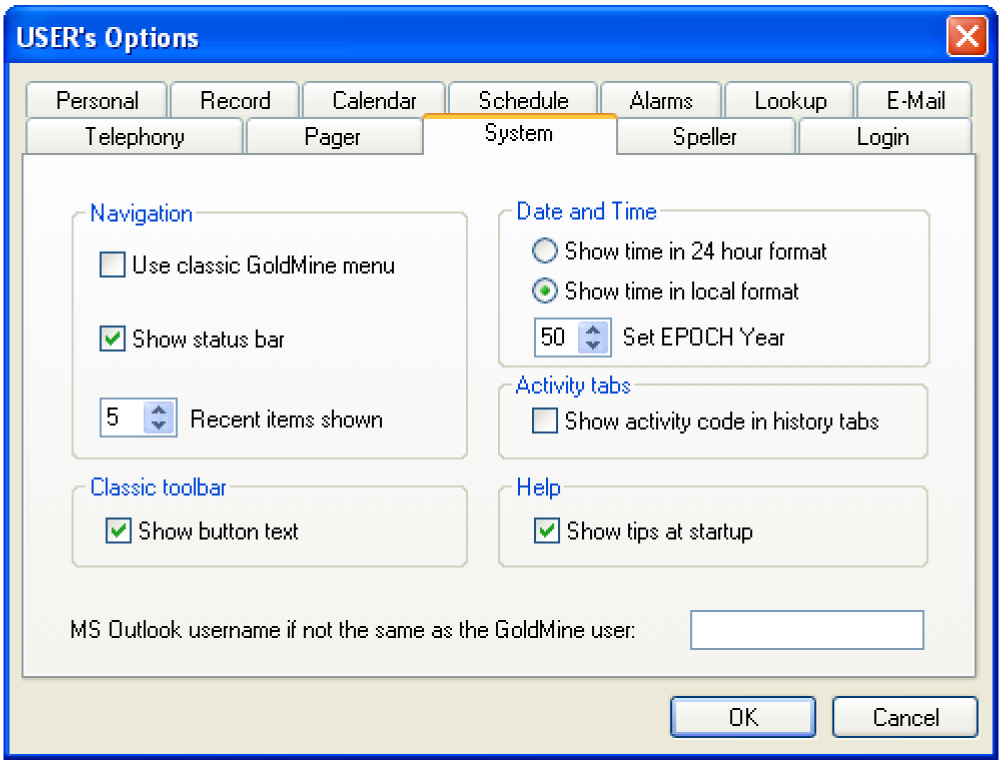
Setting Options for the System Tab

Click the System tab on the **Options** dialog box to define your GoldMine system settings.

1. Navigate to **Tools>>Options.**

   The **Options** dialog box opens.

2. Select the **System** tab.



3. In the **Navigation** area, select the checkbox next to the following options as needed:
   - **Use classic GoldMine menu.** Select this option to display the *GoldMine Corporate Edition* default main menu rather than the current menu configuration.
   - **Show status bar.** Select this option to use the status bar in GoldMine Corporate Edition.
   - **Recent item shown.** In the dropdown box, select the number of recent items you want to display.
4. In the **Classic toolbar** area, click **Show button text** to show the Classic GoldMine toolbar buttons.
5. In the **Activity tabs** area, select **Show activity code in history tabs** to show the activity code in the **History** tab.

6. In the **Date and Time** area, select the checkbox next to the following options as needed:
   - **Show time in 24 hour format.** Select this option to display time in a 24-hour format on the status bar and the time fields of windows. For example, 9:00 P.M. appears as 21:00 in the 24-hour time format.
   - **Set EPOCH.** Select this option to determine how GoldMine interprets dates when no century is indicated, that is, a date entry containing only the last two digits of the year. To scroll through values by five-year increments, click the up and down arrows next to the field. For example, if you set the value to 80, GoldMine will interpret the entry 03/10/80 as March 10, 1980 and the entry 10/01/70 as October 1, 2070.
7. In the **Help** area, select the checkbox next to **Show tips at startup** to display the User Tips when you launch GoldMine. Do not select this checkbox if you do not want to see the User Tips.

NOTE: For best results, assign the same user name in both GoldMine and MS Outlook.

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8. At the **MS Outlook user name if not the same as the GoldMine user** text box, type the Microsoft Outlook user name if the Outlook user name is different than the GoldMine user name.
9. After making all of your selections, click **OK.**

Updating Undocked Users

CAUTION: Do not allow undocked users to synchronize with an updated GoldMine system until that undocked user has updated to the same version the updated site is using.

To update undocked users after performing a NetUpdate on the main GoldMine system, locate the gmsetup.exe file. Depending on how undocked users communicate with the network and GoldMine system and on the connection speed, send the gmsetup.exe file to the undocked user by putting it on CD, posting it on an FTP site, e-mailing it, or placing it on an accessible network drive.

Include directions on executing the gmsetup.exe file and what undocked users should expect after the upgrade.

After the undocked users update to the same version of GoldMine, they can use NetUpdate to sync with the master site.

Use the following procedure to perform an update.

1. Click **Net-Update Now** and follow the prompts.
2. To change the registration information, select **Update Registration Information**.

Creating Undocked User Licenses

GoldMine has a sub-license for an individual user called an Undocked License (U-License). This license type is created for users who work primarily with GoldMine at a remote location on a laptop, notebook, or home office computer but who may also need to log on to the network occasionally.

Consider the following before creating an undocked user licence:

- Creating an undocked user decreases the available users of the network site (Master License or Site License) by one; however, when an undocked user logs on to the site from which they were sub-licensed, they do not take up an additional seat.
- Every user supported by the GoldMine license can have an Undocked license to work on a remote computer. For example, on a 5-user GoldMine system, 5 Undocked licenses can be created. This is in contrast to creating an “S” sub-license which requires one seat to remain available from the Master License.
- All undocked users, as well as the total number of users that make up the difference in the total number allowed by the Master License can log on to GoldMine. For example, on a 5-user GoldMine system with 3 undocked users, 3 undocked users plus 2 other users can log on to GoldMine.
- If you undock all users, only those users will be able to log in. If you have not assigned master rights to any of those undocked users, GoldMine administration cannot take place.
- When used in combination with GoldSync, administrators can synchronize security settings to undocked users including new passwords, menu items, and options in addition to data.
- To work on an undocked basis, users must have an Undocked license on their laptop. Create an Undocked license from the Master License or a Site license.

Use the following procedure to create an undocked user

1. From the GoldMine main menu, select **Tools>>Configure>>License Manager**.
2. At the License Manager window, click the **Licenses** tab and **Undock Users.**
3. At the Create Undocked User Licenses dialog box, select the check box next to the user you want to create a sub-license for, and click **Create Undocked License**.
4. At the Sub-Licenses dialog box, review the information and click **I Agree.**

   The sub-license number for a remote user or an undocked user appears in the Sub-license for Remote Site [Name of Site] dialog box.
5. Write the sub-license number down or copy it to Windows Notepad.

   The sub-license number is needed for each remote computer installation. Send the remote site license number to the remote user who can type the license number during the GoldMine installation.

.INI Files and Macros

GoldMine contains .ini files (initialization files) that define program and user parameters. Each GoldMine user has a username.ini and username.tbi (which is the user login name followed by the file extension; for instance, if the user's login is *JohnS* then the user's .ini file is *johns.ini*).

The username.ini stores options and is in the GoldMine directory. See “Username.ini” on page 72.

The username.tbi file stores the user's taskbar settings. See “Username.tbi” on page 78.

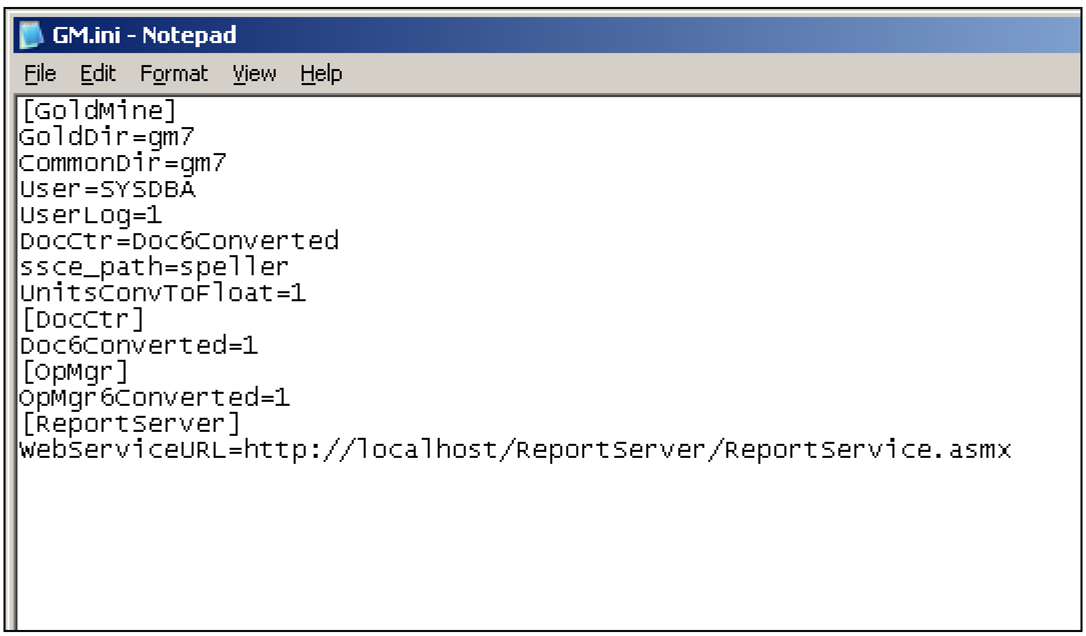
Configuring the INI File

After installing Microsoft SQL Server Reporting Services and configured on the network, add a section to the gm.ini file typically located in **Program Files/GoldMine/.** This tells GoldMine where the Reporting Services is hosted.

Use the following procedure to configure the ini file

1. Close GoldMine.
2. Open the gm.ini file using Notepad.
3. Type:

   [ReportServer] WebServiceURL=http://localhost/ReportServer/ReportService.asmx



4. Click Save and close Notepad.
5. Open GoldMine.
6. Select **Go To>>Reports>>Report Scheduling.**

   The **Scheduled Reports** dialog box opens.

GM.ini Settings

The GM.ini file found in the main GoldMine folder contains the paths to these locations:

[GoldMine]

GoldDir=MSSQL: GoldMine_Sales: dbo:

CommonDir=MSSQL: GoldMine_Sales: dbo:

Select **Help**>>**AboutGoldMine**>>**System** to display the About GoldMine dialog box and view the file locations.

Section	Command	Values	Description
[GoldMine]	UserNameFormat=	1	Orders the username display as **FirstName LastName (LoginName)**. If the command is not added, the default display is LoginName (FirstName LastName).
	UserLogo=	<path\filename>	Places your custom logo on the GoldMine login screen.
	RecAlertSec=	<number of seconds>	Changes the delay before an alert appears.
	NewComplete=	0	Creates only a partial record (Contact1) rather than a full record (Contact1 and Contact2).
	GoldDir=	<path\filename>	Path to the GMBase files.
	CommonDir=	<path\filename>	Path to the Contact files.
	SysDir=	<path\filename>	Path to the GoldMine system files.
	Exclusive=	1	Locks all other users out of GoldMine.
	LastRun=	<number of days>	Set the number of days to wait before performing another Automatic Maintenance.
	HTML_Cal_Notes=	0	Displays the scheduled activity Notes as simple text rather than HTML. To display the Notes as HTML, the value is **1.**
	SQLQueryTimeout=	<minutes>	Sets the global timeout for all database queries.
	LongSQLQueryTimeout	<minutes>	Sets the global timeout for critical operations such as synchronization and database re-indexing.

Section	Command	Values	Description
	OnByDefault	Turn calendar alarms on by default (separate setting for each activity type).	Turns calendar alarms on by default. Also enabled in **Tools>>Options>>Alarms**
	FollowUp	Prompt to schedule a follow-up activity when completing an activit	Prompt to schedule a followup activity. Also enabled in **Tools>>Options>>Schedule**
	ShowTipOfThe Days		Also enabled in **Tools>>Options>>System**
	ROTabs		Renames tabs. In global setting area, only admin with master rights can edit.
	MSSQLMaxBrowse Recs		In global setting area, only admin with master rights can edit.Admin UI only needs support as corporate override in gm.ini)
	SearchTopRec	Maximum records displayed in Contact Search Center	The maximum records displayed in Contact Search Center. Only admin with master rights can edit. Admin UI only needs support as corporate override in gm.ini)
	SQLQueryLimit	1000	In global setting area, only admin with master rights can edit. Admin UI only needs support as corporate override in gm.ini)
	AllowDupEmails -	Allows having duplicate email's address	Allows e-mail addresses to be duplicated on multiple records. This should be in a global setting area.
[WebImpPassword]	Passwordx=	<password>	Requires passwords on WebImport files. X is the number of the password.
[WebImportOverwrite]	IAgree=	I Want To Allow Fields To Be Updated By WebImport	Lets fields update by WebImport. Specify the fields using the Fields= setting.
	Fields=	<field names separated by commas>	Specifies the fields updated by WebImport.

Username.ini

This file controls user settings not set from interface menus. GoldMine generates some default username.ini settings.

The default Username.ini settings appear in the following table:

Section	Command	Options	Notes
[Internet]	ShowPreview=	0 -- Preview off 1 -- Preview on	E-mail Center Preview settings can be toggled on/off. Right-click an object in the tree pane and select **Show Preview**.
	BodySizeLimitKB=	Size in KB	Increase the amount of a e-mail message previewed in the E-mail pane
[GoldMine]	AutoFillAddlAddress=	1 -- Auto-fill selected by default	When creating an additional contact on the Contacts tab, use the primary contact's address information to automatically populate the address fields.
	AutoFillEmailAddr=	1 -- Auto-fill selected by default	Auto-fills new e-mail addresses with the @<domain.name> of the selected primary e-mail address

Add or modify command statements to **username.ini** to customize:

- Access to macros of another user
- Title bar display
- Modem and dialing settings
- Configurations for messaging activities

GoldMine updates most of the settings in the username.ini when settings in options, toolbars, and other user areas of GoldMine are changed. Manually add or change the settings by editing the file with a text editor.

GoldMine organizes settings in this format:

```
[Section]
Setting=x
```

where the section name always appears in brackets, setting is the specified setting, and (x) represents the value of the designated setting. Be sure to place each new command in the correct section of Username.ini. However, the order of statements within a section does not affect proper execution.

The Goldmine section options are listed in the following table.

Setting	Option	Description
Followup=	1	Instructs GoldMine to automatically select the Schedule a follow-up check box when completing an activity.
SyncActiveObj=	1	Syncs the current contact record object with the highlighted activity in the activity list.
SyncGroupObj=	1	Syncs the contact record object as the contact if a group listing is changed.
PubForm=	1	Show **(public)** user forms in the merge forms menu
ROTabs=	1	Lets you change labels on the tabs. Type new labels in the order the tabs display on the screen with commas separating the labels and no spaces. For example, **Summary,Notes,Fields**.
ROTitle=	1	Displays the contact name in the record object title bar.
MacFile=	2	Uses the macros of the user specified

Changing Settings the INI File in GoldMine

GoldMine has the ability to change some settings in the ini file by configuring the System Settings tab. For more information, see “Configuring System Settings” on page 75.

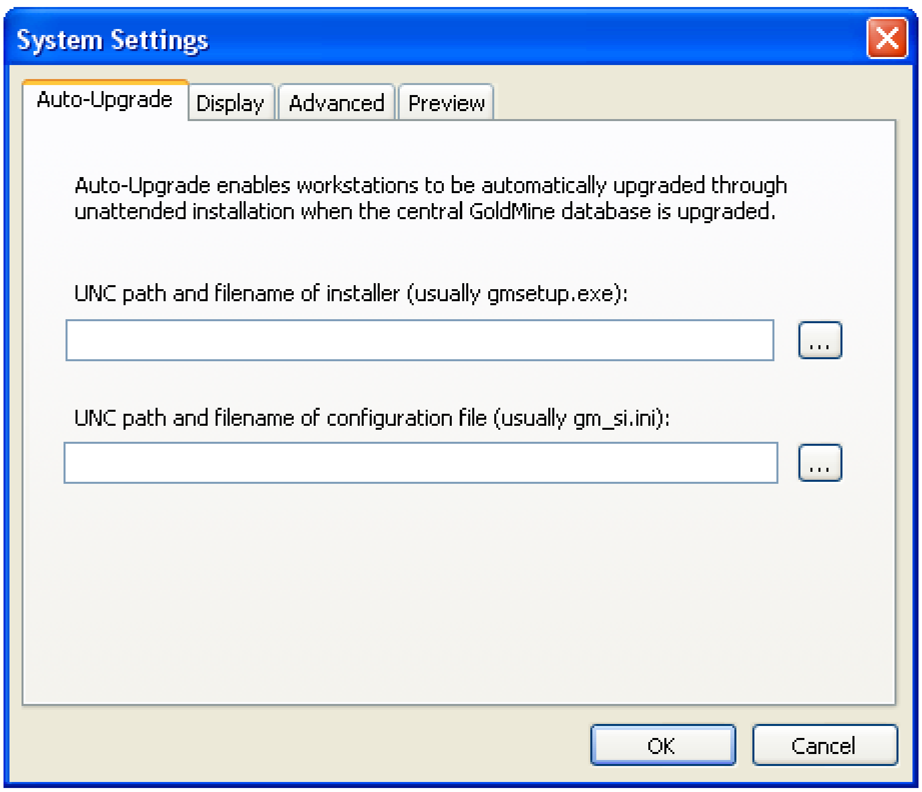
You can change the settings in the following table.

Setting	**Configure**
HTML_CAL_NOTES	To view notes as HTML navigate to **Tools>>Configure>>System Settings>>Display** tab. In the Notes Format area, select **HTML** and click **OK.**
HTML_CAL_NOTES	To view notes as Plain text navigate to **Tools>>Configure>>System Settings>>Display tab** In Notes Format area, select **Plain text** and click **OK.**
MSSQLMaxBrowseRecs SearchTopRec	To set Maximum number of records shown in CSC, Activity List, Contact List and Contact Record tabs navigate to **Tools>>Configure>>System Settings>>Display tab.** Set Maximum records shown in CSC, Activity List, Contact List and Contact Record tabs value to desired number and click **OK.**
SQLQueryLimit	To set Maximum number of records shown in SQL Query results navigate to **Tools>>Configure>>System Settings>>Display tab**. Set Maximum number of records shown in SQL Query results value to desired number and click **OK.**
AllowDupEmails	To allow Duplicated e-mail addresses navigate to **Tools>>Configure>>System Settings>>Advanced tab**. Check Allow e-mail addresses to be duplicated on multiple records check box and click **OK.**
OnByDefault	To turn Calendar alarms on by default navigate to **Tools>>Options>>Alarms,** click **Alarms on by Default** button. Check desired types of Activity for which you want Alarm to be checked for
FollowUp	To set automatic scheduling of Follow-Up activity when completing an activity navigate to **Tools>>Options>>Schedule**. Check Prompt to schedule a follow-up activity when completing an activity check-box.
ShowTipOfThe Days	To switch on the option of Showing Tips at every startup navigate to **Tools>>Options>>System.** Check Show Tips at startup check-box.

Setting	Configure
ROTabs	To rename tabs for one user follow the instructions: Open any contact record. On the tabs row click **tab selector tab (drop-down triangle)>>Customize.** or High-light the tab to be renamed and click the **Rename** button to give the tab new name. or To rename tabs globally, follow the procedure but select Customize tab labels globally.

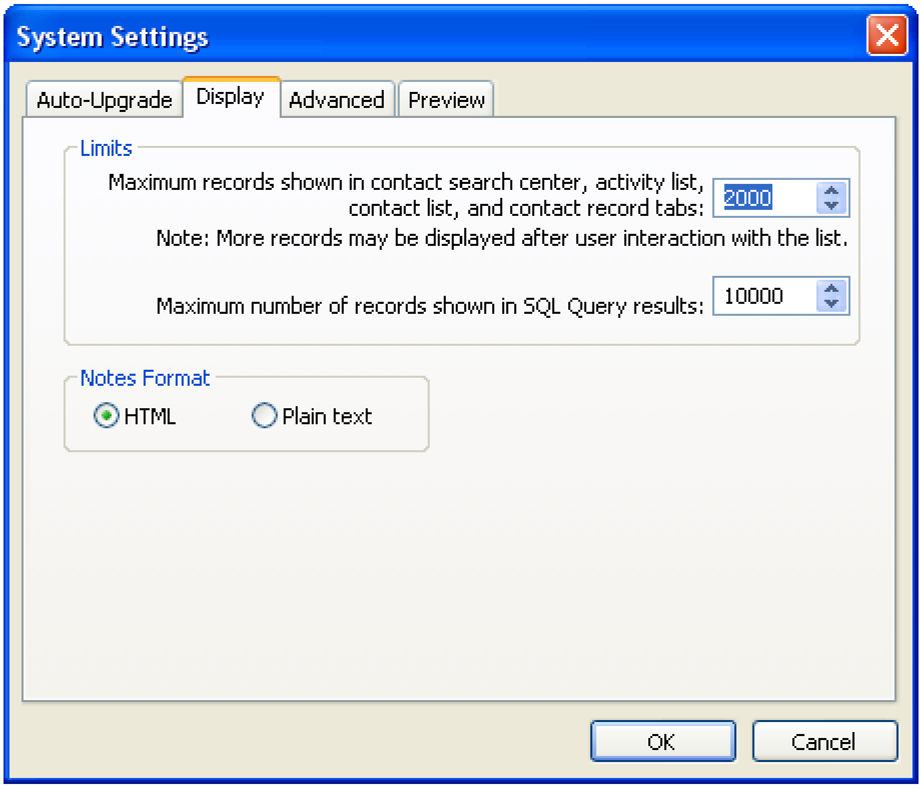
Configuring System Settings

1. Select **Tools>>Configure>>System Settings.**



2. To allow workstations to automatically upgrade when GoldMine upgrades, click **Auto-Display** tab.
   - UNC path and filename of installer (usually gmsetup.exe). Browse to find location.
   - UNC path and filename of configuration file (usually gm_si_ini). Browse to find location.

3. To set contact record result limits and Notes formats, click the **Display** tab.



4. At the **Limits** area:
   - Select the maximum number of records to display in the Contact Search Center, contact lists. Activity list and contact record tab.
   - Select the maximum number of MSSQL query results to display.
5. At the **Notes** area, select the **HTML** or **Plain text** option
6. To allow emails to be duplicated on multiple records, click the **Advanced** tab.
7. At the **Contact's permissions** area, click the checkbox to allow emails to be duplicated on multiple records.
8. At the **Universal Search** area, click the button to install or uninstall Universal Search. See the Contact Management chapter for more information on Universal Search.
9. To select the file types to display, such as Microsoft Word Document (doc) or HTML (htm), click the   tab.
   - Click each file type you want to display. The default is all are selected.
   - To create a new file type, click **New** and type in the name of the file.
   - To delete a file type, select the type and click **Delete.**
10. Click **OK** to close the dialog box.

Changing ini Settings

1. Open the Username.ini file:
   - From Windows Explorer, double-click username.ini; the file opens in Notepad.
   - From a text editor (such as Notepad), select **File>>Open**. Navigate to the GoldMine directory and select username.ini.
2. To customize the file with command statements, see:
   - **Setting E-mail Preview Text Amounts.** See "Setting Email Preview Text Amounts" on page 77
   - **Setting Keep or Clear on Tagged Records**. See "Setting Keep or Clear on Tagged Records" on page 77.
   - **Setting Calendar Publishing Output to XML**. See "Setting Calendar Publishing Output to XML" on page 77.

Setting Email Preview Text Amounts

By default, GoldMine displays 63 KB of message text. Increase the amount to preview very large messages.

1. Open Username.ini.
2. Beneath the [Internet] section, add:

   BodySizeLimitKB=size in KB
3. Select **File**>>**Save** and then exit.

Setting Keep or Clear on Tagged Records

Set a standard of keeping or clearing tagged records.

1. Open Username.ini.
2. Beneath the [GoldMine] section, add this line, using a defined number:

   ClickUnselectDefault=<a number (where 0 is always ask, 1 is keep tagged records without asking, and 2 is clear tagged records without asking)>
3. Select **File**>>**Save** and then exit.
4. Restart GoldMine to apply the changes.

Setting Calendar Publishing Output to XML

By default, GoldMine publishes the calendar to HTML. You can also publish to an XML file.

1. Open **Username.ini**.
2. Beneath the [CalObj] section, add:

   XMLOutput=1 (Publishes to XML. If XMLOutput=0 or if there is not XMLOutput setting, the calendar publishes to HTML.)

3. Use a customized XSLT file when publishing daily, weekly, or monthly calendars. In the same section, specify these transformation files:
   - ExternalXSLDaily=DailyFile.xsl
   - ExternalXSLWeekly=WeeklyFile.xsl
   - ExternalXSLMonthly=MonthlyFile.xsl
4. Select **File>>Save** and then exit.

NOTE: For best results, backup your .ini file before adding or changing any settings, and change only settings exactly as described in the online Help topics or contact Technical Support.

Username.tbi

Copy entire taskbars or just task groups from one user to another. The taskbar has one section, called [gmbar]. If you delete the username.tbi, you must log back into GoldMine as the user to recreate the file; however, it only has global task groups. You must copy or manually create the task groups.

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

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

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

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 Toshiba P105-S6167|Notebook HP Pavilion dv9260us|Notebook Lenovo ThinkPad T60|
- &Profiles.Computer.Notebook.2Computer|Notebook Toshiba P105-S6167|Computer|Notebook HP Pavilion dv9260us|Computer|Notebook Lenovo ThinkPad T60|
- &Profiles.Computer.Notebook.4Computer|Notebook Toshiba P105-S6167|Toshiba|1.60GHz|Computer|Notebook HP Pavilion dv9260us|HP|2.0GHz|Computer|Notebook Lenovo ThinkPad T60|Lenovo|166GHz|

&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. With Macro buttons activated in the Global Toolbar, click **Record.**

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 ALT+<*Underlined letter of menu item*>. Use the arrow keys to navigate the menu options

---

2. Begin the steps to record.

3. When finished, click **Stop** on the Global Toolbar or press **CTRL+SHIFT+END.**

The **Define Macro Button** dialog box opens.

4. In the **Status Bar Description** field, type a description of the macro to serve as the button name and pop-up text.

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.

CAUTION: 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.

Adding GoldMine User's Macros

Use the following procedure to create macros to speed or ease workflow.

1. Right-click on the GoldMine taskbar and select **Add New Item.**
2. At the Taskbar Group Item Selection dialog box, select **GoldMine Users' Macro f**rom the **Item Type** drop-down list.
3. Select the user who created the macro from the **User** drop-down list. Highlight the macro to add to the taskbar.
4. Browse to an icon file.

   The options display in the area below. Select an icon.
5. Click **OK** to add the item to the taskbar.

GoldMine Report Macros

The following is a compiled listing of information pertaining to the macros used within GoldMine reports along with a short description.

Some macros are only available within the "Calendar Printouts" reports category. The remaining macros are available in all of the report categories. They have been separated within this document for organizational purposes.

All Report Categories

&FullAddress

Displays Address1, Address2, City, State, Zip, and Country. A line feed separates address lines. City, State, Zip values are displayed on one line.

&Company&Address

Displays Contact Name, Company Name, Address1, Address2, City, State, Zip, and Country. A line feed separates all fields except for City, State, and Zip, which are displayed on one line.

&Address1&2

Displays Address1 and Address2 data separated by a line feed.

&Contact, Company

Displays Contact Name and Company Name separated by a semi-colon.

&Name&Address

Displays Contact Name, Title, Department, Company Name, Address1, Address2, City, State, Zip and Country. A line feed separates all fields except for City, State, and Zip, which are displayed on one line.

&Company

Contact Company Name, Contact Name separated by a semi-colon.

&Title&Address

Contact Name, Title, Department, Company Name, Address1, Address2, City, State, Zip, and Country. All fields separated by a line feed, except for City, State, Zip, which appear on the same line.

&CityStateZip

City, State, Zip displayed on the same line. City and state values are separated by comma.

&SourceFile

Returns the name of the database file being accessed in the current Section.

&CalActvName

Outputs the name of the scheduled activity being printed, based on the RECTYPE. For example, if a record of RECTYPE S is printed, the macro will return a value of "Sale".

&HistActvName

Works in the same manner as &CalActvName, except that it returns names based on history records, not calendar data.

&User

Outputs the user name of the currently logged in user.

&FullName

Returns the full name of the currently logged in user, as defined in **File>>Configure GoldMine>>Users File**.

&Licensee

Outputs the "Licensed To:" company name as defined when the GoldMine serial number was specified.

&Sort1

Outputs the data from the field set as the primary sort for the report. Can also be used to specify a break field within a sort header. For example, if the primary sort of a report is set to contact1->company and I insert the value of &Sort1 for the break field in the sort header, the report will then break on contact1->company.

&Sort2

Outputs the data from the field set as the secondary sort for the report. Can also be used to specify a break field in the same manner as the &Sort1 value.

&Sort3

Outputs the data from the field set as the tertiary sort for the report. Can also be used to specify a break field in the same manner as the &Sort1 value.

&Phones

Outputs all three of the phone numbers, the fax number, and the extension fields.

&LocalLabel:

Returns the local label of the field specified after the colon.

&Suppfile=”xxx” Used to specify break fields and filters within sections of reports. The “xxx” value must be at least two characters, but no greater than three. It is used to specify the database and record types you wish to include in a report section. The first two characters specify the database and the third specifies the RECTYPE within that database. Possible values for the different databases are as follows: cs = CONTSUPP.DBF, ca = CALENDAR.DBF, ch = CONTHIST.DBF. The different RECTYPEs that can be specified as the third character are listed in the “Database Structures” section of your manual.

NOTE: The ADDRESS3 field data found in the GoldMine CONTACT1 table is included in those macros that return address information.

Calendar Printouts Section Only

&Detail1

Displays the information that has been specified in the “Options” window for the report.

&Year

Returns the value of the current year in four-digit format, such as 1998. The macro will also return the value of the year for all dates within the specified date range under the report’s options. For example, if the date range is set as 01/01/95 to 01/31/97, the macro will return all values that fall within the date range (i.e. 1995, 1996, and 1997).

&Month Returns the numeric equivalent of the current month. For example, January = 1, February = 2, etc. The macro also returns the value of the month for all dates within the specified date range in the report’s options. For example, if the date range is set as 10/01/96 to 01/31/97, the macro will return all values that fall within the date range (i.e. 10, 11, 12 and 1).

&CMonth

Returns the name of the current month (For Example, January, February, etc.). The macro will also return the value of the month for all dates within the specified date range under the report's options. For example, if the date range is set as 10/01/96 to 01/31/97, the macro will return all values that fall within the date range (i.e. October, November, December and January).

&CMonthYr

Returns the name of the current month, plus the 4-digit year (For example: January 1998). The macro will also return the value of the month and year for all dates within the specified date range in the report's options. For example, if the date range is set as 11/01/96 to 01/31/97, the macro will return all values that fall within the date range (i.e. November 1996, December 1996, and January 1997).

&Day

Returns the numeric value of the current day (For example, 12, 100, 300, etc.). The macro will also return the value of the day for all dates within the specified date range under the report's options. For example, if the date range is set as 01/29/97 to 01/31/97, the macro will return all values that fall within the date range (i.e. 29, 30, and 31).

&Dow

Returns the numeric value of the day of the week. For example, a date which falls on Wednesday would return a value of 4, etc. Sunday is considered as being the 1st day of the week. This macro will also return all values within a date range.

&CDow

Functions much in the same manner as the &Dow macro, except that instead of returning a numeric value, it returns the actual name of the day. For example, if a date falls on a Sunday, the macro will return the value "Sunday" and so forth.

&DayNo

Returns the day number based on the year. For Example: January 2, 1997 = Day 2.

&WeekNo

Returns the week number of the year, similar to &DayNo. Jan 5–11 = Week 2

&WDay1

Returns the numeric day value of the Monday for the workweek in which the date falls. Assume that we are looking at records that fall on Wednesday January 29, 1997, the value returned by the macro would be 27. Since the 29th is a Wednesday, Monday is the 27th for the week of January 29, 1997.

&WDay3

Functions in the same manner as the macro &Wday1, except that it returns the numeric day value of the third work day of the week, or Wednesday.

&WDay4

Functions in the same manner as the macro &Wday1, except that it returns the numeric day value of the fourth work day of the week, or Thursday.

&WDay7

Functions in the same manner as the macro &Wday1, except that it returns the numeric value of the seventh work day of the week, or Sunday.

&Hour

Displays the time in hourly increments from 7:00 AM to 7:00 PM, generated in 12-hour format.

&Time

Returns the scheduled time for calendar records, in 12-hour format.

&FrDate

Displays the **From:** date entry from the report's options.

&ToDate

Displays the **To:** date entry from the report's options.

&LastMonth

Generates a graphical representation of the prior month, based on the date of the calendar records on the current report page. For example, if my report is displaying items for the month of January, the macro will print the graphical month of December.

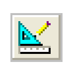
&ThisMonth

Generates a graphical representation of the current month, based on the date of the calendar records on the current report page. For example, if my report is displaying items for the month of January, the macro will print the graphical month of January."&NextMonth

Generates a graphical representation of the next month, based on the date of the calendar records on the current report page. For example, if my report is displaying items for the month of January, the macro will print the graphical month of "February."

iSearch.ini

This INI determine the engines available in the Internet Search dialog box. Use the following procedure to add search engines to the listings.

1. Select **Lookup>>Internet Search.**
2. At the **Internet Search** dialog box, click iSearch.ini properties .

   The iSearch.ini file opens in Notepad.
3. Select the location where the new search engine displays.

   Press Return to give yourself a line of space.

4. Type the appropriate information.

   Example: Insert Google as a new corporate search engine.

```
[Section: Corporate Search: <<Company>>]
Icon= 1
[AltaVista]
URL1= http://www.altavista.digital.com/cgi-bin/query?pg=q&what=web&kl=XX
Data= &q=<<Company>>
Icon= 5
[Yahoo]
URL1= http://search.yahoo.com/bin/search
Data= ?p=<<Company>>
Icon= 5
[Google]
URL1= http://www.google.com/search?hl=en&ie=UTF8&oe=UTF8
Data= &q=<<Company>>
[Yahoo Corporate News]
URL1= http://search.news.yahoo.com/search/news
Data= ?p=<<Company>>
Icon=6
```

   NOTE: Determine the structure of the entry (unique to each search engine) by testing a search and determining where the search begins.

   In this example, the test search returned the following results in the Internet Explorer Address text box

   http://www.google.com/search?hl=en&lr=&ie=UTF8&oe=UTF8&q=global+sales+corp

   Notice the search command for Google, &q, and the company name, Global Sales Corp, at the end. In the iSearch.ini entry, this is replaced by the company macro, <<Company>>. The macro allows the search to remain interactive with the current contact record.

5. Select **File**>>**Save.**

When launching the Internet Search, the new entry appears in the dialog box.

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 workflow.

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

1. Defining Primary Fields Views. See "About Primary Field Views" on page 94.
    - Creating Primary Fields Views. See "Creating Primary Field Views" on page 94.
    - Editing fields. See "Customizing Field Properties" on page 96.
    - Using Field Typing. See "Customizing Field Typing" on page 102.
2. Creating Custom Screens
    - Creating Custom Screens. See "Creating Custom Screens" on page 106.
    - Adding Fields to Screens. See "Adding Fields to Screens" on page 107.
    - Editing fields
    - Using Field Typing
    - Customizing Labels. See "Customizing Field Typing" on page 102.
    - Creating GM+Views. See "Creating GM+View Templates" on page 112.

About Primary Field Views

Primary field views are customized views of primary fields. Primary fields are in the upper pane of a Contact Record and are **Contact1** fields.

GoldMine now allows you to move fields around the screen as your needs dictate. 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. The only set limit to the number of views in GoldMine is 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 Types Administration Center. for more information, see "Using the Record Types Administration Center" on page 117.

Use Primary Fields Views to:

- Create Primary Fields Views. See "Creating Primary Field Views" on page 94.
- Customize Primary Fields. See "Customizing Field Properties" on page 96.
- Edit Primary Fields Views. "Editing Field Properties, Profile Tab" on page 96.
- Add to Record Type. "Using Record Types and Contact Records" on page 117.
- Delete Primary Fields Views.
- Manually Change Primary Fields Views

Creating Primary Field Views

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

TIP: 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.

TIP: 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.

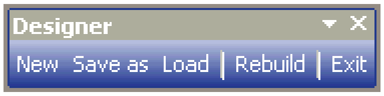
Use the following procedure to create a primary field view.

1. Before modifying the fields, right-click in the primary fields (top) pane and select **Select Primary Fields.**
2. Select a view from the menu.

   The primary fields update to the selected view.

3. Right-click in the primary fields panes and select Screen Design.

   The Screen Design toolbar appears and the contact record displays with a grid-like series of lines.

   Select one of the following from the toolbar and then click **OK:**

   New. To add a new field to the view, click New and then select the field from the **Place Field** drop-down box.

   To add a new field to the list, click **New Field** and do the following:

   - At the **New Field** field type a unique name for the new field.
   - At the **Description** field type a brief description of the new field.
   - At the **Field Type** field select the type of the new field and then add the number of characters in the **Len** (length) and/or **Date** fields.

   Save As. Save the screen as a new Primary Fields View.

   Load. Load the new Primary Fields View.

   Rebuild. Rebuild the database and add the fields to the Contact2 table. Review details on rebuilding before proceeding at "About Maintaining Databases" on page 206.

   Exit. Exit the Screen Designer.

4. Click **Save as a Primary Field.** .

   The Main View Profile dialog box appears. Use this dialog box to name and set access on Primary Fields Views. Complete the following fields and then click **OK**:

   - **Name.** Type a descriptive name in the field.
   - **User Access.** Select the user or user group to have access to this new group in the User Access. Select (public) for all users to have access this view.

   The new view appears in screen design mode and ready for modification.

5. To modify the fields in the view, see Customizing Primary Fields.

Customizing Primary Fields

Primary fields appear in the upper pane 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.

NOTE: Whenever a form of DDE is used, the external application extracts data based on the hard-coded Field Name regardless of the field label.

After you make the modifications to the primary fields, save as primary fields views. The Contact1 table stores primary field data.

Customizing Field Properties

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

Use the following procedure to edit the field properties.

1. Right-click on the field label and select **Properties**.

   The Field Properties dialog box appears.

2. Configure the settings on these tabs and then click **OK**:

   Profile. Field labels and field data options. For more information on editing these properties, see "Editing Field Properties, Profile Tab" on page 96.

   Color. Colors on the Contact record for the field label and field data. For more information on editing these properties, see "Editing Field Properties, Color Tab" on page 99.

   Layout. Field size, position, and tab order. For more information on editing these properties, see "Editing Field Properties, Layout Tab" on page 100.

   Security. Fields requiring data, users having read and update rights to the field, and options to update the log on the History tab. For more information on editing these properties, see "Editing Field Properties, Security Tab" on page 100.

Editing Field Properties, Profile Tab

1. Select the **Profile** tab. In the **Field Label area,** select **Global Label** and type the field label in the associated field.

   The Global Label applies to all GoldMine databases.

   Global Labels:

   - Display in all databases unless there is a Local Label.
   - Have a length limit of 15 characters, but are limited by the field label size.
   - Are stored in the Contudef and Fields5 table in the database.

2. Type the field label in the **Local Label** field if the local label differs from the Global Label.

   The Local Label applies only to the current database.

   Local Labels:

   - Display in the current database.
   - Have a length limit of 15 characters, but are limited by the field label size.
   - Are stored in the Contudef table in the database.
   - Take precedence over the Global Label.
   - Are always applied when the field is displayed within the corresponding contact set database, regardless of Record Type or Primary Fields View being used.

3. Select **Expression** if editing an expression field.

   See"Adding Expression Fields to Screens" on page 98 for details about the Expression option and the Label Reference.

NOTE: Use expressions to create complex field typing related to displaying and hiding the field label and data.

---

4. In the **Field Data area**, select **Name in Database**.

   The field name displays in the field. The **All Fields** button is active for user-defined fields, not primary contact fields.

5. Select **All Fields** to change the data field.

   The **User Defined Fields** dialog box opens.

   Select the new field data to display in the field. After selecting a new field, the Global Label remains the same; however, the Local Label changes to reflect new data.

6. Select **Expression** if editing the data expression.

   See "Adding Expression Fields to Screens" on page 98 for details about the Expression option.

7. Configure the Color tab, Layout tab, and Security tab.

Remember these general rules for Label Types in the following table.

Label (Type)	**Priority (Versus Other Label Types)**	**Stored with Contact Set (Different for each Contact Set)**	**Stored with Field View (Different for other Record Types or view types)**
Global	3 - Base level	No	Yes
Expression	2 - Overrides Global Label Types	No	No
Local	1 - Overrides both Global and Expression Label Types	Yes	Yes

Adding Expression Fields to Screens

Use expressions to create titles or text messages on screen or to create calculated fields (fields that contain a mathematical expression rather than data). Calculated fields have no value; they only display a value, so reporting or filtering cannot take place on the field. If filtering or reporting is required, create a field and use the Lookup.ini to calculate its value. The Lookup.ini returns a value.

Use the following procedure to add an expression field to a screen.

1. Select the **Fields** tab and right-click in the area under the tab. Select the screen to which you are adding the field.

   The selected custom screen becomes active under the **Fields** tab.
2. Right-click and select **Screen Design**.

   The **GoldMine Screen Designer** toolbar appears with a grid-like background in the Contact record.
3. Click **New** on the design toolbar.

   The Place Field dialog box opens.
4. At the **Field** drop-down list; select **-- dBASE Expression --.**
5. Click **OK**.

   The field box appears in the upper left corner of the **Fields** tab. Drag and drop the field in the desired location on the Field Screen.
6. Double-click the field.

   The **Field Properties** dialog box opens.
7. In the **Field Label** area on the **Type** tab, select either:
   - **Global Label.** Designate the Global Label that applies to all databases. With Expression fields, the Local Label is not an option.
   - **Expression.** Type text in quotes or type a field expression.

     Examples:
     - To create a text expression label, type *Total:* in the Field Label area Expression box. GoldMine displays **Total: as the field label.**
     - To create a field expression label, type *Contact1->Company* in the Expression box. GoldMine displays the first 15 characters of the company name as the field label.
8. If you use Expression as a field label, type the **Label Reference** label for the expression field.
9. In the **Field Data** area, select **Expression** and type the expression that displays the field value.

Example

For two numeric fields, called *USUM1* and *USUM2*, create a calculation expression to add them together. For example, *Contact2->USUM1+Contact2->USUM2*. Remember, you cannot report on the total value. If you create a complex expression, test it using the **dBASE Expression Tester**.

Editing Field Properties, Color Tab

1. Right-click the field label and select **Properties.**
2. At the **Field Properties** dialog box, select the **Color** tab.
3. In the **Label Color** area, select **Fixed Color** and click **Colors.**

   The **Color** dialog box opens.
4. Select the color from the palette to use as the label color.
   - Select **Define Custom Colors** to create custom colors.
   - Click **Use default label color** to reset the color to black.
5. Select **Expression** if you know the system number for the color.
6. Type the number in the field.

NOTE: Use expressions to create more complex field typing, related to changing the color of field labels and field data.

Examples

Use expressions to create a variable color based on a more complex expression. For example, to display a red label on Key1 if the field is empty and a black label if it not empty, use this expression: iif((len(trim(contact1->Key1))=0),255,0). In the example 255 is the Windows color profile for red and 0 is the profile for black.

Use field label expressions with predefined colors. For example, to flag companies with a credit limit of $1000 or higher with a red field label and a green label for less than $1000, use this expression: color(iif(contact2->u_credit>1000, "RED","GREEN")) where u_credit is the user-defined numeric field storing the credit limit value.

If a user-defined field is empty, change the color on the Company field label to red; otherwise, it displays black. The expression to add to the Company field is:

iif(contact2->u_userdefinedfield=" ",color("RED"),color("BLACK")).

In the last two examples, the expressions are configured differently — Either is valid.

Use expressions to create more complex field typing, related to displaying and hiding the field label and field data.

7. In the **Data Color** area, select **Fixed Color** and click **Colors.**

   The **Color** dialog box opens.
8. Select the color from the palette to use as the data color.
   - Select **Define Custom Colors** to create custom colors.
   - Click **Use default data color** to reset the color to dark blue.
9. Select **Expression** if you know the system number for the color.

   Type the number in the field.
10. Configure the Profile tab, the Layout tab, and the Security tab.

Editing Field Properties, Layout Tab

1. Right-click the field label and select **Properties.**
2. At the **Field Properties** dialog box, select the **Layout** tab to configure field size and position and to select field tab order.
3. In the Field Size & Position area, configure these by typing in numbers or increasing or decreasing the values with the up and down arrows for each field:
   - **Field Label Size.** Sets the size of the field label (up to 15 characters).
   - **Data Size.** Sets the size of the data field to display. To increase the actual size of a field, select File>>Configure>>Custom Fields.
   - **(:) Row (y): and Column (x).** Sets the placement of the field based on a grid of rows and columns. Refine field placement after dragging and dropping.
4. In the **Field Order** area, **Position** field, type or select the numbered tab order for the field.

> **NOTE:** Increase data entry efficiency by setting the field tabs in the order the data should be entered.

5. Click **Screen Fields** to view field order on the active **Field Screen**.
6. Configure the Profile tab, the Color tab, and the Security tab.

Editing Field Properties, Security Tab

1. Right-click the field label and select **Properties**.
2. At the **Field Properties** dialog box, select the **Security** tab to specify whether the field requires data, configure fields access, and turn on auditing.
3. In the **Field Data Entry Requirement** area, select **Required Data Entry** to force users to fill in the field.

   A required field displays on the contact record with a red box around it.

   If the field requires data and the user has neglected to provide data in the field when saving the record, the Required Fields Alert warning appears letting authorized users override the requirement. When a required field is overridden, an Override activity adds to the associated History tab with a Result code of OVR.

   The record is not removed when the field is updated and can only be deleted by a user with Master rights.
4. In the **Field Access** area, leave the **Read Rights as (public)** to allow users to view field data.
   - To limit user access to fields, select a user or user group from the drop-down list.
   - If **Required Data Entry** is selected, the field must have (public) read and update rights.

> **NOTE:** This setting does not override record ownership and record curtaining. If record ownership is assigned and record curtaining is activated, only the owning user or user group sees the field.

5. To set **Update** rights, select the user or user group from the drop-down list.

   Only the selected user or user group can update field data. To let users update the field, leave as (public).

   NOTE: This setting does not override record ownership. If record ownership as been assigned, only the owning user or user group can update the field.

   ---

6. In the **Field Audit** area, select Log changes in history to record changes made to the field data.

   NOTE: The record is kept on the History tab with an Activity code of Other and a Result code of LOG.

   ---

7. Configure the Profile tab, the Color tab, and the Layout tab.

Required Fields Alert Dialog Box

The Required Fields Alert dialog box appears when saving or leaving a Contact Record with one or more fields requiring data or when changing a primary fields view without populating the field. Configure the Required Data Entry setting for a field on the **Field Properties dialog box, Security tab**.

When receiving the warning, type the correct data or override the field requirements. To override the required field you must have the Required field override permission selected on the User Properties dialog box, Access tab.

Use the following procedure to override Required Fields.

1. When the Required Fields Alert dialog box appears, select either:
   - **OK.** Closes the dialog box, letting you add data to the fields.
   - **Skip Required Entry.** Expands the dialog box, letting you specify the reason and authorize the override.
2. If you selected **Skip Required Entry,** the dialog box expands. In the **Reason** field, type the reason for not updating the field or select the reason from the F2 Lookup list.
3. At the **Authorizing user** drop-down list, select the user with permission to override the entry.
4. Type the user's **Password.**
5. Click **Authorized!.**
6. Save the contact record without the required data; an Override activity adds to the **History** tab of the record.

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.

Use the following procedure to customize a field type

1. Right-click on the field label and select **Properties**.
2. At the **Field Properties** dialog box, 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 field 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 field to affect the label or to the Data Color Expression field 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)
  ```

Inserting Labels in Reports

1. Right-click the report template and select **Insert>>Label.**

   An edit box opens. Drag the edit box to the desired location and click to place.
2. The box shows the word **Label,** Double-click the label box and the Text Field Parameters dialog box opens.

   NOTE: Labels appear on the report regardless of whether the field contains data.

3. In the **Text** field, type the words to appear in the label.
4. In the **Text Position** area, select the **Horizontal** and **Vertical** placement of the text within the label box.
5. Click **Outline** to create an outline of the text field and set the Line Properties.
6. Click **Background** to create a background color and type within the label box.
7. Click **Font** to select the text font.
8. Click **OK** to save and close the text parameters.

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** fields.

In the following example, the label and data for the **Source** field are hidden if the Key1 field value is Employee.

Example

To hide both the label and the data, add the expression to the **Label Color Expression** field and the **Data Color Expression** field 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:

Use the following procedure to combine hiding and color.

1. Right-click on the **Source** field and select **Properties.**

   The **Field Properties** dialog box opens.
2. On the **Profile** tab, select **Expression** in the Field Label area.
3. Copy this into the **Expression** field:

   ```
   iif((len(trim(contact1->source))=0).and.(trim(contact1->key1)<>"Employee"),"SOURCE:",
   "Source:")
   ```
4. Select the **Color** tab.
5. Select **Expression** in the **Label Color** area.
6. Copy this into the Expression text field:

   ```
   iif((len(trim(contact1->source))=0).and.trim(contact1->key1)<>"Employee",255,iif(contact1-
   >key1="Employee",-2,-1))
   ```
7. 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))
   ```
8. 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 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 questions:
- 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.

Use the following procedure to create a custom field.

1. Select **Tools>>Configure>>Custom Fields.**
2. At the **User Defined Fields** dialog box, select **New**.

   The **User Defined Field Profile** dialog box opens.
3. Type a unique name, beginning with *U*, in the **Field Name** field (it can be up to nine 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 (_).

   NOTE: The Field Name appears when inserting fields into Microsoft Word; therefore, make the field name user-friendly and identifiable.
4. In the **Description** field, type the field label to appear in the contact record.
5. At the **Field Type** options select one of the following:
   - **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.

   It 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 reopens with your new field added to the list. Next, add the field to your custom screen.

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.

You can 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 **Tools>>Configure>>Custom Screens.**
2. At the **Custom Screens Setup** dialog box, click **New.**

   The **Custom Screen Profile** dialog box opens. See “Custom Screen Profile Dialog Box” on page 106.
3. After configuring the **Custom Screen Profile** dialog box, click **OK.**

   The **Custom Screens Setup** dialog box reopens.
4. Click **Close.**

You can now add fields to your new custom screen.

Custom Screen Profile Dialog Box

1. In the **Screen Name** field, type the name (up to 20 characters) you want to appear in the **Fields** tab local menu and on the configuration dialog boxes.
2. In the **Tab Name** field, type the name for the tab.

   Leave this box blank for the screen to not display as an individual tab.

   View Tab Name tips.

   - Due to viewing limitations, the tab name should not exceed six to eight characters, and it should not have spaces.
   - GoldMine alphabetizes tabs. To reorder tabs, place a number at the beginning of the tab name. The number does not appear on the tab, but determines the position of the title in the bank. For example, for the Reseller View tab to appear before the Mgt View tab, type 1Reseller in the Tab Name field.
   - To create a special tab without the name appearing on it, type two asterisks (**) in this field. The tab label remains blank.
3. Leave the **User Access as (public)** to let users view the screen, or select a user or user group from the drop-down list.
4. Select **This screen is available** in the current **Contact Set** to let users see the screen listed in the Fields tab local menu.

   When this option is cleared, the screen is unavailable in the current contact set. If you have three contact sets, disable the screen in only two of the databases, log on to each contact set and disable the option.
5. When finished, click **OK.**

Adding Fields to Screens

After you have created the fields and screens, place these types of fields on the screens:

- **Fields.** Hold data.
- **Expression fields.** Display titles, messages, or mathematical calculations based on other fields.

Use the Screen Designer to place the fields on screens. Only users with Master Rights can access the Screen Designer. The Screen Designer lets you click and drag fields in the display. Only unindexed fields can be dragged from the upper panes to the Fields tab area.

NOTE: If asked to rebuild the database, review Help topics regarding rebuilding and maintaining Firebird and SQL.

Use the following procedure to add fields to a screen.

1. At the Screen Designer, select the **Fields** tab and right-click in the area under the tab.
2. Select the screen to which you are adding the field.

   The selected custom screen becomes active under the Fields tab.
3. Right-click and select **Screen Design.**

   The GoldMine Screen Designer toolbar appears with a grid-like background in the contact record.

   NOTE: Changing the field order position of Company, Contact, Phone1, or any of the Key 1–5 fields can cause problems–especially with synchronization and querying the database.
4. Click **New** on the design toolbar.

   The **Place Field dialog box** opens.
5. From the **Field** drop-down list, select the field to place on the screen.

   TIP: Click **New Field** to create a new field without accessing **Tools>>Configure>>Custom Fields.**

6. Click **OK.**

   The field appears in the upper left corner of the Fields tab. Drag and drop the field in the desired location on the Field Screen.

   NOTE: When working with Row and Column entries, do not delete indexed fields from the primary Contact Record display or move indexed fields to custom user screens. Moving or deleting indexed fields can reduce GoldMine's ability to find records based on these fields when using search commands from the Lookup menu.

7. Double-click the field.

   The **Field Properties dialog box** opens.

8. Make changes to the Profile, Color, Layout, and Security tabs and click **OK**.

   The field is placed on the screen with an **n/a** in the data area.

9. Log out and back into GoldMine to see the field.

   Select **File>>Exit** and then relaunch GoldMine.

About the GM+Browser Tab

Create a customizable information page using HTML capabilities. Display images, linked documents, or inserted GoldMine fields. Create several templates, set default templates, and then create rules controlling what template displays for contacts meeting the rules.

The tab uses Internet Explorer 6 or 7; the local menu and HTML design options are IE-based. Settings in the IE menu (View>>Text Size) control font size.

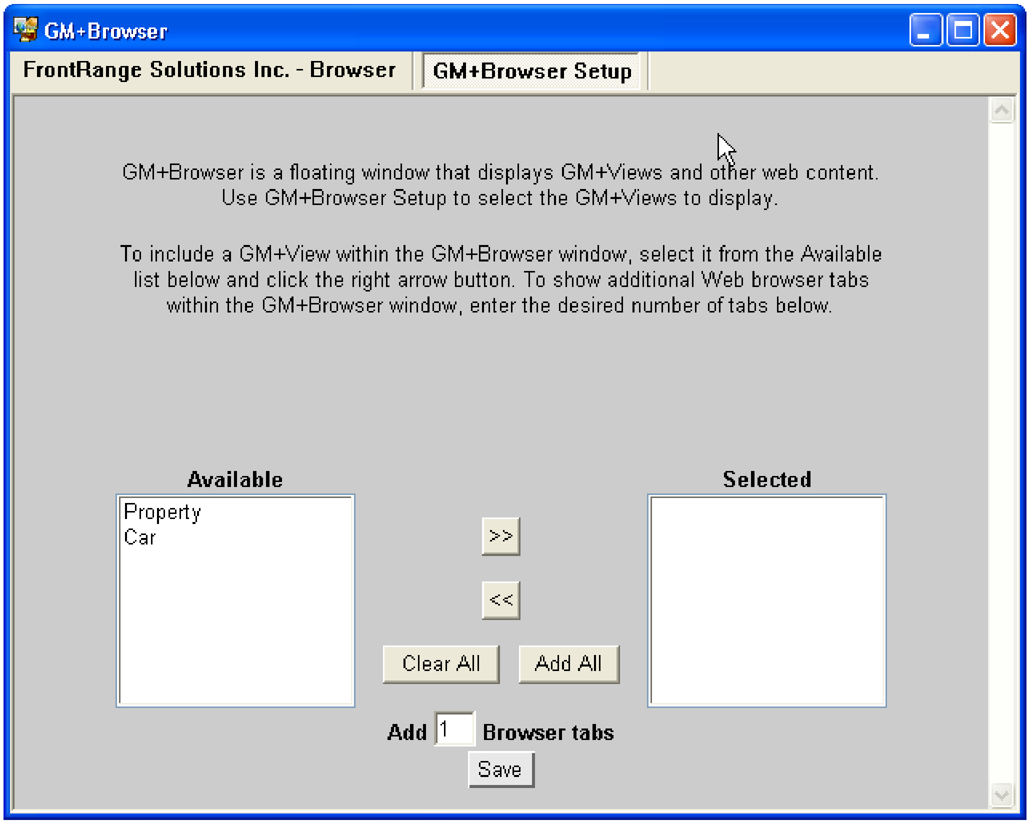
Information in the tab stores in the Mailbox table and synchronizes to remote users. Users with Master Rights can create or edit a template by selecting **Web>>Setup GM+Browser**. The GM+Browser Tab Settings dialog box opens.

Views on this tab are a key component of the record-typing used in the Record Type Administration Center. If record type rules are activated, right-click in the tab area and select another view; or, to reactivate the rules, right-click in the tab area and select **Rules-Based Selection**.

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.

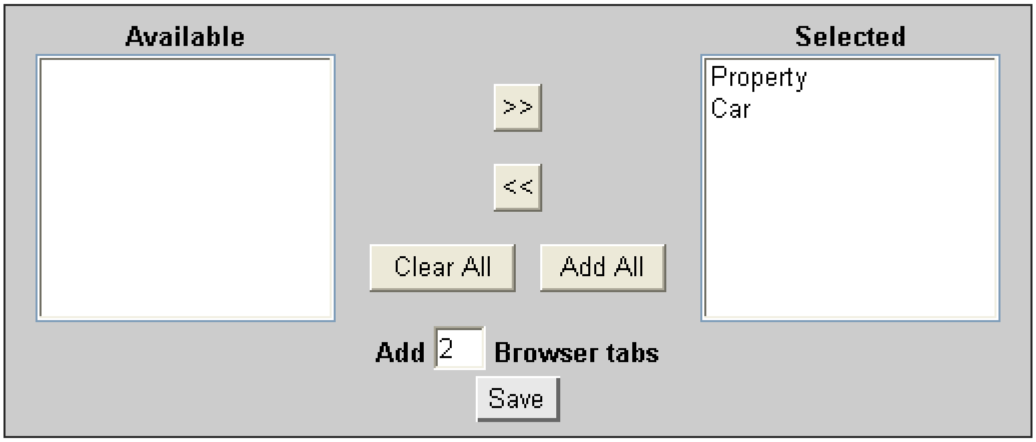
---

3. Click the **[>>] move** button.

   The Property view moves to the Selected list.

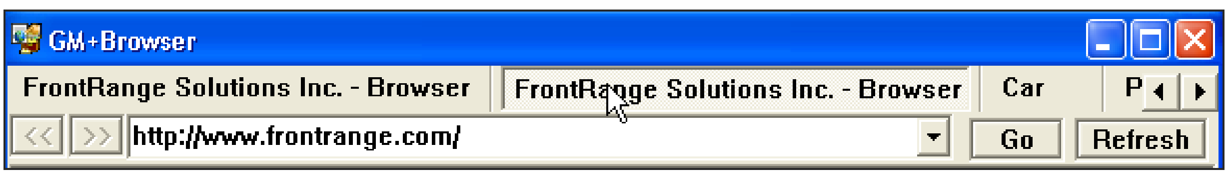
4. To make all views available, click **Add All**.

   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** field, 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

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.

About the GM+View Tab

Create a customizable information page using HTML capabilities. Display images, linked documents, or inserted GoldMine fields. Create several templates, set default templates, and then create rules controlling what template displays for contacts meeting the rules.

The tab uses Internet Explorer 6 or 7; the local menu and HTML design options are IE-based. Settings in the IE menu (**View>>Text Size**) control font size.

Information in the tab stores in the **Mailbox** table and synchronizes to remote users. Users with Master Rights can create or edit a template by selecting **Web>>Setup GM+View**. The **GM+View Tab Settings** dialog box appears.

Views on this tab are a key component of the record-typing used in the Record Type Administration Center. If record type rules are activated, right-click in the tab area and select another view; or, to reactivate the rules, right-click in the tab area and select **Rules-Based Selection**.

Creating GM+View Templates

Use the following procedure to create a GM+View template.

1. Select **Web>>Setup GM+View.**

   The **GM+View Tab Settings dialog box** opens.

2. In the **Template List** area, click **New**.

   The **Edit GM+View** dialog box opens.

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

   ---

3. Type a name in the Template Name field.
4. Click in the design box to activate the template design toolbar.
5. Design using these toolbar options (or right-click and Select):
   - **Font.** Formats fonts.
   - **Paragraph.** Sets alignment and check spelling.
   - **Style.** Selects from Normal, Formatted, Address, Heading.
   - **Picture.** Inserts images stored in shared directories. See “Inserting Pictures in GM+View Templates” on page 114.
   - **Insert HyperLink.** Inserts a hyperlink to a Web site.

- **Insert 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.

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

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

Type 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.

Inserting Pictures in GM+View Templates

1. Place cursor in the design box where you want to insert the picture.
2. Right-click and select **Insert>>Insert Picture.**
3. At the **Picture** dialog box, click **Browse** to select the **Picture Source** from a shared directory.
4. Type **Alternative Text to** describe the picture.
5. In the **Layout** area, select the **Alignment** from the drop-down list and type the number of pixels to use for the **Border Thickness.**
6. In the **Spacing** area, type the number of pixels to use as the **Horizontal** and **Vertical** spacing around the picture.
7. Click **OK**.

Inserting Links in GM+View Templates

1. Place cursor in the design box where you want to insert the link.
2. Right-click and select **Insert>>Insert Link.**
3. At the **Hyperlink** dialog box, select hyperlink type from the **Type** drop-down list.
4. Type the appropriate Internet address in the URL field and then click **OK**.

Inserting Fields in GM+View Templates

1. Place cursor in the design box where you want to insert the field.
2. Right-click and select **Insert>>Insert Field.**
3. At the **Field** local menu, select the field to insert.

   The field macro is inserted in the template (use <<&company>> to insert the appropriate company name). The Contact Details expands to include more fields, including Linked Image and Linked Document File name.
4. Right-click and select **Save**.

Inserting Linked Images in GM+View Templates

1. At the **GM+View design template dialog box**, right-click and select **Insert>>Insert Field>>Contact details>>Linked Image**.

   The **Linked Image Field** Properties dialog box opens.
2. Type the **Linked Image** (Links tab Document Name).

   The name must be the one that appears in the Links tab Document field.
3. Type a description for the linked image in the **HTML Alt (Alternative Text) Attribute f**ield.
4. Select the **Linked Image's Alignment** from the drop-down list.
5. In the **More HTML Attributes** field, type the HTML code for the other formatting options.
6. Click **OK**.

Inserting Linked Documents in GM+View Templates

1. At the **GM+View design template** dialog box, right-click and select **Insert field>>Contact details>>Linked Document File name.**

   The statement **<<LinkedImageFileName:?>>** is inserted.

2. Replace the question mark (?) with the document name in the **Document** column of the Links tab (<<LinkedImageFileName:MyDocument>>).
3. Save and **Exit.**

The path to the linked document displays on the GM+View tab.

Creating GM+View Rules

Apply templates to particular contact records by creating rules. GoldMine evaluates a rule and if a Record meets the criteria, the specified template is displayed. Create templates prior to creating rules.

Use the following procedure to create a GM+ View rule.

1. Select **File>>Configure>>GM+View** tab.

   The **GM+View Tab Settings** dialog box opens.

2. In **Template List**, click **Rules**.

   The **GM+View Tab Rules for Template Selection** dialog box opens.

   The template rule selected becomes the primary set of rules that are applied to the GM+View templates:

   - **Field Value**. See "Creating GM+View Rules for Field Values" on page 115.
   - **dBase Expression**. See "Creating GM+View Rules for dBASE Expressions" on page 116.
   - **User Selected**. See "Creating GM+View Rules for the User Selected Option" on page 116.

Creating GM+View Rules for Field Values

1. Select **File>>Configure>>GM+View** tab.
2. At the **GM+View Tab Settings** dialog box, click **Rules**.
3. At the **GM+View Tab Rules for Template Selection** dialog box, select **Field Value**.
4. Select a **Field Name**.

   This is the field for which you will select the Field Value.

5. Click **New**.

   The **Field Value and Corresponding Template** dialog box opens.

6. In the **Field Value** field, type the value to be the trigger for the rule.

   If the values in the field are determined by F2 Lookup list, the right arrow on the Field Value text box will display the F2 Lookup value for the field.

7. Select a **Template**.

   This is the template that displays when the Field Value is triggered.

8. Click **OK**.

   The **GM+View Tab Rules for Template Selection** dialog box reopens.

Creating GM+View Rules for dBASE Expressions

1. Select **File>>Configure>>GM+View** tab.
2. At the **GM+View Tab Settings** dialog box, Click **Rules**.
3. At the **GM+View Tab Rules for Template Selection** dialog box, select **dBase Expression**.
4. Type the dBASE expression in the **Expression** field.

Examples:

The expression used must return a string, and the string must be the name of one of the templates. One option is *iif*, which functions as an *if ... else* statement:

```
iif(contact2->uacctbal<500,"GM+View1","GM+View2")
```

In the above statement, GM+View1 and GM+View2 are defined templates. If the amount in the Account Balance field is less than 500, the GM+View1 template displays. If the amount is over 500, the GM+View2 template displays.

```
iif(trim(CONTACT1->KEY1)=="test","GM+View1","GM+View2")
```

If the Key1 field is "test," then the GM+View1 template displays. If the value of Key1 is not equal to "test," then the GM+View2 template displays. Please note the double equal signs (==) in the above statement.

Creating GM+View Rules for the User Selected Option

1. Select **File>>Configure>>GM+View** tab.
2. At the **GM+View Tab Settings** dialog box, click **Rules**.
3. At the **GM+View Tab Rules for Template Selection** dialog box, select **User Selected**.
4. Right-click the **GM+View** tab and select a template to display for the current contact.

Using the Record Types Administration Center

The Record Types Administration Center manages record types.

- Creating Record Types. See “Creating Record Types” on page 118.
- 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.

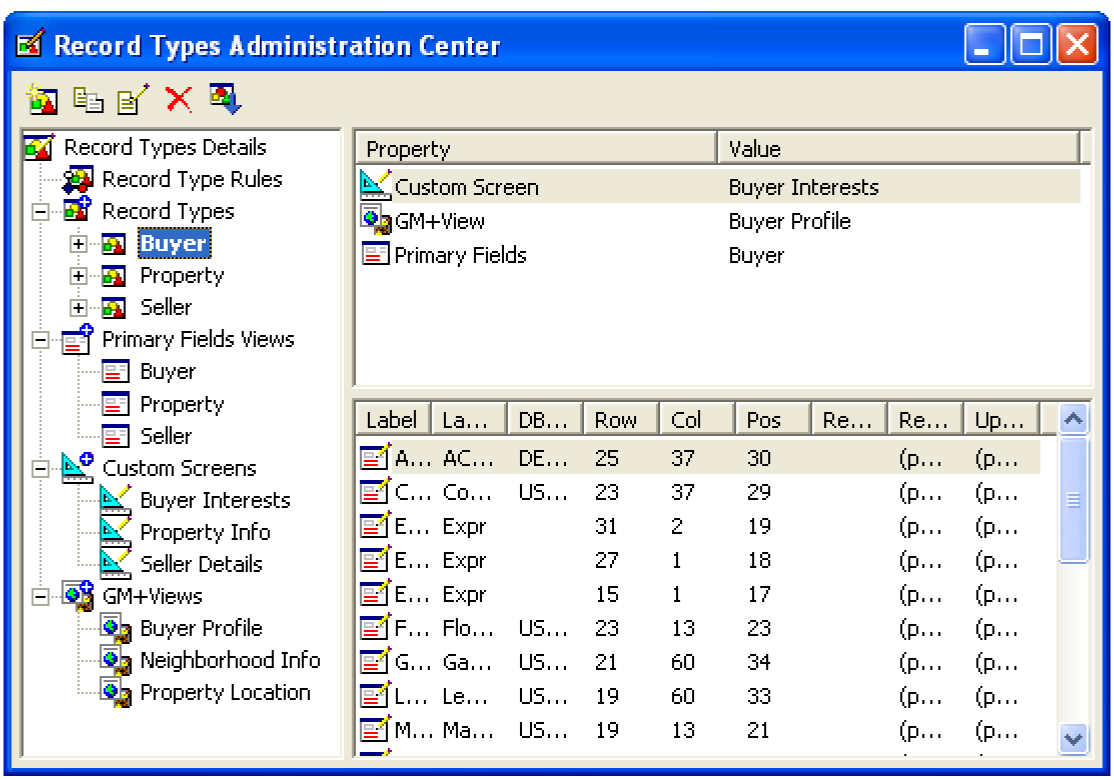
With the **Field value-based rules** activated, the **File>>New** menu expands to include record types with the New Record Creation Options configured. The New Default Record Type option provides you with an efficient data entry option.

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

The Record Types Administration Center allows you 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 **Tools>>Configure>>Record Types**.



Users can perform searches for record types instead of field names which allows 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.*

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 **Tools>>Configure>>Record Types**.

   The Record Types Administration Center opens.

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 opens.

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.** The GM+View to associate with this record type.

4. To specify a different field layout for the New Default Record Type dialog, check **New** record dialog uses different field layout, and select a layout from the New Record Layout pull-down menu.

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 .

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 **Tools>>Configure>>Record Types**.

   The Record Types Administration Center opens.

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.

In**active (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.

NOTE: Field value-based rules are limited to 32. If you have 33 or more, no rules are evaluated.

NOTE: f the rules are not met, GoldMine displays your default record type.

Contact Management

About Contact Records

GoldMine uses the contact record (contact) as the core component to which all information is tied. When a contact is added to GoldMine's database, a contact record is created. It 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.

NOTE: The default view for Contact Records is the **Contact List** view. Double-click on a contact to open that Contact Record.

The Contact Record has two basic sections:

- **Upper section.**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 Relationships, 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.

For more information on user procedures, please see the *GoldMine User Guide*.

About Record-Related Settings

You can 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 Non-USA Format, which does not apply formatting. See "Setting Phone Formatting in the Record-Related Settings" on page 122.
- **Ownership**. Control what information can be viewed and updated by other users. See"Setting Ownership in the Record-Related Settings" on page 123
- **Alerts.** Assign a code to an active contact record to alert other GoldMine users of a special status or situation regarding the contact. See "Setting Alerts in the Record-Related Settings" on page 125.

Setting Phone Formatting in the Record-Related Settings

GoldMine formats telephone numbers in standard US format if your Windows language setting is English. The standard US format is (999)999-9999. You can type the numbers in without formatting, and GoldMine translates it in the formatted style.

Change the telephone number format for an active contact record from the **Phone Formatting** tab of the Record-related Settings dialog box.

For other language settings, GoldMine formats telephone numbers in the international telephone number format. The international telephone number format leaves the telephone number as entered.

Each contact record maintains its own telephone format setting. To specify the international telephone number format when adding a new contact record, change the setting of the International Format field in the Add a New Record dialog box.

Use the following procedure to set up phone formatting.

1. At the contact detail view, select **Edit>>Record Properties>>Record-related Settings.**

2. Select the **Phone Formatting** tab and select one of the following:

   USA Format. Formats the telephone number on the contact record to the United States and Canadian standard: (999) 999-9999. No matter how the numbers are entered they will be formatted in this style.

   Non-USA Format. Does not apply formatting to the telephone numbers.

   Use a consistent format for international phone number entries. When checking for duplicate records, GoldMine considers entries for the same number but with differing formatting as separate entries. For example, GoldMine considers 55 12 345-6789 to differ from 5512 345-6789.

3. Click **OK.**

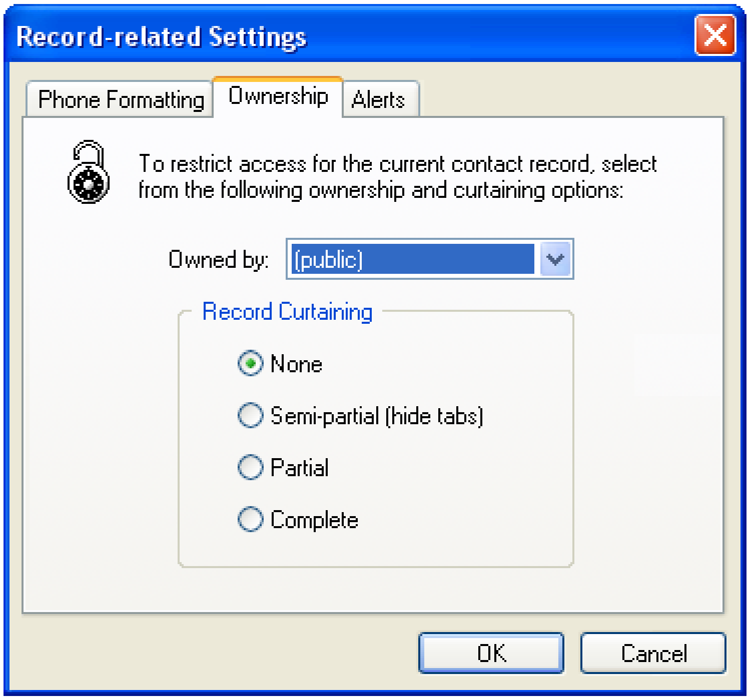
   The phone format you selected applies to the active contact record.

Setting Ownership in the Record-Related Settings

Record curtaining is controlled by the record Owner. Each contact record can be public or private. Private records are records that have been assigned an owner, either an individual GoldMine user, or a user group.

Applying record curtaining hides data on contact records from users who not owners of the record. With record curtaining, if a user tries to display a contact record that he or she does not own, the contact screen is partially or completely curtained, hiding the data from view.

1. Select **Edit>>Record Properties>>Record-related Settings.**



2. Select the **Ownership** tab.
3. At the **Owned by field,** select the owning user or user group.

   When new records are added to the database, the default owner is (public) unless the user has specific Ownership settings configured in the User Properties dialog box.
4. In the **Record Curtaining** area, select an option:
   - **None.** All users can view the entire contact record.
   - **Semi-partial (hide tabs).** All users can view the contact information in the Primary Fields View, but only the owning user or user group can view the information in the Tabs. The tabs are curtained, marked private, and cannot be viewed.
   - **Partial.** All users can view the top four rows of the Primary Fields View. The other rows in the Primary Fields View and the tabs are curtained, marked private. The owning user or user group can view all information in the Contact record.
   - **Complete.** The entire record is curtained, which means that users who do not own the record cannot see it or locate it using the Contact Search Center. The owning user or user group can view all information in the Contact record.
   - **Note.** Users with Master Rights are able to view information in the contact records, without regard to the owner or what level of curtaining has been set.
5. When you are finished, select **OK**.

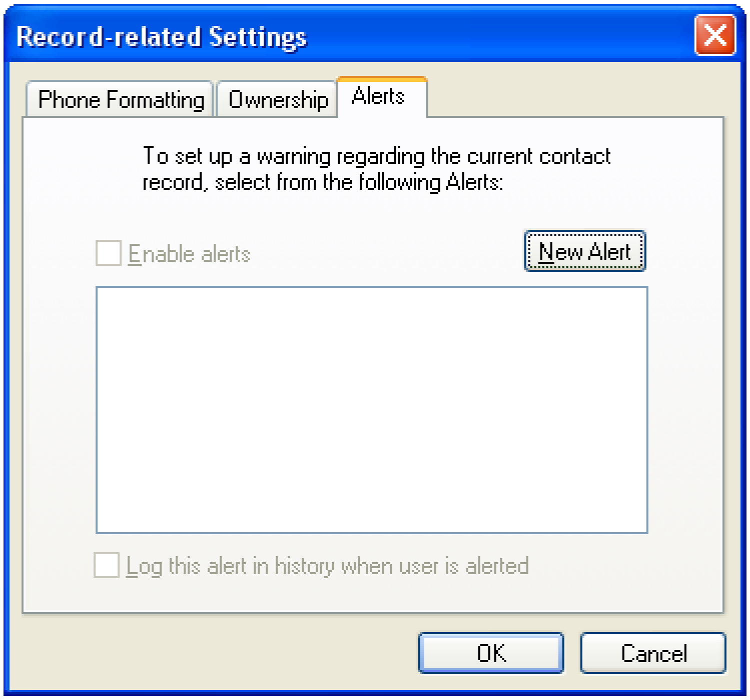
   The settings you configured are now applied to the active contact record.

Setting Alerts in the Record-Related Settings

Assign an alert to an active contact record to notify other GoldMine users of a special status or situation regarding the contact.

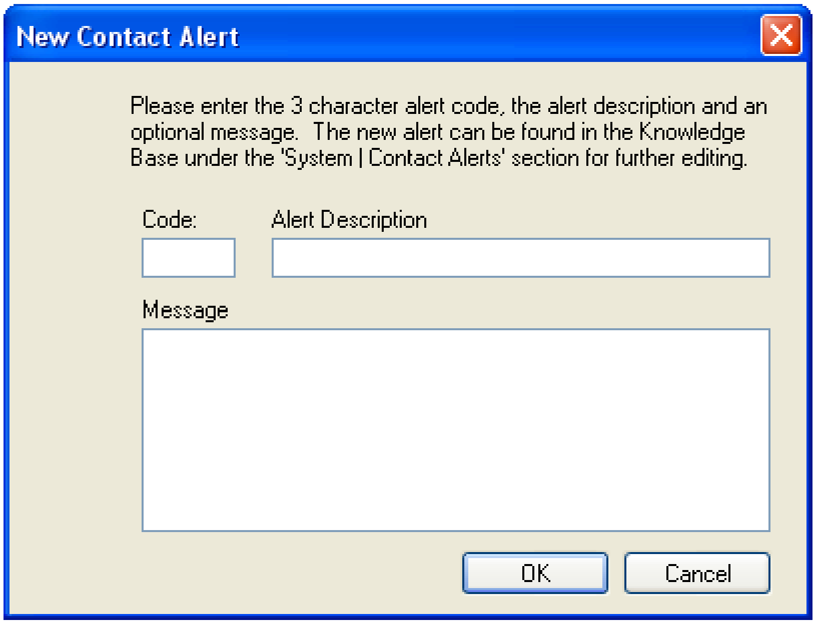
Use the following procedure to set up an alert.

1. Select **Edit>>Record Properties>>Record-related Settings.**



2. Select the **Alerts** tab.
3. Click on the **Enable alerts** check box. After selecting this option you can activate one or more of the alerts in the panel.

   By default, GoldMine displays the alert seven seconds after you display the record. However, change the delay period by changing the GM.ini file setting for RecAlertSec.
4. Click **New Alert** to add a new alert.



5. On the **New Contact Alert** dialog box, define these options for the three-character alert code you are creating:
   - **Code.** Type the three-character code representing the alert status.
   - **Alert Description.** Type a brief description of the alert.
   - **Note.** You must enter an Alert Description to save the alert.
   - **Message.** Type the extended message to appear when users activate the Contact record.
6. Click **OK** to return to the Alerts tab.
7. Select one or more alerts to activate when accessing the contact record.
8. Select **Log this alert in history when user is alerted** to log the date, time viewing user, alert code and the assigning user in the **History** tab. GoldMine adds the history record when the alert appears, not when the view user closes the alert.
9. When finished, click **OK.**

   The alerts are assigned to the active Contact record.

   View available alert codes in the InfoCenter. In the InfoCenter, select **System>>Contact Alerts.**

Changing the Delay Time on Alerts

By default, GoldMine displays an alert 7seconds after the user displays a contact record to which an alert has been assigned.

To change the time delay before the alert appears, place the following setting in the [GoldMine] section of the *GM.ini*.

RecAlertSec= <number of seconds before alert appears>

Setting Digital IDs in Contact Details

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

Use the following procedure to set digital IDs.

1. With the contact record active in GoldMine, select **Edit>>Record Properties>>Contact Details.**
2. At the Contact Details dialog box select the **Digital IDs** tab.
3. Click **Import** to add a contact's digital ID file to the GoldMine contact record.
4. At the **Import Digital ID** dialog box, at the **Filename** field type or browse to the *.p7b or *.cer certificate file you are importing.

   In the **Name** field, type the name to display.
5. Click **OK** to return to the Digital IDs tab.
6. To export the file to another location, click **Export** and select a location.
7. To review the certificate details, click **View**.

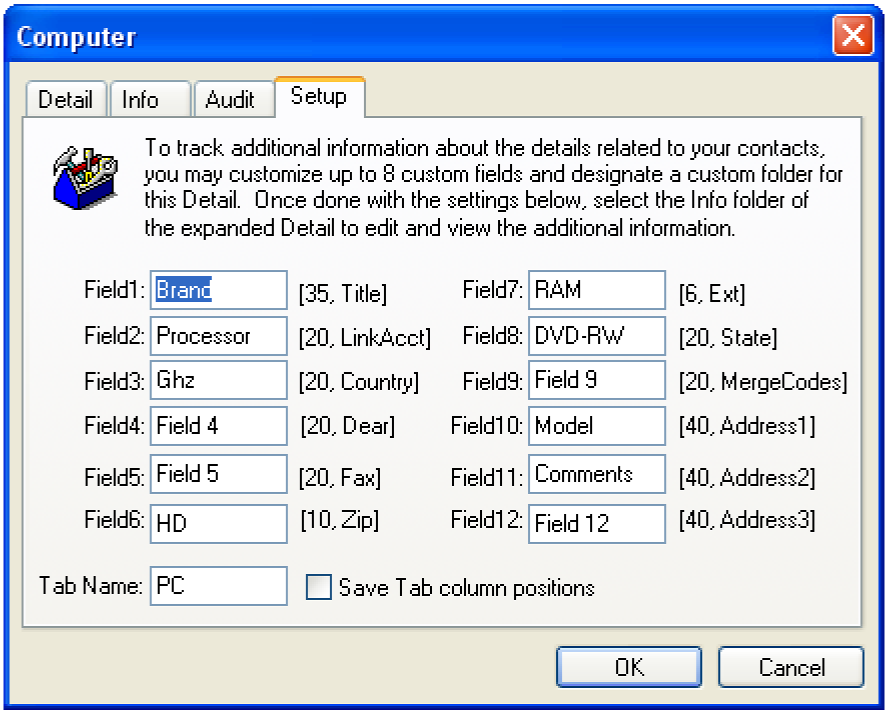
   To remove a digital ID, highlight the ID and click **Delete.**

Creating Details Information Fields

Master rights users can customize twelve fields on the Details tab. The extended detail fields must be character-based, not numeric or date fields. If searched, they are searched as a character string. The eleventh and twelfth fields do not display on the user-defined Details tab.

Use the following procedure to create a detail field.

1. At the **Detail tab,** double-click on a detail.



2. In the Detail Properties dialog box, select the **Setup** tab.
3. In each text box, type a field label to apply to each field, following the procedure that appears on the **Setup** tab.

   The number to the right of the text box is the fixed field length.

   Neither the format, order, nor length can be changed. Therefore, carefully consider your custom labels, based on the length of the field.

   To use only a few of the fields, hide a field by typing at least two asterisks (**) rather than a name in the field label text box.
4. At the **Tab Name** field, type the label name again.
   - **Tab Name.** The tab name should not exceed six to eight characters, depending on the letters used, and should not contain any spaces.
   - **Shortcut.** To access the new tab with a shortcut key, type the tab namewith an **&** before the letter you want to use. For example, type **&** if you want to use **Ctrl+H** as the shortcut keys.
   - Click the **Save Tab column positions** check box to save modifications made to the new and the standard Details tab and then click **OK**.

   The details entered on the new tab are recorded on the standard Details tab. Be careful when deleting details that have been converted into custom detail tabs.

Deleting Custom Detail Tabs

1. At the **Details tab,** right-click on the detail and select **Edit.**
2. Select the **Setup** tab.
3. Delete the value from the **Tab Name** field and then click **OK**.

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.

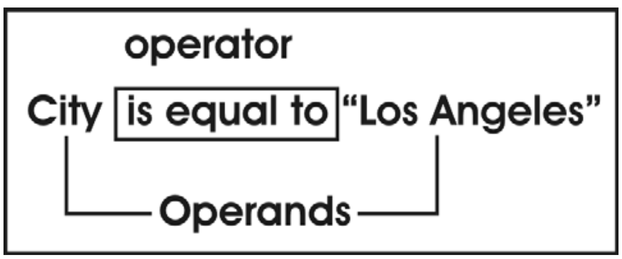
Filters

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.

Use the following procedure to access Filters.

1. Select **Tools>>Filters.**

   The Filters and Groups window opens.

2. Select the **Filters** tab.
3. At the View Filters drop-down list, 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.

Creating Filters

GoldMine contains a filter generator that builds a search expression based on menu and browse window selections. Filters operate on the entire database.

After the criteria are met, a filter moves through the database one record at a time, searching for a match. Filters rerun every time they are activated.

Filters are often used for reporting purposes or as the basis for creating a group of frequently accessed records. Filters can also limit the amount of data synchronized from one GoldMine system to another.

Filters operate only on the Contact Record's primary information and the Summary, Fields, and Notes tabs. To select records based on other tabs, you must use the Groups feature or a SQL query.

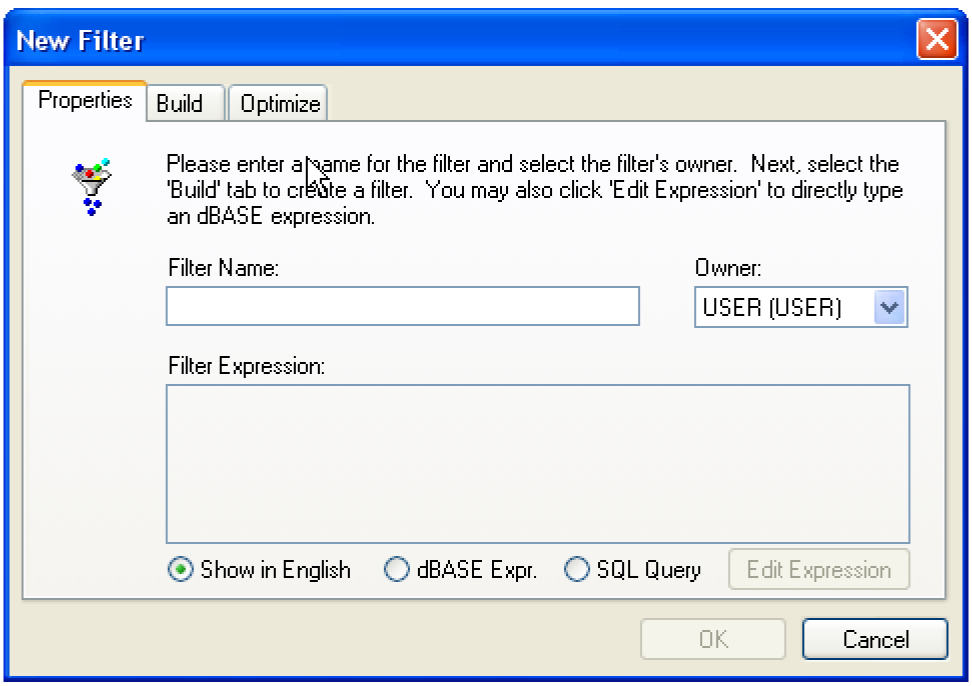
Use the following procedure to create a filter.

1. Select **Tools>>Filters.**

The Filters and Groups dialog box opens.

2. On the **Filters** tab, click **New.**

The New Filter dialog box opens.



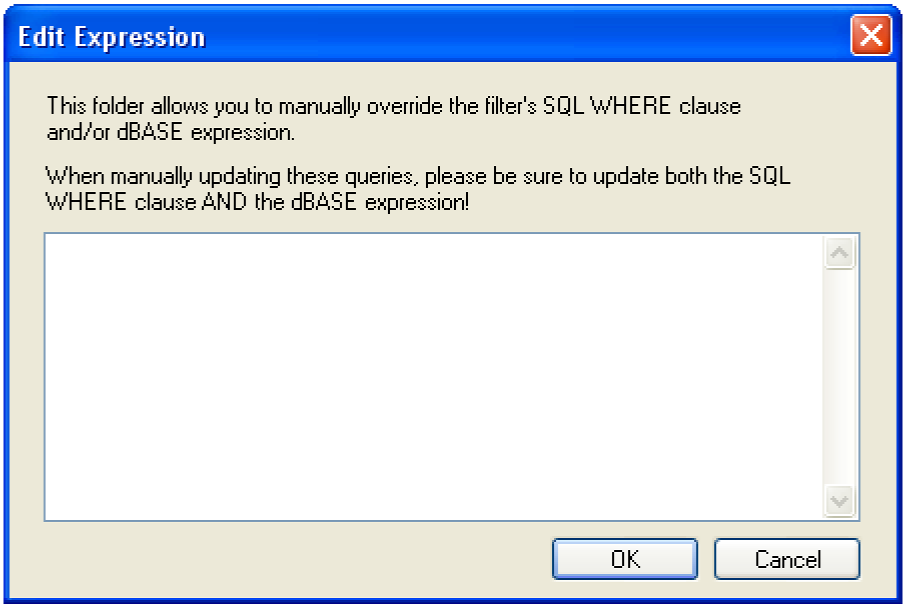
3. On the **Properties** tab, type the name of the filter in the **Filter Name** field.

4. Select the filter **Owner** in the drop-down list.

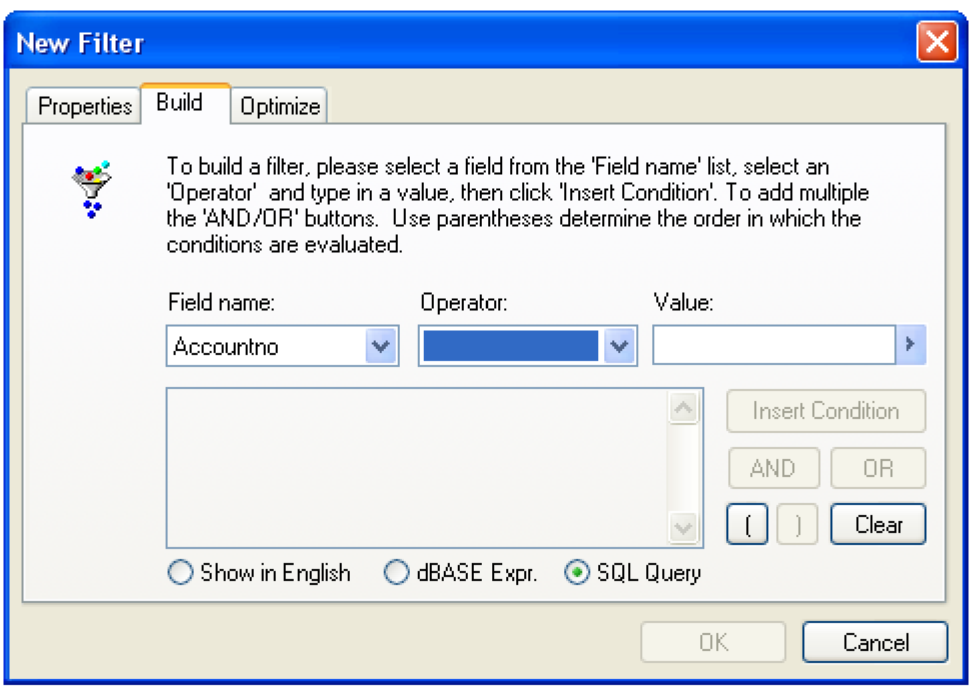
5. Enter the filter expression in the **Filter Expression** field.

For more information, see "Filter Expression Operators" on page 132.

6. Click the radio button to indicate how to enter the filter expression:
   - in English
   - dBase Exp.
   - SQL Query
7. To edit an expression, click **Edit** and at the Edit Expression dialog box, make your changes.



8. Click the **Build** tab and at the **Field name** field, select the field name in the drop-down list.



- Select the **Operator** in the drop-down list.
- Type the **Value** in the text box or select a value from the F2 Lookup to specify the comparison value.
- Click **Insert Condition. T**he expression you constructed is inserted in the large text box.
- Click **AND or OR** to insert a Boolean operator and then construct the additional expression using **Field, Operator, and Value**.

Click **OK** to return to the Filters and Group dialog box.

9. Select **Optimize** to improve the performance of a filter with a Sort field.

See “Using the Optimizing Filters Options” on page 134.

10. Click **OK.**

The filter appears in the **Filters and Groups** window.

11. Click **Properties** to view and edit the filter.

12. Select the filter and click **Delete** to delete the filter.

Filter Expression Operators

Operators specify the criteria a field must meet to be included or excluded from a filter.

Select one of these operators:

- **Equal to.** Tests for an exact match between the field designated in Field Name and the entry in the Value field. When the data field and comparison value match, the record is selected.

  Example: Selecting the field City and the Value entry Los Angeles creates the filter *City Equal to “Los Angeles”* that will select every record with the City entry of Los Angeles.

- **Not Equal to**. Tests for a difference between the field designated in Field Name and the entry in the Value field. When the data field and comparison value match, the record is selected.

  Example: Selecting the field City and the Value entry Los Angeles creates the filter *City Not Equal to “Los Angeles”*. Each record with the City entry of Los Angeles will not be selected. Records with City entries of any other city will.

- **Greater than.** Tests for a value in the data field alpha-numerically higher than the comparison value. In a test for alphabetic entries, such as City, a higher value is one that comes after the entered value, meaning, later in the alphabet. When the data field’s value is alphanumerically higher than the comparison value, the record is selected.

  Example: Selecting the file and the Value entry I creates the filter *City Greater than “Los Angeles”*. A record with a City entry of Pacific Palisades will be selected, but a record with a City entry of Burbank or Los Angeles will not.

- **Less than.** Tests for a value in the data field alphanumerically lower than the comparison value. In a test for alphabetic entries, such as City, a lower value is one that comes before the entered value, meaning, earlier in the alphabet. When the data field's value is alphanumerically lower than the comparison value, the record is selected.

  Example: Selecting the field City and the Value entry *Los Angeles* creates the filter *City Less Than "Los Angeles".* A record with a City entry of Glendale will be selected, but a record with a City entry of Los Angeles or Santa Monica will not.

- **Greater or Equal.** Tests for a value in the data field equal to or alphanumerically higher than the comparison value. In a test for alphabetic entries, such as City, a higher value is one that comes after the entered value, meaning, later in the alphabet. When the data field's value is alphanumerically higher than the comparison value, the record is selected.

  Example: Selecting the field City and the Value entry Los Angeles creates the filter *City Greater or Equal to "Los Angeles".* Any records with City entries of Los Angeles and any records with City entries that come later in the alphabet, such as Pacific Palisades, will be selected. Records with City entries that come earlier in the alphabet, such as Burbank, will not.

- **Lesser or Equal.** Tests for a value in the data field equal to or alphanumerically lower than the comparison value. In a test for alphabetic entries, such as City, a lower value is one that comes before the entered value, that is, earlier in the alphabet. When the data field's value is alphanumerically lower than the comparison value, the record is selected.

  Example: Selecting the field City and the Value entry Los Angeles creates the filter *City Lesser or Equal to "Los Angeles".* Any records with City entries of Los Angeles and any with City entries that come later in the alphabet, such as Glendale, will be selected. Records with City entries that come later in the alphabet, such as Santa Monica, will not.

- **Begins with.** Tests for a value in the data field that starts with the comparison value. If the characters of the comparison value match the starting characters in the data field, the record is selected.

  Example: The filter *City I* will include records in which the City entries all start with P such as Pacific Palisades, Pasadena, Pico Rivera, and so on.

- **Contains.** Tests for the existence of the comparison value anywhere within the data field. If the data field contains the comparison value, the record is selected.

  Example: The filter *City Contains "P"* will include records in which the City entries include P anywhere in the city name such as Pacific Palisades and Corpus Christie.

- **Does Not Contain.** Tests for the absence of the comparison value anywhere within the data field. If the data field does not contain the comparison value, the record is selected.

  Example: The filter *City Does Not Contain "P"* will include records in which the City entries do not include P anywhere in the city name such as New York and Los Angeles. However, Pacific Palisades and Corpus Christie will not be selected.

- **Is Empty.** Tests for an absence of any entry in the specified field. Character fields are empty when they contain only spaces.

  Example: If you have contacts in the United States and other countries and you want to search for only contacts in the United States—assuming you have not entered country data for domestic clients—the filter Country Is Empty will select contacts located in the United States.
- **Is Not Empty.** Tests for any value in the specified field.

  Example: If you want to fax an announcement to all of your client companies, the filter *Fax Is Not Empty* will select all companies with a telephone number entered in the Fax field.

Boolean Operators

Boolean operators are the functions used between filter expressions to refine the scope of your search or filter.

You can link two search terms, for example, Sales Rep equals Bill and Sales Territory equals Southwest, with these operators:

- **AND.** Only records that contain both expressions are retrieved.

  Filter includes only records where Sales Rep = Bill AND Sales Territory = Southwest. Both conditions must be true for the record to be included in the filter group.
- **OR.** Any record that contains either expression is retrieved.

  Filter includes all records where Sales Rep = Bill OR Sales Territory = Southwest. Either condition can be true for the record to be included in the filter group.

Using the Optimizing Filters Options

Use the Filter Optimization option to improve the performance of a filter by associating the filter expression with a particular sort order, narrowing the range of records selected for the filter.

Optimization creates a subset before the filter is applied.

1. In the **Filters and Groups** dialog box, highlight the filter and select Properties.

   The **Filter: name** dialog box appears.
2. Click the **Optimize** tab.
3. Select the **Sort Order** in the drop-down list.
4. Type in the **Beginning Limit** to set the first valid record to be considered part of the filtered subset.
5. Type in the **Ending Limit** to set the last valid record to be considered part of the filtered subset.
6. Click **OK.**

Using the Previewing Filters Options

Use the Preview tab on the Filters and Groups dialog box to test your filter before activating it.

Use the following procedure to test your filter.

1. In the Filters and Groups dialog box, on the **Filters** tab, highlight the filter to test and click the **Preview** tab.

   The Preview tab displays the selected filter in the upper text box.
2. To edit the filter expression in the upper text box, right-click and select the necessary options from the local menu.
3. Click **Search All** to run the filter. The results display in the lower text box. The number of records included in the filter display in the lower right corner as Count.
4. Use these options to alter the results:
   - **Build Filter.** Displays the Expression Builder dialog box to modify an existing filter or build a new filter. After selecting the filter of a GoldMine user, the available options are the same as for Creating Filters.
   - **Save.** Displays the Save Query dialog box to save the filter expression or the selected records as a group. If you save only the filter expression, the actual records selected by the filter may differ when the filter is activated, depending upon changes to your contact database.
   - **Drill Down.** Lets you select a filter—existing or newly built—that GoldMine applies only to the records already selected on the basis of a different filter. For example, if after performing a search based on a filter to select the records of contacts located in California, GoldMine retrieved 200 records, apply differing filters to only those 200 records.

Creating SQL Query Filters

Use the Filters and Groups dialog box to create filters based on Microsoft Structured Query Language (SQL) Queries. SQL Query options are designed and optimized for systems running a SQL database.

NOTE: SQL queries have a format different from the dBASE format.

Use the following procedure to create a filter.To create an SQL query filter.

1. Select **Tools>>Filters.** The Filters and Groups dialog box opens.
2. Click the **SQL Query** tab.
3. Type the SQL query. See “SQL Query Samples” on page 136.
4. Click **Query** to display results in the lower text box.
5. To save the query for future use, click **Save.** The **Saved SQL Queries** dialog box opens.
6. Type a name in the **Query** name field.

SQL Query Samples

Count Number of Records

To count the number of Contact Records, write your statement as:

```
SELECT count (*) FROM Contact1
```

For count statements, notice the wildcard (*) is surrounded by parentheses.

Fields in Each Table

To return a listing of all fields in each table for GoldMine, write a query such as:

```
SELECT * FROM Contact1
```

and then change the table name for each listing required:

```
SELECT * FROM CAL, select * from ContHist
```

Restrict to City

To find all contacts in New York City, write your statement as:

```
SELECT * FROM Contact1 WHERE city = “New York”
```

A query to find all New York City records where users entered both initial cap and lowercase:

```
SELECT * FROM Contact1 WHERE city like “_ew _ork”
```

Use the underscore _ character to match any single character.

Restrict to Two States

To find all contacts in CA and NY, write your statement as:

```
SELECT * FROM Contact1 WHERE state = “NY” OR state = “CA” ORDER BY state, city
```

Duplicate Contacts

Finding all possible duplicates in a database can be difficult. A query to find duplicate Contact Records in the database is to search on duplicate Account Numbers looking in both the Contact1 and Contact2 tables:

```
SELECT count(*), AccountNo FROM Contact2 GROUP BY AccountNo HAVING Count(*) > 1
```

Duplicate RecID

To find Contact Records with duplicate RecIDs, use this query:

```
SELECT recid FROM Contact2 GROUP BY recid HAVING count(recid) > 1
```

Find Orphans

An orphan record exists when there is a Contact2 record but NOT a Contact1 record.

```
SELECT * FROM Contact2 WHERE AccountNo NOT IN (SELECT AccountNo from
Contact1)
```

Contact Records with No E-mail Address

To subset Contact Records with no e-mail address, use this query:

```
SELECT company, contact FROM Contact1 WHERE accountno NOT IN (SELECT
accountno FROM ContSupp WHERE contact = “E-mail Address”)
```

View New Contact Records Entered During a Specific Time Period

The **Summary tab** of a contact record has a **create on** field that records the date the record was entered. Use the createon field to build a subset of records created on a certain date. Create a filter or an SQL query to build the subset.

Use the following example and procedure to view contacts during a specific time period.

Example:

To create a filter to find new Contact Records created during the week of June 24, 2003, create on is greater than “6/24/2003” AND createon is less than “6/28/2003”.

1. Create this filter:

   SELECT * FROM Contact1 WHERE createon > “20030624” and createon < “20030628”

2. Select one:
   - **Save as new query.** Saves the SQL query as a new expression. Once saved, the entered title appears in the Query name drop-down list.
   - **Update current query.** Saves changes to a previously created query expression. The title appears in the Query name field.
   - **Delete query.** Deletes the query expression specified in the Query name field.
3. Click **OK.**

Groups

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

To Access Groups:

1. Select **Tools>>Filters.** The Filters and Groups dialog box opens.
2. Select the **Groups** tab.

The upper pane lists the 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.

Group Members Local Menu

1. To access the **Group members local menu,** at the Filters and Groups tab, right-click in the **Groups tab>>Member area.**

2. Select one of the options:
   - **Sort Members.** Opens the Sort Group Members dialog box; sort group members by clearing all sorting options or sort by field, by an expression, or a reference expression.
   - **Sync Contact.** Displays the selected group member's Contact Record as the active contact.
   - **View.** Changes the display from company to contact, or both.
   - **Find.** Searches within the group for the specified contact.
   - **Output to.** Sends the list of group members to the printer, Word, Excel, or the clipboard.
   - **New.** Displays the Group Member Profile dialog box where you add the current contact to the group with the reference you type or select.
   - **Delete.** Removes a member from the group.
   - **Edit.** Displays the Group Member Profile dialog box so you can change the reference or sort for a member.

Using the Groups Tab

Use the Groups tab to create and activate static groups of contacts.

Use the following procedure to create a group of contacts.

1. Select **Tools>>Filters**.

   The Filters and Groups dialog box appears.
2. At the Filters and Groups dialog box, click the **Groups** tab.
3. Right-click in the group tab and select **New.**

   The New Group dialog box opens.

4. Type or select a name in the **Name** field.
   - Type or select the code in the **Code** field.
   - Select another user in the **User** field.
   - Select the following options as needed:
   - Assign a descriptive name to each group in **Group Name** field. Members of the highlighted group displayed in the lower portion.
   - **Code.** An optional identification code assigned to each group to help locate a group if you defined many in GoldMine.
   - Click **Build the Group** and/or the **Synchronize** button as needed.
5. The Group Building Wizard opens. See "Group Building Wizard" on page 139.

Group Building Wizard

In the Group Building Wizard, select one option and click **Next:**

Filtered records. Uses an existing filter created by any user. The Build a Group based on a Filter dialog box opens. See "Groups Based on Filtered Records" on page 140.

Previewed records. Uses records you are previewing in the Preview tab in the Filters and Groups dialog box to preview filter results. The Optional Settings dialog box appears. See "Using the Optimizing Filters Options" on page 134.

SQL Query records. Uses an existing SQL query on the SQL Query tab of the Filters and Groups dialog box to query an MSSQL Server database. The Optional Settings dialog box appears.

Tagged records. Uses records you tagged in the Contact Search Center using **CTRL+click**. Once multiple contacts are highlighted, select **GoTo>>Contact Groups** and create a new group. The Optional Settings dialog box appears.

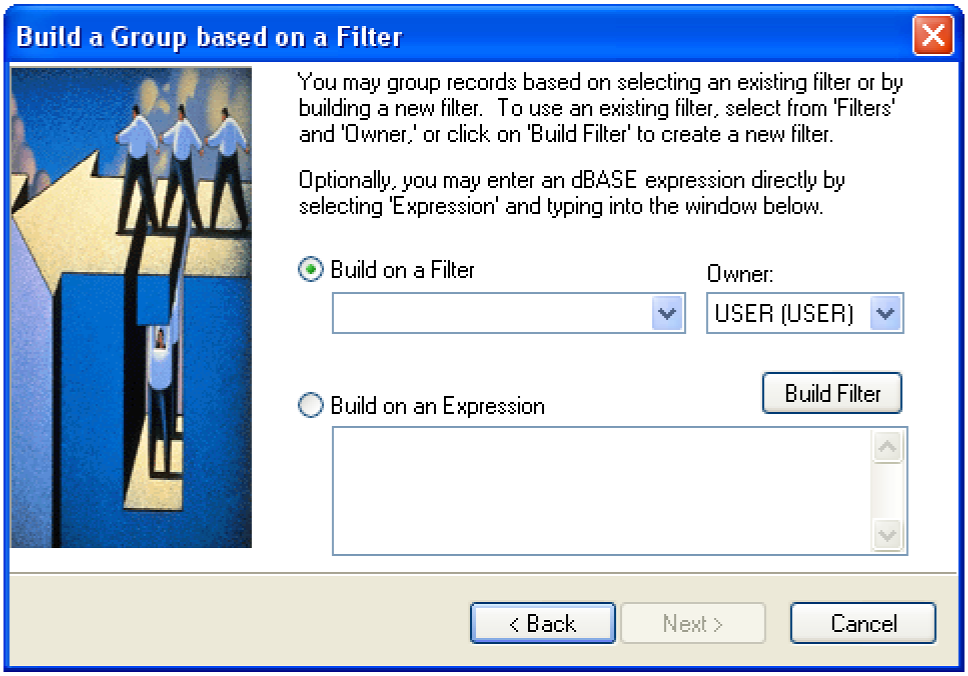
Scheduled calendar activities: Creates a group based on scheduled activities in the Calendar. The Group Based on Scheduled Activities dialog box appears.

Completed history activities. Creates a group based on historical activities. Select a User. Enter the date range and type an Activity code (the default is blank). Select an Activity Type. The Build a Group based on Completed Activities dialog box appears.

Supplemental contact data. Creates a group based on detail records, linked documents, additional contacts, or referrals to build a group based on supplemental data. The Build a Group based on Contact Details dialog box appears.

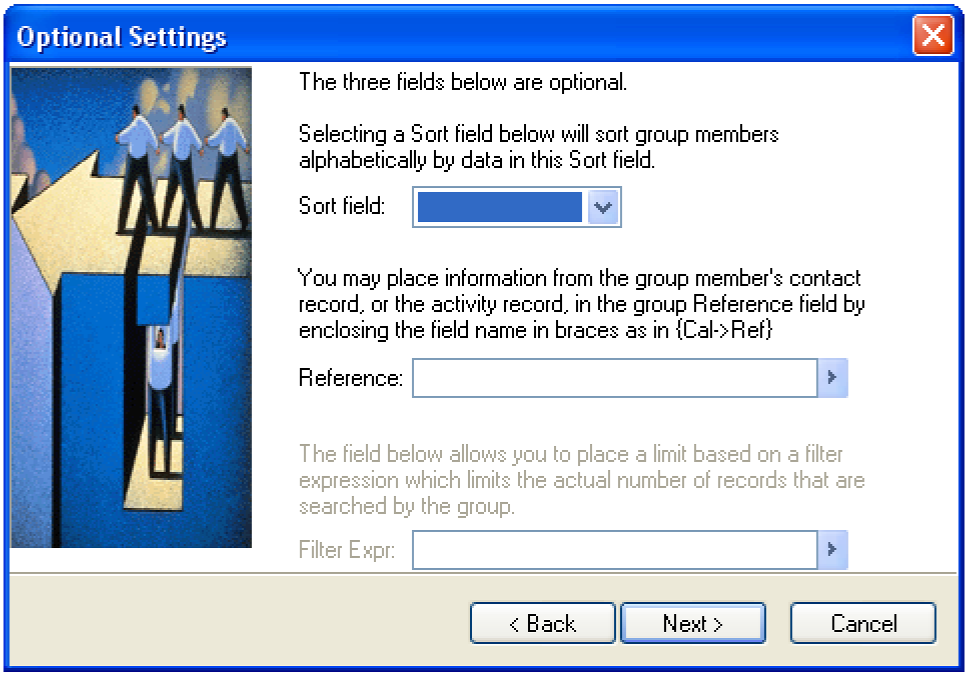
Groups Based on Filtered Records

1. In the Group Building Wizard, select **Filtered records**.
2. Click **Next.**



The Build a Group based on Filtered Records dialog box opens.

3. Select one option:
   - **Build on a Filter.** Create a group based on an existing filter. Select the filter **Owner** in the drop-down list and the filter name in the Build on a Filter drop-down list.
   - **Build Filter.** Create a filter if one does not exist.
   - **Build on an Expression.** Type a new filter expression or edit the filter expression.
4. Click **Next.**



5. The **Optional Settings** dialog box appears. See "Group Optional Settings" on page 141.

Group Optional Settings

When building a group, use the **Optional Settings** to refine your choices.

1. At the Optional Settings dialog box, select the **Sort Field** in the drop-down list.

NOTE: The Sort Field specifies a contact field or user-defined field GoldMine sorts the group by. Select the field to sort the group by, and GoldMine places the value from that field in the group Sort field for each group member's contact record. When the group is active, group members are arranged alphabetically by this sort field.

2. Type or select the **Reference** value from the F2 Lookup list.

NOTE: Each member has a group Reference field. The field contains information you type or select. When GoldMine builds a group, you can select the value placed in the group Reference field for each group member, for example, {Database->Fieldname}.

3. Type or select a Filter Expr. from the F2 Lookup list. The filter expression must be a valid dBASE Boolean expression.

NOTE: This option is not available of you are creating a group based on filtered records.

---

4. Click **Next.**

   The Ready to Build dialog box opens.

5. Click **Finish.**

   The GoldMine Process Monitor opens and displays the status of the building process until it is completed. It then displays the number of records added to the group.

When the group is built, the name is added to the Group Name box on the **Groups** tab.

Group Based on Scheduled Activities

1. In the Group Building Wizard, select **Scheduled calendar activities** and click **Next.**
2. At the Build a Group based on Scheduled Activities dialog box, in the **Range** area, select:
   - **User.** Select the user in the drop-down list.
   - **From Date.** Type or select the date from the F2 graphical calendar.
   - **To Date.** Type or select the date from the F2 graphical calendar.
   - **Activity.** Type the activity code.
3. In the **Activity Type** area, select **All Activities** or a specific activity.
4. Click **Next** and complete the Optional Settings dialog box appears. See “Group Optional Settings” on page 141.

Group Based on Completed Activities

1. In the Group Building Wizard, select **Completed history activities** and click **Next.**
2. At the Build a Group based on Completed Activities dialog box, in the Range area, select:
   - **User.** Select a user in the drop-down list.
   - **From Date.** Type or select the date from the F2 graphical calendar.
   - **To Date.** Type or select the date from the F2 graphical calendar.
   - **Activity.** Type the activity code.
   - **Result.** Type the result code.
3. In the **Activity Type** area, select **All Activities** or a specific activity.
4. Click **Next** and complete the Optional Settings dialog box appears. See “Group Optional Settings” on page 141.

Group Based on Supplemental Contact Data

1. In the Group Building Wizard, select **Supplemental contact data** and click Next.
2. At the Build a Group based on Contact Details dialog book, select an option:
   - **Details.** Builds the group based on detail records.
   - **Document Links.** Builds the group based on linked documents.
   - **Additional Contact.** Builds the group based on other contact records.
   - **Referrals.** Builds the group based on referral records.

   NOTE: If you select Details, type or select a value from the F2 Lookup list to limit the detail-based group to a particular detail, for example, email address. This option is not available with the other options.

3. Type or select the Keyword in the F2 Lookup list. This option specifies a word or phrase to be searched within the Reference field in the select supplemental data.
4. Click **Next** and complete the **Optional Settings** dialog box opens. See "Group Optional Settings" on page 141.

Saving Search Results as a Group

1. After creating a search, save the results as a group by clicking **Save.**

   The Save menu appears.
2. Select **Only Tagged Records** to save only tagged records in the new group, or **All Listed Records** to save the entire list of records.
3. Select **Save as Group.**

   The **Group Profile** dialog box opens.
4. Type a name in the **Group Name** field.
5. In the **Code** text box, type or select a code from the F2 Lookup list.
6. Select a group owner from the **User** drop-down list.
7. Click **OK.**

   The results are saved and the group name appears below the selected user's groups in the Groups tab of Filters and Groups.

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, or in the Contact Search Center, where you can build and save search criteria as Filters, or search results as Groups.

1. Select **Tools>>Filters.**

   The Filters and Groups dialog box appears.

2. Click a tab:
   - **Filters.** Create and delete filters. Also activate and release filters. See “Creating Filters” on page 130
   - **Preview.** Preview filter results. See “Using the Previewing Filters Options” on page 135.
   - **Group.** Build groups and review members. Also activate and release groups. See “Groups” on page 137
   - **SQL Query.** Write and save a SQL query from scratch or using the Lookup wizard. See “Creating SQL Query Filters” on page 135.

Activating and Releasing Filters

Use created filter expressions in an operation such as performing a global replace based on a filter. While the filter is active, the filter name becomes part of the Contact Record window title.

NOTE: The Contact Search Center still lets you deviate from filter results to locate and display a record that does not meet filter criteria. However, selecting the Next Record (PAGE DOWN) or Previous Record (PAGE UP) returns you to the filter results.

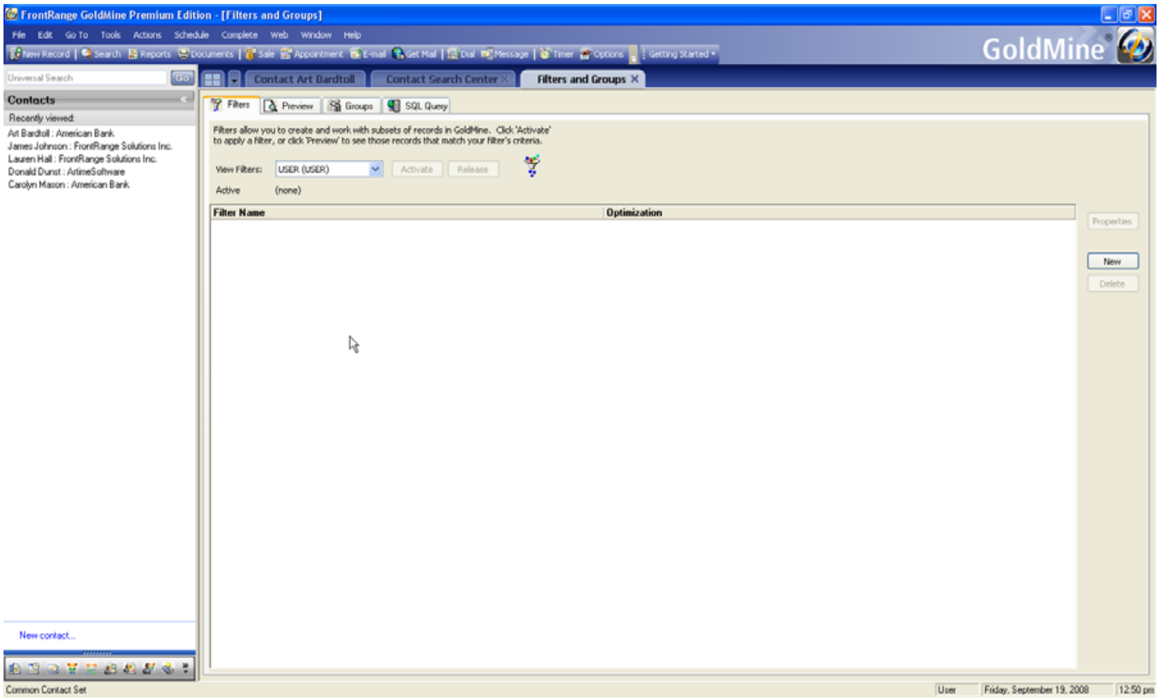
Use the following procedure to activate a filter. Note that activating the filter affects the following GoldMine operations:

- PAGE UP and PAGE DOWN and corresponding menu commands, Next Record and Previous Record
- Merge Forms command
- Record deletion commands: Delete Old History of ALL Contact Records and Delete ALL Contact Records
- Global Replace commands
- Synchronize commands
- Export Contact Records command

Use the following procedure to activate a filter.

1. Navigate to **Tools>>Filters.**

   The Filters and Groups dialog box opens.



2. On the **Filters** tab, highlight a filter and click **Activate.**
   - The active filter name appears in the Contact Record title bar.
   - The filter remains active until released.

Use the following step to activate to release a filter.

On the **Filters** tab, highlight a filter and click **Release.**

The filter is deactivated and you can now access the entire database.

Activating and Releasing Groups

When selecting this command, GoldMine's database appears containing only contact records that are members of the group. After you build a group, it must be activated before it can be used in an operation.

NOTE: Create, activate, and release groups in the Contact Search Center.

- **Activate.** Restricts the contact list to displaying only contacts within the activated group (or filter, etc.)
- **Release.** Deactivates the filter.

Use the following procedure to activate a Group.

1. Select **Tools>>Filters.**
2. At the Filters and Groups dialog box, click the **Groups** tab.
3. Highlight a group and click **Activate.**

Use the following procedure to release a Group.

1. Select **Tools>>Filters.**
2. At the Filters and Groups dialog box, click the **Groups** tab.
3. Highlight a group and click **Release.**

Contact Communication

About Communicating with Contacts

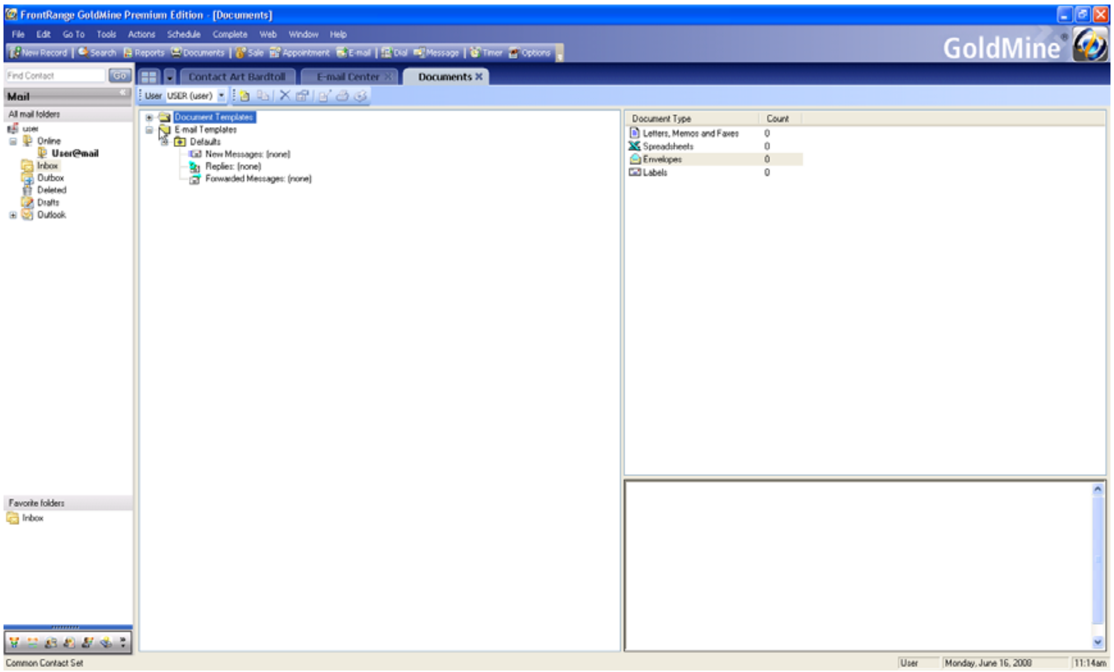
You can use GoldMine to print and fax correspondence, send e-mail, send pages, and distribute literature. GoldMine integrates the functionality of your word processor and email software to communicate with contacts and coworkers.

- **Email.** Send, retrieve, and manage Internet email. Individuals within an organization can use GoldMine email, providing the same features as Internet email, 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 email.

For user procedures see the *GoldMine 8.5 User Guide*.

About the Document Center

The Document Management Center helps you manage document templates. It contains a lists of templates for emails, memos and faxes and other documents you might use in communicating with a contact.



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

The Document Management Center works with GoldMine Plus for Microsoft Word.

Use the Document Management Center to:

- Create Document Templates
- Create email 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.

Creating Document Templates

GoldMine installs predefined templates but you can create your own templates as well.

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.

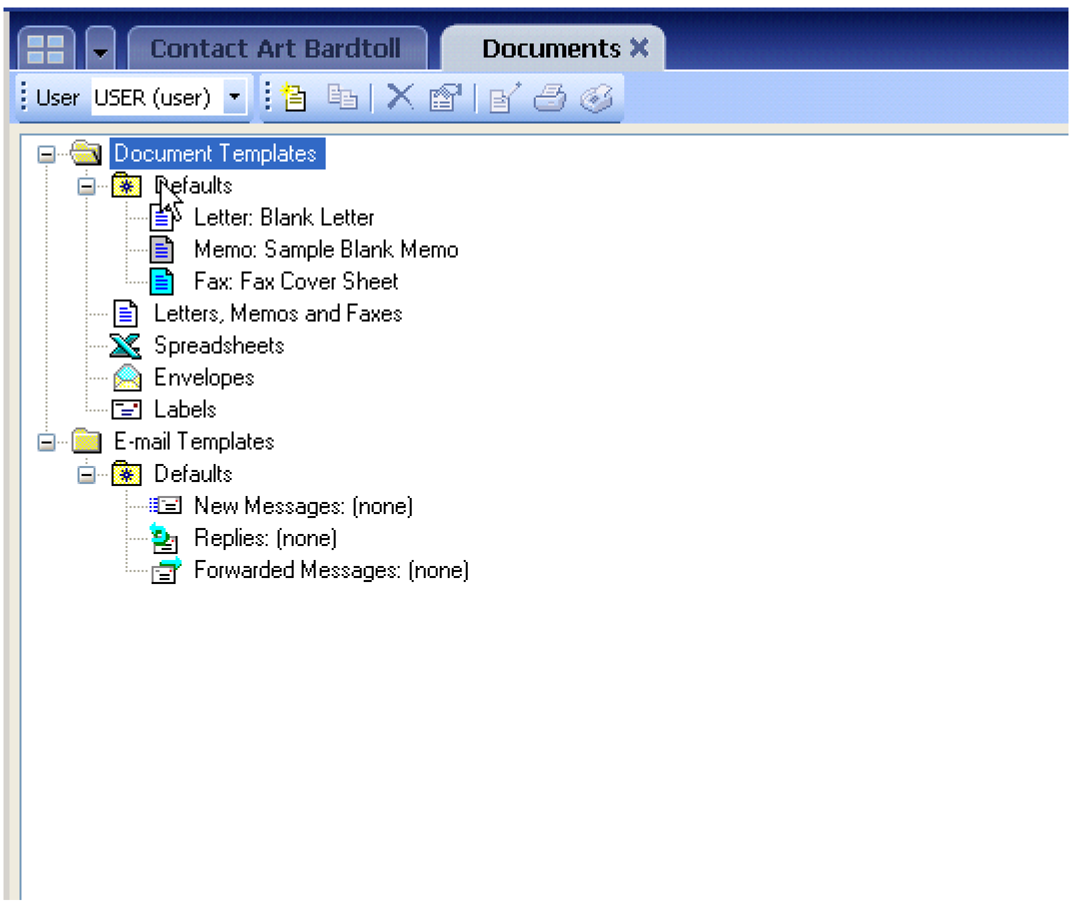
There are two ways to create templates:

- With GoldMine Plus installed
- Without GoldMine Plus installed

In both cases you can create new templates. The most common options for creating a document are using WordPad and Microsoft Word with GoldMine Plus for Microsoft Office installed.

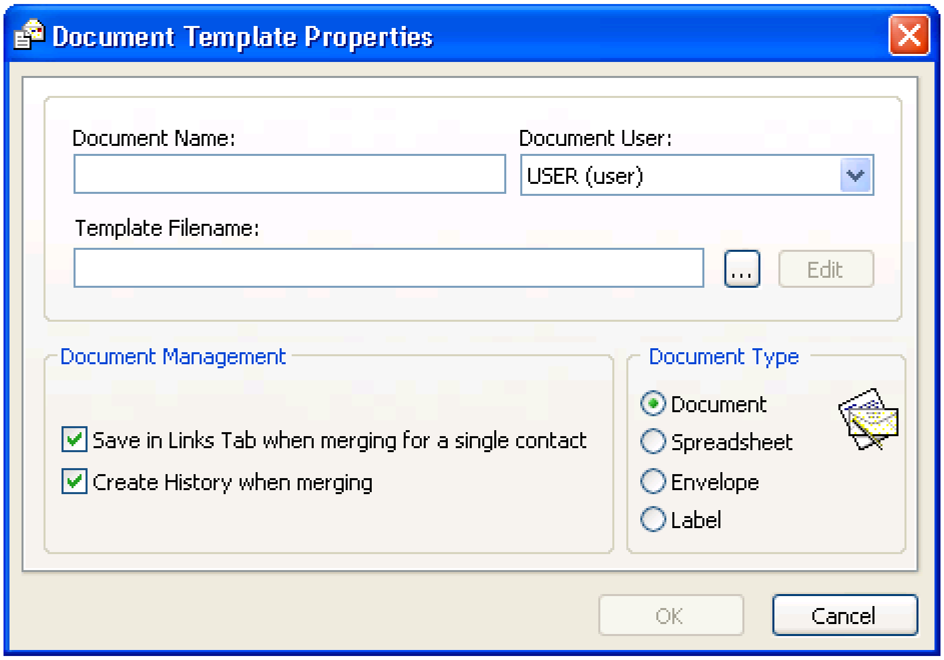
Use the following procedure to create a document template.

1. Select **Go To>>Document Templates**.
2. At the Document Management Center, select the **User** from the drop-down list.



3. Right-click on **Document Templates** and select **New.**

   The **Document Template Properties** dialog box opens.

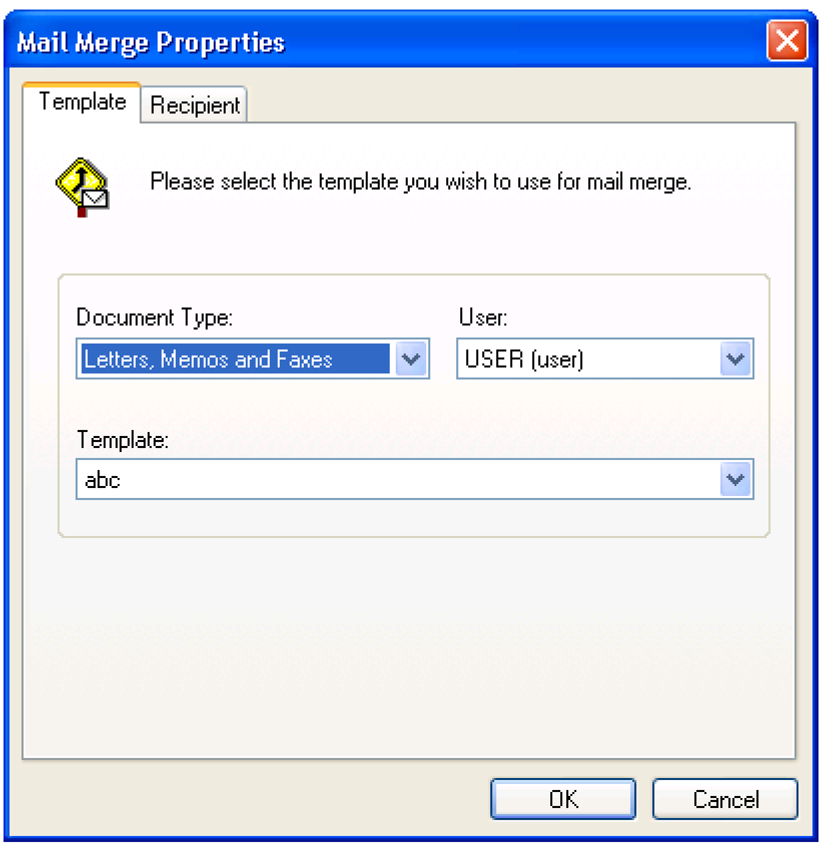


4. At the **Document Name** field, type in the document name you want to appear in the Document Management Center and in the template drop-down list on the Merge Form dialog box.
5. At the **Document User** drop-down box, select the owning user.
6. At the **Template Filename** field, type or browse to the location of the template.
7. Click **Edit** to open the document and make changes.
8. In the **Document Management** area, click on the appropriate checkbox as needed:
   - **Save in Links Tab when merging for a single contact.** Creates a linked document when the document is merged.
   - **Create History when merging.** Creates a history record when this template is merged.
9. In the **Document Type** area, select a document type and then click **OK**.

   The following Alert Message appears.

10. If you have defined a Filter/Group defined and are ready to do the merge now, click **OK**.

The Mail Merge Template dialog box opens.



11. At the **Document Type** field, select a document type for a mail merge.

    At the **User** field, select and user and, if it does not already appear, at the **Template** field select the template for the mail merge,

12. Click **OK.**

    The actual merge occurs after you click OK. The settings of this merge will be defined after filling the information on **Recipient** tab, where you can select a current contact (filter/group) and delivery method (printer/fax) or queue for day(s).

    So, if the default settings are selected, the template will be printed with the current contact information.

Editing Document Templates

You can edit document templates using the application you used to create the template. In the following procedure, Microsoft Word is used as an example.

1. Select **Go To>>Document Templates.**

   The Document Management Center opens.

2. At the **User** dropdown box, select a user.
3. Right-click on a template name and select **Properties.**

   The **Document Template Properties** dialog box appears.

4. Click **Edit.**

   The document opens in the application used to create it. Use your Word functionality to add, delete, or edit the text.

5. To add GoldMine fields to the document, at the Word document, select **GoldMine>>Insert GoldMine Field.**

   The Insert GoldMine Field dialog box opens.

6. Select the field or field macro from the drop-down list.

   For example, *Contact* is an example of the field macro format.

7. To save the edited template to the same file, select **GoldMine>>Update GoldMine Form.**
8. To save the edited template as a new template, select **GoldMine>>Save as GoldMine Form.**
9. At the **Title** field type in a new title and then click **OK.**

Faxing Correspondence

You can fax correspondence 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**.

  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**.

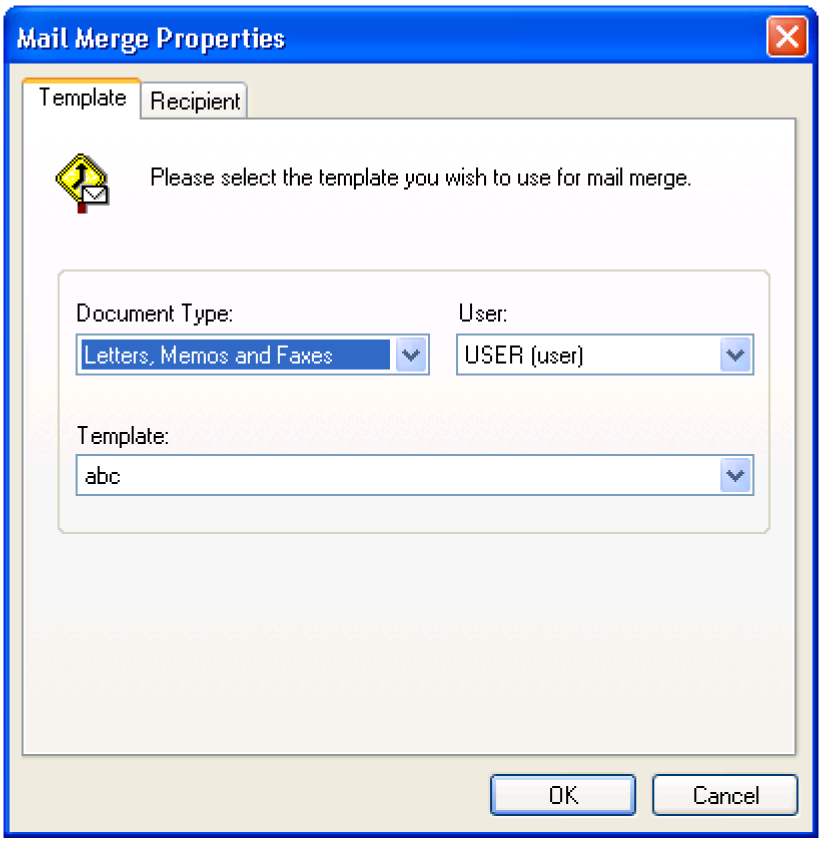
Use the following procedure to fax a correspondence from GoldMine Document Center.

1. Select **Go To>>Document Templates.**

   The Document Management Center opens.

2. Right-click on **Fax, Fax Cover Sheet>>Fax.**

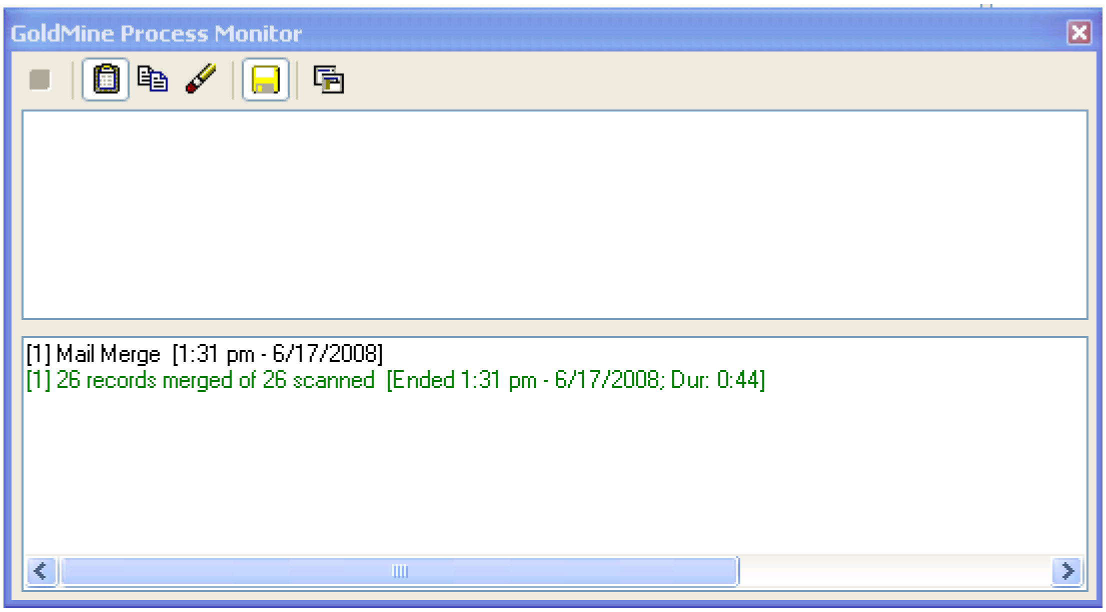
   The Mail Merge Properties dialog box opens.



3. At the **Contact Selection** area, select the contact or contacts you want the fax to reach by clicking on the appropriate radio button.
   - **This Contact.** Merges the fax with the primary contact from the active contact record or an additional contact selected from the drop-down list.
   - **All contacts linked to (contact name).** Merges the fax with the primary and additional contacts for the active contact.
   - **All contacts in the following filter or group.** Merges the fax with all contact records or with the filtered group or contact group you select from the drop-down list.

4. If you select **All contacts linked to (contact name)** or **All contacts in the following filter or group**, you can also select these options:
   - **Primary.** Merges the fax with the primary contact.
   - **Additional.** Merges the fax with the additional contacts.
   - **Merge code.** Merges the fax based on the code you select in the F2 Lookup list.
5. At the Delivery area, at the **To** box, select **Fax**, and at the **Queue for x days** box, select a number of days to delay the printing or sending of the document. This option sets the fax to print at a selected number of days in the future.
6. Click **OK**.

   When the merge is complete, the results appear in the GoldMine Process Monitor window.



Faxing Your Default Fax Sheet

When you use the Fax capability, 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. You can also fax a correspondence using a default fax template.

Use the following procedure to fax a correspondence with a default fax template.

1. Select **Go To>>Document Templates.**

   The Document Management Center opens.
2. Open any contact record and then select **Actions>>Write fax to contact.**

Printing Documents

You can print documents for one contact or for a filtered group or group of contacts.

To print documents from the Goldmine Document Center

3. Select **Go To>>Document Templates.**

   The Document Management Center opens.

4. Select the **User** from the drop-down list.
5. Highlight the document template you are printing and right-click.
6. Select one of the following options:
   - **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.

   Due to a Microsoft limitation, the GoldMine menu in Microsoft Word is disabled during the Merge & Edit process.

   - **Print.** Opens the Mail Merge Properties dialog box. See "Using Mail Merge Properties (Printing)" on page 1-155.

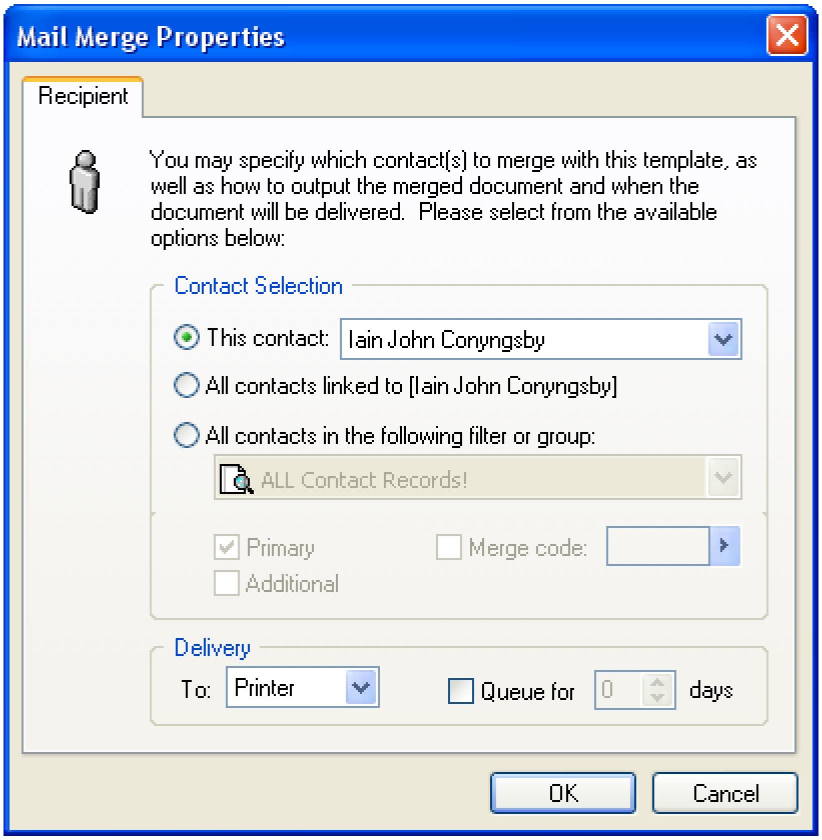
   If you print immediately, a record of what was sent to the contact is filed on the **History** tab.

Using Mail Merge Properties (Printing)

Use the following procedure when merging and printing documents.

1. In the Document Management Center, right-click a document template and select **Print or Fax.**

   The Mail Merge Properties dialog box opens.



To access this dialog outside of the Document Management Center select **Actions>>Begin Mail Merge.** The Mail Merge Properties dialog opens with an additional Template tab.

2. In the **Contact Selection** area, select from the following:

   This Contact. Merges the document with the primary contact from the active contact record, or select an additional contact from the drop-down list.

   All contacts linked to (contact name). Merges the document with the primary and additional contacts for the active contact record.

   All contacts in the following filter or group. Merges the document with ALL contact records or with the filtered group or contact group selected from the drop-down list.

   If you select **All contacts linked to (contact name)** or **All contacts in the following filter or group,** select from the following:

   - **Primary.** Merges the document with the primary contact.
   - **Additional.** Merges the document with the additional contacts.
   - **Merge code.** Merges the document based on the code you select in the F2 Lookup list.

3. In the **Delivery** area, select the **To** method from the drop-down list (Printer or FAX).
4. Type or select the Queue for x days to delay the printing or sending of the document.

   This option sets the document to print at a selected number of days in the future using the Server Agents or the Literature Fulfillment Center.

   Printing a mail merge document for a contact produces a History item for that contact.

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.

1. To check on queued correspondence in GoldMine's Literature Fulfillment Center, select **GoTo>>Literature.**
2. To print envelopes or labels when queued documents are printed, select **GoTo>>Literature.**
3. 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.**
4. 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.
5. 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.

Using the E-mail Center

Use GoldMine's E-mail Center to view, organize, and send your queued Internet emails.

Use the E-mail Center to:

- Edit email preferences
- Creating emails
- Send email messages
- Retrieve email messages
- Link email messages to contacts
- Create and use email templates
- Set email rules
- Create distribution lists

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.

E-mail Center Components

The E-mail Center contains the following components:

- **E-mail Center Toolbars.** Allows quick access to E-mail Center functions.
- **E-mail Center tree.** Allows you to connect to your mail server and organize incoming, outgoing, and filed messages.
- **E-mail message listing browse window.** Displays messages available in the in-box, out-box, or selected folder.

The default limit for messages that can be displayed at once is set at 2,500. You or your administrator can implement a <USER>.ini file setting to override this limit, but this is not recommended because of the negative side effects are associated with this action, including:

  - Increased load on the database server and the network (the database server will have to read your records from disk, and they will be sent over the network).
  - Increased time to load the list of e-mails in the Email Center list. During this time GoldMine may be unresponsive.
  - Increased memory usage by GoldMine. You may have a slower response in the Email Center because it has to process a large number of emails and use more memory.

  For more information on message limits, see the System Settings section of the *GM 8.5 Administrators Guide.*

- **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

General Email Toolbar

The *General E-mail Center Toolbar* contains buttons and menus for creating, sending, receiving, and filing e-mail messages, setting up e-mail rules, templates, and distribution lists, and editing e-mail options. Buttons in the toolbar will appear and disappear depending on the type of activity you are performing.

The General E-mail Center Toolbar differs depending on which folder is opened in Email Center assuming there are letters in them.

- If an online folder is opened then General E-mail Center Toolbar consists of:
  - New Message, Print, Refresh, Delete, Stop, Reply, Reply to all, Forward and Actions (which is a drop-down button with the following functions: Get selected items, Get all Items, Set up E-mail rules, Customize E-mail templates, Set up Distribution lists, Sync Contact, Show Preview, Edit E-mail Options)

- If an Inbox (or any sub-), Deleted or Filed subfolder is opened then General E-mail Center Toolbar consists of:
    - New Message, Print, Refresh, Delete, Reply, Reply to all, Forward, File it (with its options), Re-link/Unlink and Actions (which is a drop-down button with the following functions: Mark as Read (Un-read), Set up E-mail rules, Customize E-mail templates, Set up Distribution lists, Sync Contact, Show Preview, Edit E-mail Options)
- If an Outbox or Drafts folder is opened then General E-mail Center Toolbar consists of:
    - New Message, Print, Refresh, Delete, Re-link/Unlink, Send, Send all, Re-Send, Re-Queue and Actions (which is a drop-down button with the following functions: Set up E-mail rules, Customize E-mail templates, Set up Distribution lists, Sync Contact, Show Preview, Edit E-mail Options)
- If a Sent subfolder is opened then General E-mail Center Toolbar consists of:
    - New Message, Print, Refresh, Delete, Forward, File it (with its options) Re-link/Unlink, Re-Send, Re-Queue and Actions (which is a drop-down button with the following functions: Set up E-mail rules, Customize E-mail templates, Set up Distribution lists, Sync Contact, Show Preview, Edit E-mail Options)

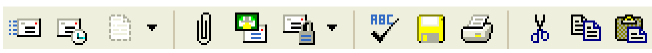
Depending on the action being performed, the following commands are available in the General Toolbar:

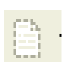
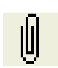
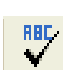
- **New Message**. Creates a new message in the **Edit E-mail** window, or create a new mail subfolder.
- **Re-link/Unlink.** Links files to or unlink files from contacts.
- **Print.** Prints the currently selected message.
- **Refresh.** Refreshes the contents of the e-mail list.
- **Delete**. Deletes the currently selected message.
- **Stop.** Stops any current retrieval process.
- **Set up Email Rules.** Sets up E-mail rules.
- **Customize E-mail Templates.** Creates and edits email templates, in the Document Management Center.
- **Set up Distribution Lists.** Creates and edit Distribution Lists.
- **Send.** Sends the selected message.
- **Send All.** Send all outbox messages.
- **Re-Send.** Resends the selected message.
- **Re-Queue.** Opens the selected message in the Edit E-mail window and add to the queue in the Outbox.
- **Reply.** Opens a reply to the sender using the Edit E-mail window.
- **Reply to All.** Opens a reply to the sender and all recipients in the Edit E-mail window.
- **Forward.** Forwards the currently selected message to a new recipient.
- **Mark as Read.** Marks currently selected message as *read.*

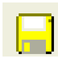
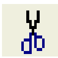
- **File.** Selects a filing method for the selected message from the drop-down menu
  - **File it.** Opens the Complete and E-mail dialog boxes.
  - **Fast File.** Files the selected message in your Filed folder and in the linked contact's History tab.
  - **File to.** Saves the selected message directly to a filed folder or subfolder.
- **Actions.** Opens the list of actions such as E-mail, Message and so on.

Edit the Email Toolbar

The Edit E-mail Toolbar is present when the Edit E-mail window is active. It contains buttons and menus useful when creating and editing e-mail messages.



Symbol	Description
	Send the selected message immediately.
	Queue the selected message in the Outbox
	Select from the drop-down menu
Save as Draft	Save the selected message to the Drafts folder and close
Save as Draft - Continue Editing	Save the selected message to the Drafts folder and leave open for editing
	Browse for files to attach to the selected message
	Sign with Digital ID
Do Not Encrypt	Send messages without encryption
Encrypt Using GoldMine	Send messages with GoldMine encryption
Encrypt Using Digital ID	Send messages encrypted with Digital ID
	Spell check selected message

Symbol	Description
	Save the selected message as an HTML or text file
	Print the selected message
	Cut selection
	Copy selection
	Paste selection

Local Menus

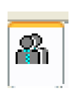
Use the E-mail Center local menu (also called a shortcut menu) to access commands in the selected browse window, tab, or pane.

6. Right-click in the window, tab, or pane you are working in.
7. Select the action from the menu.
8. Use GoldMine's E-mail Center to view, organize, and send your queued Internet emails.

Use GoldMine's E-mail Center to view, organize, and send your queued Internet emails.

Creating and Sending Email

1. Access the Edit E-mail dialog box in one of the following ways:
   - Click the **E-mail button**  included on the Global Toolbar.

   - Select **Actions>>Send Email Message or Actions>>Send Outlook Message.**
   - Clicking the **New Message** button on the E-mail Center toolbar.
   - Replying to pending activities.
2. The **From** text box uses the logged in user's name and email account. To change to a different email account for the logged in user, select the account in the drop-down list.
3. The **To** text box populates with the name and email address of the current contact. To change to an alternative name and e-mail address associated with the current contact, select the name from the drop- down list.
4. To send the email to additional recipients, at the **Additional Recipients** box, click on a line and select one of the following:
   - **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 email 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.
5. Click **Link** to link the email message to the current contact and file the message in the History tab when sent.
6. To add recipients, click **Cc:**. At the pop up menu, select one of the following:
   - **To:** Adds recipients to the To list.
   - **Cc:** Sends copies to other recipients.
   - **Bcc:** Sends a blind copy to other recipients.
7. Click the **Recipients** button  again and select one of the recipient types listed in step 6. Multiple types of recipients are allowed.
8. In the **Subject** text box, type a subject or select a template in the **Subject** drop-down list.
9. Type a message in the message text box. To use HTML formatting in the message, in the **Options** tab, select **Rich text (HTML)**. Check your spelling by right-clicking and selecting **Actions>>Spell check.**

10. To configure settings for: for the
    - Adding email attachments
    - Options tab
    - Mail merge tab
11. Click the **Attachments** icon to add email attachments.
12. Click **Send** to send the message immediately or **Queue** to queue it for sending at the times defined in the Server Agents Administrator.

Adding Email Attachments

Use the Edit E-mail dialog box to add one or more files as attachments to your e-mail message.

1. At the Edit E-mail dialog box, click the Attachments tab
2. Right-click the **Attached documents** area and then select **Attach.**
3. Browse to the location of the file to attach.
4. Click **Open** to attach the file. Repeat the procedure for each file to attach.
5. Click **Send** to immediately send the message, or **Queue** to queue it for sending at the times defined in the Server Agents Administrator.

NOTE: If a file is edited after it has been sent as an attachment, the attached file reflects these changes, even though the message is in the Sent folder.

Sending Email to Multiple Recipients

Use the Mail Merge tab on the Edit E-mail dialog box to send the e-mail to all contacts or to a filtered group of contacts.

6. At the **Edit E-mail dialog box,** click the **Mail Merge** tab.
7. Select **Merge this E-mail to a group of contacts** to activate the mail merge options.
8. Select your filter or group in the drop-down list, or click on **<Filters of:>** or **<Groups of:>** to select other users and use their filters or groups.
9. Select **Confirm each recipient** to display a confirmation prompt for each selected recipient.
10. Select merge options:
    - **Primary.** Merges primary contact information with the selected template.
    - **Additional.** Merges additional contacts with the selected template. GoldMine can mass merge both primary and additional contacts into documents. This control is used to include or exclude additional contacts from a mass mailing.
    - **Other.** Merges other email addresses linked to the primary contacts.
    - **Limit to E-mail merge code.** Merges primary and additional contacts with the specified merge codes. Select the merge codes from the F2 Lookup list. To enter multiple merge codes, separate each entry with a semi-colon (;).
11. Click **Send** to send the message immediately or **Queue** to queue it for sending at the times defined in the Server Agents Administrator.

Creating Email Templates

Use the following procedure to create an email template.

1. Select **Go To>>Document Templates.**
2. At the Document Management Center, at 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 opens.
4. The cursor is automatically on the Subject line. Type the subject of the email.

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.

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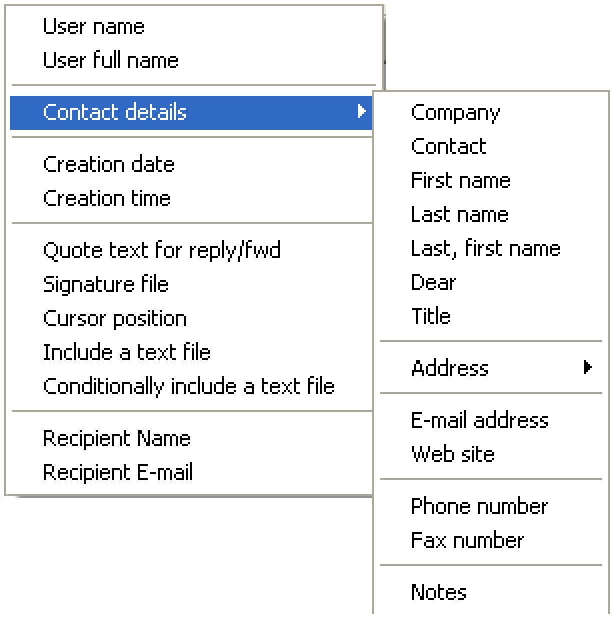
5. Click **Attach files** on the Edit E-mail toolbar to attach a file to the template.
6. Browse to locate the file you are attaching to the template.
7. Select the **Options t**ab to configure template formatting and encoding options.
8. Select Rich text (HTML) to send the message in HTML.

   The Rich text format options lets you use specialized fonts and insert .bmp files.
9. If your recipient's system does not support HTML, leave the check box blank to send the message as plain ASCII text.
10. **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.

    When creating a template, you cannot change this option.
11. Select **Attach VCard** to include a .vcf file with your message. The VCard contains basic contact information.
12. 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 email system supports the return receipt feature.
13. 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
14. If desired, insert GoldMine fields into the message body, creating a dynamic email message using data from the contact record in the merged document. Right-click in the message box and select **Actions>>Insert GoldMine Field.**



NOTE: 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>>.

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

Sending Emails from the Document Management Center

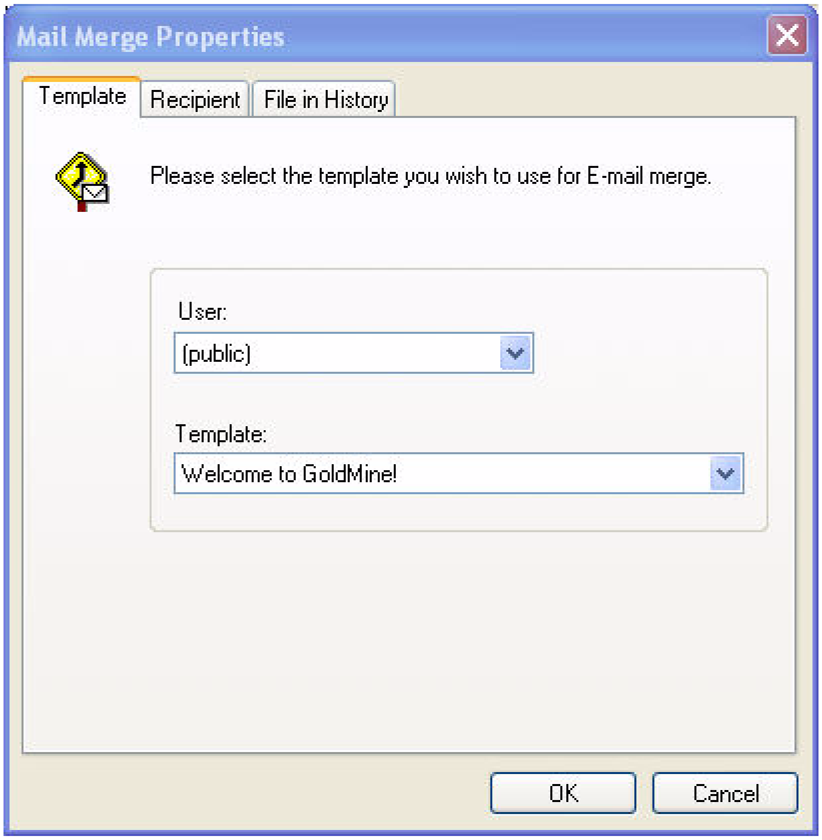
Use the Document Management Center to send emails.

1. Select **Go To>>Document Templates** or click the **Documents** button on the toolbar.

   The **Document Management Center** opens.

2. At the **User** field, select a user from the drop-down list.
3. Highlight and right-click on the email template you want to send and then click **Merge.**

   The Mail Merge Properties dialog box opens.



4. Select the user and template in the appropriate fields, if not already selected and then click **OK.**

   The email is ready to be sent.

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

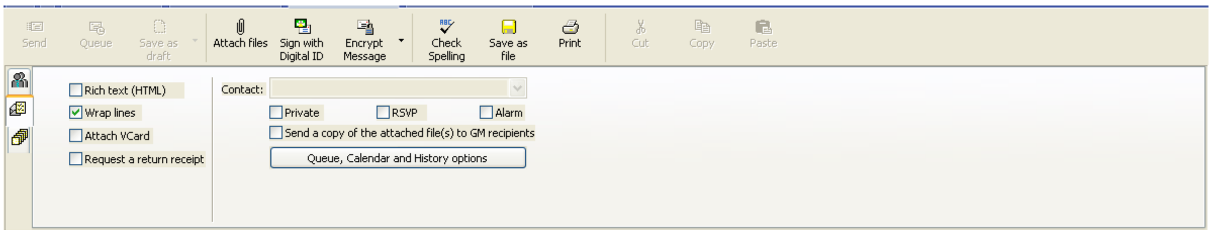
Use GoldMine for your email by acquiring an email account and setting up your system to access the Internet email account. After set up, configure settings to:

- Format outgoing messages.
- Handle incoming messages.
- Add Internet email accounts.
- Customize the GoldMines 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.

For information about configuring GoldMine for sending and retrieving internet email, please see See "Setting Email Account Properties" on page 1-167..

Use the e-mail Options tab on the **Edit E-mail** dialog box to configure:

- Properties of your message such as formatting the body text in Rich Text Format (.rft) and including a return receipt.
- Options for recording your message such as saving in the recipient's History record and with an Opportunity or Project.
- Date and time to send a queued message.



Setting Email Account Properties

Define properties for individual Internet e-mail accounts when selecting New or Edit from the Accounts tab of the Internet Preferences window. The E-mail Account Properties dialog box opens.

1. On the Internet Preferences Accounts tab, highlight the account you are changing and click Edit; or click New to create a new account.

The E-mail Account Properties dialog box opens.

2. In the **Account Name** field, type a descriptive name for the account to appear on the E-mail Center>>Accounts tab.

3. Select Show the account in the E-mail Center to display the account in the E-mail Center. For the account to not appear in the E-mail Center, clear the option.

4. In the Getting Mail area, configure:

- **E-mail retrieval protocol.** Choose either:

  POP3

  IMAP

- **Server.** The name of the mail server retrieving your mail. For example, the structure of the entry might look like mail.somewhere.com. Typically, the same server is used for outgoing protocol SMTP and retrieval protocols POP3 or IMAP. If you do not know the correct entry for this field, contact your Internet service provider.

NOTE: POP3, or Post Office Protocol version 3, and IMAP, or Internet Message Access Protocol, are systems for retrieving e-mail.

- **Username.** The name you use to log into your Internet mail server. Type only your user account name, not your entire e-mail address.
- **Password.** The password you use to log into your Internet mail server. When you type the password into the field, each character appears as asterisks (*).

- **Auto-retrieve.** Select Auto-retrieve for GoldMine to automatically connect with your POP3 or IMAP mail server for the selected account and check for new mail. The interval for checking the account is defined globally in the Retrieval tab. GoldMine checks for new mail in all accounts with this option.
- **Auto-delete.** Select Auto-delete to remove messages from the Internet mail server after they have been retrieved.
- **Use encrypted connection (SSL).** Select this checkbox to use a secure connection. This ensures the privacy of the connection between your account and the server. Implementing SSL does not verify the identity of your account or the e-mail server, but does prevent third parties from listening or recording messages sent between them.

NOTE: Selecting Use encrypted connection (SSL) changes port numbers on the server side. Servers usually have dedicated ports for secure connections.

- **Port.** Type any non-standard port address to the POP3 or IMAP server for the selected account. This option allows greater flexibility in setting up a nonstandard server. The default POP3 Port value is 110. The default IMAP Port value is 143. Typically, this entry should not be changed. However, if your account uses a non-standard POP3 or IMAP server configuration requiring a different port entry, contact your network administrator or Internet service provider.

5. In the Authentication area, configure the way your POP3 or IMAP server recognizes and authenticates your account and password. The selections are:

- Login
- NTLM
- CRAM-MD5
- Plain
- None

6. In the **Sending Mail** area, configure:

- **SMTP server.** Type the name of the mail server sending your mail. For example: mail.somewhere.com. Typically, the same server is used for both SMTP and POP3 or IMAP. If you do not know the correct entry for this field, contact your Internet service provider or network administrator.

NOTE: SMTP, or Simple Mail Transport Protocol, is a system for sending mail.

- **Your return address.** Type your Internet address. This is typically a combination of your Internet user name and server name. For example, johndoe@somewhere.com.

7. In the **Authentication** area, configure the way your SMTP server recognizes and authenticates your account and password.
   - **Use signature file.** Attach a signature file (a text file containing information about you, your organization, telephone number quotations, and so on) to account messages. Select Use signature file and browse to the file location.
8. Click the **Advanced Options** button to set special options for the POP and SMTP server.
9. Select **OK** to return to the Accounts tab of the Internet Preferences window.

If your computer is connected to a LAN or other high-speed internet connection, you need only set account properties in GoldMine to access email and other Internet-based features.

Use the following procedure to create a new network connection in Microsoft Windows.

1. From the desktop, select **Start>>Programs>>Accessories>>Communications>>Network Connections.**

   The **Network Connections** dialog box opens.
2. At the **Network Tasks** menu, click **Create a new connection.**
3. At the New Connection Wizard welcome screen, follow the on screen instructions to create a new high-speed or dial-up connection.

For more information about configuring Windows networking functions, please see *Microsoft Windows Help.*

NOTE: Default modem and dialing properties in Windows are set up in the Phone and Modem Options Control Panel. However, select special modem and dialing settings for use only with GoldMine in the Options dialog box under the Telephony tab.

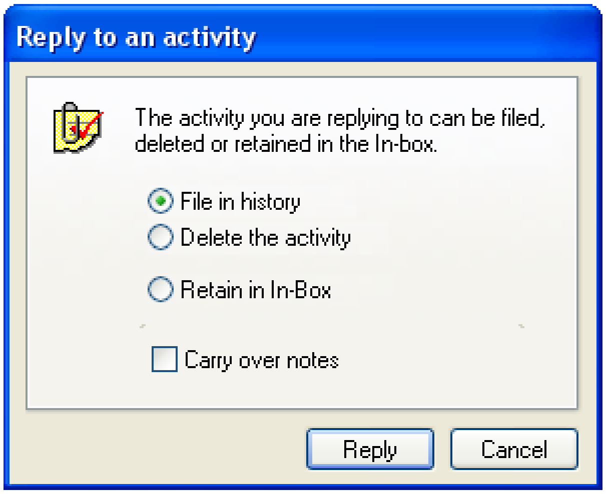
Replying to an Activity

Use the Reply to an activity dialog box to determine how activity information is recorded when replying to a user's email.

Use the following procedure to reply to an activity.

4. At the **Pending** tab, right-click on a listed activity and select **Reply**.

   The Reply to an activity dialog box opens.



5. Select one of the following radio buttons:

   File in history. This button deletes the activity and creates a record of the outgoing e-mail message on the current tab. It creates a history record of the activity and adds a record of the outgoing email message on the **History** tab.

   Delete the activity. This button deletes the activity from the current tab and creates a record of the outgoing email message on the current tab and the **History** tab.

   Retain in the In-Box. This button leaves the activity on the current tab and creates a record of the outgoing e-mail message on the **History** tab.

   Select **Carry over notes** to keep notes with the activity record.

6. Click **Reply.**

   The Edit E-mail window opens with the message addressed to the GoldMine user who created the activity.

7. Edit the message as needed and then click **Send.**

Spell-Checking Email

Use the E-mail Center to check the spelling in the message, improve professional presentation, and customize the spell-checker.

Open the User Options>>Spell tab dialog box for basic customization; for more information. see “Setting Options for the Speller Tab” on page 60.

However, you can customize the speller as you work, adding words and creating individual or company dictionaries. For more information, see “Creating Dictionaries” on page 171.

1. After creating your e-mail, click **Check Spelling** button on the E-mail Center toolbar.

   The Check Spelling dialog box opens.

   The questionable word appears in the **Not in Dictionary** field.

   Suggestions are listed in the **Suggestions** list. The words displayed are based on the options selected on the Speller tab.

2. Select an 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 Suggest button, a deeper search is made. When the spell checker exhausts all possibilities, the Suggest button is disabled.
3. To edit a questionable word, type a revised version of the word in the **Not in Dictionary** field. **Ignore** changes to **Undo edit.**

   Clicking **Undo edit** returns the edited word to the original form.
4. Use the Check Spelling dialog box to change the Options and Dictionaries.
5. Select **Undo** if you made changes to a document with Ignore or Change and wish to undo the changes.

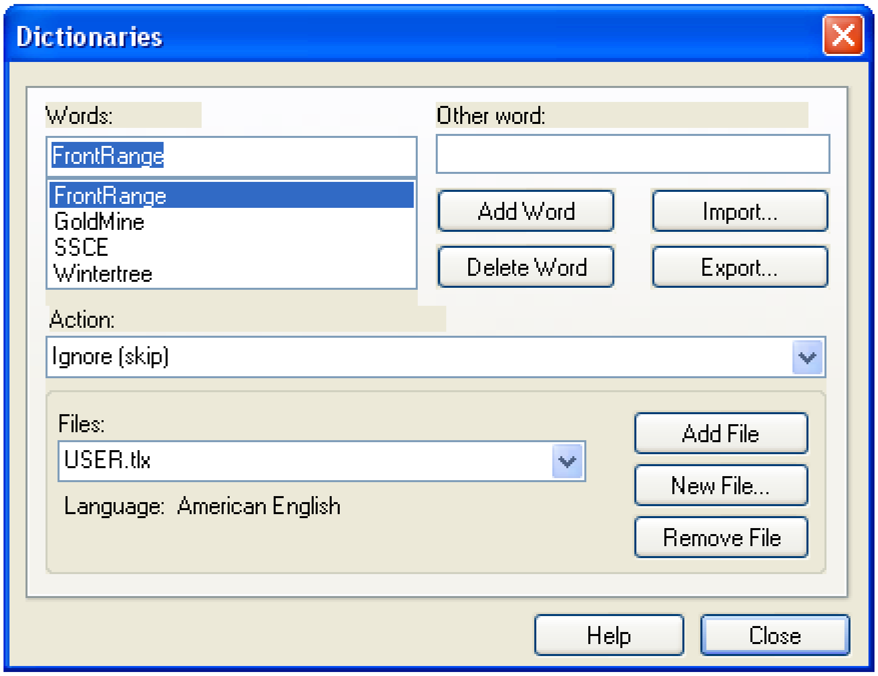
   The **Undo** button takes you back one word at a time.
6. Click **Cancel** to stop the spell checker and close the window.

Creating Dictionaries

Use the GoldMine spell checker to configure and customize the dictionary for each user. Add words, import files, and change the action on individual words.

Use the following procedure to create dictionaries.

1. Select **Tools>>Options,** and select the **Speller** tab.
2. Click **Setup Dictionaries.** The Dictionaries dialog box opens.



3. Select from the following options as needed.

   The **Words** text box lets you add a word or edit the highlighted word from the text box. The text box listing displays the words in the Files.tlx file.

   - To add a word, type the word and then click **Add Word.**
   - To edit a word, highlight the word, type the correction and click **Add Word.**
   - To type case variations on a word, at the **Other word** field, type in the word and then click **Add Word**.

4. Click **Delete Word** to remove the word from the dictionary file.
5. Click **Import** to import the words in a .txt file to the current Files .tlx file.

NOTE: When files with multiple word phrases are imported, each word adds individually rather than as a phrase

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6. Click **Export** to export the words in the current Files .tlx file to a .txt file.

7. At the **Action** drop-down list, select an action to apply to individual words:
   - Auto change (use case of checked word)
   - Conditionally change (use case of other word)
   - Conditionally change (use case of checked word)
   - Ignore (skip)
   - Exclude (treat as misspelled)

   To apply an action to a word:

     - Highlight the word in the **Words** text box listing.
     - Select the action from the Action drop-down list.
     - Click **Add Word.** The action you selected applies to that word.
     - The **Files** drop-down list displays available custom .tlx dictionaries.
     - Click **Add File** to browse to other .tlx files.

   NOTE: The .tlx files store in user folders in the Speller folder of the main GoldMine directory.

8. To create a new dictionary, click **New File.**

   A .tlx file is created, and the New Dictionary dialog box appears.

   Type the new File Name. Select the **Language** from the drop-down list and click **OK.**
9. Click **Remove File** to delete the current .tlx file.
10. Click **Close** to save the settings.

Retrieving Internet Email

To retrieve Internet email within GoldMine using a dial-up Internet Service Provider (ISP), you must use a ISP 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 email feature. You must configure Windows for dial-up networking to connect to your ISP.

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

You can retrieve email two ways.

Retrieve Email Manually

The default configuration in Windows requires manual dialing.

1. From the Microsoft Windows status bar, click **Start**.
2. Select **Programs>>Accessories>>Dial-up Networking.**
3. In the **Dial-Up Networking** window, double-click the icon for your service provider.
4. In the **Connect To** window, ensure all settings are correct, then select **Connect**.
5. After your computer connects successfully, start or switch to GoldMine, then retrieve Internet email.

Retrieve Email Automatically

Your Internet Preferences must be configured properly in the User's Preferences. Using the Microsoft Internet Explorer, you can configure Windows to automatically dial your ISP when you retrieve Internet email. The default configuration in Windows requires manual dialing.

1. From the Microsoft Windows status bar, click **Start** and then select **Programs>>Accessories>>Dial-up Networking.**
2. In the **Dial-Up Networking** window, double-click the icon for your service provider.
3. In the **Connect To** window, ensure all settings are correct, then select **Connect.**
4. After your computer connects successfully, start or switch to GoldMine, then retrieve Internet email.

Retrieving Email

Use the following procedure to retrieve Internet email.

1. Select **Go To>>E-mail** 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.
3. The POP Password dialog box appears if you do not have your Internet email password configured in the Internet tab of your User's Options.
4. Type the Password and click **OK.**

   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 email 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.

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

   You can also read retrieved email by selecting **Read from the local menu** in the Activity List or on the Pending tab of the contact record.

7. Configure e-mail settings by selecting **Tools>>Options.**

   The User's Options dialog box opens. Select the **E-mail** tab.

8. After the email options have been set, retrieve internet or Outlook email messages manually or automatically in the E-mail Center.

9. Select **Go To>>Mail.** The E-mail Center opens.

   In the view window of the Navigation Pane, click an account in your Online folder to check internet e-mail, or open the Outlook folder to manage Outlook messages.

10. To process the message, right click on **Action**.

    You can select any option depending on how you want to process the message (for example, Reply, Forward, and so on.)

    You can also read retrieved email by navigating to the local menu in the Activity List or Pending tab of the contact record and the selecting **Read.**

11. Configure email settings by selecting **Tools>>Options**.

    The User's Options dialog opens. Select the **E-mail** tab.

12. After email options have been set, retrieve internet or Outlook email messages manually or automatically in the E-mail Center.

    - Select **Go To>>Mail.**

      The E-mail Center opens.

13. In the view window of the Navigation Pane, click an account in your Online folder to check internet email, or open the Outlook folder to manage Outlook messages.

Linking Email Messages to Contacts

You can attach e-mail messages to contacts using the Attach E-mail to Contact dialog box.

1. Select **GoTo>>Mail.**

2. In the E-mail Center, move messages to the Inbox or right-click and select **File.**

   The Attach E-Mail to Contact dialog box appears displaying the sender's Internet account name, return address, subject of the message, and the VCard name if there is one.

   If the message was sent with a VCard, select **Use the VCard** information if you create a new contact based on the VCard information.

3. For an unlinked message select one:
   - **Find an existing contact and link this message to it**. Use the Contact Search Center to select a contact. GoldMine will associate the message and VCard file with the selected contact.
   - **Create a new contact and link this message to it.** Uses the VCard information to create a contact and displays the Read E-mail dialog box. GoldMine will associate the message and VCard file with the selected contact.
   - **Find an existing contact, create a new additional contact, and link this message to it.** Use the Contact Search Center to select a contact. GoldMine will create an additional contact from the sender of the message, then link the message to the contact record.
   - **Do not link this message to any contact.** Displays the Read E-mail dialog box without associating the message or VCard information to a new or existing contact. If you have selected one of the first three options, you may select Link the address <E-mail Address> to the contact to link the "From:" e-mail address of the retrieved mail to the contact. Click **OK.** If linking multiple messages, the dialog box appears for the next message.

Reading Email

The E-mail Reader window is the primary way you work with individual email messages. Use the following procedure to read an email.

1. Launch the **E-mail Reader** by double-clicking a message in the E-mail Center or the contact.
2. On the **Retrieval** tab of the Internet Preferences dialog box, select **Open 'Read E-mail** dialog.

   GoldMine opens your email upon retrieval.
3. 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 email 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 inter-operability between Outlook messages created in Outlook and GoldMine.

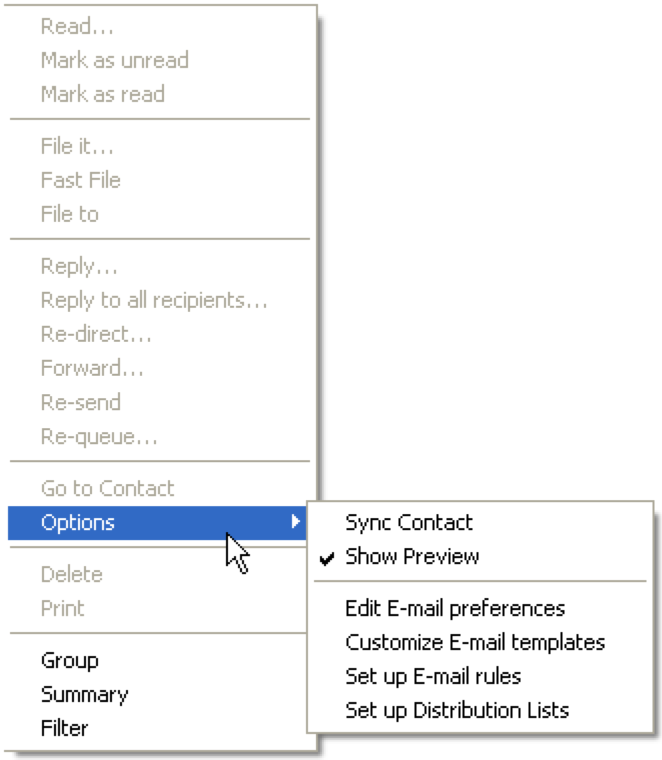
Using E-mail Templates

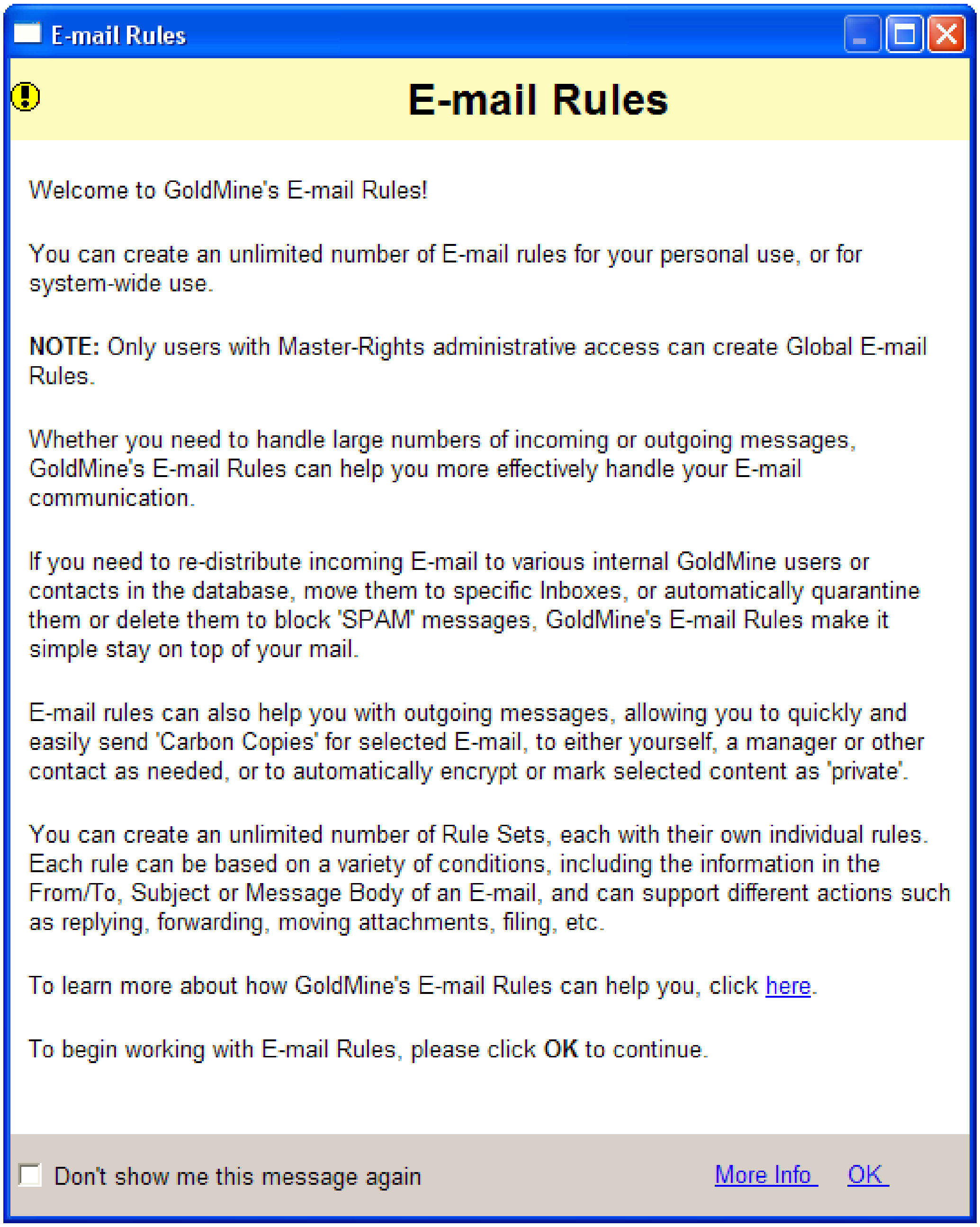
After creating an e-mail template in the Document Management Center, select it when creating an e-mail. For information on creating an email template, see “Creating Email Templates” on page 164.

1. Select **Actions>>E-mail,** or **Schedule>>GoldMine E-mail.**
2. From the E-Mail Center, click **New Message** in the toolbar.

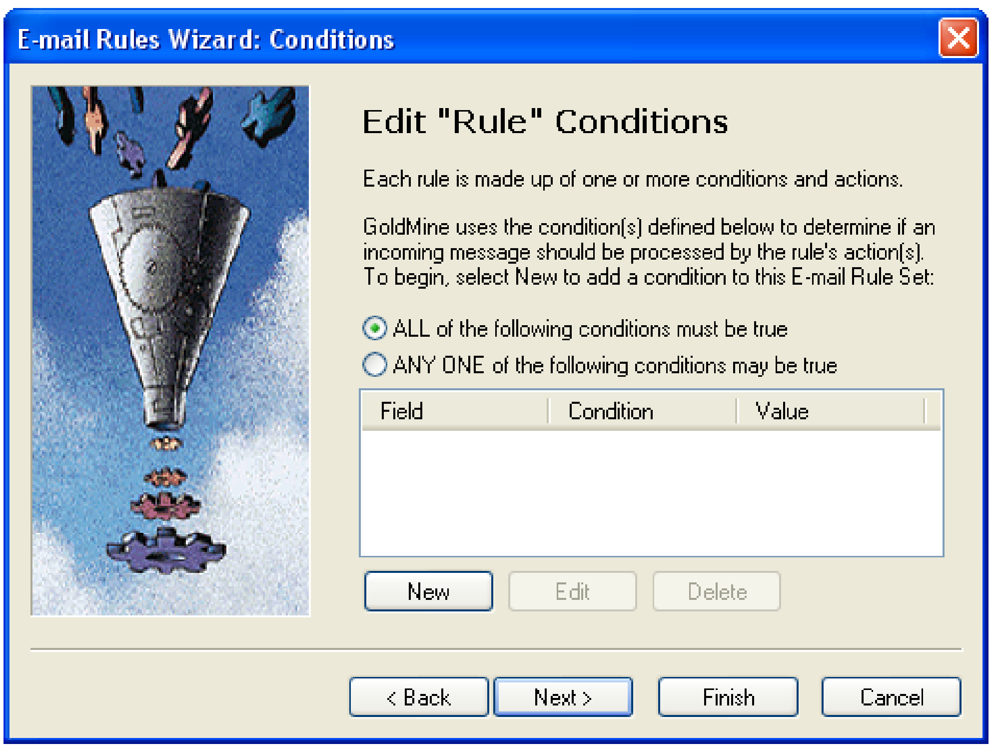
   The **Edit E-mail** dialog box opens.
3. At the **Subject** drop-down list. select the template.
4. To select the template of another user, click **Select Template User.**
5. Edit the message as needed.

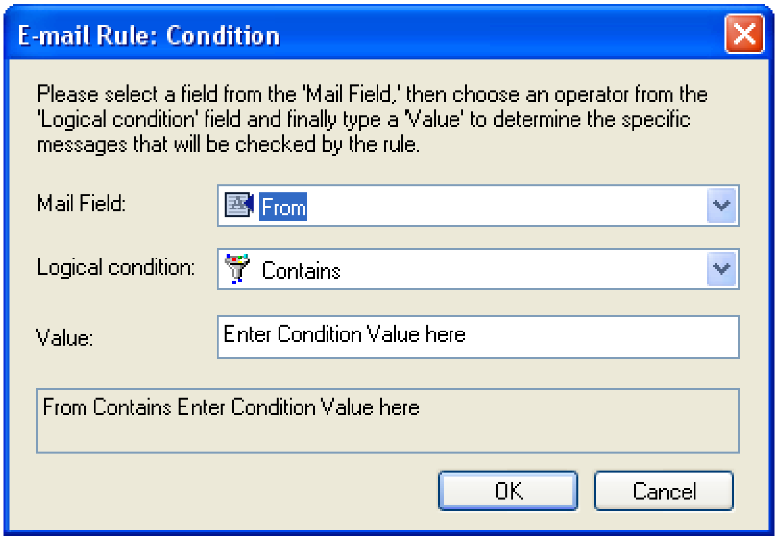
6. Click **Send** to send the message immediately or **Queue** to queue it for sending at the times defined in the Server Agents Administrator.



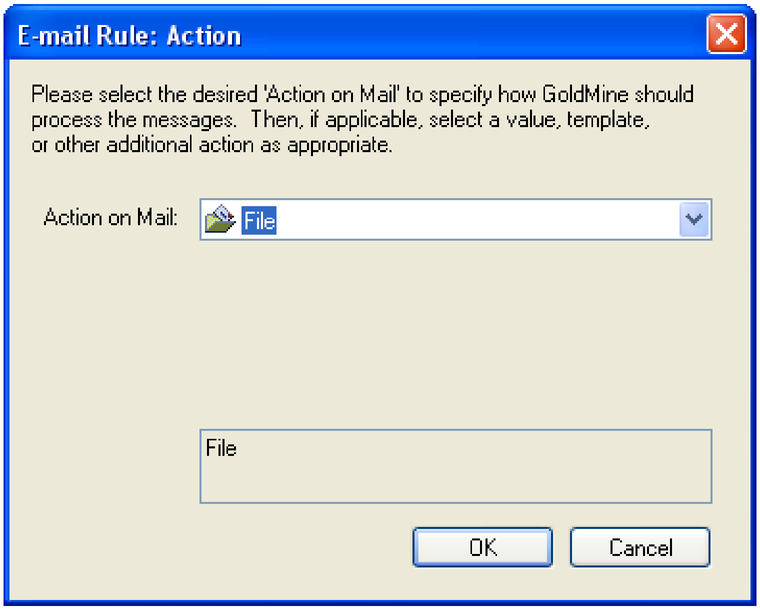

E-mail Rules
E-mail Rules
Welcome to GoldMine's E-mail Rules!
You can create an unlimited number of E-mail rules for your personal use, or for system-wide use.
NOTE: Only users with Master-Rights administrative access can create Global E-mail Rules.
Whether you need to handle large numbers of incoming or outgoing messages, GoldMine's E-mail Rules can help you more effectively handle your E-mail communication.
If you need to re-distribute incoming E-mail to various internal GoldMine users or contacts in the database, move them to specific Inboxes, or automatically quarantine them or delete them to block 'SPAM' messages, GoldMine's E-mail Rules make it simple stay on top of your mail.
E-mail rules can also help you with outgoing messages, allowing you to quickly and easily send 'Carbon Copies' for selected E-mail, to either yourself, a manager or other contact as needed, or to automatically encrypt or mark selected content as 'private'.
You can create an unlimited number of Rule Sets, each with their own individual rules. Each rule can be based on a variety of conditions, including the information in the From/To, Subject or Message Body of an E-mail, and can support different actions such as replying, forwarding, moving attachments, filing, etc.
To learn more about how GoldMine's E-mail Rules can help you, click here.
To begin working with E-mail Rules, please click OK to continue.
Don't show me this message again
More Info
OK


E-mail Rules Wizard: Welcome
E-mail Rules Wizard : Welcome!
This wizard will help you process and organize incoming E-mail by walking you through the procedure to create management rules.
For example, an E-mail rule set can be created to automatically mark all messages from a particular sender as private, or to automatically file all messages that contain a particular word in a custom folder in your E-mail Center that tracks a specific project.
GoldMine allows you to activate or deactivate any number of rule sets at a time. So, if necessary, you may activate an E-mail rule set temporarily to send an automatic response whenever you're away from the office.
To begin, please enter a unique name for this E-mail Rule:
Rule
Select what type of E-mail should this rule handle:
Incoming E-mail
Outgoing
Incoming and Outgoing
< Back
Next >
Finish
Cancel


E-mail Rules Wizard: Conditions
Edit "Rule" Conditions
Each rule is made up of one or more conditions and actions.
GoldMine uses the condition(s) defined below to determine if an incoming message should be processed by the rule's action(s). To begin, select New to add a condition to this E-mail Rule Set:
ALL of the following conditions must be true
ANY ONE of the following conditions may be true
Field
Condition
Value
New
Edit
Delete
< Back
Next >
Finish
Cancel


E-mail Rule: Condition
Please select a field from the 'Mail Field,' then choose an operator from the 'Logical condition' field and finally type a 'Value' to determine the specific messages that will be checked by the rule.
Mail Field:
From
Logical condition:
Contains
Value:
Enter Condition Value here
From Contains Enter Condition Value here
OK
Cancel


E-mail Rules: Actions
Edit "Rule" Actions
Each rule is made up of one or more conditions and actions.
GoldMine uses the action(s) that you define below to determine how to process an incoming message, which matches the previously defined condition(s) of the rule.
To continue, select New to add an action to this E-mail Rule Set:
Action
Value
New
Edit
Delete
< Back
Next >
Finish
Cancel



Creating Distribution Lists

Use the following procedure to create custom email Distribution Lists of contacts, users, and manual email addresses.

1. In the E-mail Center, right-click and select **Options>>Set up Distribution Lists.**

   The Distribution List Center opens.

2. Right-click the upper-right pane and select **New Distribution List.**
3. Type a descriptive name for the list and press **Enter.**
4. Right-click the new distribution list and select one of the following options:
   - **Add Contact.** Add a contact from the Contact Search Center.
   - **Add Contacts E-mail.** Add a contact from the Contact Search Center and specify the email address.
   - **Add User.** Add a user or user group.
   - **Add Manual E-mail address.** Select or type the e-mail address.
   - You can add more than one recipient to the Distribution list.

Using the Document Management QuickStart Wizard

GoldMine Plus for Microsoft Office is installed during the main GoldMine application installation. It can also be installed independently by using the Add/Remove Programs Windows control panel.

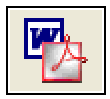
GoldMine Plus for Adobe Acrobat is installed from its own installer. For more information about installing and using GoldMine Plus for Adobe Acrobat, please see the document: ***GMAcrobatLink.pdf***, located on your GoldMine installer CD, or via: http://support.frontrange.com.

NOTE: GoldMine must be installed locally in order to install the Acrobat Link. It will not function from a shared folder location.

This Document Management QuickStart Wizard directs you to an informational web page. It does not install any add-on products.

1. Select **Tools>>Quick Start Wizard.**

   The GoldMine QuickStart Wizard dialog box opens.

2. Click the Document Management Wizard button .

   A web page opens in your browser showing details about the GoldMine Plus suite of products.

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 email messages, you can use GoldMine to configure your Internet E-mail Options.

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 **Edit>>Record Properties>>Contact Details>>Digital IDs** tab and import your Digital ID using your **Internet E-mail 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 Message.** 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 Email

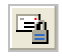
Protect e-mail messages with encryption. Messages encrypted with **Encrypt using GoldMine** can only be read by GoldMine users with the correct password. Messages sent as **Encrypt using Digital ID** can only be sent using the recipient's public key and can only be decrypted and read using the recipient's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

You can protect e-mail messages with encryption. Messages encrypted with Encrypt using GoldMine can be read only by other GoldMine users with the correct password.

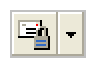
1. On the toolbar, click the **Encrypt Message**  button (if you are reading a message and want to encrypt it before sending it to other GoldMine users or filing the message, automatically encrypt using GoldMine; otherwise, select **Encrypt using GoldMine**.

   The Encryption Settings dialog box opens.
2. Select **Encrypt the message.**
3. In the **Password** field, type the password you are using on the message.
4. In the **Encryption mode** drop-down list, select the encryption level.
5. Click **OK** to save your settings.

NOTE: Only users with the proper password and working in GoldMine can open the message.

Sending Email Messages Encrypted Using Digital ID

When you encrypt a message using a digital ID, you must have the contact/recipient's digital ID configured in the **Record Properties>>Contact Details**. Encrypting a message to a recipient with a digital ID encrypts the message using the recipient's public key. When recipients receive the message, they decrypts it using his or her private key. You can configure your Internet Security settings to automatically encrypt all outgoing messages with a Digital ID.

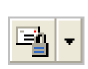
6. On the tool bar, click the **Encrypt Message** drop-down arrow  button and select **Encrypt using Digital ID.**

   The outgoing message will be sent encrypted.
7. If a Digital ID is not configured for the contact, a warning box states GoldMine cannot encrypt the message. Click **OK** to return to the unsent message window.
8. Configure the contact's Digital ID or remove the encryption from the message by clicking the **Encrypt Message** drop-down arrow and toggling the **Encrypt using Digital ID option** off.

For more information on encrypted email messages, see the *GoldMine 8.5 Administrator's Guide*.

Sending Digitally Signed Email

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.

On the toolbar, click the **Sign with Digital ID**  button. Your digital signature is added to the outgoing message.

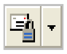
Reading Email Sent with Digital IDs

Receive email messages digitally signed and encrypted from non-GoldMine users.

Senders must have a Digital ID from a valid Certificate Authority before they can send you a signed email.

To send you an encrypted email message, senders 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.

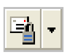
Signed Icon in Inbox



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

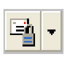
When the message signature is verified, the Inbox displays a signature icon next to the message. When you open the message, you are notified if the signature is verified or if the signature verification failed.

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 You are asked to supply the password to your private key to read the message.

Signed and Encrypted Icon in Inbox

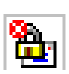


Signed and Encrypted. When receiving a digitally signed and encrypted message, the message includes the sender's digital signature and a message encrypted with your public key (supplied to the sender at an earlier time).

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

Failed Encrypted and Signed Icon in Inbox



Signature Verification Failed Banner on Message

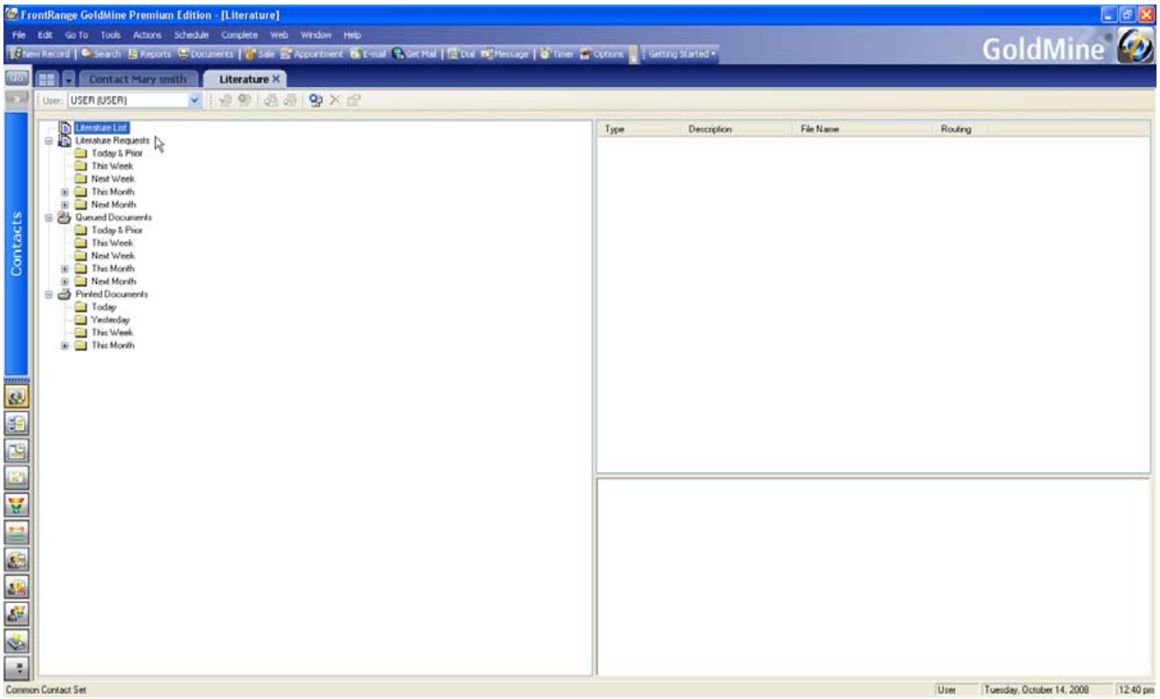
Reasons signatures can fail.

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

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.



You can perform the following tasks in the Literature Fulfillment Center:

- 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.

Use the following procedure to access the Literature Fulfillment Center.

1. Select **Go To>>Literature.**

The **Literature Fulfillment Center** opens.

2. Use the toolbar to execute commands or local menu options in the left pane to manage:

- **Literature List.** A predefined literature list that varies depending on which user created the literature packet. This list is available when you schedule a Literature Request. When selecting a Literature List in the left-hand pane, the literature options display in the right pane.

  Right-click on the Literature List to access the local menu.

  - **Refresh.** Refresh the Literature List.
  - **Refresh All**. Refresh everything in the left pane.
- **Literature Requests.** Literature 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.

  - **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. For more information on Mail Merge properties, see “Using Mail Merge Properties (Printing)” on page 155.

Queued Documents Local Menu

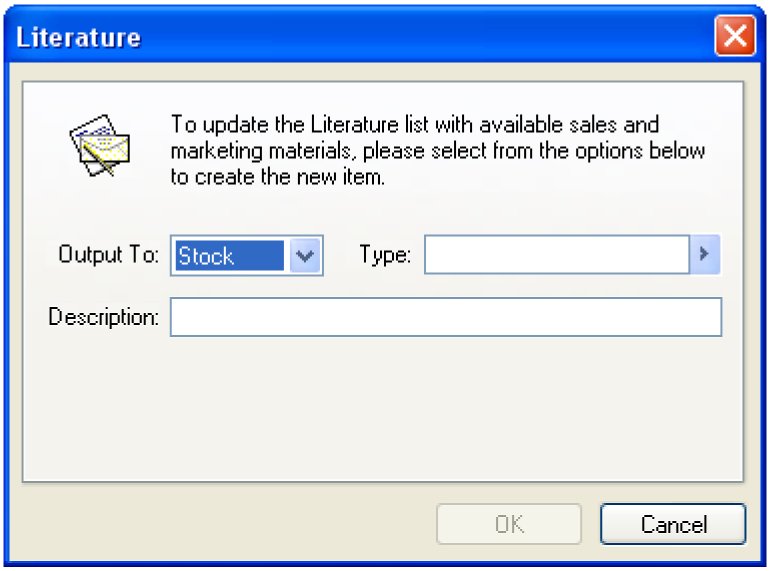
- **Refresh.** Refresh the Literature List.
- **Refresh All.** Refresh everything in the left pane.
- **Printed Documents.** Documents and literature requests you fulfilled. Right-click **Printed Documents** to access the local menu.
- **Refresh.** Refresh the Literature List.
- **Refresh All.** Refresh 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 **Go To>>Literature.**
2. At the Literature Fulfillment Center, highlight **Literature List** in the left pane and right-click and select **New** from the local menu.

   The **Literature** dialog box opens.



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** field, type or select the literature type from the F2 Lookup list.
5. In the **Description** field, type or select a brief description of the literature from the F2 Lookup list.
6. Click **OK**.

Editing Documents in the Literature Fulfillment Center

1. Select **Go To>>Literature.**
2. At the Literature Fulfillment Center, 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 opens.

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.
5. In the **Type** field, type or select the literature type from the F2 Lookup list.
6. In the **Description** field, type or select a brief description of the literature from the F2 Lookup list.
7. 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 **Go To>>Literature.**
2. At the **Literature Fulfillment Center,** 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.
5. 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.
6. To reject the request, select **Reject.**
7. At the Rejection of Literature Requests dialog box, 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.

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 come 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.

Use the following procedure to fulfill or reject queued documents.

1. Select **Go To>>Literature.**
2. At the **Literature Fulfillment Center,** 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.
5. To fulfill the print or fax request, right-click and select **Fulfill**.

   The document will print or send, depending on the settings configured.
6. To reject the request, right-click and select **Reject.**

   The Rejection of Queued Document dialog box opens. Type or select the reason in the F2 Lookup list.

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

Use this procedure to edit a Literature Request assigned to you

7. Select **Go To>>Literature Fulfillment.**
8. At the Literature Fulfillment Center, select your name in the **User** drop-down list to view requests assigned to you.
9. Select the **Literature Requests** date or date range for the request to act on. The literature request appears in the upper right pane.
10. Highlight the literature request, right-click, and select **Edit.**

    The Schedule a Literature Request dialog box appears.

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.

Branching Scripts Workflow

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 **Go To>>Scripts.**

   The Script dialog box appears.

2. Click **Maintain Scripts.**

   The Branching Scripts Listing dialog box opens. It lists the script names in the main pane and the number of times it was run.

3. Click **New.**

   The Branching Scripts Profile dialog box opens.

Branching Scripts Listing Dialog Box

The following buttons appear on the Branching Scripts Listing dialog box:

- **New or Edit.** Opens the Branching Script Profile dialog box.

  Click **New** to create a telemarketing script.

- **Delete.** Removes the script.
- **Reset.** Resets the selected script statistics, including all response percentages, and the number of runs.
- **Close.** Exits the dialog box.

Branching Scripts Profile Dialog Box

The following options appear on the **Branching Scripts Profile dialog box**:

- **Number**. Determines the location of the script in the browse window. Lower numbered scripts appear higher on the list.
- **Script**. Descriptive title for the script.
- Existing questions display in the **Script Questions** pane.
  - **New**. Displays the **Branching Script Question** dialog box where you add a script question.
  - Click **New** to create a telemarketing script.
- **Edit.** Displays the Branching Script Question dialog box where you edit the highlighted script question's number, title, or responses.
- **Delete.** Deletes the selected script question.

Branching Script Question Dialog Box

When you select **New** or **Edit** from the **Branching Script Profile**, the Branching Script Question dialog box opens.

- **Title.** Descriptive title for the question that appears at the top of the question screen when the script is used.
- **Update field.** Optionally, you can select a field in the drop-down list to store the response to this question when the script is executed. When a field is used, GoldMine places the text of the response in the selected field in the contact record.
- **Notes.** Question and any other text to be delivered to the participant.
- **Question No.** The question number assigned to the script question.

  You should have selected a question number for each question when you designed the script. Enter numbers lower than 10 with a leading zero. For example, enter `1` as `01`.
- **Save History.** Select this field to include the question's title and response in the script dialog text. If this field is cleared, the question is excluded from the dialog when the script is executed.
- **New.** Adds a response record.

  The Branching Script Answer dialog box opens.
- **Edit.** Edits a response. The Branching Script Answer dialog box appears.
- **Delete.** Removes the selected response.

Branching Script Answer Dialog Box

When you select **New** or **Edit** to add a response record, the Branching Script Answer dialog box opens.

- **Number.** The number of the response determines the position of the response in the listing. Lower number responses appear on the top of the list.
- **Goto.** Type the number of the question this response leads to. The Goto question number displays if this response is selected during script execution.
- **Answer.** Type the text of the response.
- **Prompt for response.** Select this field to prompt the operator to enter a response when this answer is selected.

  This option can be selected only when an entry is made in **Update** field in the **Branching Script Question dialog box**. The operator's response saves to the field specified by Update field.

  If the script question contains only one answer and that script answer has the **Response box** checked, GoldMine automatically displays the Enter Response dialog box, eliminating the need to select the answer.

After entering all the questions and responses into GoldMine, perform a test by running the script.

Using Telemarketing Scripts

Use telemarketing scripts to construct structured dialogs with customers.

1. Select **Go To>>Scripts.**

   The Telemarketing Script dialog box opens.

   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.

Making and Answering Calls with 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.

NOTE: 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.

NOTE: 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 **Actions>>Call Contact>>Launch SoftPhone.**

   The SoftPhone control dialog box opens.

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.

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

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 **Go to>>Personal.**

   Your Personal Contacts dialog box opens.

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.

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

Data Maintenance and Management

About Managing Information

GoldMine's extensive feature set lets you share data between GoldMine and other applications, to globally replace field data, and to monitor running processes.

Maintaining the data in your GoldMine database ensures the highest performance for your system and the most effective use of information. GoldMine is equipped with many features to help maintain your system.

About Contact Set Databases

Use the Contact Set Databases dialog box to create, attach, delete, and edit contact database properties. To open the Contact Set Databases dialog box, use the following procedure.

1. Select **Tools>>Databases>>Open Database.**

   The Contact Set Databases dialog box opens. The currently attached Contact Set databases display in the database list stored in the **SPFiles** table. The buttons are explained below:

   - **New.** Launches the Database Wizard. Create a new database. See “Data Maintenance and Management” on page 197.
   - **Attach.** Opens the Contact Set Profile dialog box. Attach a database to the Contact Set listing. See “Defining Contact Set Profiles” on page 198.
   - **Delete.** Deletes the highlighted database.
   - **Properties.** Opens the Contact Set Profile dialog box. Edit properties of an existing database. See “Defining Contact Set Profiles” on page 198.
   - **Open.** Opens the highlighted database in GoldMine. See “Opening Databases” on page 199.
   - **Close.** Closes the Contact Set Databases dialog box.

2. If you right-click the database list with a database highlighted, select **Open, Attach Database, New, Delete, and Properties** options, and also select:
   - **Maintain Database.** Launches the Maintenance Wizard. See “About Maintaining Databases” on page 206.
   - **Find.** Searches for words in the Description, Access, and Database/Location fields.
   - **Output to.** Output the Contact Set list to the printer in a GoldMine Report format, Word, Excel, or the clipboard.

Defining Contact Set Profiles

The Contact Set Profiles dialog box appears when editing the Properties or Attaching Databases. You can set the description and path, ownership and access, and the SQL login information.

Use the following procedure to define contact set profiles.

1. Select **Tools>>Databases>> Open Database.**

   The Contact Set Databases dialog box opens.
2. Highlight the database and click **Properties** to edit an existing database, or click Attach to add a database to the Contact Set Database list. The Contact Set Profiles dialog box opens.
3. In the **Contact Set** area, type the **Description** in the field.
4. Type the three-letter **File Code**.

   This is a unique code used to identify a database among multiple databases when GoldMine synchronizes.

   NOTE: The File Code is required for synchronization.
5. The **Server Type** drop-down list displays the type of database (fixed; you cannot add or change an entry in this field).
6. Select the appropriate **Alias** from the drop-down list (displays known aliases; auto populated based on Database Connections Manager).
7. In the Owner text box, retain the default dbo or type the owner of a SQL database (Firebird has no owner).
8. In the GoldMine File Ownership & Access area, select a user or user group from the Grant access to this file for drop-down list, or leave as (public). Only the owning user or user group can open this Contact Set.

   NOTE: Users with Master Rights can access all contact databases, without regard to the owner.

9. Select **Grant Access** from this GoldMine license only to let only the currently running GoldMine to open the database.

NOTE: For SQL users only, type the Logon name and Password you placed on the SQL database.

10. Click **OK**.

Opening Databases

GoldMine lets you have more than one Contact Set database. For example, departments within your company may use different databases.

1. Select **Tools>>Databases>>Open Database.**

   The Contact Set Databases dialog box opens.

2. Highlight the database to open and click **Open**. The new database opens with the database name in the lower left corner of the GoldMine status bar.

About Creating Databases

Use the Databases Wizard to create a database for new data or rehost an existing database to a new database. You can create or rehost the Contact files and/or the GoldMine files.

The Contact files contain all the tables related to the Contact records; when you create a new database, the database name is added to the Contact Set Databases dialog box. The GoldMine files contain the shared tables such as Calendar, Filters, Mailbox. When you create a new database of any of these files, GoldMine does not add the database name to the Contact Set Databases dialog box.

Rehosting creates a new database, but copies or converts data from the old database to the new one without affecting the original database. The rehosting process converts dBASE to Firebird or SQL, letting an organization support multiple platforms.

Creating SQL Databases

Creating a new SQL database is a three-stage process. Create the:

- SQL database shell
- Alias
- Database in GoldMine

NOTE: Follow the steps below to initiate the process, or use the Database Wizard. For detailed information, see your Microsoft SQL documentation.

1. From the Windows **Start** menu, select **Programs>>Microsoft SQL Server>>SQL Server Manager Studio**.

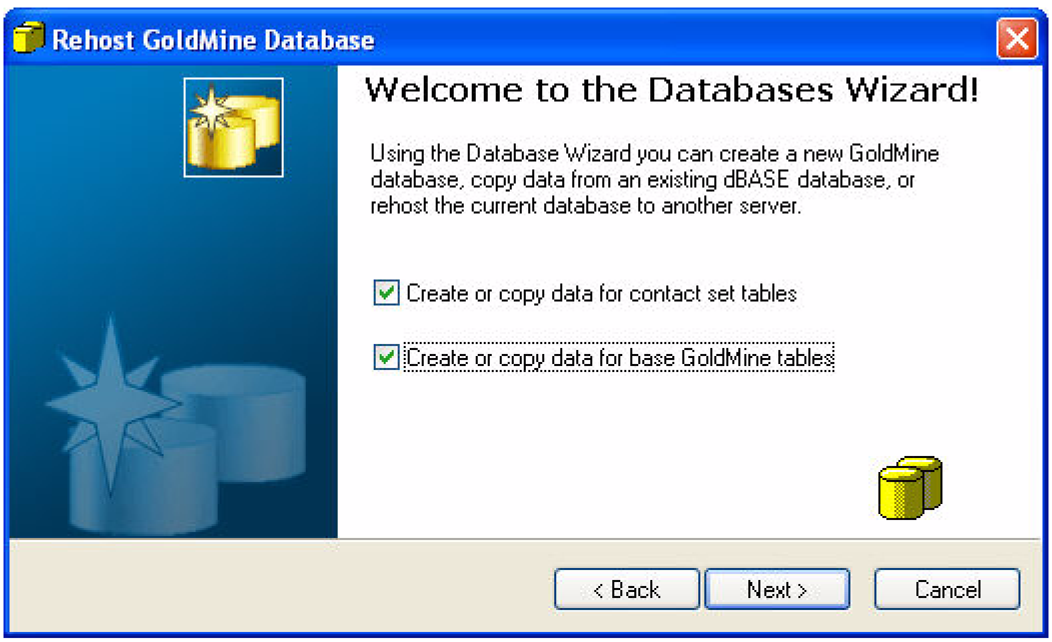
2. Expand the files under the **Console Root** to locate the correct server. Expand the server to locate **Databases**.
3. Right-click **Databases** and select **New Database**. The **Database Properties** dialog box appears.
4. In the **Name** text box, type the database name.
5. Click **OK**. The new database now appears in the database list.
6. Create an alias for the database in the Database Connections Manager.

Using the Databases Wizard

Use the ***Databases Wizard*** to create a new database or contact set. The new database can be created as either a copy of the currently active database, or as an empty database containing the same fields as the currently active database. You can also copy data from a dBASE database.

1. Select **Tools>>Databases>>New Database.**

   The **Welcome to the Databases Wizard** dialog box opens.

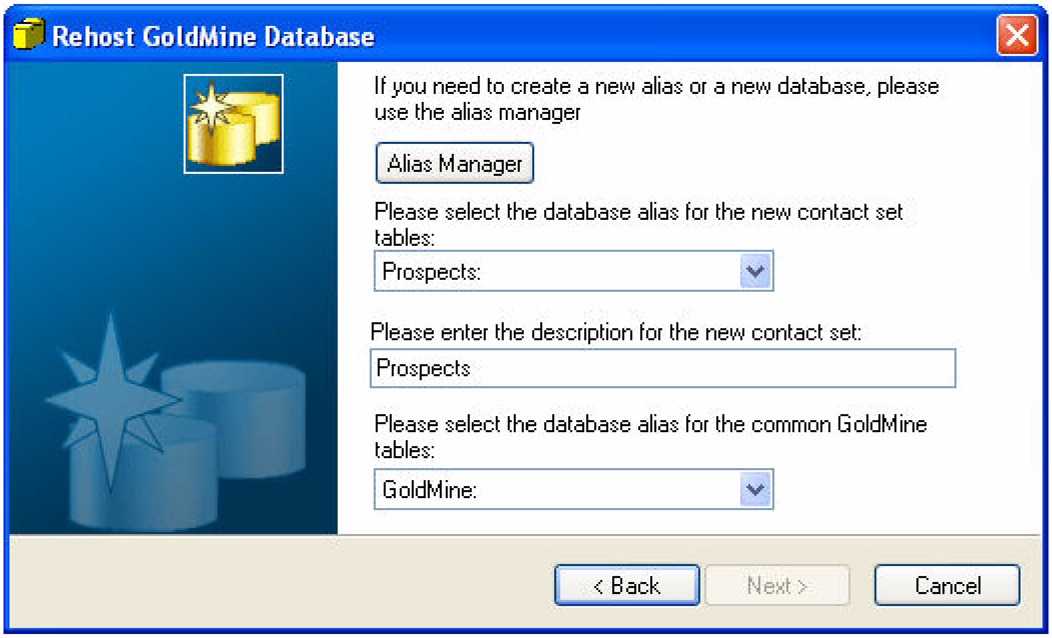


   Select the check boxes corresponding to the type of data you will create or copy.

   - **Contact set tables.** Select this option to create or rehost a new Contact Set.
   - **Common GoldMine tables.** 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.

NOTE: For this example, both contact set and common GoldMine tables are selected.

2. Click **Next**.

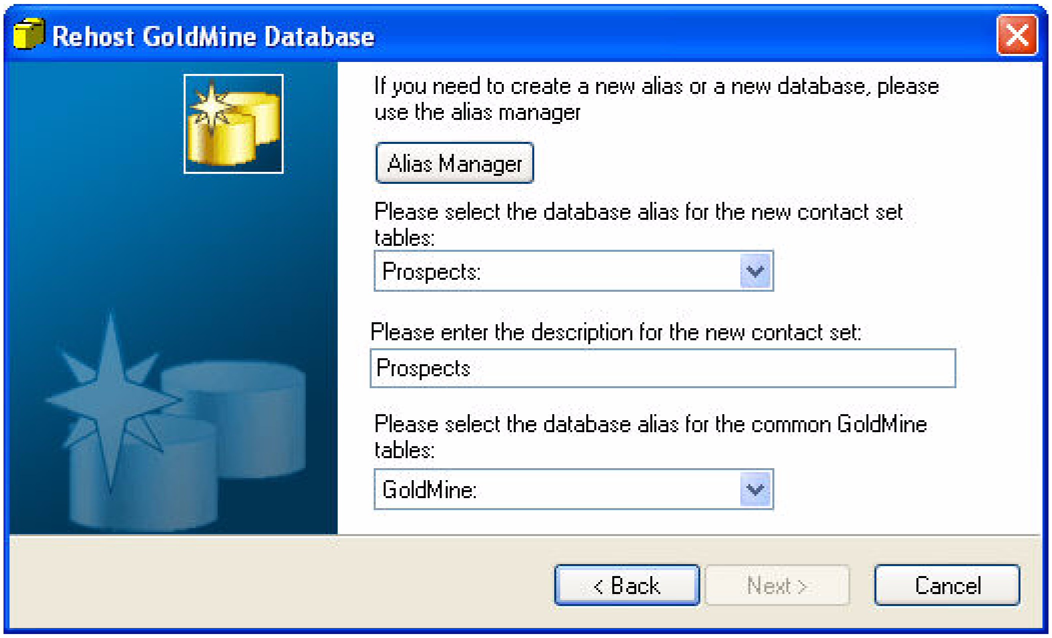


3. To create a new alias or database, click the **Alias Manager** button.

   The Database Alias Manager dialog opens. After you create your new alias or database, the Databases Wizard will reopen. See "Using the Database Alias Manager for SQL and Firebird Databases" on page 204.

   - If you chose to create or copy **contact set tables** in the previous step of the Wizard, select the database alias for the new contact set from the drop-down menu, then enter a description for it in the text field below.
   - If you chose to create or copy **common GoldMine tables** in the previous step of the Wizard, select the database alias for the new GoldMine tables from the drop-down menu.

     Click **Next**.



Select the data source for your new database using the radio buttons

- **Create blank tables. (no data, except for a few system records):** Select to create an empty database. Click **Next**, or go to **Select individual tables to rehost** below to individually select the tables for your new database.
- **Copy data from the currently active database.** Select to copy records from the currently active database into the new database. Click **Next**, or go to **Select individual tables to rehost** below to individually select the tables for your new database.
- **Copy data from 6.x dBASE tables:**. Select to open a dialog box for defining paths to external dBASE data.
- **Advanced Settings:**
    - **Select individual tables to rehost:** Select this check box to choose individual tables to rehost in your new database.
    - Click **Next**. The Rehost Selected Tables dialog box opens.

After the dBASE and Rehosting processes are completed, (or if you did not select these optional step), the **Database Access** dialog opens.

4. Select from the following options:

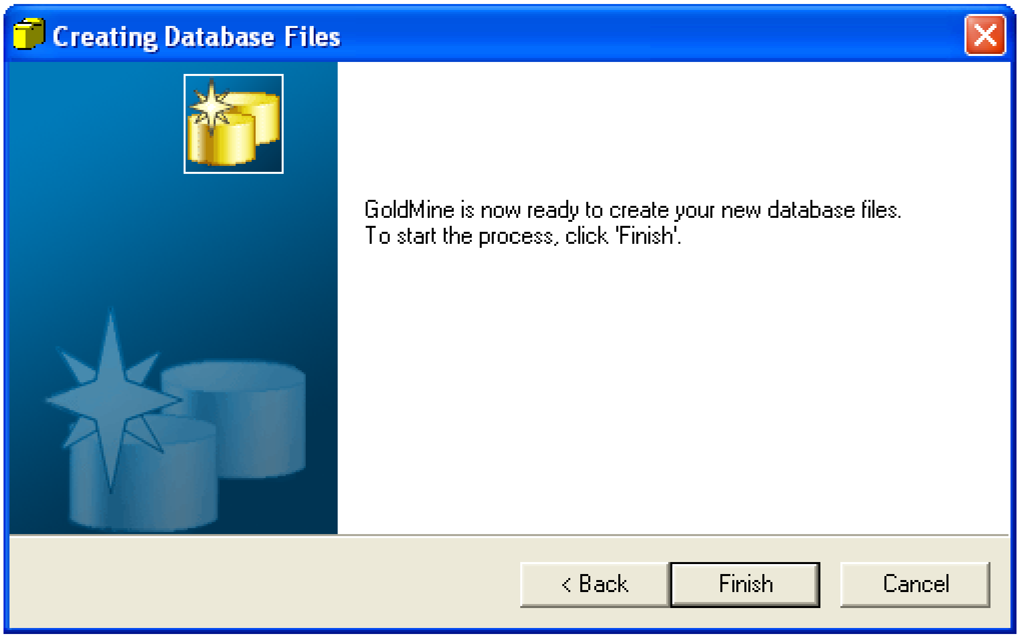
- From the **Allow access to** drop-down list, accept the default **(public)**. This grants access to all users and groups. To select a user or user group, select a name in the drop-down list.
- In the **Contact set code** text box, type a unique value (such as **GM7_P**). GoldMine uses this to associate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

  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 names the Contact Set *Industrial;* the West Coast office names the same contact set "Manufacturing". As long as each office assigns the same Contact set code value to the local copy of the database, the offices can synchronize data.

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

NOTE: Selecting this check box allows only the currently active GoldMine system (as determined by serial number) to log into the database. A GoldMine system with a different serial number cannot log into the database.

Click **Next**. The **Creating Database Files** dialog box opens.



6. Click **Finish**. The status dialog box opens.

   When complete, a message appears asking if you want to open this new database now. Click **No**.

NOTE: 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 Database Alias Manager for SQL and Firebird Databases

1. From the menu bar, select **Tools>>Databases>>Alias Manager,**

   or

   From the appropriate window in the Databases Wizard, click the **Alias Manager** button. The Database Alias Manager opens.

   To alias a database, click **New Alias.** The Edit Alias dialog opens.

NOTE: This dialog window contains a form for collecting information used to build an ADO connection string. This information is stored in an INI file.

---

2. In the **Alias Name** field, type a name for the alias.

   There is a 100-character limit.

3. From the **Server Type** drop-down list, select either **MSSQL** or **Firebird**.

NOTE: : The form will change depending on the Server Type selected.

---

4. In the **Host** field, type the name of the computer hosting the database.
5. In the **Database** field, type the name of the database.
6. In the **Owner** field, type the database owner's name. [Typically, this is dbo. This applies only to MSSQL aliases.]
7. In the **Login** field, type the username for the database.
8. In the **Password** field type the password for the database.

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

NOTE: This action registers the alias and creates the database specified. The new database will not be created without completing this step, although it will appear in the list. You cannot test it prior to completing this step.

---

9. 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.]
10. Click **Create New Database.**
11. Click **Test Connection**. This verifies that the alias was created successfully.
12. Repeat this process for each alias you wish to create and the click **OK** when done.

Editing an Alias

1. From the menu bar, select **Tools>>Databases>>Alias Manager**.

   The Database Alias Manager opens.
2. Select an alias from the list and click **Edit.**

   This activates the associated form.
3. Make appropriate changes to the information in the text boxes.
4. Click **Save** and then click **OK**.

Deleting an Alias

1. To delete an alias, select the alias.
2. Click **Delete** and then click **OK**.

About Maintaining Databases

GoldMine includes a database Maintenance Wizard that generates indexes, rebuilds and packs the data, and sorts and verifies the database. Indexing ensures data integrity and quick access to the data in indexed fields. Rebuilding and packing creates fresh data files and builds tables, and then repacks the database, minus the deleted records. Sorting the database orders database files by the most-used indexes. Verifying data ensures it is readable, that the fields in the synchronization records are populated and readable, and that unique fields are not duplicated.

- Indexing Databases
- Rebuilding and Packing Databases
- Sorting and Verifying Databases

CAUTION: Before maintaining the database, always do a full backup of your database. This guarantees you can restore the database if something interrupts the process. For example, a power outage or network failure during the process could cause data loss.

Only one user should be logged into the GoldMine system during maintenance operations. Before the maintenance begins, GoldMine ensures no other user is accessing that data. Once the operation is in progress, GoldMine prevents other users from accessing the system by renaming the **License.bin** to **License.bix**. When maintenance is completed, the license renames back to **License.bin**.

To monitor what database maintenance has been initiated, view the Maintenance Logs.

Attaching Databases

Attach an existing database to make it available in GoldMine. Then tell GoldMine where the database is located, who the owner is, and, if necessary, the SQL login information.

Use the following procedure to attach a database.

1. Select **Tools>>Databases>> Open Database**.
2. At the Contact Set Databases dialog box, click **Attach**.

   The Contact Set Profile dialog box opens.
3. Update the fields as needed. See “Defining Contact Set Profiles” on page 198.
4. Click **OK**.

Globally Replacing Fields with a Value

Use the Replace a Field with a Value option in the Global Replace Wizard to change the value of a field with another value.

1. Select **Tools>>Data Management>>Global Replace.**
2. At the Global Replace Wizard, select **Replace a Field with a Value**, then click Next.
3. Select a **Replace Field** in the drop-down list.

   This specifies the field to be updated. The data in this field will be replaced by the value specified in the With Value field.

   Select the GoldMine fields in the drop-down list.
4. Type or select from the F2 Lookup list the **With Value** to insert in the selected field.

   This option specifies the replacement value that will be placed in the Replace Field. GoldMine will replace the specified field in all contact records with the value in this field. For example, if the Replace Field is City, and the With Value entry is Long Beach, GoldMine will replace all City entries with Long Beach.
5. Click **Next.**
6. Check the fields and replacement values before initiating the process:
   - **Expand partial contact records.** Expands partial contact records in the database into complete records if the field to be replaced is contained in the Contact2.dbf file. If the field is contained in Contact2.dbf, this option is selected by default.

     If you clear the Expand partial contact records option, partial records are not expanded, and field values in these records are not updated. However, when additional entries require more space, GoldMine converts a partial record to a complete record. Clearing Expand partial contact records prevents GoldMine from automatically converting partial records during a global replacement.
   - **Update linked fields (based on lookup.ini).** Changes values in linked fields according to the instructions in the [AutoUpdate] section of the Lookup.ini file. This option is available only if one or more selected fields include fields listed in Lookup.ini.
   - **Log updates in history.** Records global changes to fields in the following System Logs:
   - **Process Monitor Logs.** Displays the date, time, user, and number of records affected by the global replacement
   - **Contact Files Logs.** Displays the date, time, user, field name, and the value inserted by the global replacement. This option appears only if you selected Log updates in history for each field from the Field Label dialog box which you can access by pressing CTRL and double-clicking the field label.
7. You can globally replace more than one field at a time. To add another field and replacement value, click Back.
8. If you have more than one replacement entry, Remove becomes active. You can delete any entry other than a single entry.

9. Click **Remove** to delete the highlighted global replacement entry.
10. Click **Next.**

    The Global Replace Wizard displays a list of available filters and groups to apply to limit the records updated by the global replacement. The filter or group does not have to be activated prior to selection.

    Select the filter or group to apply in the drop-down list, then click **Next.**

    The final Global Replace dialog box appears.
11. Click **Finish.**

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 of Using Lookup.ini

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 Kansas City, 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 **Kansas City**, **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 Fileds 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
```

Globally Updating Fields Using Advanced Options

Use the Updating Fields Using Advanced Options in the Global Replace Wizard for the following advanced options:

- Replacing an entire field with a value
- Replacing field text only with a value
- Evaluating the replacement value as a dBase expression
- Replacing field text with a value at the specified position

1. Select **Tools>>Data Management>>Global Replace.**
2. A the The Global Replace Wizard, select the **Update a field using advanced options** and click **Next.**
3. Select from the following options:
   - **Update Field.** Specifies the field to replace with the selected option.
   - **Replace.** Type the value to insert into the specified field. GoldMine replaces the specified field in all contact records with this value.
   - **Replace the entire Field with Value.** Removes any entry in the field and inserts the contents of the field.
   - **Replace text with Value.** Removes specified text only from the field and inserts the value from this field. GoldMine conducts a case-sensitive search for the value you enter. An F2 Lookup list is not available for this option.
   - **Insert Value at position.** Specifies the position, in character spaces, where the replacement value appears in the specified field.
   - **Evaluate Value as dBase expression.** Replaces the field with the result of the dBase expression entered in Replace.
4. In the Convert to area, select one:
   - **Proper case.** Converts characters in the field value to initial capitals. For example, if the field value is ACME PRODUCTS, the entry is converted to Acme Products.
   - **Upper case.** Converts all alphabet characters in the field value to capital letters. For example, if the field value is Acme Products, the entry is converted to ACME PRODUCTS.
   - **Lower case.** Converts all alphabet characters in the field value to lowercase letters. For example, if the field value is Acme Products, the entry is converted to acme products.

- **Phone format.** Converts all telephone numbers in the replacement entry to the format that was selected for the record. Telephone numbers in contact records set up for a USA format appear as (999)999-9999; telephone numbers in contact records set up for an international phone format have no formatting applied.
- Click **Next.**

5. Check the fields and replacement values before initiating the process.
   - **Expand partial contact records.** Expands partial records in the database into complete records if the field to replace is contained in the Contact2.dbf file.

   NOTE: If the field is contained in Contact2.dbf, this option is selected by default. If you clear the Expand partial contact records options, partial records are not expanded, and field values in these records are not updated.

   - **Update linked fields (based on lookup.ini).** Changes values in linked fields according to the instructions in the [AutoUpdate] section of the Lookup.ini file. This option is available only if one or more selected fields include the field(s) listed in Lookup.ini.
6. You can globally replace more than one field at a time.

   To add another field and replacement value, click **Back**.
7. Click **Remove** to delete the highlighted global replacement entry.

   If you have more than one replacement entry, Remove becomes active. You can delete any entry other than a single entry.
8. Click **Next.**

   The Global Replace Wizard displays a list of available filters and groups you can apply to limit the records to be updated by the global replacement. The filter or group does not have to be activated prior to selection.
9. Select the filter or group to apply from the drop-down list and click **Next.**
10. At the final Global Replace dialog box, click **Finish.**

Moving Linked Documents and Attachments

Email attachments and/or documents linked to contacts, the Knowledge Base and Service Center may be stored in folders on disks.

Use the following procedure to move that folder to another location, (for example from the C: drive to the E: drive, or from Program Files to ProgramData for Vista compliance).

Use the following procedure to move linked documents and attachments.

1. Select **Tools>>Data Management>>Move Linked Docs and Attachments.**
2. Click the **Move the Linked Documents, Knowledge Base and Case Attachments to** checkbox if not selected and then define destination folder.

   The **Move Linked Docs and Attachments** dialog box opens.

   - Go to Step 3 if you want GM to automatically find ALL linked documents, knowledge base and attachments, and move them to destination folder.
   - Click the **Add** button and select the source folder(s) to set the list of directories manually.

     Each time a new record will appear in the **Move documents from:** list.
   - To remove a record from **Move documents from:** list highlight it by right mouse click and click **Remove**.
3. To move mail attachments check the **Move all Mailbox Attachments to**: checkbox and then define destination folder.
4. In the **Options** area, select one:
   - **Move actual files and folders, and update database references.**
   - **Update the database reference only.** (Choose this selection when files and folders are already been moved to destination directory).
5. Click **Go** to finish or **Cancel** to cancel operation.

   The files are moved along with all existing subdirectories.

Backing Up Databases

If you encounter a problem while working in GoldMine that causes data loss or data corruption, the problem may be internal or external to your system. Ensure data availability in the event of data loss or corruption using a regular program of data backup.

To maintain an optimal backup system, make a separate backup on each day for a 2-week cycle. That is, your backup system should include 10 to 14 individual backups. Two weeks of backups are recommended because data corruption may not be discovered for several days. Only 1 or 2 backups may contain corrupted data. Use tape or diskettes as a backup medium.

For added security and recovery, keep a backup in secure offsite location (a bank deposit). Ensure you periodically update the backup.

NOTE: Maintain regular backups of GoldMine contact data, setup data, and program files. To back up contact data in GoldMine on an MSSQL database, use a utility designed to back up SQL data

Restoring SQL Databases

To use the SQL restore utility, find the SQL Server Enterprise Manager and right-click the database name. Select **All Tasks>>Restore Database**. The **SQL Server Restore** dialog box appears. Select the backup file to restore and click **OK**. The **Restore Progress** window shows the restoration process status.

SQL Query for Counting Contacts

If you are running GoldMine on an SQL database, the Summary tab does not display the database count. Instead you see n/a in the Record field. You can, however, count the number of records in an SQL database by running a query from the SQL Query tab of the Filters and Groups dialog box.

Running the SQL Counting Query

1. Select **Lookup>>SQL Queries**. The Filters and Groups dialog box opens to the SQL Query tab.
2. In the large upper pane, type this statement:

   `Select Count(*) from contact1`
3. Select **Query.**

   GoldMine displays the record count results under Column1 in the lower pane.

Using the GoldMine Maintenance Wizard

Configure these maintenance options:

- **Indexing.** Ensures data integrity and quick access to the data in indexed fields. See “Indexing Databases” on page 218.
- **Rebuilding and Packing**: Creates fresh data files and builds tables, then repacks the database minus deleted records.
- **Sorting and Verifying:** Sort reorders records in the tables based on the most-used indexes. **Verify** checks data for readability. It checks to see if all fields in the synchronization records of the database files are populated and for any duplication of unique fields. See “Sorting and Verifying Databases” on page 219.

CAUTION: Always back up your database before maintaining GoldMine.

Use the following procedure to use the Maintenance Wizard.

1. Select **Tools>>Databases>>Maintain Databases**. The **Welcome to the GoldMine Maintenance Wizard** dialog appears.
2. Select:
   - **Current Contact Set Files.** Includes currently open contact files. Does not include GoldMine files, such as Calendar, Lookup, or Mailbox.
   - **Individual Files.** Lets you select individual tables from open contact files and GoldMine files.
   - **All Database Files.** Lets you select GoldMine files, current Contact Set, or all contact sets.
   - **Automatic Maintenance.** Lets you configure automatic maintenance options (regular maintenance without user intervention).
3. Click **Next**.

   The dialog box that opens varies based on previous selection (each box eventually opens the **Rebuild, Sort and Verify Database Files** dialog box).

Indexing Databases

Whether you are using Firebird or SQL, indexes may become lost or corrupt.

For example, if a large amount of data is added or removed or statistics update has been disabled, you may want to re-index the database in order to let the SQL engine recalculate index selectivity (also known as index statistics). **Selectivity** is an internal measurement of efficiency of the index and it is used by the SQL engine in deciding how best to access the data.

Use the following procedure to index the database.

1. Select **Tools>>Databases>>Maintain Databases.**

   The Welcome to the GoldMine Maintenance Wizard dialog box opens.

   NOTE: : Depending on the size of your database, indexing the entire database can be time-consuming. Select All Database Files if you are indexing the entire database. To index a particular table, select Individual Files.

2. Select one of the following options:
   - **Current Contact Set Files.** Indexes only the contact files/tables in the currently open contact database. If you select Current Contact Set Files, the Rebuild, Sort and Verify Database Files dialog box opens.
   - **Individual Files.** Specifies which files/tables in the GoldMine directory and in the open database that GoldMine indexes. If you select Individual Files, the Maintain Selected Tables dialog box opens.

- **All Database Files.** Indexes and rebuilds contact files/tables in the open contact database, and those contained in the GoldMine system directory. If you select All Database Files, the Maintain All Database Files dialog box opens.

NOTE: Select Automatic Maintenance to configure GoldMine to automatically perform indexing and rebuilding. The Automatic Maintenance dialog box opens.

---

3. Click **Next**.
4. Based on your selection in step 2:
   - If you selected **Individual Files**, at the Maintain Selected Tables dialog box, select the table or tables to be indexed. Click **Next.**

     To select all tables, click **Set All**. To clear all tables, select **Reset All.**
   - If you selected **All Database Files**, select **Files in GoldMine Directory** and **Current Contact Set Files**. Select **All Contact Set Files** to index other contact databases. Click **Next.**
5. The Rebuild, Sort and Verify Database Files dialog box opens. To perform a simple indexing, do not select the options. Click **Next**.
6. Select **Force all users to exit GoldMine within x minutes.** Set the number of minutes.

   A message is sent to the currently logged in users telling them the GoldMine Administrator is performing maintenance, to complete their work, and close GoldMine.
7. Click **Finish.** GoldMine deletes the current indexes for the selected table or tables, and creates new ones.

Sorting and Verifying Databases

Sort reorders records in the tables based on the most-used indexes. Verify checks data for readability. It checks to see if all fields in the synchronization records of the database files are populated and for any duplication of unique fields.

NOTE: Always back up your database before maintaining GoldMine.

---

1. Select **Tools>>Databases>>Maintain Databases.**
2. At the Welcome to the GoldMine Maintenance Wizard dialog box select:
   - **Current Contact Set Files.** Includes currently open contact files. Does not include GoldMine files, such as Calendar, Lookup, or Mailbox.
   - **Individual Files.** Lets you select individual tables from both the currently open contact files and the GoldMine files.
   - **All Database Files.** Lets you select GoldMine files, current Contact Set, or all contact sets.
   - **Automatic Maintenance.** Lets you configure automatic maintenance options (regular maintenance without user intervention).

3. Click **Next.**

   The dialog box that appears varies based on previous selection (each box eventually opens the Rebuild, Sort and Verify Database Files dialog box).

4. Select **Rebuild and Pack the database files**.

   If using GoldMine with a SQL database, a warning message appears reminding you SQL tables do not need rebuilt.

5. If appropriate, select **Sort the database files.**
6. If appropriate, select **Verify the data and synchronization information.** Click **Next**.
7. From the GoldMine Maintenance Wizard dialog box, select **Force all users to exit GoldMine within x minutes.** Set the number of minutes. A message is sent to the currently logged in users telling them the GoldMine Administrator is performing maintenance, to complete their work, and close GoldMine.
8. Click **Finish.**

Setting Up Automatic Maintenance

Configure GoldMine to automatically maintain the database based on specified criteria.

1. Select **Tools>>Databases>>Maintain Databases**. The **Welcome to the GoldMine Maintenance Wizard** dialog box appears.
2. Select **Automatic Maintenance**.
3. Click **Next**. The **Automatic Maintenance** dialog box appears.
4. Select the **Logged User** (designates the user with Master Rights responsible).

NOTE: The Logged User must be logged into GoldMine at the specified start time and day for the automatic maintenance to run.

5. Type or select the **Start Time**. Click the right arrow to access the F2 graphical clock.
6. In the **Maintain Files** box, select a file to maintain.

NOTE: Because GoldMine forces all network users to log out of GoldMine during indexing and rebuilding, index after regular business hours.

NOTE: Maintain Calendar File and Sync Log Files often (rebuild and pack weekly).

7. Select the **Frequency**.
   - **Pack, rebuild and index:** Indexes, rebuilds, and packs the selected files.
   - **Index only:** Only indexes the selected files. Available only for the GoldMine Files, Current Contact Set, All Contact Sets, and System Logs.
8. Select **Save**.

   View the Maintenance Logs to verify the process has run successfully.

NOTE: If you maintain a SQL database with the Wizard, you must reset table permissions. Be aware you may lose data in the Contact2 table if you have more than 233 user-defined fields.

Viewing System Logs

GoldMine records system activity for a variety of operations in System Logs. To view a system log, select **Go To>>Logs>>GoldMine Logs**. The left pane displays the log types and the right pane displays the details. To see details, expand the log type until you locate the day to view. Select the day; details appear in the right pane.

The **System Logs** window displays these log types:

- Process Monitor Logs: Activities recorded in the GoldMine Process Monitor.
- Maintenance Logs: Dates and outcomes of database maintenance procedures.
- Users' Login Logs: Users' login activity.
- Sync Wizard Logs: Dates and details for GoldMine synchronization.
- GoldSync Logs: Details about GoldSync synchronization.
- Contact Files Logs: Changes made to the Contact Set files.
- GoldMine Files Logs: Changes made to GoldMine files.
- Error Logs: Details of errors.

Use the logs for troubleshooting. To prevent performance problems, periodically purge the logs.

About the Database Alias 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 **Tools>>Databases>>New Database**.

See "Using the Database Alias Manager for SQL Databases" on page 222.

Using the Database Alias Manager for SQL Databases

From the menu bar, select **Tools>>Databases>>Alias Manager**, or from the appropriate window in the Databases Wizard, click the **Alias Manager** button. The Database Alias Manager appears.

To alias a database, click **New Alias**. The **Edit Alias** dialog opens.

NOTE: This dialog window contains a form for collecting information used to build an ADO connection string. This information is stored in an INI file.

1. In the **Alias Name** text box, type a name for the alias.

   There is a 100-character limit.
2. From the **Server Type** drop-down list, select either **MSSQL**.

   NOTE: The form will change depending on the Server Type selected.
3. In the **Host** text box, type the name of the computer hosting the database.
4. In the **Database** text box, type the name of the database.
5. In the **Owner** text box, type the database owner's name. [Typically, this is **dbo**. This applies only to MSSQL aliases.]
6. In the **Login** text box, type the username for the database.

7. 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. .

> **NOTE:** This action registers the alias and creates the database specified. The new database will not be created without completing this step, although it will appear in the list. You cannot test it prior to completing this step

8. 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.]
9. Click **Create New Database**.
10. Click **Test Connection**. This verifies that the alias was created successfully.
11. Repeat this process for each alias you wish to create.
12. Click **OK** when done.

Editing an Alias

1. From the menu bar, select Tools>>Databases>>Alias Manager. The Database Alias Manager opens.
2. To edit an alias, select an alias from the list.
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.

Deleting an Alias

1. Select the alias.
2. Click **Delete** and then click OK.

Using the Database Alias Manager for Firebird Database

1. From the menu bar, select **Tools>>Databases>>Alias 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.

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2. To alias a database, click **New Alias**. This creates a blank form.
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 **Firebird**.
5. In the **Host** text box, type the name of the computer name where the Firebird database server is run. If the database server is on the same host as the Goldmine installation, you can enter *localhost*.
6. In the **Database** text box, type the path to the database.

   Firebird maintains the database in a regular disk file. Your entry in this field should specify a fully qualified path to this file. By default the GoldMine installer creates an initial database file in \Program Files\GoldMine\Data\GOLDMINE.fdb. It is advisable to keep the same file naming convention and create additional database files in the same folder and maintain the same .fdb extension.
7. In the **Login** text box, type a valid login name for the firebird server.
8. By default, during GoldMine installation, the installer gives you the option to create a login: GMSYSDBA. If you accepted this default value at the time of the GoldMine installation, enter GMSYSDBA in this field. Otherwise the value you specified during installation should be entered.
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. **(Perform this step only if you are creating an entirely new database)** Click **Create Database**. Skip to step 11 if you are connecting to an existing database.
11. Click **Test Connection**.
    - 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.
    - This action validates the parameters you entered above and also checks for the existence of the database.
12. Click **OK**.
13. Repeat this process for each alias you want to create and then click OK when done.

Globally Replacing Field Data Using the Global Replace Wizard

The **Global Replace Wizard** helps you replace the value of a field in the contact record.

NOTE: Before beginning a global replace, back up the GoldMine databases.

If using a global replace to operate on a subset of data, first build that subset with a filter or group you can then select during the process.

- Users without Master Rights cannot replace the **Owner** or **Status** fields.
- Apply global updates only to **Contact1** and **Contact2** fields.

Use the following procedure to globally replace field data.

1. Select **Tools>>Global Replace Wizard**.
2. At the **Global Replace Wizard** dialog box, select one option:
    - Replace a Field with a value
    - Update a field using advanced options
    - Exchange the value of two fields

Globally Exchanging the Values to Two Fields

Use the Global Replace Wizard to update data in one field with data from another field by:

- Exchanging values of two specified fields on a contact record
- Replacing the value of one field on a contact record with the value of another field

1. Select **Tools>>Global Replace Wizard**.
2. At the Global Replace Wizard, select **Exchange the values of two fields**, and then click **Next**.
3. Select one option:
    - **Exchange the values of both fields.** Trades the value of one specified field with the value of a second specified field.
    - **Replace value of the left field with the value of the right field.** Inserts the value in the first specified field with the value in the second specified field. The original field remains unchanged.

4. Select the fields to update in the drop-down lists.
    - **Update this field.** The field to replace or exchange.
    - **With this field.** The field to exchange data with the first field or provide the replacement value.

NOTE: GoldMine converts the replacement data into the appropriate data type before copying the data into the selected replace field.

---

5. Click **Next.**
6. Use the Global Replace Wizard setup dialog box to check fields and replacement values before initiating the process.

- **Expand partial contact records.** Expands partial records in the database into complete records if the field to replace is contained in the Contact2.dbf file. If so, this option is selected by default. If you clear Expand partial contact records, partial records are not expanded, and field values in these records are not updated.
- **Update linked fields (based on lookup.ini).** Changes values in linked fields according to the instructions in the [AutoUpdate] section of the Lookup.ini file. This option is available only if one or more selected fields include the fields listed in the Lookup.ini.

    You can globally replace more than one field at a time. To add another field and replacement value, click **Back.**

7. Select Remove to delete the highlighted global replacement entry.

NOTE: If you have more than one replacement entry, Remove becomes active. You can delete any entry other than a single entry

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8. Click **Next**. The Global Replace Wizard displays a list of available filters and groups to apply to limit the records to be updated by the global replacement. The filter or group does not have to be activated prior to selection.
9. Select the filter or group o apply, then click **Next**. The final Global Replace dialog box opens.
10. Click **Finish**.

Importing and Exporting Data

About Importing Data

GoldMine provides several ways to import data. Use the GoldMine Import Wizard to import data from other applications into GoldMine using predefined profiles or by creating your own profiles using the wizard. A predefined utility is included for importing from ACT!.

Import data into GoldMine from these database sources:

- DBF file
- ASCII file
- SDF file
- SQL file

GoldMine also provides a wizard for importing data from an XML file.

For information about **Web Import**, see "Web Import" on page 251.

About Exporting Data

The exporting process copies data into a formatted file the receiving application understands. The Export Wizard provides simplifies the task. Using the Export Wizard, create a data file from GoldMine records according to criteria in a predefined profile, or define your own profile. GoldMine can export from the current database in three formats:

- DBF file
- ASCII (TXT) file
- SDF (fixed length) file
- export data to an XML file.

Considerations for Importing and Exporting Data

When importing and exporting data:

- Only fields in the Contact1 and Contact2 tables and the primary e-mail and Web site Details are available for standard import or export. The XML import and export lets you import or export the full database.
- Merge information and check for duplicates while importing.
- Save import and export profiles to facilitate the process. A profile is predefined field mappings and specifics of data file locations.
- GoldMine supports the importing and exporting of calendar, history, and supplemental contact information when using the predefined ACT! import profile or XML.

- When importing or exporting, all fields are referenced by their GoldMine field names, which may differ from their label name. Once created, the field name never changes, though the label may be changed by the user.

  For example, the field Key1 located in the Contact1 table is commonly labeled Contact Type. This means the field would be listed as Key1 and not as Contact Type in the lists of GoldMine fields in the import and export wizards. This is important because you may not recognize the field name as the field you wish to use.

NOTE: If your import requirements include calendar, supplemental contact information, or history records, use third-party utilities to import. Several products designed to work with GoldMine are GoldBox Utilities, Inaport, CRMSwitch, and Beyond Gold. As third-party products, they are not supported by FrontRange Solutions technical support.

Data Preparation

Before importing, establish the source file and destination file components. Do not start the importing procedure until you create necessary fields in GoldMine.

Taking the source file, create a list of all of the field names and lengths, then manually match the GoldMine field and its length. If the fields do not exist or are not long enough, make structural changes to the fields before proceeding. The data should be in ASCII, SDF, SQL, or DBF format for importing.

CAUTION: Failure to save the file correctly could result in loss of data.

Using the Import Wizard

1. Select **File>>Import and Export>>Import contact records**.

   The **Welcome to GoldMine's Import Wizard** dialog box opens.
2. Select one option:
   - **Import a new file:** Incoming data formats according to the profile you define in the Import Wizard. You can save the profile for future use.
   - **Import a new file using an existing profile:** If importing:
     - DBF, ASCII, or SDF, select a profile you created on the Select File to Import dialog box.
     - DBF, select an ACT profile or one you created.
     - ASCII or SDF, select a profile you created.
     - from SQL, the **Select SQL Table to Import** dialog box appears.

3. Select one option for the file type to import.
    - **DBF file.** Incoming data is in dBASE file format. Fields in a dBASE file are referred to by field name, for example, the Company field might be referred to as COMPANY, and the Contact field might be referred to as CONTACT.
    - **ASCII file.** Incoming data is in delimited text file format. A delimited text file formats data with field delimiters, field separators, and record separators. In the delimited ASCII format, fields are referred to by their position in the record.
    - **SDF file.** Incoming data is in a text file with fixed-length record format which is commonly used by mainframe computers. Fields in the SDF format are referred to by starting and ending character positions.
    - **SQL file.** Incoming data is from an SQL table.
4. Click **Next**.

    The dialog box that appears depends on the options you selected:
    - **Import an new file** from DBF, ASCII, or SDF, the **Import a New File** dialog box opens.
    - **Import a new file** from SQL, the Import a New SQL Table dialog box opens.
    - **Import a new file using an existing profile from DBF, ASCII, or SDF**, the Select File to Import dialog box opens.
    - **Import a new file using an existing profile from SQL**, the Select SQL Table to Import dialog box opens.

Using the Export Wizard

1. Select **File>>Import and Export>>>>Export Contact Records**.

    The **Welcome to the GoldMine Export Wizard** dialog box opens.
2. Select an export option:
    - **Export to a new file:** GoldMine exports the data according to the settings defined in the Export Wizard. You can save the new settings for future use.
    - **Export to a new file using an existing profile:** Displays the Select Export Profile dialog box where you select a predefined profile GoldMine will use to format the data for export.
3. Select the file type to export into:
    - **DBF file:** Specifies data will export in the dBASE file format. Fields in a dBASE file are referred to by field name; for example, the Company field is called COMPANY, and the Contact field is called CONTACT.
    - **ASCII (TXT) file:** Specifies data will export in the delimited text file format. A delimited text file formats data with field delimiters, field separators, and record separators. In the delimited ASCII format, fields are referred to by their position in the record. For example, company name is field 1, contact name is field 2, and so on.

- **SDF (fixed length) file:** Specifies data will export to a text file with fixed-length record format which is commonly used by mainframe computers. Fields in the SDF format are referred to by starting and ending character positions.

4. Click **Next**. If you selected:
    - **Export to a new file**, the Select Filter/Group dialog box opens.
    - **Export to a new file using an existing profile**, the Select Export Profile dialog box opens.

About Importing and Exporting XML Files

Import and export GoldMine contact data to or from an Extensible Markup Language (XML) format. XML is a meta language used to facilitate the easy exchange of data between systems using different applications. Importing or exporting your GoldMine data as an XML file helps you share information with different applications, such as contact management systems, that support XML.

Like HTML, XML uses tags (words bracketed by < and >) and attributes (name = "value"). However, XML provides more flexibility when interpreting the tags and values. For example, HTML specifically defines the meaning of each tag and attribute as well as the appearance of the tagged text when displayed in a browser; XML uses tags only as data delimiters, leaving the interpretation to the receiving application.

NOTE: When exchanging data with other GoldMine systems, be sure to synchronize with GoldMine instead of sharing exported data. Synchronization provides features unavailable when you export data as an XML file, including cutoff dates to limit the date range of data and the capability to exchange updates to additional contact data and calendar data.

Use the GoldMine XML Import Wizard to import data from an XML file. The wizard takes you through the process and lets you save the settings in a profile to reuse.

Use the GoldMine XML Export Wizard to export your contact data as an XML file. The wizard guides you through the procedure. All the data you export is placed in one file that the recipient can import and use as a key to map the imported data into the recipient's database.

Exporting to XML

Export GoldMine contact data to Extensible Markup Language (XML) format. XML is a meta language is used to facilitate the exchange of data between systems using different applications. Exporting your GoldMine data as a .xml file helps you share information with recipients using a different contact management application supporting XML. Data exported is placed in one file the recipient can import and use as a key to map the imported data into the recipient's database.

The following is a view part of a sample XML export.

```
- <accounts>
  - <account gm_recid="00000009I{{{>2R" gm_accountno="ELAN SOFTWARE CORP.">
    - <properties>
      - <property name="Accnt Mngr" db_name="KEY4">
          <property_string>C.Stott</property_string>
        </property>
      - <property name="Actionon" db_name="ACTIONON">
          <property_string>20021109</property_string>
        </property>
      - <property name="Address" db_name="ADDRESS1">
          <property_string>1150 Kelly Johnson Boulevard</property_string>
        </property>
      - <property name="Asst" db_name="SECR">
          <property_string>Jane</property_string>
        </property>
      - <property name="Business" db_name="KEY2">
          <property_string>Comp. Sfw. Dev.</property_string>
        </property>
      - <property name="Callbkfreq" db_name="CALLBKFREQ">
          <property_string>0</property_string>
        </property>
      + <property name="City" db_name="CITY">
      - <property name="Company" db_name="COMPANY">
          <property_string>FrontRange Solutions Inc.</property_string>
        </property>
      - <property name="Contact" db_name="CONTACT">
          <property_string>Patrick B. Hillyard</property_string>
        </property>
      - <property name="Contact Type" db_name="KEY1">
          <property_string>Internal</property_string>
```


NOTE: When exchanging data with other GoldMine users, synchronize with GoldMine instead of sharing exported data. Synchronization provides features unavailable when you export data as an XML file, including cutoff dates to limit the date range of data as well as the capability to exchange updates to additional contact data and calendar data.

1. Select **File>>Import and Export>>Export GoldMine Data to an XML File**. The GoldMine XML Export Wizard opens.
    - **Export to a new XML file:** Displays the Select GoldMine Data for Export dialog box. GoldMine exports the data according to a profile created as you define settings in the **GoldMine XML Export Wizard**. You can save the new profile for future use.
    - **Export to a new XML file using an existing profile:** Displays the **Select Profile** dialog box to select a predefined profile GoldMine will use to format the data for export.
2. Make a selection and click **Next** to advance to the Select GoldMine Data for Export dialog box (new .xml file) or Select Profile dialog box (select an existing profile).

Exporting Data Using an Existing XML Profile

If you selected Export to a new XML file using an existing profile, the Select Profile dialog box appears.

1. In the Select one of the following, predefined XML export profiles text box, select the existing profile you want to use.
2. Click Delete Profile to delete the highlighted profile.
3. After highlighting your profile, click Next. The Select GoldMine Data for Export dialog box appears

Importing XML

GoldMine can import contact data and user activities from an XML file. The GoldMine XML schema dictates how data is arranged within the XML file in order for GoldMine to recognize contacts, calendar activities, and other data when importing into GoldMine. The XML file you importing into GoldMine must conform to the GoldMine XML schema for the field mapping to work. You can use XSL Transformations (XSLT) to transform XML source documents to GoldMine-compliant XML documents.

NOTE: For more about XSLT, see www.w3.org/TR/xslt

Create an XML transformation sheet converting the XML file to match the GoldMine schema. Then import the data into GoldMine.

Example: Your XML source schema has the contact's first name in one field and the last name in another field. Because the GoldMine schema requires the first and last names to be in the same field, you must create a transformation sheet merging the two fields in your source XML file. Once your source file matches the GoldMine schema, you can import the XML data into GoldMine.

- To view the GoldMine schema, export your GoldMine data to an XML file and include the schema. Open the file in Internet Explorer and view the schema.
- To create a transformation sheet (a language for transforming XML documents into other XML documents) and transform the data, use Notepad or an XML transformation utility.

Example of the first few lines of a GoldMine schema:

```
  <?xml version="1.0" encoding="utf-8" ?>
- <xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
    targetNamespace="http://www.frontrange.com/goldmine/xmlexport"
    xmlns="http://www.frontrange.com/goldmine/xmlexport" version="1.0">
  - <xs:element name="gmdata">
    - <xs:complexType>
      - <xs:sequence>
          <xs:element ref="header" minOccurs="1" maxOccurs="1" />
          <xs:element ref="accounts" minOccurs="0" maxOccurs="1" />
          <xs:element ref="unlinked_content" minOccurs="0"
            maxOccurs="1" />
        </xs:sequence>
      </xs:complexType>
    </xs:element>
  - <xs:element name="header">
    - <xs:complexType>
      - <xs:sequence>
          <xs:element ref="goldmine_version" minOccurs="1"
            maxOccurs="1" />
          <xs:element ref="gmdbdef" minOccurs="0" maxOccurs="1" />
        </xs:sequence>
      </xs:complexType>
    </xs:element>
    <xs:element name="goldmine_version" type="xs:string" />
  - <xs:element name="gmdbdef">
    - <xs:complexType>
      - <xs:sequence>
          <xs:element ref="gmdbfld" minOccurs="0"
            maxOccurs="unbounded" />
        </xs:sequence>
      </xs:complexType>
    </xs:element>
```

1. Select **File>>Import and Export>>>>Import GoldMine Data from an XML File**. The **GoldMine XML Import Wizard** appears.
2. Select one option in the **GoldMine XML Import Wizard**:
   - **Import a new file:** Displays the **Import a New File** dialog box. GoldMine imports the data according to a profile created as you define settings in the GoldMine XML Import Wizard.
   - **Import a new file using an existing profile:** Displays the **Select File to Import** dialog box to select a predefined profile GoldMine will use to format the data you import from.
3. Click **Next** to advance to the Import a New File dialog box or the Select File to Import dialog box.

Import a New File Dialog Box

This box appears when you select Import a new file from DBF, ASCII, or SDF on the GoldMine XML Import Wizard dialog box.

1. In the Enter the full path and filename of the file to be imported text box, type or browse to the path of the .xml file to import.
2. Click **Next**.

   Either the Select Data to be Imported From File or Import File Profile dialog box appears.

Importing from Other Applications

Importing Data from ACT!

GoldMine offers an import wizard to help convert ACT! data to GoldMine. Select an import method based on the ACT! version you are importing from.

- If importing from ACT! 6.x, select **File>>Import and Export>>Convert from ACT! 6.0**. The **Welcome to the ACT! Import Wizard!** opens.
- If importing from ACT! 2000 or ACT! 4 and lower, select **File>>Import and Export>>Import Contact Records**. The Welcome to GoldMine's Import Wizard opens.

Using the ACT! Import Wizard

The ACT! Import Wizard appears when configuring ACT! data importing using one of these methods:

1. Select File>>Import and Export>>Convert from ACT! 6.0. The ACT! Import Wizard appears.
2. Select File>>Import and Export>>Import Contact Records.)

NOTE: We recommend backing up your data before beginning.

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3. On the ACT! Import Wizard dialog box, type or browse to the location of your ACT! .dbf file in the Enter the full path and filename of the ACT! file to be imported text box.
4. In the **User** field, type the name of the ACT! user.
5. In the **Password** field, type the user's password.
6. Click Next. The ACT! Import Options dialog box appears.

Using the Outlook Conversion Wizard

The Outlook Conversion Wizard provides an easy way to convert your Outlook files (Contacts, Calendar, Tasks, and E-mail folders) to GoldMine. This is useful when moving information from Outlook to GoldMine as your business contact management system. The conversion wizard is an import feature and is not to be used in lieu of Outlook synchronization.

NOTE: Outlook contact and calendar notes with rich text formatting and embedded URLs import into GoldMine as plain text.

1. Select **File>>Import and Export>>Convert from Outlook**. The **Outlook Conversion Wizard** dialog box appears.
2. Click **Next**. The **Import Options** dialog box appears.
   - **Apply GoldMine's Formatting to phone numbers being imported:** Converts the Outlook format—commonly (719) 555-5555) to GoldMine—commonly (719)555-5555.
   - **Select the username...:** Select the user in the drop-down list who will become the owner of the records and who the calendar and history activities will be assigned to.
   - Select one duplicate checking option:
   - **Do not import duplicate records:** Does not import any records where the company, contact, and phone fields in Outlook match a GoldMine record.
   - **Import all record to GoldMine:** Imports all selected records into GoldMine without checking for duplicate records.
3. Click **Next**. The **Contact Folder(s)** dialog box appears.
   - To select Contact folders to import, click **Add**. The **Select Folder** dialog box appears. Select a contact folder to import and click **OK**. Repeat the process for each contact folder to import.
   - Click **Remove** to delete a highlighted folder on the Contact Folder(s) dialog box.
   - If not importing any contact folders, click **Next** without adding folders to the Folder list.
4. Click **Next**. The **Calendar Folder(s)** dialog box appears.
   - To select Calendar folders to import, click **Add**. The **Select Folder** dialog box appears. Select a calendar folder to import and click **OK**. Repeat the process for each calendar folder to import.
   - Click **Remove** to delete a highlighted folder on the Calendar Folder(s) dialog box.
   - If not importing any calendar folders, click **Next** without adding folders to the Folder list.
5. Click **Next**. The **Calendar Options** dialog box appears.
   - To set the date range of calendar records you are importing, select number of days, months, years before today for the **Starting** date, and the number of day, month, or year before today for **Ending** date.

6. Click **Next**. The **Task Folder(s)** dialog box appears.
   - To select Task folders to import, click **Add**. The **Select Folder** dialog box appears. Select a task folder to import and click **OK**. Repeat the process for each task folder to import.
   - Click **Remove** to delete a highlighted folder on the Task Folder(s) dialog box.
   - If not importing any task folders, click **Next** without adding folders to the Folder list.
7. Click **Next**. The **E-mail Folder(s)** dialog box appears.
   - To select E-mail folders to import, click **Add**. The **Select Folder** dialog box appears. Select an e-mail folder to import and click **OK**. Repeat the process for each e-mail folder to import.

     NOTE: Imported e-mail folders and Inbox messages are categorized and filed in the E-mail Center in a separate Outlook Import folder.

   - Click **Remove** to delete a highlighted folder on the E-mail Folder(s) dialog box.
   - If not importing any e-mail folders, click **Next** without adding folders to the Folder list.
8. Click **Next**. The **Ready to Import** dialog box appears.
9. Click **Back** to change any settings and then click Finish.

Exporting to GoldMine From Microsoft Excel

Once **GoldMine Plus for Microsoft Office** is installed, data can be exported from Microsoft Excel to your GoldMine database using new menu options in Excel.

GoldMine Plus for Office adds an export feature to the GoldMine menu in Excel. Use this menu option to map Excel columns to GoldMine fields and initiate the export process.

CAUTION: Backup your database before beginning.

NOTE: Before proceeding with the export, verify that phone numbers are formatted consistently and make changes as needed. The format of the phone numbers in your Excel spreadsheet must be the same for the Excel ODBC to interpret the numbers correctly. If formats are inconsistent, the ODBC driver interprets all the values in the column as null and you lose phone number data during the export process. For example, you cannot have one phone number that is 1235557894 and another that is 777-555-1236. Before exporting to GoldMine, specify one format and update all phone numbers in your spreadsheet to match the selected format. When the phone number format is consistent, begin exporting to GoldMine.

1. Launch **GoldMine**.
2. **Open** the Excel spreadsheet you are exporting to GoldMine.
3. Select the cells you are exporting to GoldMine and specify the Named Range. In Excel, select **Insert>>Name>>Define**. The **Define Name** dialog box appears. **See Excel Help for details**.

> **NOTE:** To perform this function in Microsoft Office 2007, select the cells to export to GoldMine, right-click on the selected cell range and select Name a Range from the drop-down menu. You may also select the Formulas tab, then select **Define Name>>Define Name...** from the Defined Names sub-menu.

4. In the **Names** text box, type the desired name of the range.

> **NOTE:** The first row of the selected range must contain only header data.

5. Select either **Workbook** or **Sheet** from the **Scope** drop-down menu.
6. Select **GoldMine>>Export Data to GoldMine**. The **Export Data to GoldMine** dialog box appears.

   The **Welcome to the GoldMine Plus for Microsoft Excel Export Wizard!** appears.
7. Click **Next**. The **field mapping** dialog box appears.
8. To map columns to GoldMine fields, highlight the **column** in the **Excel Fields** list and then highlight the **GoldMine field** to map the column to. Click **Add Mapping**. Your selection is added to the **Mapped Fields** list (for example, **Column1<=>C1.Company**).
9. Continue to map desired fields. When finished, click **Next**. The **GoldMine is now Ready to export your Excel data!** dialog box appears.
10. Click **Finish**.

    When the import process completes, a dialog box appears, indicating the number of records imported into GoldMine.

Importing and Exporting iCalendar Files

Importing iCalendar Files

1. Select **File>>Import and Export>>Import from an iCalendar file**. The Windows **Open** dialog box appears.
2. Locate the iCalendar (*.ics) files to import and click **Open**. The **Import from an iCalendar file** dialog box appears.

3. To import a single iCalendar activity, select the activity and click **Import**.

NOTE: When importing iCalendar files from Lotus Notes, GoldMine schedules activities without assigned participants, or invitees, as unlinked. Identify this situation whenever the Organizer entry is UNKNOWN.

4. To import all activities, click **Import All**.
5. As each activity is processed, the **Attach imported activity to contact** dialog box appears. Select one option:
   - Find an existing contact and then link this activity.
   - Find an existing contact, create a new additional contact and link to it.
   - Create a new contact and then link this activity.
   - Do not link this activity to any contact
6. Click **OK**. Depending on the option selected, different windows and dialog boxes appear.
7. Click **Close**.

Exporting iCalendar Files

Export iCalendar files so users of iCalendar-enabled applications, such as Microsoft Outlook or Lotus Notes can import activities from your iCalendar file to their calendars.

1. Select **File>>Import and Export>>>>Export to an iCalendar file**. The **Export to an iCalendar file** dialog box appears.
2. In the **Select based on Contact(s)/User(s)** area, select one:
   - **Activities based on Contact(s).** Exports activities scheduled for the current contact record, or for records based on the selected filter.
     - Select from:
     - **Current Contact record:** Exports the information for the current record.
     - **Filters/Groups:** Exports information based on the filter or group selected in the drop-down list.
   - Activities based on the User(s): Exports activities scheduled for selected users.
     - Select the any or all users' activities to export.
3. In the **Selection Criteria** area, select the activity types to export.
4. To narrow the export to a range of dates, select **Date range** and select the **From** and **To** dates on the F2 graphical calendar.
5. Click **Export**. The Windows **Save As** dialog box appears.
6. Locate the folder to save the files to and type the **File Name**.

   Verify the **Save as type** is **iCalendar format (*.ics)**.
7. Click **Save**. The **GoldMine Process Monitor** appears displaying the progress of the export.

Merging, Purging, and Deleting Records

About Merging and Purging

Users may accidentally create duplicate contact records in GoldMine that, over time, may be too great for manual deletion. GoldMine provides several methods for consolidating information and deleting duplicate records:

- **Merge/Purge Wizard.** Simplifies the replacement process by guiding you through the entire procedure.
- **Merge Visible Records.** Updates the contact record with input focus by merging information in two contact records displayed in GoldMine's work area.
- **Merge Tagged Records.** Creates one contact record by merging information from all tagged records.

CAUTION: Merging and purging permanently changes the database. We recommend backing up the database first,

---

Using the Merge/Purge Wizard

Use the Merge/Purge Wizard to select records based on a predefined profile or define your own criteria. Set up a custom merge/purge profile by defining:

- **Contact record field.** Select as many as you want GoldMine to use during the evaluation process to match records.
- **Method.** Select a criterion for each record match which can be case sensitive, case insensitive, Soundex, or first n characters.
- **Weight.** Select and assign a numeric weight to each criterion. When a record is evaluated, each match with a criterion accrues the assigned weight value. If the total weight earned by matches between two records and the specified criteria equal or exceed the qualifying weight value, GoldMine selects the records as duplicates.

You can also select the method for disposing of duplicate records. Merge data from two duplicate records to create one updated record, or delete one of the duplicates according to a condition such as deleting the older record. Specify GoldMine process the merge/purge automatically, or display duplicate records for viewing or manual deletion.

CAUTION: Merging and purging permanently changes the database. We recommend you back it up before performing a merge/purge.

NOTE: It is highly recommended that you select **Prompt me before merging records** and **Dry run: Only show duplicates—do not merge nor purge** before actually performing a purge.

---

1. Select **Tools>>Data Management>>Merge/Purge Records**. The **GoldMine Merge/Purge Wizard** appears.
2. Select one procedure:
   - **Merge/Purge using a predefined profile:** Displays the **Select a Merge/Purge Profile** dialog box containing a list of previously defined merge/purge profiles. Highlight the profile to use to search for duplicate records.
   - **Merge/Purge using new criteria:** Set up weighted criteria for the current merge/purge. The settings can be used one time only or saved as a merge/purge profile for future use.
3. Click **Next**.
   - If you selected **Merge/Purge using a predefined profile**, select the profile from the **Select a Merge/Purge Profile** dialog box. You can also delete a previously defined profile by selecting **Delete Profile**. After selecting a profile, click **Next.** The **Select a Filter/Group** dialog box appears.
   - If you select **Merge/Purge using new criteria**, the **Select a Filter/Group** dialog box appears.

Selecting the Merge and Purge Methods

The **Merge Method** and **Purge Method** dialog boxes contain settings that determine how GoldMine treats records selected as duplicates.

1. The **Merge Method** dialog box appears after selecting merge/purge criteria.
2. Select one merge method:
   - **Keep the record that was Created First:** Selects the contact record saved first. The date is determined by the entry logged in the Creation field of the Summary tab.
   - **Keep the record that was Last Updated:** Selects the contact record changed last. The date is determined by the entry logged in the Last Update field of the Summary tab.
   - **Create Linked Additional Contacts in each record:** GoldMine keeps both records and creates additional contacts in the Contacts tab of the duplicate records. For example, if GoldMine determines Jon Smith and John Smyth are duplicate contacts, Jon Smith is added as an additional contact in the John Smyth contact record. John Smyth is added as an additional contact in the Jon Smith contact record.

NOTE: Selecting Create Linked Additional Contacts does not prompt you for a purge method, but displays the Save the Merge/Purge Profile dialog box.

3. Select one of the following options:
   - **Create Additional Contact of non-surviving record:** The primary contact of the deleted duplicate record is stored as an additional contact in the surviving contact record. GoldMine stores the new additional contact in the Contacts tab of the surviving contact record.
   - **Prompt me before merging records:** Check this box for GoldMine to display duplicate records and offer options so the user can make individual decisions on each set of duplicate records.
   - **Dry run: Only show duplicates—do not merge nor purge:** Check this box for GoldMine to display duplicate records without any options to select records for purging. At the end of the process, duplicate records remain in the contact database.

   NOTE: If you select Dry run, GoldMine does not prompt you for a purge method, but displays the Save the Merge/Purge Profile dialog box.

   NOTE: It is recommended that you select **Prompt me before merge records** and **Dry run: Only show duplicates—do not merge or purge** before actually performing a purge.

4. After selecting a merge/purge option, click **Next**. Unless creating linked additional contacts or performing a dry run, the **Purge Method** dialog box appears.
5. Select one option:
   - **Delete the duplicate record:** GoldMine automatically deletes records meeting the qualifying weight specified in the merge/purge profile.
   - **Update a field with a value to indicate record deletion:** Changes the specified field with a specified value—selecting this option does not purge duplicate records.

   TIP: Selecting Update a field with a value to indicate record deletion is the safest way to merge/purge records. This option performs the merge based on your criteria and then marks the non-surviving record but leaves it in your database. Review the records and delete based on the value with which the specified field is updated.

6. Click **Next**. The **Purge Method: Update Field Settings** dialog box opens.
   - **Update Field:** Select the field in the drop-down list.
   - **Value:** Type the value you are updating the field with to indicate deletion. If any record had an entry in the specified field, this data overwrites the existing value.

7. Select **Merge Calendar, History, and ContSupp records** to move this data to the surviving contact record from the purged record. This option moves data from these records:
    - Calendar
    - History
    - Additional contact
    - Referral
    - Detail
8. Click **Next**. The **Save the Merge/Purge Profile** dialog box opens.

Merging Visible Contacts

You can merge two or more visible contact records. The active contact record is updated with information from the other record. The non-active contact is deleted.

1. Select **Window>>New Contact Window**. A second contact window opens.
2. Display the second record you are merging. Make the record you are keeping in the database the active contact record.
3. Select **Tools>>Data Management>>Merge/Purge Records>>Merge Visible Records**. The **Merge/Purge Visible Contact Records** dialog box appears.
4. The dialog box reminds you that the active contact record will survive. Information from the other records will be consolidated on the surviving record, and the other records will be deleted.
5. Click **Yes**.

Merging Tagged Records

You can consolidate information from all tagged contact records into one contact record.

NOTE: GoldMine updates the first tagged contact record and deletes all other tagged contact records.

---

1. Tag the records to merge.
2. Select **Tools>>Merge/Purge Records>>Merge Tagged Records**. The **Merge/Purge Tagged Contact Records** dialog box appears.
3. The dialog box reminds you that the first record tagged will be the surviving record with data from the other records consolidated on that one record. Once consolidated, the other records are deleted.
4. Click **Yes**.

Using the Delete Wizard

To update your contact database by deleting some or all Calendar records, history records, and/or contact records, use GoldMine's Delete Wizard to reduce the possibility of an unintentional deletion.

NOTE: Only users with Master Rights can access the Delete Wizard.

1. Select **Tools>>Data Management>>Delete Records**. The **Delete Wizard** appears.
2. Select one delete option:
    - **Delete old history records:** Purges old history data from the contact database. Delete all history records from the contact database, or activate a filter or group, then use this option to delete history records from the subset of records.

      NOTE: Removing old history records periodically can significantly reduce the amount of disk space used by contact sets.

    - **Delete ALL (filtered) contact records:** Deletes a subset of records from the contact database based on a filter or group.
3. Click **Next**. If you selected **Delete old history records** or **Delete ALL**, the select filter/group dialog box appears.

Monitoring Processes

The GoldMine Process Monitor launches automatically when executing or running processes within GoldMine, including synchronization, Automated Processes, importing and exporting, or merging and purging.

NOTE: Once opened, the Process Monitor can float anywhere on the GoldMine screen, or it can be docked to any of the four sides of the GoldMine screen. The window may also be resized to maximize available workspace. For best results, dock the Process Monitor to the bottom of the GoldMine screen.

The upper pane displays processes running and general status, while the lower pane displays the status of the component tasks.

Use the toolbar or the local menu to manage process options.

The Process Monitor uses color codes, assigned to text or the background, to indicate process status.

Color	Meaning
Black text on default background	Operation normal
Blue text on default background	Notice
Black text on yellow background	Warning
White text on red background	Error
Green text on default background	Task successfully completed

GoldMine Tables

The **Cal** table contains a record for each scheduled activity. Different record types are distinguished by the RecType. Each record type may use the same field for different purposes. The Cal table is part of the GoldMine files

Field Name	Type	Length	Description
USERID	String	8	User Name
ACCOUNTNO	String	20	Account number of the linked contact
ONDATE	Date	8	Activity date
ONTIME	String	5	Activity time
ENDDATE	Date	8	Ending date of a scheduled activity
ALARMFLAG	String	1	Alarm flag
ALARMTIME	String	5	Alarm time
ALARMDATE	String	8	Alarm date
ACTVCODE	String	3	Activity code
RSVP	String	1	RSVP notification
DURATION	Integer	3	Duration/Probability
RECTYPE	String	1	Record type
ACONFIRM	String	3	Meeting confirmation
APPTUSER	String	10	Meeting confirmation user
STATUS	String	4	The first character is flag. The second character=1 if notes exist.
DIRCODE	String	10	Contact Set code of the contact file
NUMBER1	Integer	8	Sales potential

Field Name	Type	Length	Description
NUMBER2	Integer	8	Units of a forecasted sale
COMPANY	String	60	Company/Contact name
REF	String	80	Reference
NOTES	Memo	1	Notes
LINKRECID	String	15	Linked record ID
LDOCRECID	String	15	Reserved for future use
LOPRECID	String	15	Linked Opportunity Manager record ID
CREATEBY	String	8	Created by user
CREATEON	Date	8	Created date
CREATEAT	String	6	Creation time
LASTUSER	String	8	Last modified by
LASTDATE	String	8	Last modified date
LASTTIME	Date	8	Last modified time
RECID	String	15	Record ID

- **Fields5** stores the location and tab order of every field within the Fields tab and the field position and tab order of the primary contact fields.
- **Filters** holds all filters created in the system.
- **Forms** stores the merge form template properties added to the merge forms system.
- **FormsFld** contains information about fields in the merge forms.
- **FormsQue** is a queue of mail-merged documents waiting to be sent.
- **GMTLog,** with the **ContTlog** table, controls the synchronization process. The Primary Tlog holds the synchronization time stamp for the tables in the GoldMine files, such as Cal, Filters, and others.
- **GSLogs** is the GoldSync log table.
- **GSServer** contains the GoldSync server settings.
- **GSSites** contains configuration parameters for GoldSync sites.
- **InfoMine** stores data from the InfoCenter. The InfoCenter is part of the GoldMine files.

Field Name	Type	Length	Description
ACCOUNTNO	String	20	Account number

Field Name	Type	Length	Description
CREATEBY	String	8	Creation user
RECTYPE	String	10	Record type
SORTKEY	String	20	Sort key
TSECTION	String	100	Section
TOPIC	String	80	Topic
KEYWORDS	String	80	Keywords
OPTIONS	String	10	Options
OPTION1	String	20	Option 1
OPTION2	String	20	Option 2
LINKEDDOC	Memo	1	Linked document
NOTES	Memo	1	Notes
USERREAD	String	8	Read access
USERWRITE	String	8	Write access
LASTUSER	String	8	Last modified by
LASTDATE	Date	8	Last modified date
LASTTIME	String	5	Last modified time
RECID	String	15	Record ID

- **ImpExp** stores the Import/Export profiles used to export and import data.
- **LeadDbfs** holds leads analysis definitions set from the **GoTo>>Analysis** menu.
- **Lookup** contains each F2 Lookup entry. The Lookup table is part of the GoldMine files.

Field Name	Type	Length	Description
FIELDNAME	String	11	Field name
LOOKUPSUPP	String	10	Lookup Options
ENTRY	String	40	Description
RECID	String	15	Record ID
MASTERVALUE	String	40	Corresponding value for cross-field validation

- **Mailbox stores all GoldMine e-mail.** The Mailbox is part of the GoldMine files. The history display of messages pulls information from here. If an e-mail message has an attachment, it stores in the *\goldmine\mailbox\attach folder* by default.

Field Name	Type	Length	Description
LINKRECID	String	15	Linked Record ID
FLAGS	String	8	Flags
USERID	String	8	User name
FOLDER	String	20	Folder
FOLDER2	String	20	Subfolder
ACCOUNTNO	String	20	Account number
CREATEON	Date	8	Creation date
MAILSIZE	String	8	Mail size
MAILDATE	Date	8	Mail date
MAILTIME	String	8	Mail time
MAILREF	String	100	Linked contact name and subject line
RFC822	Memo	1	Mail message
RECID	String	15	Record ID

- **The OpMgr table** contains the data in the Opportunity and Project Managers. The OpMgr table is part of the GoldMine files.

Field Name	Type	Length	Description
OPID	String	15	Opportunity ID
RECTYPE	String	3	Record type
ACCOUNTNO	String	20	Account number
USERID	String	8	User name
FLAGS	String	10	Flags
COMPANY	String	40	Company
CONTACT	String	40	Contact
NAME	String	50	Opportunity name
STATUS	String	50	Status
CYCLE	String	50	Cycle
STAGE	String	30	Stage
SOURCE	String	30	Source
F1	String	20	
F2	String	20	
F3	String	10	
STARTDATE	Date	8	Start date
CLOSEDDATE	Date	8	Close date

Field Name	Type	Length	Description
CLOSEBY	Date	8	Close by
FORAMT	Float	10	For amount
FORPROB	Integer	4	Probability
CLOSEAMT	Float	10	Close amount
NOTES	Memo	1	Notes
RECID	String	15	Record ID

- **OpMrgFld**
- **PerPhone** serves as personal contacts, containing names and phone numbers. The PerPhone table is part of the GoldMine files.

Field Name	Type	Length	Description
RECTYPE	String	1	Record type
USERID	String	8	User name
STATUS	String	2	International or U. S. phone format
CONTACT	String	30	Contact name
PHONE1	String	16	Phone number
RECID	String	15	Record ID

- **Report32** holds the report definitions and settings appearing in the Reports Menu dialog box.
- **ResItems** contains the resource(s) you created, such as equipment, facilities, and other resources scheduled from the Resources' Master File. The ResItems table is part of the GoldMine files.

Field Name	Type	Length	Description
NAME	String	8	Name
CODE	String	10	Code
RESDESC	String	40	Description
CUSTODIAN	String	8	Custodian
NOTES	Memo	1	Notes
RECID	String	15	Record ID

- **Scripts** holds telemarketing branching scripts.
- **SPFiles** is the directory of the GoldMine Contact Set databases. The SPFiles table is part of the GoldMine files.

Field Name	Type	Length	Description
DIRNAM	String	35	Contact file description
DITPTH	String	100	Contact file path
USERID	String	8	Contact file user
DIRCODE	String	10	Contact Set code
DBPASSWORD	String	36	Database password
DRIVER	String	25	Database driver
RECID	String	15	Record type

- **SysLog** is a global table used by all databases and processes. It records errors occurring when using the database tables. This table can be deleted if a user is running out of disk space and the old tables are no longer needed for troubleshooting. The system creates a new log.
- **Processes** holds the Automated Processes definitions.
- **UserLog** contains information used for each user’s Time Clock.

Web Import

Import Contact Information from a Website

Set up Internet Web sites to collect contact information from interested visitors. Use the data in GoldMine by creating a Web form (see “Creating Web Forms” on page 253) that includes instructions for handling the data.

Once information is submitted, a Web server script (see “Creating Server Scripts” on page 257) can format the data into an Internet e-mail message which can then be sent to a designated recipient. When retrieving the e-mail message (see “Importing Contacts with Web Import” on page 262), GoldMine recognizes the import instructions and creates a Contact Record with data captured from the Web page. Or, if a Web Import contact duplicates an existing contact, update selected fields (see “Updating GoldMine Fields with Web Import Data” on page 264).

Combining the Web Import feature with GoldMine’s Automated Processes can automate capturing and responding to leads. Initiate Automated Processes automatically and send e-mail messages to GoldMine users alerting them of the incoming contact data.

An advanced knowledge of gateway scripts is not needed to implement the GoldMine Web Import feature. Begin by contacting your Web administrator and providing him or her with the sample HTML and Perl script. Writing and modifying scripts requires some programming expertise not covered in this material. Many sources for getting started with Common Gateway Interface (CGI) scripts are available on the Internet and in bookstores.

NOTE: FrontRange Solutions’ technical support cannot provide support for creating or maintaining HTML code or CGI scripts.

Using the Web Import Wizard

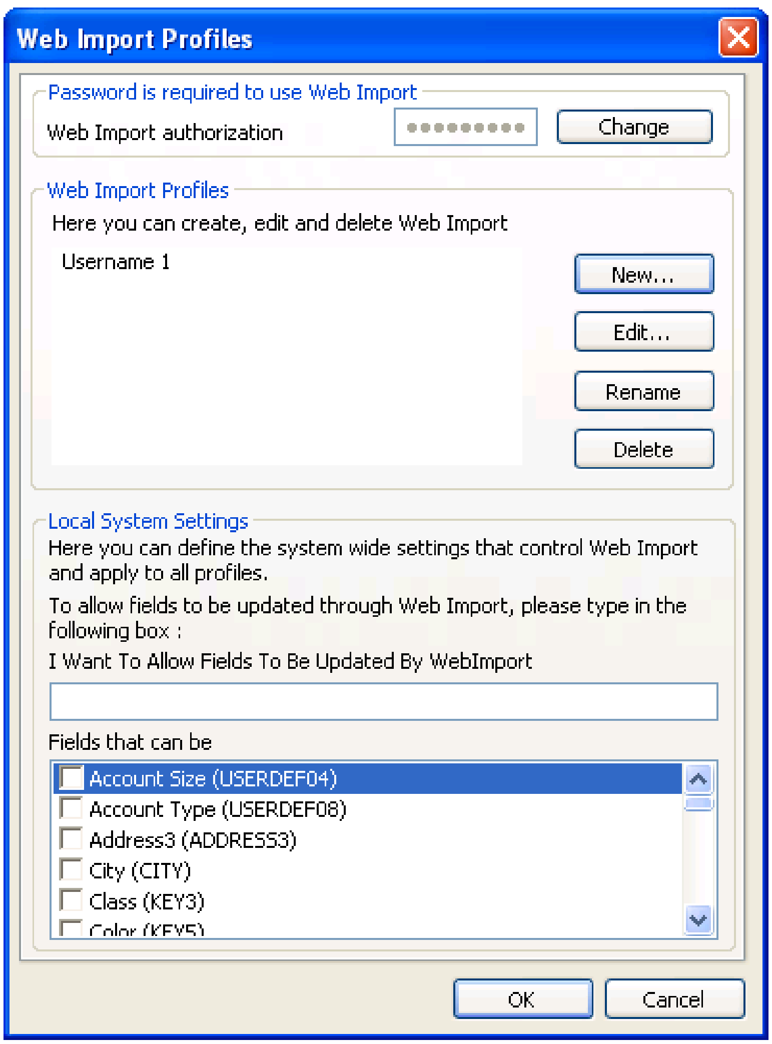
The Web Import Wizard creates the HTML form and script to process the contact information input by visitors on a Web site. You do not need to type the code and can create the forms in PERL, ASP, and PHP. Because all activities are driven off the Web server, Internet access is necessary.

The Web form captures the data, and the script formats it into an Internet e-mail message which can then be sent to a designated recipient. When retrieving the e-mail message, GoldMine recognizes the import instructions and creates a Contact Record with all the data captured from the Web page or updates selected fields if a Web Import contact is a duplicate of an existing contact.

Attach an Automated Process to a new or duplicate contact. Automated Processes can be initiated automatically, and e-mail messages sent to GoldMine users alerting them of the incoming contact data.

Once the form and script are e-mailed to the designated recipient, the Web administrator can place the HTML form page and the script source code on the Web Import server(s).

To use the Web Import Wizard, select **Go To>>Campaigns**, click the **Campaigns** button in the Navigation Pane, then click **Configure WebImport** on the toolbar, Alternately, select **Web>>Setup Web Import** and click **New**.



Set an authorization password (see “Requiring Passwords on Web Import Files” on page 263), then create, edit, rename, and delete Web Import Profiles in the Web Import Profiles dialog box.

Using Web Import Profiles

After creating a Web Import form and script using the Web Import Wizard, edit, rename, and delete Web Import profiles with these options on the Web Import Profiles dialog box:

- **New**: Create a new import form and script.
- **Edit**: Edit an existing import form and script.
- **Rename**: Type a new name for the campaign.
- **Delete**: Removes the selected Web Import profile.
- **More**>>: Users with Master rights have these settings available:
  - **Optional Web Import authorization password**: Protect the Web Import process with passwords so only authorized incoming instruction files may be imported. This prevents unauthorized persons from sending e-mail messages and inundating a GoldMine system with unwanted data.
  - **Fields to be Updated by WebImport**: Type "**I Want To Allow Fields To Be Updated By WebImport**" in the text box to let visitors to your Web site update their information in your GoldMine database.
  - **Fields that can be updated**: Select the fields to be updated by the Web Import.

Creating Web Forms

The Web form is an HTML document for collecting information. Users type text and make choices from check boxes, radio buttons, and selection lists. Design forms meeting customer requirements by combining these input types; use or modify the sample HTML form below. The name of fields in your form must be identical to the names in your GoldMine databases.

How Forms Work

A Web form works with a script on a server to process submitted information. When a person fills out a form and clicks Submit, the browser sends (or posts) information in the form to the script or application running on the server for processing. The script processes the information passed from the browser to the server. The processed information can be sent back to the server, or, as with GoldMine's Web Import feature, sent by e-mail to a designated recipient.

Example of an HTML file using a form:

```
<!----The following is an example of an HTML file using a form---->
<HTML>
<HEAD><TITLE>FrontRange Solutions Inc. - Online
Registration</TITLE></HEAD>
<BODY BGCOLOR="#008080" Text="#FFFFFF" LINK="#000000" VLINK="#FF8900">
<BASEFONT SIZE=3>
<!----This is where the table layout begins---->
<TABLE BORDER=3>
<TR>
<TD><FONT SIZE=+3>FrontRange Solutions Inc.</FONT></TD>
</TR>
```

```
<TR><TD><FONT SIZE=+2>Online Registration Form</FONT></TD>
</TR>
</TABLE>
<!----This is where the table layout ends---->
<P>
<B>
<CENTER>To register your copy of GoldMine, please fill out the following form.</CENTER>
<CENTER>Your registration number is located on the registration card.</CENTER>
<HR>
<!-----This is where the form layout begins---->
<!----The line below references the PERL script---->
<FORM METHOD=POSTACTION="http://www.frontrange.com/cgi/webimp.pl">
<!----The line below references an HTML page, created separately, that will appear once the message has been sent---->
<INPUT TYPE="hidden" Name="thankURL" value="thankyou.htm">
<!----Replace "yourname@yourname.com" in the line below with the E-Mail address where you want to receive the results
of this form---->
<INPUT TYPE="hidden" NAME="email_to"value= "yourname@yourdomain.com">
<DT>GoldMine Serial Number
<DD>
<INPUT NAME="cs1_Rectype" TYPE="hidden"  VALUE="P">
<INPUT NAME="cs1_Contact" TYPE="hidden" VALUE=          "Serial Number">
<INPUT NAME="cs1_ContSupRef" TYPE="text" SIZE="15" MAXLENGTH="15">
<BR>
<DT>Number of Licenses
<SELECT NAME="Key1">
<OPTION VALUE="Gold 01/Single user">Single user
<OPTION VALUE="Gold 05 Net">5 user Network
<OPTION VALUE="Gold 10 Net">10 user Network
<OPTION VALUE="Gold 10-25 Net">10 - 25 user Network
<OPTION VALUE="Gold 25-50 Net">25 - 50 user Network
<OPTION VALUE="Gold 51+ Net">51+ user Network
<OPTION VALUE="Gold Net Unknown">Not Sure
<OPTION SELECTED>Choose One
</SELECT>
<P>
<DT>Date of Purchase
<INPUT NAME="cs1_Country" TYPE="text" SIZE="35" MAXLENGTH="35" VALUE="MM/DD/YY">
<P>
<DT>Place of Purchase
<INPUT NAME="cs2_Rectype" TYPE="hidden" VALUE="P">
<INPUT NAME="cs2_Contact" TYPE="hidden" VALUE="Place of Purchase">
<INPUT NAME="cs2_ContSupRef" TYPE="text" SIZE="35" MAXLENGTH="35" VALUE="">
<HR>
Ms. <INPUT TYPE="radio" NAME="Dear" VALUE="Ms.">
Mr. <INPUT TYPE="radio" NAME="Dear" VALUE="Mr.">
<DT>Name
<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="CONTACT">
<DT>Title
<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="TITLE">
<DT>Company Name
```

```
<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="COMPANY">
<DT>E-Mail Address
<DD>
<INPUT NAME="cs3_Rectype" TYPE="hidden" VALUE="P">
<INPUT NAME="cs3_Contact" TYPE="hidden" VALUE="Internet Address">
<INPUT NAME="cs3_ContSupRef" TYPE="text" SIZE="30" MAXLENGTH="30">
<DT>Address1
<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="Address1">
<DT>Address2
<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="Address2">
<DT>City
<DD><INPUT SIZE="26" MAXLENGTH="26" NAME="City">
<DT>State/Province
<DD><INPUT SIZE="3" MAXLENGTH="3" NAME="State">
<DT>Country
<DD><INPUT SIZE="20" MAXLENGTH="20" NAME="Country">
<DT>Zip/Postal Code
<DD><INPUT SIZE="10" MAXLENGTH="10" NAME="Zip">
<DT>Telephone Number (WITH AREA CODE)
<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="Phone1" VALUE="(xxx)xxx-xxxx">
<DT>Fax Number (WITH AREA CODE)
<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="Fax" VALUE="(xxx)xxx-xxxx">
<HR>
<DT>Contact Manager/PIM, if any, prior to purchasing GoldMine
<SELECT NAME="userdef05">
<OPTION VALUE="ACT!">Act!
<OPTION VALUE="TeleMagic">TeleMagic
<OPTION VALUE="Janna Contact">Janna Contact
<OPTION VALUE="Ecco">Ecco
<OPTION VALUE="Lotus Organizer">Lotus Organizer
<OPTION VALUE="Other">Other
<OPTION SELECTED>Choose One
</SELECT>
<P>
Computer Type:<BR>
<INPUT TYPE="radio" NAME="cs5_ContSupRef" VALUE="Desk top">Desktop
<INPUT TYPE="radio" NAME="cs5_ContSupRef" VALUE="Laptop/NOTEbook"> Laptop/NOTEbook
<INPUT TYPE="radio" NAME="cs5_ContSupRef" VALUE="Desktop & Laptop/NOTEbook"> Both
<INPUT NAME="cs5_Rectype" TYPE="hidden" VALUE="P">
<INPUT NAME="cs5_Contact" TYPE="hidden" VALUE="Computer Type">
<P>
<DT>Network Operating System
<SELECT NAME="userdef07">
<OPTION VALUE="LAN Man">LAN Manager
<OPTION VALUE="Novell">Novell
<OPTION VALUE="OS/2">OS/2
<OPTION VALUE="Pathworks">Pathworks
<OPTION VALUE="Win4WrkGrp">Windows 3.11 for Workgroups
<OPTION VALUE="Windows 98">Window 98
<OPTION VALUE="Windows NT">Windows NT
```

```
<OPTION VALUE="Windows NT 4.0">Windows NT 4.0
<OPTION VALUE="Other">Other
<OPTION SELECTED>Choose One
</SELECT>
<P>
Primary Business at your company:
<SELECT NAME="Key3">
<OPTION VALUE="Advertising">Advertising
<OPTION VALUE="Real Estate">Real Estate
<OPTION VALUE="Banking/Finance">Banking/Finance
<OPTION VALUE="Medical">Medical
<OPTION VALUE="Telecommunications">Telecommunications
<OPTION VALUE="Government">Government
<OPTION VALUE="Aerospace">Aerospace
<OPTION VALUE="Insurance">Insurance
<OPTION VALUE="Computer">Computer
<OPTION VALUE="Manufacturing">Manufacturing
<OPTION VALUE="Legal">Legal
<OPTION VALUE="Entertainment">Entertainment
<OPTION VALUE="Electronics">Electronics
<OPTION VALUE="Other">Other
<OPTION SELECTED>Choose One
</SELECT>
<P>
<DT>Where did you learn about GoldMine?
<SELECT NAME="Source">
<OPTION VALUE="Advertising">Advertising
<OPTION VALUE="Acquaintance">Acquaintance
<OPTION VALUE="Demo Disk">Demo Disk
<OPTION VALUE="Trade Show">Trade Show
<OPTION VALUE="Magazine Review">Magazine Review
<OPTION VALUE="Reseller">Reseller
<OPTION VALUE="Literature">Literature
<OPTION VALUE="Other">Other
<OPTION SELECTED>Choose One
</SELECT>
<P>
<DT>Comments
<TEXTAREA NAME="NOTEs" ROWS=4 COLS=72></TEXTAREA>
<P>
</DL>
<INPUT TYPE="submit" VALUE="Register">
<INPUT TYPE="reset" VALUE="Reset Form">
</FORM>
<!----This is where the form layout ends---->
<B>
</BODY>
</HTML>
```

Creating Server Scripts

The Common Gateway Interface (CGI) is the specified standard for communication between HTTP servers (Web servers) and server-side gateway programs. The CGI specifications define how data passes from the server to gateway programs, and vice versa.

Gateway programs can be compiled programs written in languages such as C, C++ or Pascal, or they can be executable scripts written in languages such as Perl, TCL, ASP, and other various shell programs. Most gateway programs are Perl scripts; they are easy to write and modify and are transportable between computers.

Sample PERL Gateway Script for GoldMine Web Import

```
#!/usr/local/bin/perl
# check for the POST method
if ($ENV{‘REQUEST_METHOD’} eq ‘POST’)
{
# How many bytes are we supposed to receive?
read(STDIN, $buffer, $ENV{‘CONTENT_LENGTH’});
# make a list of keyword/value pairs
@pairs = split(/&/, $buffer);
# cycle through each pair and decipher the values foreach $pair (@pairs)
{
# get the name/value pair strings
($name, $value) = split(/=/, $pair);
# translate "+" to a space
$value =~ tr/+/ /;
# decipher ASCIhexidecimal escaped characters, if any
$value =~ s/%([a-fA-F0-9][a-fA-F0-9])/pack("C", hex($1))/eg;
# find profile/contsupp field names that begin with cs*_
if ($name =~ /cs\d_/)
#add the profile/contsupp pair to a list keyed on the name of the variable
{$csarry{$name} = $value;}
else {
#add the basic field data pair to a list keyed on the name of the variable
$contents{$name} = $value
}
}
}
($mon,$day,$year) = split(m>>/>>,‘/bin/date +%B/%e/%Y‘);
$date = "$mon $day, $year";
$to = $contents{‘email_to’};
&mailto;
&thankyou;
###############
## subroutines from here on down!
###############
sub thankyou {
print "Location: http://www.frontrange.com/thankyou.htm\n\n";
exit;
```

```
}
sub mailto {
open (MAIL, ">>/usr/lib/sendmail -t") >>>>die "can’t open pipe to sendmail \n";
print MAIL "Content-Type: application/x-gm-impdata\n";
print MAIL "To: $to\n";
print MAIL "From: $csarry{‘cs2_ContSupRef’}\n";
print MAIL "Subject: datafromgoldform.pl\n";
print MAIL "\n\n";
print MAIL "\[Instructions\]\n";
print MAIL "SaveThis=Web Import File\n";
print MAIL "DupCheck1=Contact\n";
print MAIL "\n";
print MAIL "OnNewSendEmail=Bart,NEW,Prospect requesting information \n";
print MAIL "OnDupSendEmail=Natalie,,Duplicate Record \n”;
print MAIL "\n";
print MAIL "OnNewAttachTrack=WEBLead\n";
print MAIL "\n";
# The following is an example of testing a field for a value
#print MAIL "Below a message will be printed if the CITY is
Torrance\n\n";
if ($contents{CITY}eq "Torrance") {
print MAIL "OnAnySendEmail=John,WCC,This one is from Torrance\n";
}
print MAIL "\n";
#print MAIL "Run=c:\goldmine\webimp.exe\n";
print MAIL "\n";
print MAIL "\n";
print MAIL "\[Data\]\n";
# print out general fields and values
foreach $name (sort keys %contents) {
next if $contents{$name} eq "";
print MAIL "$name = $contents{$name}\n";
}
print MAIL "\n";
print MAIL "\[ContSupp\]\n";
# print out profile/contsupp fields and values
foreach $name (sort keys %csarry) {
next if $csarry{$name} eq "";
print MAIL "$name = $csarry{$name}\n";
}
print MAIL "\n";
print MAIL "\n";
print MAIL "\n";
print MAIL "\n\n";
close (MAIL);
}
```

Formatting Web Import Files

The incoming import file contains contact data and instructions. It must conform to a specific format, similar to .ini files. Three major import file sections:

- **[Instructions]**: Define import instructions. These instructions allow duplicate checking, sending e-mail messages to GoldMine users, attaching Automated Processes, and running external applications to further process the incoming contact data. GoldMine can check if the contact already exists by considering the DupCheck#= instructions. The first duplicate checking instruction usually must be based on one of the indexed fields, Contact, Company, Phone1, City, State, Country, Zip, AccountNo, Key1, Key2, Key3, Key4, or Key5. Additional DupCheck#= instructions can be specified to test more than one field to determine if the incoming contact data is a duplicate.

  Example:

  DupCheck1=Contact

  DupCheck2=Company

- **[Data]**: Defines contact data. Format each entry as fieldname=value; for example, City=Long Beach. The filename should be the actual field name in the Contact1 or Contact2 files. A special email=field can be used to insert the contact's e-mail address.
- **[ContSupp]**: Allows addition of detail records. The fields of each record must have a prefix of cs#_, and must appear consecutively. For example, the fields of the first ContSupp record would have the prefix cs1_, while the fields of a second record would have a prefix of cs2_. Add a maximum of 8 ContSupp records.

Checking for Duplicate ContSupp Data

GoldMine can check for duplicate records based on ContSupp data by specifying the ContSupp record prefix; for example, CS1. When GoldMine identifies a duplicate record, but notices the contact name does not match the existing name, an additional contact is created with the incoming data under the existing Contact record. GoldMine also adds ContSupp records that do not already exist.

Checking for Duplicate E-Mail Addresses

Configure GoldMine to check for duplicate records based on an e-mail address. Run this check without including a check based on indexed fields. To check for duplicate e-mail addresses, include the statement:

DupCheck=Email

Using Commands to Automatically Perform Operations

E-Mail

Send e-mail messages to GoldMine users alerting them of newly created contact records. Send a separate e-mail message based on whether the contact is new [OnNewSendGMEmail=], or already exists on file [OnDupSendGMEmail=]. Designate a user as the message recipient, followed by an optional activity code, then an optional reference. Send multiple e-mail messages by appending consecutive numbers to the send e-mail instructions; for example, OnNewSendGMEmail1=, OnNewSendGMEmail2=, and so on.

Automated Processes

Attach Automated Processes to the contact to initiate an automated response. Initiate letters, faxes, e-mail, and other activities to automate responding to the captured leads. Attach a separate Automated Process based on whether the contact is new [OnNewAttachTrack=], or already exists on file [OnDupAttachTrack=]. You must specify the track name, followed by an optional attaching user. For faster processing, also specify the internal track number instead of the track name. Attach multiple Automated Processes by appending consecutive numbers to the attach track instruction; for example, OnNewAttachTrack1=, OnNewAttachTrack2=, and so on.

Launch an External Application

To launch an external application for further processing of the incoming data, use the Run=<exefile> instruction. This command allows flexibility, since custom programs can be written to perform a variety of tasks. GoldMine saves import instructions to a file, and passes that file name as a parameter to the launched application.

Extracting Import Instructions and Data

Since the import instructions are similar to .ini files, use Windows API GetPrivateProfileString to extract the import instructions and data. The ImportData=0 instruction prevents GoldMine from importing any new data, and lets the custom application append the data.

The SaveThis=<reference> instruction saves the instruction file to the notes of a new history record. Specify any history reference; for example, SaveThis=Web import file.

Protect the Web Import process with passwords to allow importation of only authorized incoming instruction files.

GoldMine can also process an import instruction file by sending a DDE command. Using a DDE command lets other applications create Contact records in GoldMine. To start processing an instruction file through DDE, send the ExecIniImp (<filename>) command; for example, ExecIniImp(i.C:\GoldMine\imp.ini)].

Example 1:

Since GoldMine stores Web site addresses as detail records (called Web Site), import these addresses using the following syntax:

[ContSupp]

cs1_RecType=P

cs1_Contact=Web Site

cs1_ConSupRef=http://www.web.site.com

cs_Address1=notes (optional)

Example 2 (correct format for an import instruction file):

```
[Instructions]
DupCheck1=Contact
OnNewSendGMEmail=JOHN, NEW, Prospect requesting information
[Data]
Company=GlobalCorp.
Contact=John Doe
Phone1=555/333-1234
email=jdoe@global.com
[ContSupp]
cs1_RecType=P
cs1_Contact=Serial Number
cs1_ContSupRef=10000002
cs1_Address1=This is a test....
```

The following example shows a short instruction file containing the password “Doodle”:

```
[Instructions]
Password=Doodle
DupCheck1=Contact
OnNewSendGMEmail=JOHN, NEW, Prospect requesting information
[Data]
Company=GlobalCorp.
Contact=John Doe
Phone1=555/333-1234
email=jdoe@global.com
```

Example 3 (an import instruction file containing all possible instructions:)

```
[Instructions]
DupCheck1=Contact
DupCheck2=userDef05
DupCheck3=cs1
OnNewSendGMEmail=JOHN, NEW, Prospect requesting information
OnDupSendGMEmail=AMI,,Repeated request...
OnNewAttachTrack=Web Lead
OnDupAttachTrack=100067,JOHN
```

```
Run=c:\goldmine\webimp.exe
SaveThis=Web import file
;ImportData=0
Password=Verify
[Data]
Company=GlobalCorp.
Contact=John Doe
Phone1=555/333-1234
Address1=1401 West Baker Street
City=Garden Grove
State=CA
Zip=90220
Source=Web Page
email=jdoe@global.com
[ContSupp]
cs1_RecType=P
cs1_Contact=Serial Number
cs1_ContSupRef=10001001
cs1_Address1=This is a test...
cs2_RecType=C
cs2_Contact=Jane Adams
cs2_Title=Beta Program Manager
```

Importing Contacts with Web Import

GoldMine's Internet e-mail reader identifies data retrieved from the Web Import Gateway. GoldMine looks at the header of every e-mail message for handling instructions.

Example of special header information:

Content-Type: application/x-gm-impdata

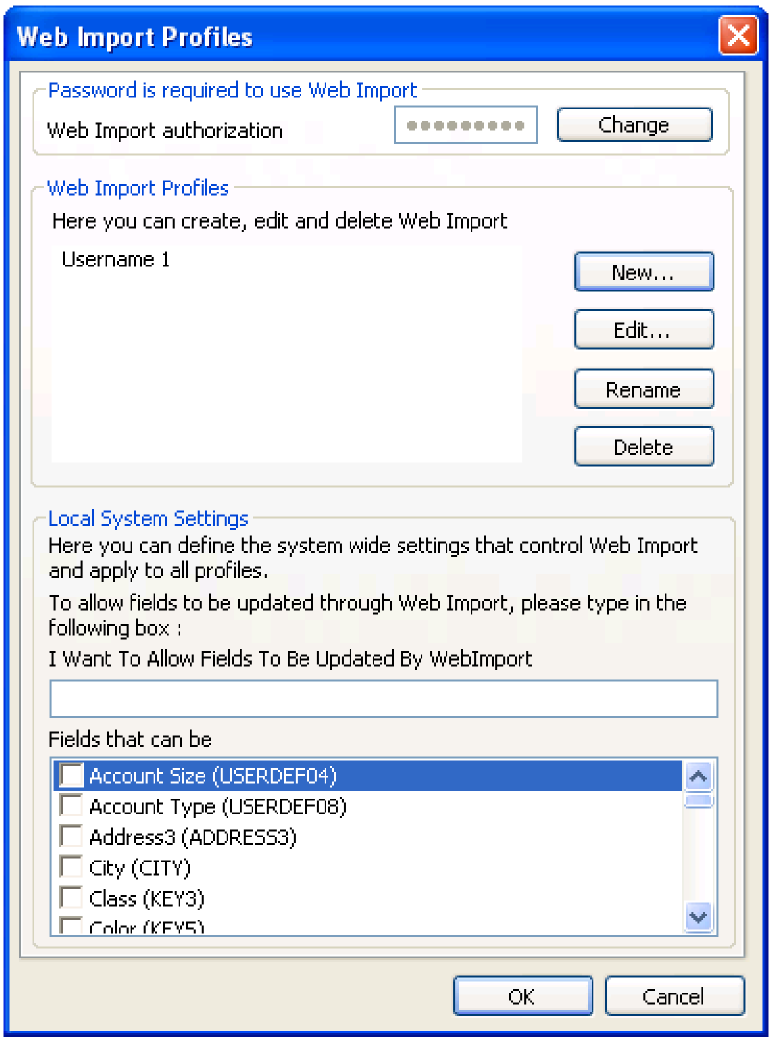
When an e-mail message containing Web Import information is retrieved, GoldMine handles the message. Alternatively, an incoming message can trigger the Web Import with this To: line entry:

{$GM-WEBIMPORT$}

Requiring Passwords on Web Import Files

Web Import processes are protected with passwords to allow importation of only authorized incoming instruction files. This prevents unauthorized persons from sending e-mail messages and inundating a GoldMine system with unwanted data. A password is always required to use Web Import. The incoming instruction file will not be processed if it does not contain a password or if it contains an invalid password.

The Web Import authorization password is set at the top of the Web Import Profiles dialog.



A password must be set before the Web Import functions are made available.

Updating GoldMine Fields with Web Import Data

If a contact already in your database fills out a Web form, set the Web Import to update specified Contact1 and Contact2 fields instead of creating duplicate records. Also enable Web Import to update e-mail addresses and append Notes.

With these settings, GoldMine updates only the specified fields and discards changes to fields not included in the list.

The e-mail address is added only if it differs from the existing addresses. It is added as the new primary address and the others save as alternative addresses.

CAUTION: Accepting changes from a Web Import might cause data integrity problems.

FrontRange recommends observing these additional security precautions when enabling Web Import overrides:

- Do not accept Web Import e-mails from an unknown e-mail address.
- Limit access to the Web Import e-mail account to one user, the GoldMine administrator with Master Rights.
- Protect your Web Import files with a password and monitor the Web Import passwords regularly for changes.

Back up GoldMine data daily if running daily Web Imports.

Enabling Field Updates with Web Importing

1. Using a text editor, such as Windows Notepad, open the GM.ini.
2. Add this section and lines:

   [WebImportOverwrite]

   IAgree=I Want To Allow Fields To Be Updated By WebImport

   Fields=<list the contact1 and contact2 fields that can be updated, separated by a comma>

   Example: Fields=Key1,Fax,UData
3. Select **File>>Save** and close the text editor.

NOTE: The **Accountno** or **Recid** fields can never be overwritten using the GoldMine Web Import.

Plug-Ins

Plug-Ins for Integrations

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 (see “ActiveX Controls” on page 265) or an HTML file/web site (see “HTML Integrations” on page 266) for integration, then set up security (see “Plug-in Security” on page 269).

ActiveX Controls

ActiveX structure provides the most control and can be created with these programming languages: C++, Delphi, Visual Basic, and .NET. When used with other GoldMine APIs, ActiveX is powerful.

Within the ActiveX support, 4 methods can be implemented in your control for stronger interaction with GoldMine. These functions are not necessary to implement:

public void GMOnStart(longhWnd)T

This is the only function that passes a parameter. The parameter is the HWND (window handle) of the container window in GoldMine. Use the Windows API SendMessage() call to control what happens to the container (for implementing a Close button—since the control is late bound in GoldMine, and cannot expose events).

public void GMOnActivate()

This function tells you when the user has given your control’s container focus in GoldMine.

public void GMLostFocus()

This function is called whenever the user gives focus to another object when your control had focus.

public void GMOnDestruct()

This function is called when the window is just about to close; it provides the opportunity to clean up.

HTML Integrations

The HTML attempts to call a JavaScript or VBScript function named like the last 3 ActiveX methods, meaning exactly the same thing. The GMOnStart() function is not supported in HTML:

```
function GMOnActivate();
function GMLostFocus();
function GMOnDestruct();
```

Plug-in Description File

The plug-in description file is a well-formed XML file describing the plug-in. The extension for the file is .GME (GoldMine Extension).

HTML

Structure for the HTML plug-in

```
<PlugInDefs>
<PlugInDef>
<URL>http://gmail.google.com/gmail</URL>
<QueryString>q=&lt;&lt;&amp;Address1&gt;&gt;, &lt;&lt;&amp;City&gt;&gt;, &lt;&lt;&amp;State&gt;&gt;, &lt;&lt;&amp;Zip&gt;&gt;</QueryString>
<Description>
<Language Locale="1033" IsDefault="1">
<Name>G-Mail</Name>
<Publisher>Google</Publisher>
<Description>Launches Google's Gmail Service</Description>
<Menu>Launch GMAIL</Menu>
</Language>
<Language Locale="4000">
<Name>eegay ale-may</Name>
<Publisher>oogle-Gay</Publisher>
<Description>aunches-Lay oogle-Gay’s eegay ale-may Urvice-Say</Description>
<Menu>aunch-Lay eegay ale-may</Menu>
</Language>
</Description>
<OnDemand>1</OnDemand>
<Startup>1</Startup>
<MultipleInstance>0</MultipleInstance>
<Modal>0</Modal>
<DefaultPos>
<top>50</top>
<left>50</left>
</DefaultPos>
<DefaultSize>
```

```
<width>800</width>
<height>600</height>
</DefaultSize>
<Visible>1</Visible>
</PlugInDef>
</PlugInDefs>
```

HTML plug-in details

The root node must be PlugInDefs and as the name implies, multiple plug-ins can be installed under one definition file. For each plug-in, there is a PlugInDef. The child nodes for PlugInDef are:

- **URL**: The URL for the HTML file or Web site must be http://, https://, or file://.
- **QueryString**: The querystring to be tacked on to the end of the URL. Can contain GoldMine field macros that will be evaluated on launch of the plug-in. The macro wrapping structure is <<field>>, like <<&Contact>> or <<Contact1->AccountNo>>.

NOTE: You must XMLEncode the macros as shown in the structure above.

- **Description**: The values here describe the item to the user and can contain multiple languages to describe the file, using the locale code associated with the target language. One language structure must be marked as IsDefault and is used in case the target language is not supported by the plug-in. Use XML entities in place of extended characters. For example, Ñ would be Ñ.
  - **Name**: Dialog name used for security.
  - **Publisher**: Your company name. Creates a sub menu under the Plug-ins menu.
  - **Description**: Used in the **Help>>About Plug-ins** button.
  - **Menu**: The text the user sees for a menu item.
- **OnDemand**: Determines if the plug-in is added to the plug-ins menu. 1 = True, 0 = False. If false, the item is started up with GoldMine.
- **StartUp**: Determines if the item is started up with GoldMine. This is for situations where you want it to start, but if the user closes the window you want them to be able to access the plug-in via a menu. 1 = startup with GoldMine, 0= don’t start with GoldMine.
- **MultipleInstance**: Determines if multiple instances of the plug-in are allowed. 1 = allow multiple instances, 0 = false. When false, if the user chooses the menu item for that plug-in, GoldMine will bring that window to the front and give it focus. non-OnDemand, Modal, and non-visible plug-ins are automatically single instance.
- **Modal**: Determines if any action can occur outside of the window in GoldMine. 1= Modal, 0 = Modeless. Startup/non-OnDemand items cannot be modal. Modal items are strictly single instance.

- **DefaultPos**: The coordinates where your dialog first appears. This is only used the first time the plug-in is run and is ignored for Modal plug-ins, which automatically center in relation to the GoldMine window.
- **DefaultSize**: Describes the height and width of the dialog box for first time use or for modal windows, which cannot be resized.
- **Visible**: Determines if the user can see the window. Not recommended for HTML-based plug-ins.

ActiveX

Structure for the ActiveX plug-in

```
<PlugInDefs>
<PlugInDef>
<ProgID>myApp.ClassInstance</ProgID>
<Installer>myAppInstaller.exe</Installer>
<Description>
<Language Locale="1033" IsDefault="1">
<Name>G-Mail</Name>
<Publisher>Google</Publisher>
<Description>Launches Google's Gmail Service</Description>
<Menu>Launch GMAIL</Menu>
</Language>
<Language Locale="4000">
<Name>eegay ale-may</Name>
<Publisher>oogle-Gay</Publisher>
<Description>aunches-Lay oogle-Gay’s eegay ale-may Urvice-Say</Description>
<Menu>aunch-Lay eegay ale-may</Menu>
</Language>
</Description>
<OnDemand>1</OnDemand>
<Startup>1</Startup>
<MultipleInstance>0</MultipleInstance>
<Modal>0</Modal>
<DefaultPos>
<top>50</top>
<left>50</left>
</DefaultPos>
<DefaultSize>
<width>800</width>
<height>600</height>
</DefaultSize>
<Visible>1</Visible>
</PlugInDef>
</PlugInDefs>
```

ActiveX plug-in details

Although it is very similar to the HTML plug-in description, there are 2 primary differences, the ProgID and Installer nodes instead of the URL and QueryString nodes.

The ProgID is the ProgID for your ActiveX control and the Installer is the installer name for the application. The Installer should be sitting in a folder named Installers under the plug-in directory.

Plug-in Security

Using GM.ini or the User.ini, a user or administrator can block the use of plug-ins altogether, block individual plug-ins, and add user-specific directory for more plug-ins (see “Adding a Local Plug-in Directory” on page 270).

GM.INI has precedence over the user INI file. Two methods are available:

- **Optimistic**:

  [PlugIns]

  allow_by_default=1

- **Pessimistic**:

  [PlugIns]

  deny_by_default=1

allow_by_default=0 is the same as **deny_by_default=1** and vice versa. If the keys are missing, the method is assumed to be **Optimistic**.

If **Optimistic**, you only need to add blocked plug-ins to the INI files. If **Pessimistic**, you must give a plug-in permission to run.

To Block with Optimistic

[PlugIns]

allow_by_default=1 or deny_by_default=0

EVIL_PLUGIN=0

To Allow a Plug-In with Pessimistic

[PlugIns]

deny_by_default=1 or allow_by_default=0

GOOD_PLUGIN=1

Adding a Local Plug-in Directory

By default, the plug-in directory is under SysDir/Plug-ins. For server installs, this means that all users have the plug-ins under that folder. If users want to add their own local plug-in directory, they could add it to the user INI:

[PlugIns]

LocalPath=c:\personal\GMPlugIns

The user still gets the global level programs (assuming they are not blocked) so ensure there is no duplication.

Security

The ShowActvForCurtained setting in [GoldMine] section of the GM.ini file lets you specify whether or not the calendar shows activities linked to completely curtained contacts. Set this field to 1 if you want the calendar to show activities linked to completely curtained contacts. For example:
[GoldMine]

ShowActvForCurtained=1

WARNING: Storing this setting in GM.ini means that GM.ini must be **read-only** for all except administrators/masters. This weakens GoldMine security.

Service Center

About the Service Center

The Service Center provides Customer Service Representatives (CSRs) with case management functionality that allows them to capture service requests and then filter and access the details of each case.

Users can accept incoming customer service requests from multiple sources, be alerted to upcoming and urgent cases, and get details for any open or closed service request. Individual agents and customer service managers can filter the users' daily case activities.

Using the Service Center

The Service Center window is divided into two views; a **List view** that lists all cases and a **Detail** view that displays the details of a particular case.

To view the Service Center List view

At the menu bar, select **GoTo>>Service Center**.

The Service Center List view opens.

To view the Service Center Detail view

4. At the Service Center List view, double-click on a case.

   The Details view for that case opens.

5. Click on the click link in the upper left corner 

of the Service Center Details view and you return to the List view.

To view the Service Center List and Details views at the same time

To enable both views, click the chevron button .

Service Center List View

The List view consists of the following elements:

- **Search field.** A field that allows you to search on an existing case. This field is useful when you have many cases to sort through.
- **Workspace bar.** The workspace allows you to create new cases and templates, edit the status of the specified case, and analyze the specified case by selecting the appropriate buttons.
- **Toolbar.** The toolbar in the Service Center List View provides elements that allow you to view and manage details for cases.
- **Case list.** The case list may be sorted by any of several columns, including:
  - **Status.** Current status
  - **Number.** Case number
  - **Subject.** Subject of case
  - **Type.** Type of case
  - **Company.** Company associated with the case
  - **Contact.** Contact at Company associated with the case
  - **Deadline.** Deadline of the case
  - **Alerts.** Any Alerts associated with the case
  - **Resolution.** The resolution of the case

To use other available fields, click **Customize button>>Column Selection** tab and click on the check box next to the field.

Service Center Detail View

The Detail view consists of the following elements:

- **Toolbar.** Allows you to create new cases and templates, edit the status of the specified case, and analyze the specified case.
- **Case Details window.** Includes fields and drop-down menus that allow you to view and manage details for the specified case.
- **Case Manager.** A customizable workspace where you can schedule and manage activities, notes, tasks, and resources for the specified case. The Case Manager can contain any of the following functional tabs, based on your selections in Case Manager Preferences:
  - **Pending.** Click on this tab to schedule activities for new or existing cases and templates.
  - **Notes.** Click on this tab to create and edit notes pertaining to an individual service case.
  - **Team.** Click on this tab to add users to a team for the specified case.
  - **Tasks.** Click on this tab to create and assign tasks to users for the specified case.
  - **Attachments.** Click on this tab to attach documentation supporting a problem or solution for the specified case.
  - **Resolution.** Click on this tab to enter and manage notes and Knowledge Base documents supporting the resolution of the specified case

    - **History.** When an activity or task is competed, it is moved from the Pending or Tasks tab to the History tab. Double-click on an activity or task in the History Tab to view additional details about the history of that item.
    - **Contacts.** Click this tab to display information about additional contacts. Additional Contacts are individuals with whom you communicate regularly, usually on behalf of the primary contact.
- **Navigation Panel.** The navigation panel provides a shortcut to view the GoldMine screens. Click the buttons at the bottom of the panel to open each screen.
- **Activities and Notes Panel.** This panel contains the following fields:
    - **Next Activity.** Displays the next activity scheduled for this case.
    - **Last Activity.** Displays the last activity performed for this case.
    - **Last Note.** Displays the last note applied to this case.

NOTE: To switch to the list view, use the chevron button in the top-right portion of the window.

Using the Service Center Toolbar (List View)

The toolbar in the service center List View provides elements that allow you to view and manage details for cases. Open new cases and create case templates, choose viewing and grouping options, reassign, escalate, and resolve cases.

- **New Case.** Click this button to create a new case or template.
- **Show.** Click this button to filter how your Cases list displays information, for example *Open Cases or My Group's Cases*.

  Note that the headings will change based on your selections.
- **Group.** Click this button to group your cases by category, for example, **Due Date** or **Owner**.
- **Reassign.** Click on this button to reassign (move) a selected case to another user. You can email the user by clicking **Reassign button>>E-mail checkbox.** The Status field changes to *Reassigned*.
- **Escalate.** Click on this button to escalate a specific case to a higher priority. You can email the user by clicking **Escalate button>>E-mail checkbox.** The Status field changes to *Escalated*.
- **Resolve.** Click on this button to mark a specific case as *Resolved*" and enter resolution notes for the case. You can email the user by clicking **Resolve button>>E-mail checkbox.** The Status field changes to *Resolved*.
- **Analyze.** Click this button to open the Case Management Analysis dialog box where you can filter performance data by user. You can also export this information to a Microsoft Excel spreadsheet or Microsoft Word.
- **Customize.** Click this button to customize the Customize Case Manager settings.

Using the Service Center Toolbar (Detail View)

The Service Center Detail View toolbar provides the following elements, which allow you to view and manage details for an individual case:

The Service Center workspace tool bar consists of these buttons:

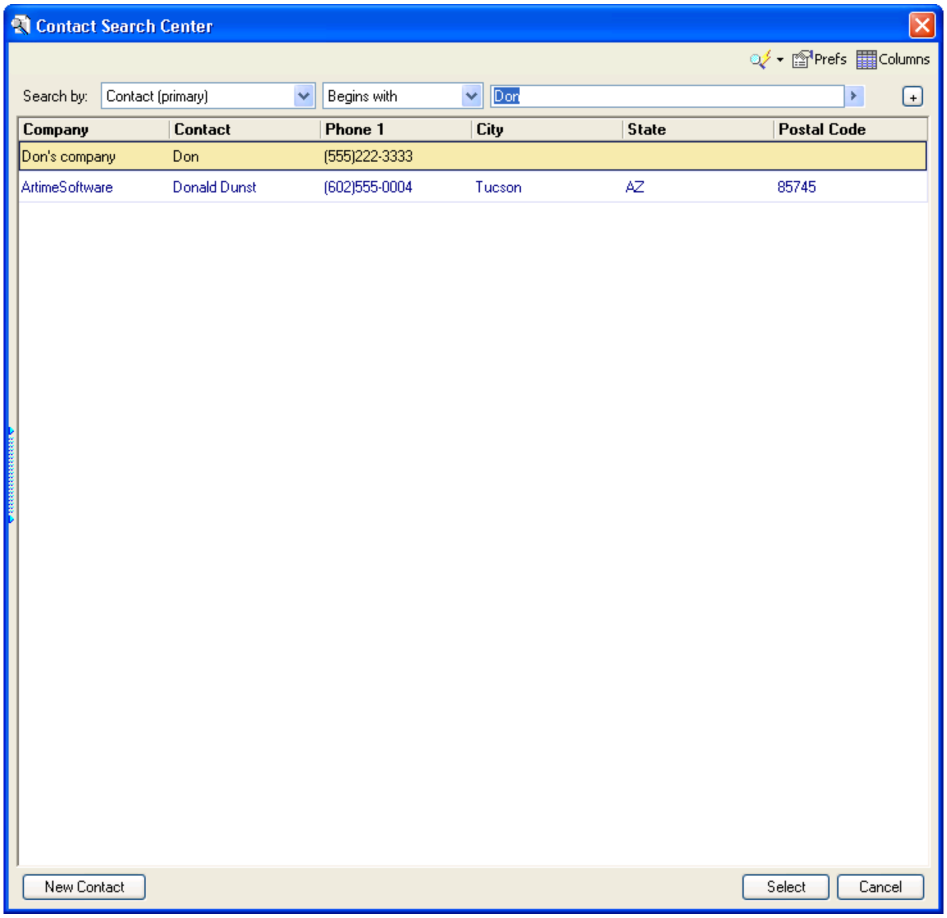
- **Reassign.**Click on this button to reassign (move) a selected case to another user. You can email the user by clicking **Reassign button>>E-mail checkbox.** The Status field changes to *Reassigned*.
- **Escalate.** Click on this button to escalate a specific case to a higher priority. You can email the user by clicking **Escalate button>>E-mail checkbox.** The Status field changes to *Escalated*.
- **Resolve.** Click on this button to mark a specific case as *Resolved*" and enter resolution notes for the case. You can email the user by clicking **Resolve button>>E-mail checkbox.** The Status field changes to *Resolved*.
- **Abandon.** Click on this button to mark a specific case *Abandoned* and enter resolution notes for that case. You can email the user by clicking **Abandon button>>E-mail checkbox.**
- **Templates.** Select from drop-down menu:
  - **Save as Template.** Open the Manage Case Templates dialog box with predefined values populated from the specified case.
  - **Manage Templates.** Open the Manage Case Templates dialog box with predefined values not populated.
- **Analyze.** Click this button to open the Case Management Analysis dialog box where you can filter performance data by user. You can also export this information to a Microsoft Excel spreadsheet or Microsoft Word.
- **Customize.** Click this button to customize the Customize Case Manager settings.

Creating a New Case

Use the following procedure to create a new service request (Case).

6. At the Service Center, click **New Case**.

The **Contact Search Center** window opens.



7. Double-click on a contact or group of contacts for which you want to create the case and click **Select.**

- If you have many records listed, use the Search capability at the top of the window.
- To create a case from a new contact, click **New Contact** and complete the **New Record** dialog box.

The Service Center window opens and the new case appears with a system-generated case number in the **Case Number** field. Depending on the case, some fields also may be system-generated.

8. Complete each field by clicking next to the field and either entering text in the field box or selecting values by clicking the down arrow on the box.

NOTE: Define the values in the drop-down box using F2 Lookup. If you have not created any values, no values will appear. For more information, see the Lookup chapter.

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9. Click on the **Pending tab** and complete the dialog box as needed.

For more information on the Pending tab, see the *GoldMine 85 User's Guide.*

10. Click on the **Notes tab** and then click **Add Notes**.

    Type any notes you have in the workspace, as needed and then click the **Save** icon in the top left side of the Notes workspace.

11. Click on the **Team tab** and complete the team information as needed.
    - To add a team member, click **Add.** At the **Add Member** dialog box, select a user from the drop-down box and type in the user's role in the **Role** field.
    - To edit a team member, either double-click on the team member or click on the team member and click **Edit,** and then make the changes.
    - To delete a team member, click on the team member and then click **Delete.**

12. Click on the **Task tab** and complete the tasks properties as needed.
    - To add a team member, click **Add** and complete the **New Task** dialog box.
    - To edit a task, double-click on the task or select the task and click **Edit**.
    - To mark a task *Complete*, click **Complete** and at the **Complete Task>>Options section**, select or type 100 in the **% completed** field.
    - To print a task, select the task and click **Print>>Print.**
    - To delete a task, select the task and click **Delete**.

13. Click on the **Attachments tab** and add attachments as needed.
    - To add an attachment, click **Add** and complete the New Attachment dialog box.
    - To delete an attachment, click on the attachment and click **Delete.**
    - To view an attachment, click **View.**

14. Click on the **Resolution tab** to add resolution information to the case, as needed.
    - To add a note, click **Add Note** and type the note in the workspace.
    - To add a Knowledge Base article, click **Search Knowledge Base.**
    - To delete a Knowledge base entry, click **Remove Knowledge Entry.**

15. When an activity or task is competed, it is moved from the Pending or Tasks tab to the History tab. Click on the **History** tab and double-click on an activity or task to view additional details about the history of that item.

16. Click on the **Contacts** tab to view the contacts associated with this case.
    - Save this case by clicking on the Save icon in the toolbar

New Record Tabs

After completing the new record, customize the tabs for the record. You may have additional tabs on your system.

To view the tabs that are off screen, click the left or right arrow at the end of the tabs.

1. Click on the **Pending** tab and complete the dialog box as needed.

   For more information on the Pending tab, see the *GoldMine User's Guide.*

2. Click on the **Notes** tab and then click **Add Notes**.

   Type any notes you have in the workspace, as needed and then click the **Save** icon in the top left side of the Notes workspace.

3. Click on the **Team** tab and complete the team information as needed.
   - To add a team member, click **Add**. At the **Add Member** dialog box, select a user from the drop-down box and type in the user's role in the **Role** field.
   - To edit a team member, either double-click on the team member or click on the team member and click **Edit**, and then make the changes.
   - To delete a team member, click on the team member and then click **Delete.**
4. Click on the **Task** tab and complete the tasks properties as needed.
   - To add a team member, click **Add** and complete the **New Task** dialog box.
   - To edit a task, double-click on the task or select the task and click **Edit.**
   - To mark a task *Complete*, click **Complete** and at the **Complete Task>>Options** section, select or type 100 in the **% completed** field.
   - To print a task, select the task and click **Print>>Print.**
   - To delete a task, select the task and click **Delete**.
5. Click on the **Attachments** tab and add attachments as needed.
   - To add an attachment, click **Add** and complete the New Attachment dialog box.
   - To delete an attachment, click on the attachment and click **Delete**.
   - To view an attachment, click **View.**
6. Click on the **Resolution** tab to add resolution information to the case, as needed.
   - To add a note, click **Add Note** and type the note in the workspace.
   - To search the Knowledge Base, click **Search Knowledge Base.**
   - To delete a Knowledge base entry, click **Remove Knowledge Entry.**
7. When an activity or task is competed, it is moved from the Pending or Tasks tab to the History tab. Click on the **History** tab and double-click on an activity or task to view additional details about the history of that item.
8. Click on the **Contacts** tab to view the contacts associated with this case.
9. Save this case by clicking on the **Save** icon in the toolbar.

Customizing Tabs

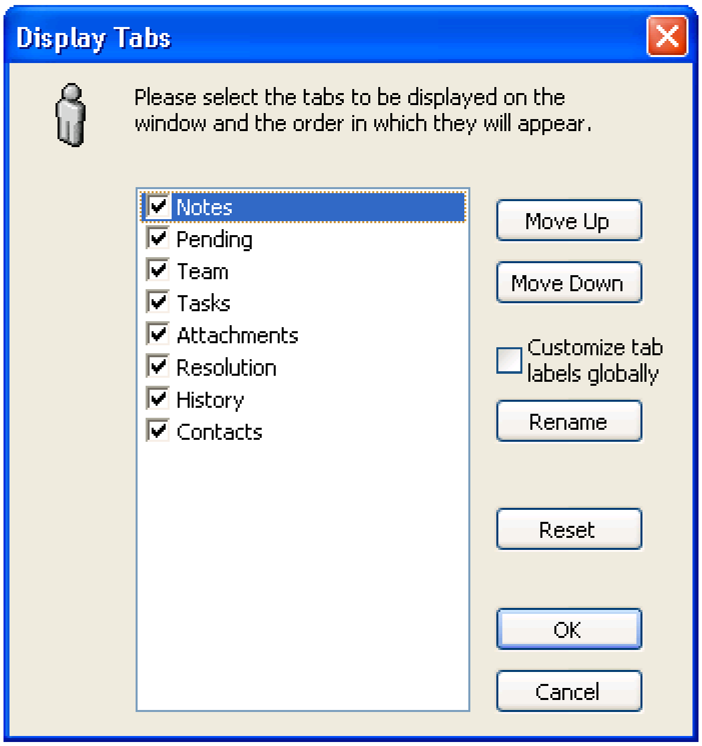
You can customize the Service Center tabs to your particular needs. You can can add or delete a tab, rearrange the order in which they appear or rename the tabs.

1. At the Service Center, in the tabs area, click the **more** tab which appears left of the tabs.

   A list of the tabs appears.

2. Click **Customize.**

   The **Display Tabs** dialog box opens.



3. To add a tab, click on the checkbox next to the tab and a check appears in the box and then click **OK.** The tab is added.
   - To delete a tab, click on the marked checkbox. The check disappears. Then click **OK**. The tab is deleted.
   - To rearrange the order of the tabs, select the tab and click the **Move Up** or **Move Down** and then click **OK**. The tabs order changes.
   - To rename a tab, select the tab and click **Rename**. Type the new name in the dialog box and click **OK**. The new name appears on the tab. To make this change global throughout GoldMine, click **customize tab labels globally.**
   - To abandon the changes, click **Reset** and then click **OK**. The original tabs and tab order appear.

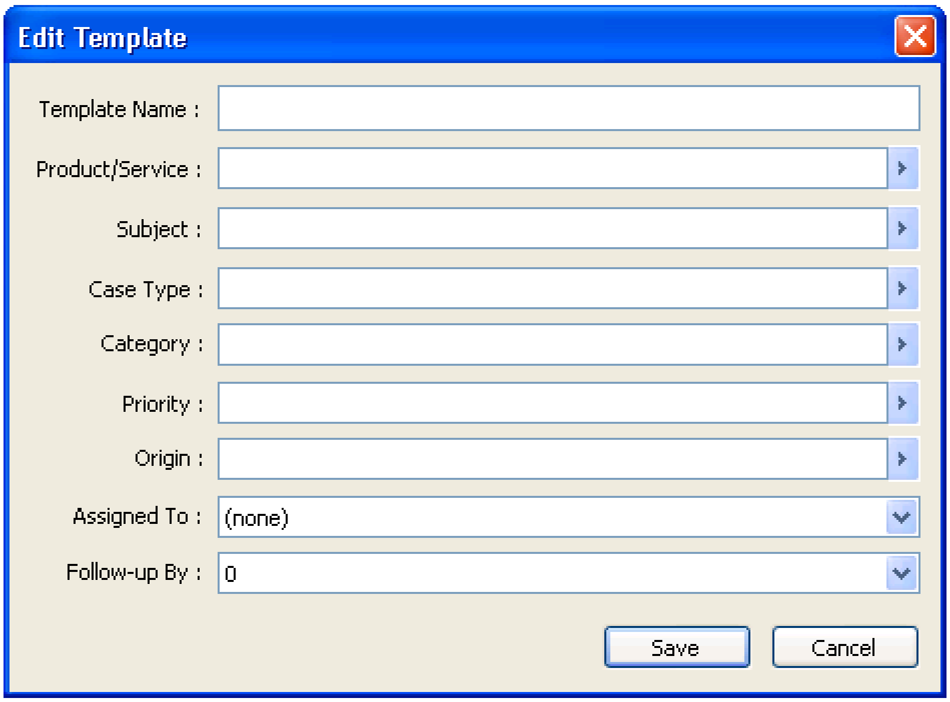
Creating a New Template

Use the following procedure to create a new template in the Service Center.

The Template fields are based on typical service case categories and prioritization. For example, a template might be used when the service call center logs a request from a customer to repair a telephone that is under warranty.

1. At the Service Center, click the down arrow on **New Case>>New Template**.

   The **Edit Template** dialog window opens.

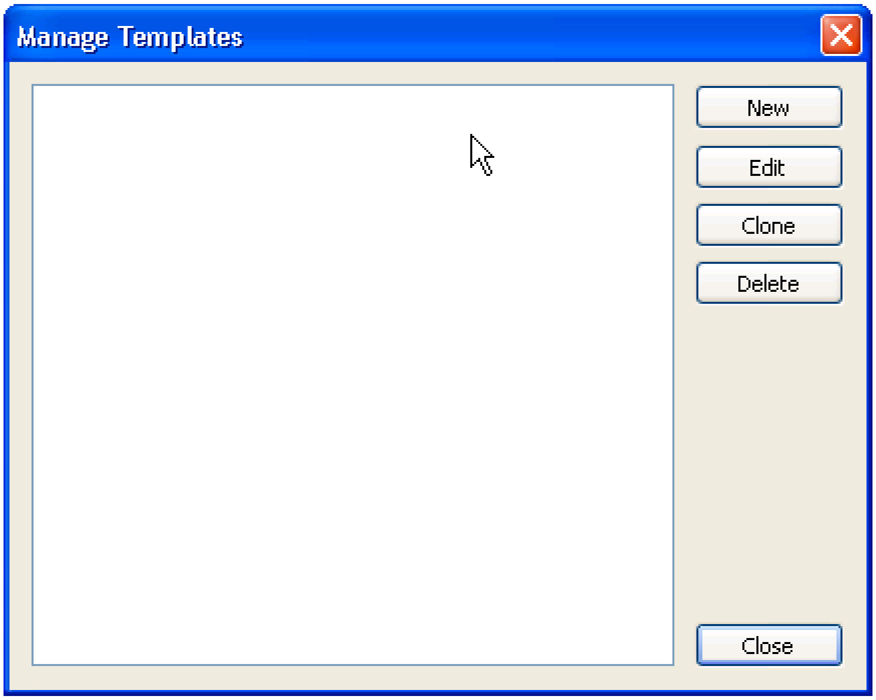


2. At the **New Template Name** field, type a name for the new template.
3. Select or type or select appropriate F2 lookup field values and then click **Save**.

To clone or edit an existing template

1. At the Service Center, click the down arrow on **New Case>>New Template** and then click **Save.**

   The **Manage Template** window opens.

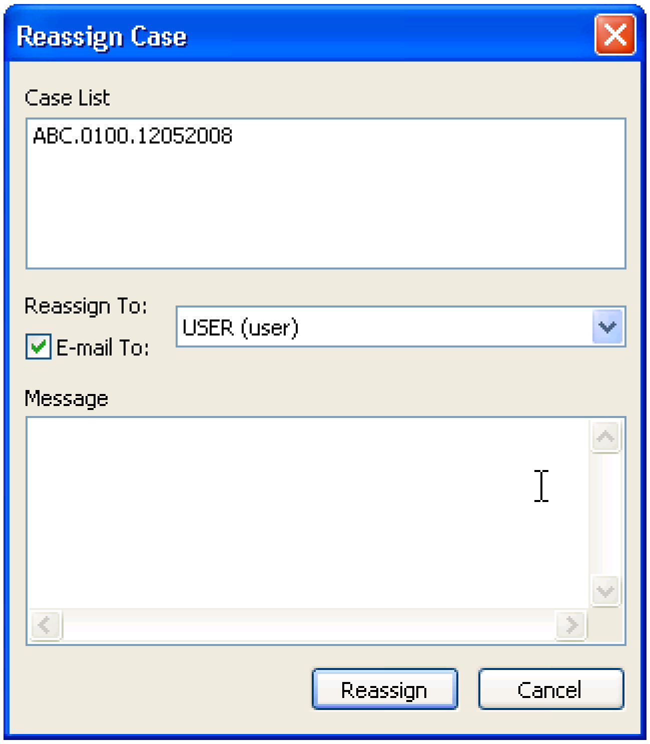
2. Select the template you want to clone or edit and click **Edit** or **Clone**.
3. Make the changes in the appropriate fields and then click **Save**.
4. To make changes on other templates, select the template and follow steps 3 and step 4, and then click **Close.**

Reassigning a Case

You can reassign a case to another user or another group.

1. At the Service Center window, at the toolbar, click **Reassign.**

   The **Reassign Case** dialog box opens and displays the selected case's unique number.



2. Click the **Use the Reassign To** drop-down menu to select a user to whom you will reassign the case.

NOTE: To notify the selected user of the reassignment via email, make sure the **E-mail Notification** checkbox is checked, and type your message into the Message box provided.

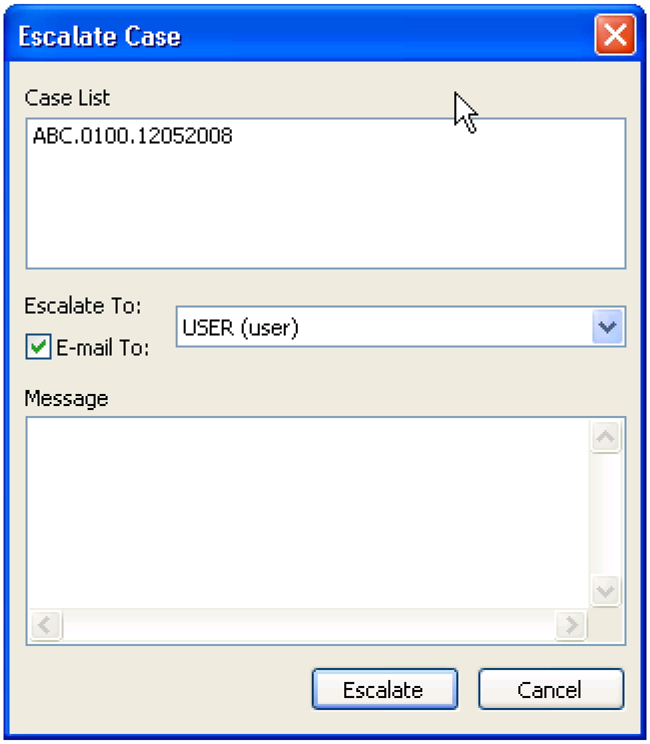
3. Click **Reassign** to reassign the case or **Cancel** to exit the dialog without reassigning the case.

Escalating a Case

Use the Escalate function to escalate a case to a higher priority.

1. At the Service Center window, at the toolbar, click **Escalate**.

   The **Escalate Case** dialog box opens and displays the selected case's unique number.



2. Click the **Escalate To** drop-down menu to select the user to whom you will escalate the case.

NOTE: To notify the selected user of the escalation via e-mail, make sure the E-mail Notification checkbox is checked, and type your message into the Message box provided.

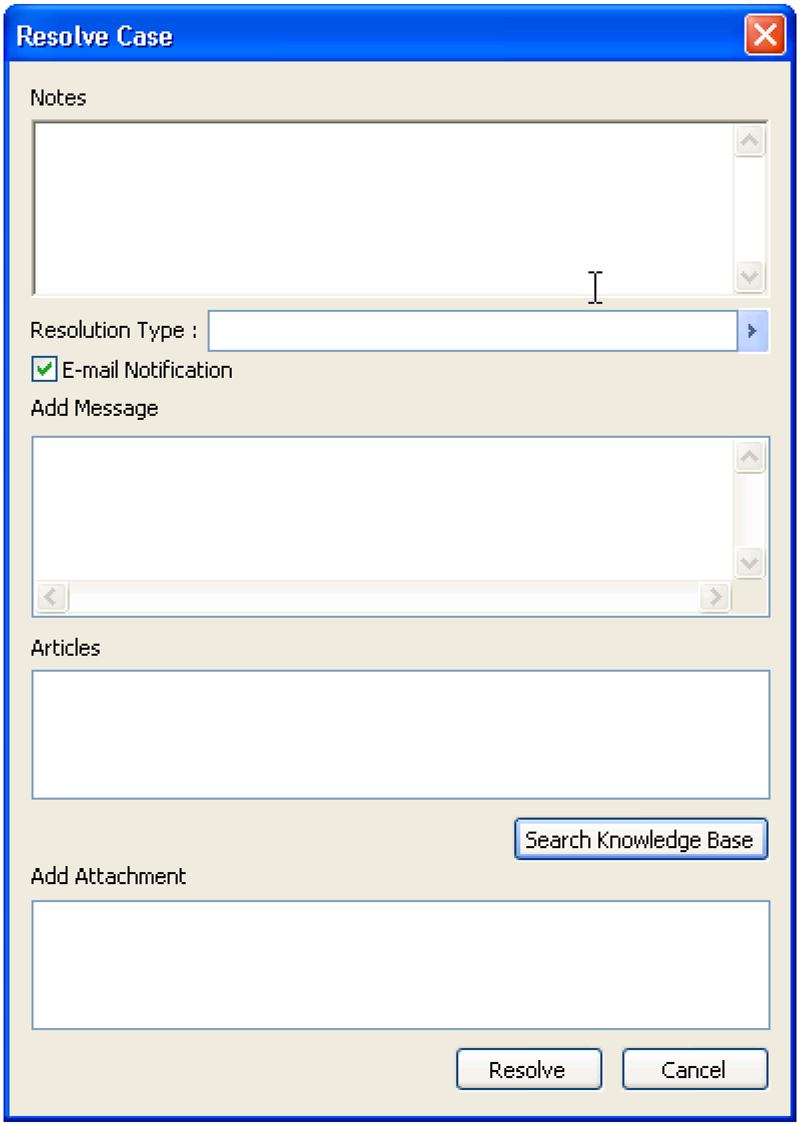
3. Click **Escalate** to escalate the case or **Cancel** to exit the dialog without re-escalating the case.

Resolving a Case

After a case is resolved, it is removed from the active list.

1. At the Service Center window, at the toolbar, click **Resolve**.

   The **Resolve Case** Dialog opens.



2. In the **Notes** field, enter information about the resolution of the case.

NOTE: To notify the selected user of the resolution via e-mail, make sure the **E-mail Notification** checkbox is checked, and type your message into the Message box provided.

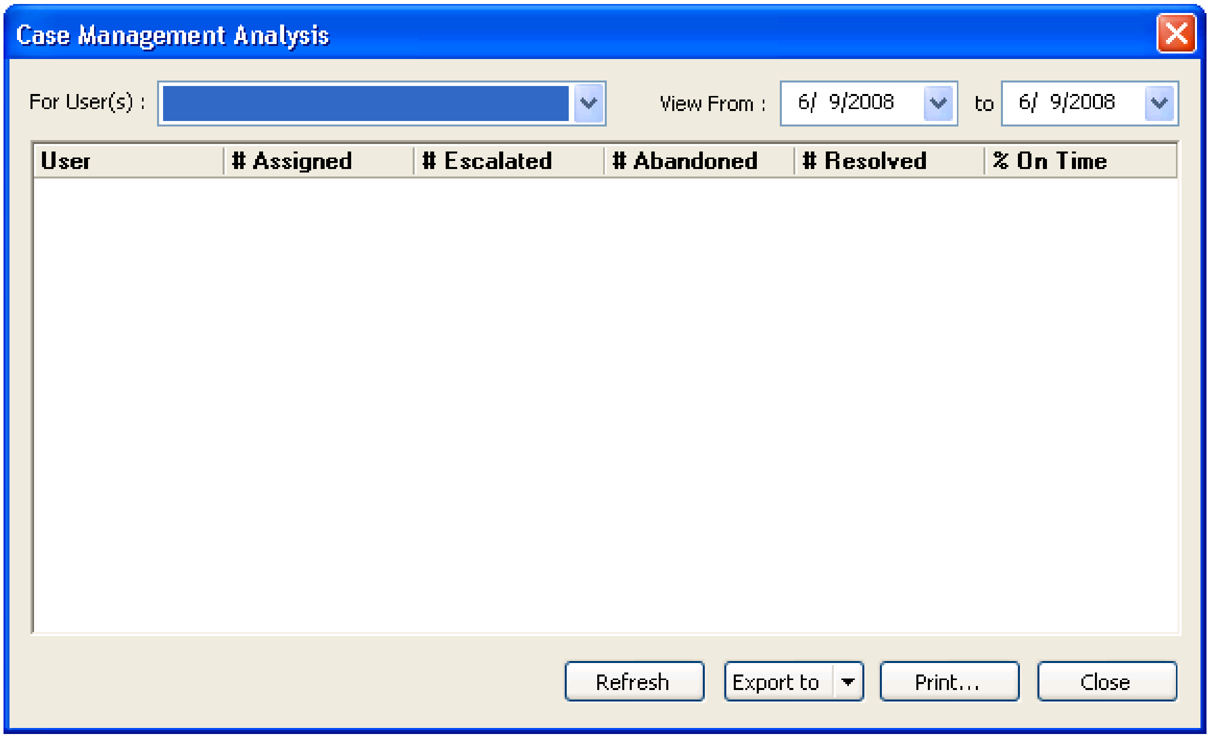
3. When finished, click **Resolve,** or select **Cancel** to exit the dialog without resolving the case.

Creating a Performance Report for a Case

Use this procedure to filter performance data by user and create reports.

1. At the Service Center window, at the toolbar, click **Analyze**.

   The **Case Management Analysis** dialog box opens.



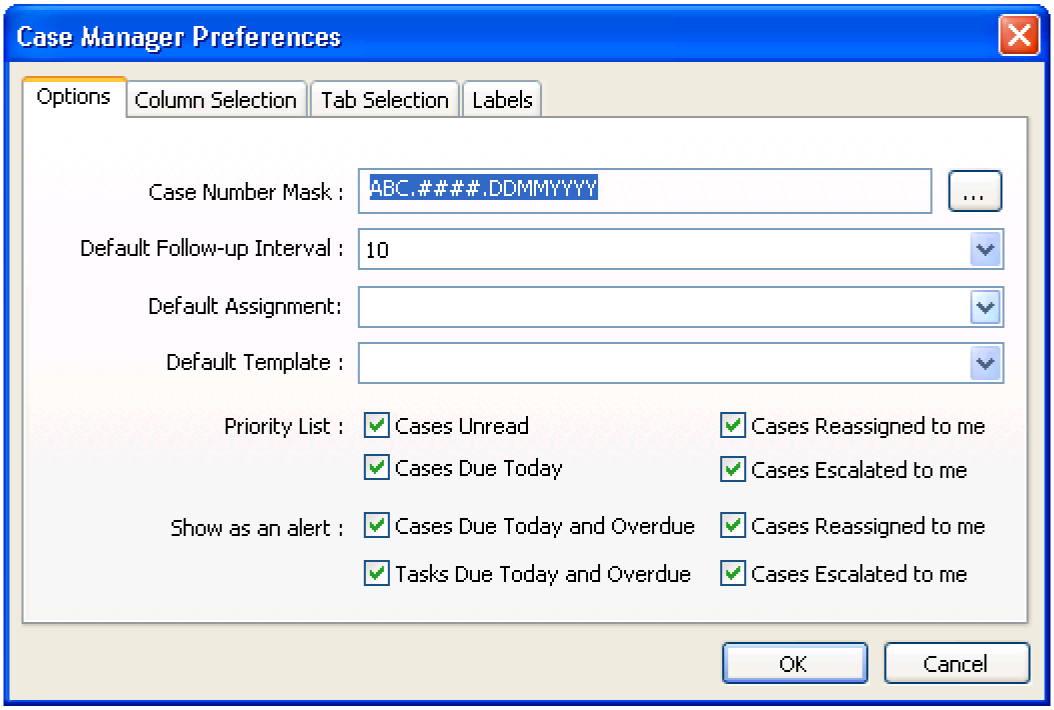
2. At the **For User(s)** drop-down box, select which user(s) to include in the report by selecting check boxes in the drop-down menu
3. Choose a date range for the report in the **View From** and **to** fields.
4. Sort the resulting data by any of the six columns:
   - **User.**
   - **# Assigned.** The number of active cases currently assigned to this user.
   - **# Escalated.** The number of active cases escalated to this user.
   - **# Abandoned.** The number of cases changed to Abandoned status by this user.
   - **# Resolved.** The number of cases changed to Resolved status by this user.
   - **% On Time.** The percentage of cases resolved before deadline by this user.
5. Click **Refresh** to refresh results after entering new criteria.
6. Click **Export to** to export your report to either a Microsoft Word or Microsoft Excel document.
7. Click **Print** to print a hard-copy of your report to a local or network printer.
8. Click **Close** to close the Case Management Analysis dialog window.

Customizing Data Appearance

Use the following procedures to customize how the data appears in the Case Manager.

1. At the Service Center window, at the toolbar, click **Customize.**

The Case Manager Preferences dialog window opens.



2. At the **Options** tab, select one of the following elements as needed:

Click on the ellipse button next to **Case Number Mask** field to set up protocols for case numbers in the Service Center. These are the fields:

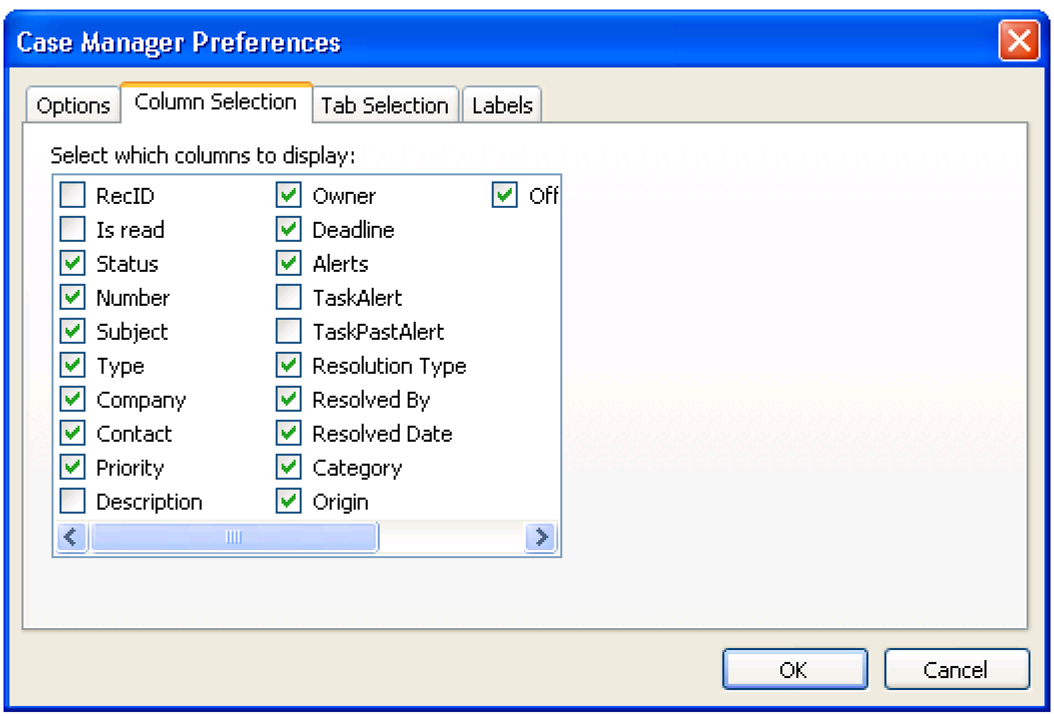
- **Preview.** Allows you to preview your numbering format based on choices you make in the settings area.
- **Settings area.** The setting area provides the following fields, menus, and check-boxes:
  - Prefix: Specifies a text string that always precedes your unique identifier number. Alternately, to use an automated date stamp as your prefix (MMDDYYYY) select the check-box labeled Use Timestamp
  - Separator (1): A punctuation mark that separates your prefix and unique identifier number
  - Identity Seed: A numeric value denoting the starting point for your unique identifier number
  - Identity Format: The total number of digits in your unique identifier number. This number must have at least 4 digits and no more than 10 digits
  - Suffix: Specifies a text string that always follows your unique identifier number. Alternately, to use an automated date stamp as your prefix (MMDDYYYY) select the check-box labeled Use Timestamp
  - Separator (2): A punctuation mark that separates your unique identifier number and suffix.

- **Default Follow-up Interval.** Allows you to determine the default interval, in days, between the case's creation date and the date automatically set in the Deadline field (Detail View). For example, to set a default interval of 7 days, select **7** from the drop-down menu
- **Default Assignment.** Allows you to choose the user, if any, that cases will be assigned to, by default.
- **Default Template.** Allows you to choose the case template, if any, to whom all cases will default.
- **Priority List.** Allows you to select the types of cases that will automatically be added to your priority list.

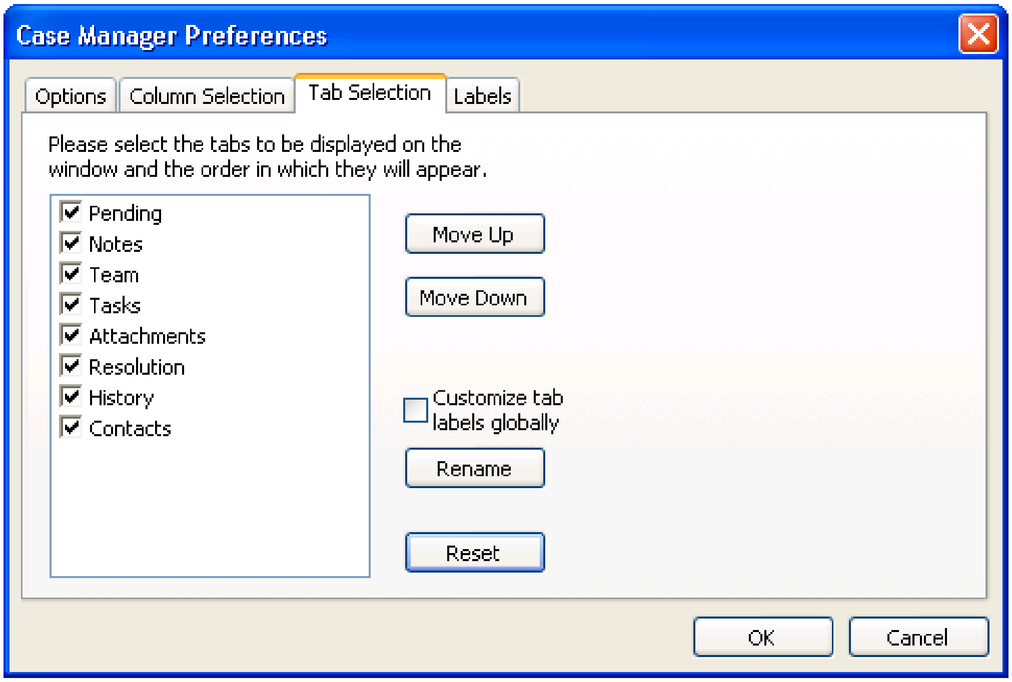
TIP: Use the Priority List to create a custom filter for cases. For example, to display only unread cases in the Service Center for a user, select only the checkbox for Cases Unread in the Options window, then select My Priority List from the Show menu in the Service Center toolbar.

- **Show as an Alert.** Allows you to select the types of cases that will automatically create alerts.

3. At the **Column Selection** tab, choose the columns to display in the window in the Case Manager.

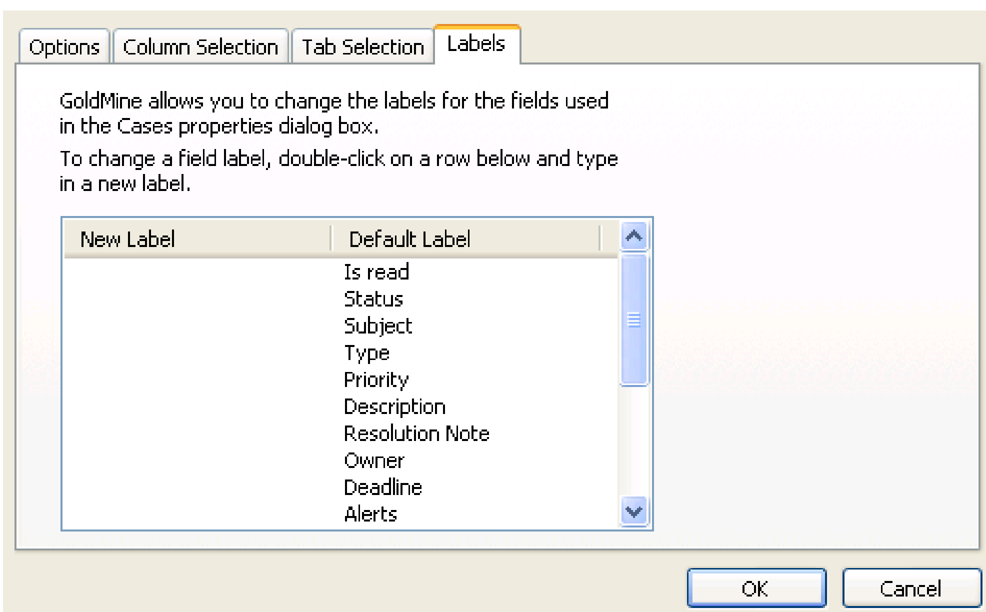


4. At the **Tab Selection** tab, choose the tabs to be displayed and the order in which to display in the Case Manager.



- Select a tab and click on **Move Up** or **Move Down** to arrange the order of the tabs.
- Select the **customize tab labels globally** checkbox to apply the changes to all users.
- Select a tab and click **Rename** to rename the tab.
- Click **Reset** to return to the original tab order.

5. At the **Labels** tab, change the labels for the fields used in the Cases properties dialog box, if needed.



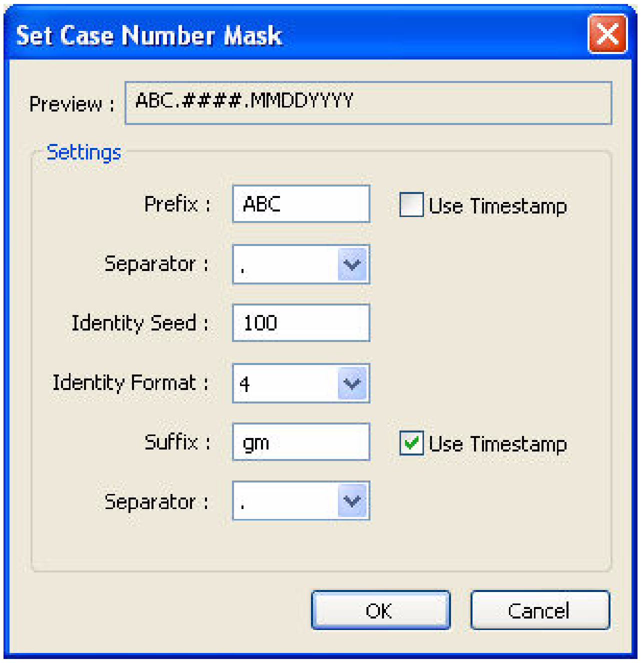
- Double-click on the row you want to change and type in the new label name.
- Create a new Contacts tab on the Case record, which enables multiple contact association.

About the Set Case Number Mask Dialog

The Set Case Number Mask dialog allows you to set up protocols for case numbers in the Service Center.

Use the following procedure to set up a protocol.

1. At the Service Center, select **Customize.**
2. At the Case Number Mask: field, click the ellipse button at the end of the field.



3. The **Set Case Number Mask** dialog box contains the following elements:

   Preview field. Preview the numbering format based on choices you make in the Settings area.

   Settings area. This are contains the following fields, menus, and check-boxes.

   Prefix. Specify a text string that always precedes your unique identifier number. Alternately, to use an automated date stamp as your prefix (MMDDYYYY) select the check-box labeled Use Timestamp

   Separator (1). A punctuation mark that separates your prefix and unique identifier number

   Identity Seed. A numeric value denoting the starting point for your unique identifier number

   Identity Format. The total number of digits in your unique identifier number. This number must have at least 4 digits and no more than 10 digits

   Suffix. Specify a text string that always follows your unique identifier number. Alternately, to use an automated date stamp as your prefix (MMDDYYYY) select the check-box labeled Use Timestamp

   Separator (2). A punctuation mark that separates unique identifier number and suffix

4. Select **OK** to save changes, or **Cancel** to exit the dialog without saving changes.

Reporting

About Reporting

GoldMine provides analysis reports for reviewing metrics. For example, you can calculate statistics based on activities scheduled and completed by GoldMine users.

Select from over 200 standard GoldMine reports or design a custom report tailored to meet your organization's needs. If using GoldMine with an E-license, you can use Answer Wizard reports.

A report can include data from these database tables:

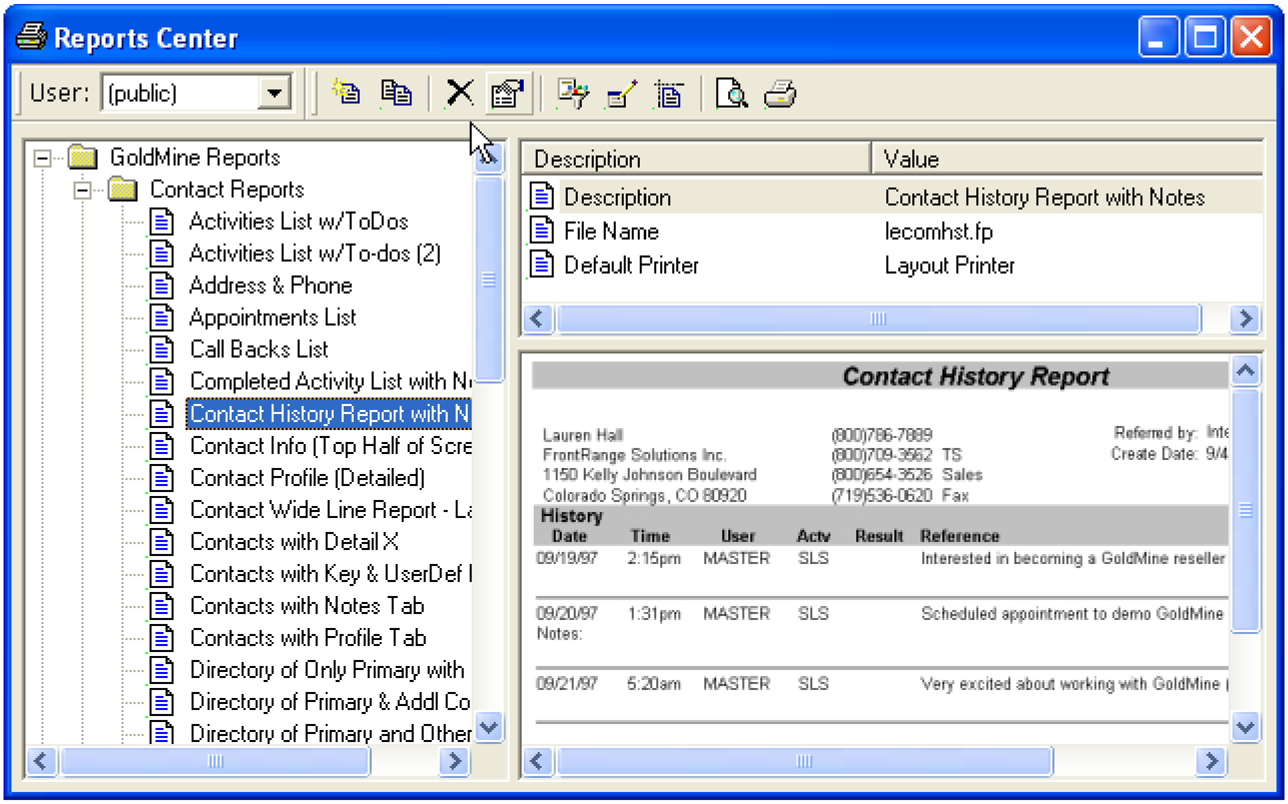
- **Contact1.** Main area of the Contact Record and the Summary and Notes tabs.
- **Contact2.** Fields tab and user-defined fields.
- **ContSupp.** Contacts, Details, Referrals, and Links.
- **Cal.** Calendar tab
- **ContHist.** History tab
- **OpMgr.** Opportunity Manager.
- **Cases.** Service Center

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. For a list of available report Macros, see GoldMine Report Macros.

About the Reports Center

The Reports Center provides easy visual access to several reporting options available within GoldMine.



To access the Reports Center, select Go To>>Reports>>Reports Center or click the Reports button in the Global Toolbar. 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 200 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: It is recommended that you use the Answer Wizard Reports (available through a Premium Edition add-on module).

- **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 FRS Support for the current information.)

NOTE: If you are using Crystal Reports version 11, you must have the CR 11 RDC Runtime files installed in order to integrate with GoldMine.

- **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 200 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 **Go To>>Reports>>Report Center**.

   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 the following analytical reports:

Types of Analysis Reports	Descriptions
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.)

- Report Properties
- Creating Reports
- Cloning Reports
- Editing Report Layouts
- Previewing GoldMine Reports
- Printing Reports
- Viewing Saved Reports

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. See Setting Report Properties, Profile Tab
- **Sorting.** Report's sort levels and fields. See Setting Report Properties, Sort Tab
- **Options.** Report's data and date inclusion options. See Setting Report Properties, Options Tab

Setting Report Properties, Profile Tab

The Report Properties Profile tab allows you to display or configure report description, filename and owner.

1. At the Report Center, select a report and click **Report Properties** on the Reports Center toolbar.
2. At the Reports Properties dialog box, click the **Profile** tab.
   - Type (or edit) the name of the report in the **Report description** field.
   - Select the owner of the report in the **Owner** drop-down list.
   - Type in extra details about the report and variables in the **Notes** field.
   - Type or select the name of the report file name in the **Reports Filename** field.

Reports store in the Reports folder of the main GoldMine directory. Report templates end with the extension .fp; for example, MyReport.fp.

- Select a printer.
  - **Selected Printer.** The printer designated in the **Output to** section of the Reports Menu.
  - **Layout Printer.** The printer selected in GoldMine's layout mode.

Setting Report Properties, Sort Tab

The Report Sorts tab of the Report Properties dialog box allows you to assign up to three sorting levels to a report. For example, you can sort a report by *Company*, *City*, and finally *Contact.*

1. At the Report Center, select a report and click **Report Properties** on the Reports Center toolbar.
2. At the Reports Properties dialog box, click the **Sort** tab.

   You can also select the Sort button on the Report Center toolbar.
3. Select a sort level.
   - **Primary Sort.** This sort specifies the first set of parameters for ordering records.

     NOTE: Every GoldMine report must have at least a Primary Sort defined to operate properly, even if no sorting is required. To preclude sorting, set Sort Database to (none). If Primary Sort is defined as (none), the Data Preparation browse window entry dims, indicating GoldMine sorts records by the natural order of record entry.

     To complete the sort definition, select the database **Sort Database** and **Field Name** GoldMine uses to order records in the report. To specify a range of records, set a **Start at** and an **End at** value.
   - **Secondary Sort.** This sort specifies a second set of parameters for ordering records.

     To complete the sort definition, select the **Sort Database** and the **Field Name** by which GoldMine sorts records. To specify a range of records, set a **Start at** and an **End at** value.

     NOTE: Define a first-level sort before defining a second-level sort. For a report with only one sort level, define the first level sort only.

   - **Tertiary Sort.** Specifies the third set of parameters for ordering records. To complete the sort definition, select the Sort Database and the Field Name by which GoldMine sorts records. To specify a range of records, set a Start at and an End at value. Define a second level sort before defining a third level sort. For a report with only two sort levels, define the first and second level sorts only.

4. In the **Sort Database** drop-down list, select the contact table containing the field on which the records are sorted for the selected sort level (Primary, Secondary, or Tertiary). The selected database appears to the right of the sort level.
5. In the **Field Name** drop-down list, select the field on which records sort for the selected sort level (Primary, Secondary, or Tertiary). Available fields are determined by the table selected from the Sort Database list. The selected field appears to the right of the sort level and the contact database name.
6. As needed, at the **Start at** field, type the beginning value of a range of ordered records.

   If the Start at field and End at field are blank, (all) appears to the right of the sort level database and field, and all records sort in ascending order.
7. At the **End at** field type the ending value of a range of ordered records.

NOTE: The Start/End range constraints are character-to-character comparisons. For example, if you constrain your start and end range to *FrontRange*, the sort will return all contacts for *FrontRange* but none for *FrontRange Solutions* or *FrontRange Solutions, Inc*. *FrontRang*e is within the start/end range, but *FrontRange<space>* is outside the end range. Also, searching for *FrontRange* would not return any results for *Frontrange*, because *r* is greater than *R* and therefore outside the end range of the sort. Finally, note that the range criteria is limited to 20 characters, so *FrontRange Solutions, Inc*. would show up in none of the above-described sorts, as it is outside the character limit.

Setting Report Properties, Options Tab

The Options tab determines what type of information displays in the report, similar to a filter applied internally to the report. Available options depend on the selected report category. Contacts, Analysis, and Labels and Envelopes display one set of Options, while the Calendar displays another.

1. At the Report Center, select a report and click **Report Properties** on the Reports Center toolbar.
2. At the Reports Properties dialog box, click the **Options** tab.

   You can also select the Options button on the Report Center toolbar.
3. In the **History Data** area, select the activity types to be included in the report and complete these fields:
   - **User.** At the drop-down list, select (all) or select the individual user of the report.
   - **Date.** Type or click the drop-down arrow and select the beginning date from the F2 Graphical Calendar. This is the first date you want the report data to reflect.
   - **To.** Type or click the drop-down arrow and select the end date from the F2 Graphical Calendar. This is the last date you want the report data to reflect.
   - **Actv.** Type the Activity Code assigned to the completed activities.

- **Result.** Type the Result Code assigned to the completed activities.This is a completion code to categorize the outcome of activities.You can use result codes to analyze specific completed activities.

4. In the **Calendar Data** area, select the activity types to be included in the report and complete these fields:
   - **User.** At the drop-down list, select (all) or select the individual user of the report.
   - **Date.** Type or click the drop-down arrow and select the beginning date from the F2 Graphical Calendar. This is the first date you want the report data to reflect.
   - **To.** Type or click the drop-down arrow and select the end date from the F2 Graphical Calendar. This is the last date you want the report data to reflect.
   - **Actv.** Type the Activity Code assigned to the completed activities
5. In the Linked Data area, select the linked data to be included in the report. The selections are: Other Contacts, Document Links, Details, Referrals, and Organizations.

Running Crystal Reports from the GoldMine Reports Center

To use the Crystal Reports in the Reports Center, first perform the following:

- Add Crystal Reports to the Reports Center. See “Adding Crystal Reports to the Reports Center” on page 298
- Configure Crystal Reports Data Source Names. See “Configuring Crystal Reports Data Source Names” on page 298.

After perfoming the previous steps, continue wiht the steps listed below:

1. Select **Go To>>Reports>>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. The Record Selection Expression and Group Selection Expression do not accept dBase or SQL expressions; they only accept Crystal expressions, such as:

   {CONTACT1.STATE} = "MO"
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** .

Adding Crystal Reports to the Reports Center

Add Crystal Reports to the Reports Center by adding a new report to the Reports Center display. The report must already be created and saved to a shared location. Or clone a report already added to the Reports Center.

To use the Crystal Reports option you must have:

- Crystal Reports installed.
- ODBC (Open Database Connectivity) Data Sources mapped to the GoldMine databases.
- Reports created in Crystal based on the GoldMine data.

Use the following procedure to add Crystal Reports.

1. Select **Go To>>Reports>>Report Center**.
2. At the Reports Center, select the owner of the report in the **User** drop-down list.
3. In the tree-view report list, expand **Crystal Reports.**
4. To add a Crystal Report already created, expand and select a report category.
   - Right-click a report category and select **New**.

     The Report Properties dialog box appears with the **Profile** tab active.
   - From here attach an existing Crystal Report. In the **Report Filename** field, browse to the location of the Crystal Report with the extension of .RPT.
5. Click **OK**. The report name appears in the report tree-view pane.
6. Right-click the report name and select Set ODBC Data Sources from the local menu.

   The Crystal Report Data Source Names dialog box opens.

Your report is added to the Reports Center. Now configure and run your report.

Configuring Crystal Reports Data Source Names

Crystal Reports use ODBC data sources to connect to your GoldMine database. To use Crystal Reports in the GoldMine Reports Center, you must set the ODBC data sources.

Use the following procedure to configure Crystal Reports.

1. Select **Go To>>Reports>>Report Center**.
2. At the Reports Center, select the owner of the report in the **User** drop-down list.
3. In the tree-view report list, expand **Crystal Reports.**
4. Right-click the report name and select **Set ODBC Data Sources** from the local menu. The Crystal Report Data Source Names dialog box opens.
5. In the GoldMine home directory data source name text box, type the name of the ODBC data source you created to connect to the GoldMine Users table.
6. In the **GoldMine database data source name** field, type the name of the ODBC data source you created to connect to the GoldMine tables (tables that store other database information. Also referred to as GMBase files. The GoldDir line in the GM.ini points to the shared GoldMine files.) such as Cal, Mailbox, and SPFiles.

7. Type any associated **User ID** and **Password** to access the GoldMine tables. If connecting to a Firebird database, use your GoldMine user name and password. If connecting to a SQL Server database, use the SQL login and password.
8. In the **Contact database data source name** field, type the ODBC data source you created to connect to the Contact tables (tables that store a database's contact information. Also referred to as Common files. The CommonDir line in the GM.ini points to the default contact files.) such as Contact1, Contact2, ContHist.
9. Type any associated User ID and Password to access the GoldMine tables. If connecting to a Firebird database, use your Firebird user name and password. If connecting to a SQL Server database, use the SQL login and password.

NOTE: When using SQL Server, GoldMine can store the GoldMine tables and the Contact tables in the same SQL database. Therefore, the ODBC data source for the GoldMine database and Contact database may be the same.

10. Click **OK**.
11. Click **Print** .

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 **Go To>>Reports>>Report Center**.
2. At the Reports Center click the **New Report** button or right-click inside the report name tree-view pane and select **New**.

   The Report Properties dialog box opens.
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.

     WARNING: If you do not give the report a unique file name at this stage of the process, it does not save.

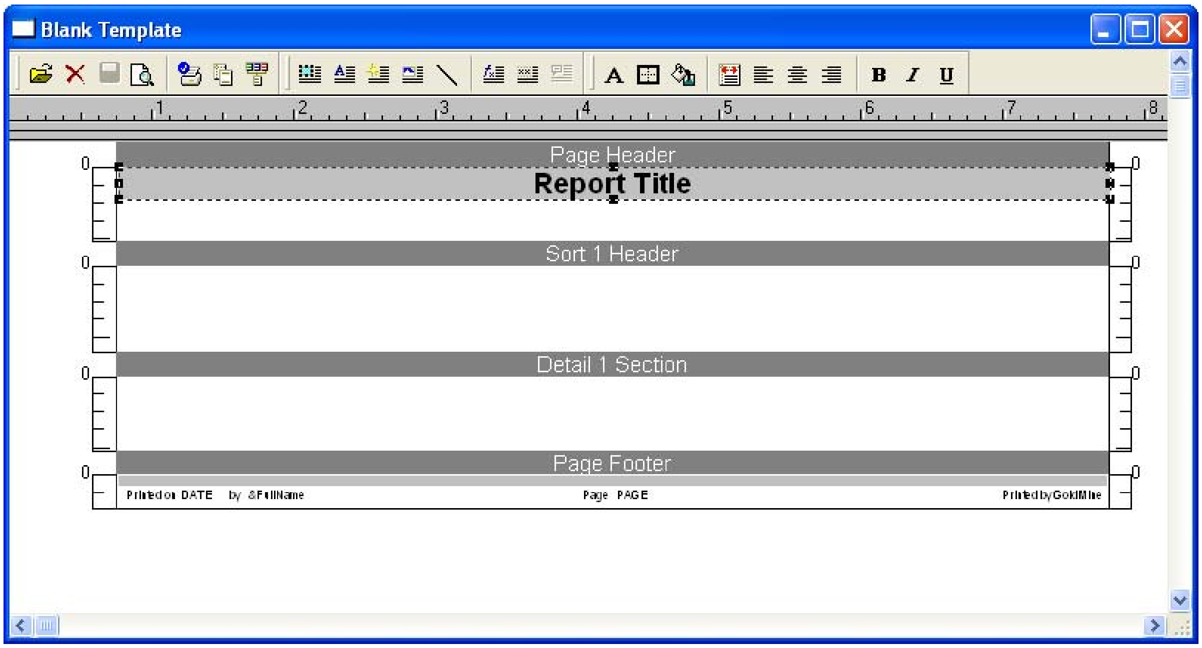
   - **Default Printer:** Select a printer:

- **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 opens.



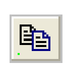
6. Use the Report Layout local menu and the Layout toolbar to format your GoldMine Report. See "Editing Report Layouts" on page 302.

Cloning Reports

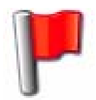
Identifying an existing report that is closest to meeting your needs and then cloning it is the most efficient way to create new GoldMine reports. We recommend you clone existing reports before modifying them so you always have a clean copy available for future edits.

1. Select **Go To>>Reports>>Report Center**. The Reports Center opens.

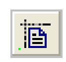
2. Select the user whose report you are cloning in the **User** drop-down list. Select **(public)** if the report is publicly owned.

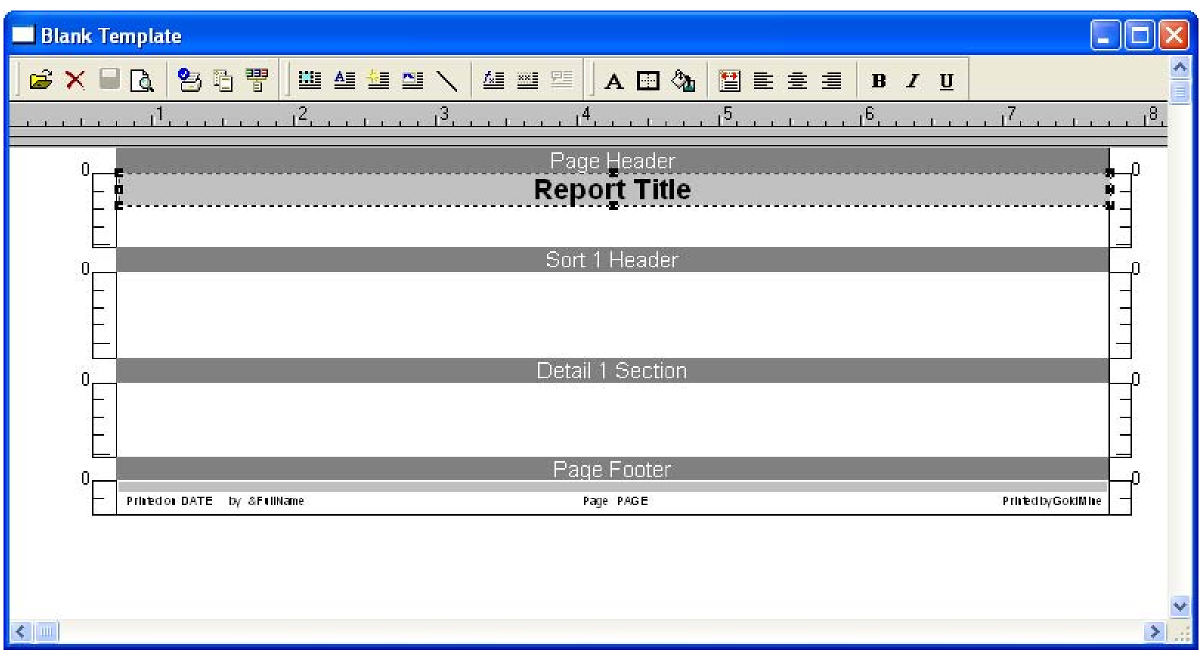
3. Select the report to clone and click the **Clone Report** button  or right-click the report name tree-view pane and select **Clone**.

4. At the Report Properties dialog box, 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.



WARNING: If you do not give the report a unique file name at this stage of the process, it does not save.

   - **Default Printer:** Select a printer:
     - **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.

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.

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1. 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.

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2. To quickly edit Reports, use the GoldMine Reports Shortcut Keys and the Layout local menu or the Layout toolbar.

3. Customize the GoldMine Reports by:

- **Cloning a Template**. See “Cloning Reports” on page 300.
- **Creating a New Template.** See “Creating Reports” on page 299.

4. Refine the reports by:

- **Editing Report Parameters.** See “Editing Report Parameters” on page 304.
- Editing Report Pages.
- **Inserting Sections.** See “Inserting Sections in Reports” on page 304.
- **Inserting Fields. See** “Inserting Report Fields” on page 305
- **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.

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 **Go To>>Reports>>Report Center**. The Reports Center opens.
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**.
4. At the Report Properties dialog box 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.

   NOTE: 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.

Editing Report Parameters

Set report margins, rulers, date format, and print defaults with the report parameters.

1. Right-click on the report template and select **Report Settings>>Options**.

   At the Report Parameters dialog box opens.

2. In the **Margins** area, type the **Left, Right, Top,** and **Bottom** margins in inches.
3. In the **Ruler Selection** area, determine if a ruler displays and whether it appears in inches or centimeters:
   - **Hide.** No ruler displays on the template window.
   - **Inches.** Each section displays a ruler calibrated in inches.
   - **Centimeters.** Each section displays a ruler calibrated in centimeters.
4. In the **Default Date Format** area, select MM/DD/YY to display dates as month/day/year, or DD/MM/YY to display day/month/year.
5. Select **Print trial records when output to printer** prior to running a report.

   Use this option to run a test printing and adjust paper feed through the printer before sending the records.

6. Select **Print report header before the page header** to print report headers added before printing the page header.
7. Click **OK**.

Inserting Sections in Reports

1. Right-click the report template and select **Insert>>Section**.

   The New Section window opens. The window displays sections available for inclusion. Detail and Sort sections are numbered from 1 to 9 and are only available for inclusion in numeric order.

2. Select the section to insert in the **Section Name** area.
3. Click **OK**.
4. Edit sections after inserting them. See “Editing Report Sections” on page 304.

Editing Report Sections

1. Click on the header, detail, or footer section. An editing box appears around the section.
2. Right-click and select **Edit**:
   - **Delete.** Deletes the section.
   - **Outlines**. Accesses the Line Properties dialog box. Select lines that outline the section. Also select the line size and color.
   - **Background.** Accesses the Item Background dialog box. Select the color and type of section background.
   - **Filter.** Accesses the Section Selection Criteria dialog box. Create a filter to specify section contents.
   - **Show Field Names.** Toggles the template display from XXXX to field names.

3. To edit using the Sort # Header or Detail # Section dialog boxes, double-click the section title. Select from:
   - **Compress Space Before the First Item**. Compresses space between the beginning of the section and the object at the top of the section.
   - **Compress Space After the Last Item.** Removes space after the last object of the section to allow for large word-wrapped fields.
   - **Advance Page Before Printing the Section.** Advances to the next page before the beginning of the section.
   - **Advance Page After Printing the Section**. Advances to the next page after printing the section.
   - **Reprint Titles on Every Page.** Prints titles on every page (available for sort sections only).
   - **Number of Records Across the Page.** Specifies the number of records that can be placed across the report template. This option is useful for printing labels and is available for Detail Sections only.
   - **Filter.** Accesses the Section Selection Criteria dialog box. Create a filter to specify section contents.
   - **Outlines.** Accesses the Line Properties dialog box. Select the lines that outline the section. Select the line size and color.
   - **Break Field.** Accesses the Break Field for Section dialog box. Edit a break field to manage the grouping of multiple entries (available for Sort Header sections).
   - **Background.** Accesses the Item Background dialog box. Select the color and type of section background.

Inserting Report Fields

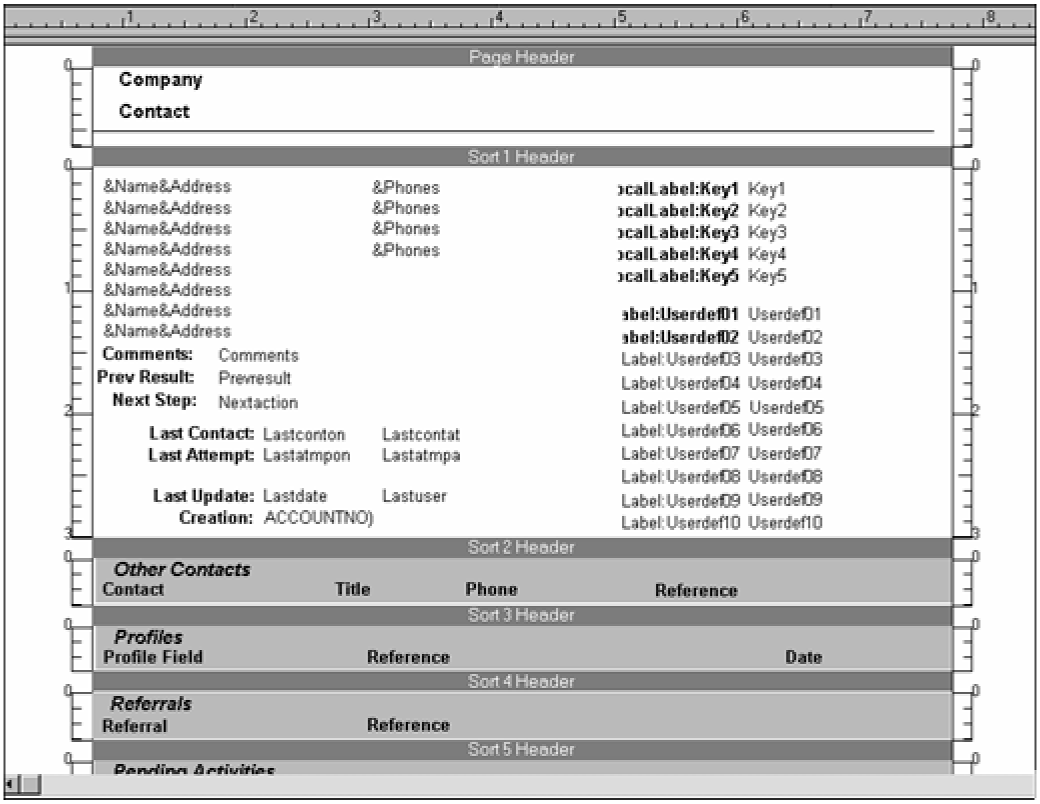
Insert several types of fields into a GoldMine report. After inserting, edit the fields.

1. Right-click on the report template.
2. At the layout local menu, select **Insert.**
3. Insert the following field types as needed:
   - **Label**. A text field to act as a field label.
   - **Section**. A section in the report.
   - **Data Field.** A macro field or a field from the database.
   - **Expression Field.** A calculation field in the report.
   - **System Field.** A predefined system field, such as a record count.
   - **Dialog Field.** An interactive field in the report that requires a response from the user.
   - **Line.** A line into the report.
   - **Picture from Clipboard.** The .bmp that is in the clipboard.
   - **Picture from Disk File.** A .bmp from a saved location.

Examples of Formatting Sections

The Contact Profile (Detailed) report example shows report template divided into 17 sections, each one holding different information. By default, the information displays as rows of Xs, plain text labels, and dates.

To display the field names instead of the Xs, right-click and select **Edit>>Show Field Names.**



- **Page Header.** Company and Contact Name fields from the Contact1 database. Also displays a line dividing the header from following sections.
- **Sort 1 Header.** Contact name, address details, and telephone numbers as macros. It also displays the five key fields and the first 10 user-defined fields along with the local label names. The final information shown is that drawn from the Summary tab.
- **Sort 2 Header.** Title bar information for displaying additional contacts within the report. If additional contacts exist, this section defines where they are displayed.
- **Sort 3 Header.** Sort 2 Header, but displays Details.
- **Sort 4 Header.** Sort 2 Header, but displays Referrals.
- **Sort 5 Header.** Sort 2 Header, but displays Pending Activities.
- **Sort 6 Header.** Sort 2 Header, but displays History Activities.
- **Sort 7 Header**. Sort 2 Header, but displays Linked Documents.
- **Detail 1 Section.** Information defined in Sort 2 Header listing all additional contacts.
- **Detail 2 Section.** Information defined in Sort 3 Header listing all profiles.

- **Detail 3 Section.** Information defined in Sort 4 Header listing all referrals.
- **Detail 4 Section.** Information defined in Sort 5 Header listing all pending calendar activities.
- **Detail 5 Section.** Information defined in Sort 6 Header listing completed history activities.
- **Sort 5 Header.** Sort 2 Header, but displays Pending Activities.
- **Sort 6 Header.** Sort 2 Header, but displays History Activities.
- **Sort 7 Header.** Sort 2 Header, but displays Linked Documents.
- **Detail 1 Section.** Information defined in Sort 2 Header listing all additional contacts.
- **Detail 2 Section.** Information defined in Sort 3 Header listing all profiles.
- **Detail 3 Section**. Information defined in Sort 4 Header listing all referrals.
- **Detail 4 Section.** Information defined in Sort 5 Header listing all pending calendar activities.
- **Detail 5 Section.** Information defined in Sort 6 Header listing completed history activities.
- **Detail 6 Section**. Information defined in Sort 7 Header listing all linked documents.
- **Sort 1 Footer.** Section for notes from the Notes tab. With no criteria for determining whether notes exist, this section prints in every report.
- **Page Footer.** System information such as the date the report was printed, by which user, and the page number.

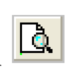
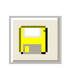
When running this report, the page header and footer and Sort 1 Header and Footer have no filter and therefore always display. The other sections use filters. If the data for the section exists, the section displays in the report.

Title bars for the optional sections display in sort headers while the actual information displays in detail sections.

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 opens.

     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 one of the following ways:

- Selecting **File>>Print a Report**. The **Print Report** dialog box appears.
- Selecting **Go To>>Reports>>Report Center**. 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.
- From the **Calendar**, click **Print** on the **Calendar** toolbar. The **Print Report** dialog 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
    - Service 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. and then type a **File name**.
4. Select **Native Format (*.FRC)** in the **Save as type** drop-down list.
5. Click **OK**. The report saves to that location.
6. To view a saved report, click **View saved report**  on the **Report Center** toolbar.

Viewing Saved Reports

View reports saved with data.

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.

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**.

Answer Wizard Reports

Answer Wizard is a reporting tool that allows 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 you are 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 Premium 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

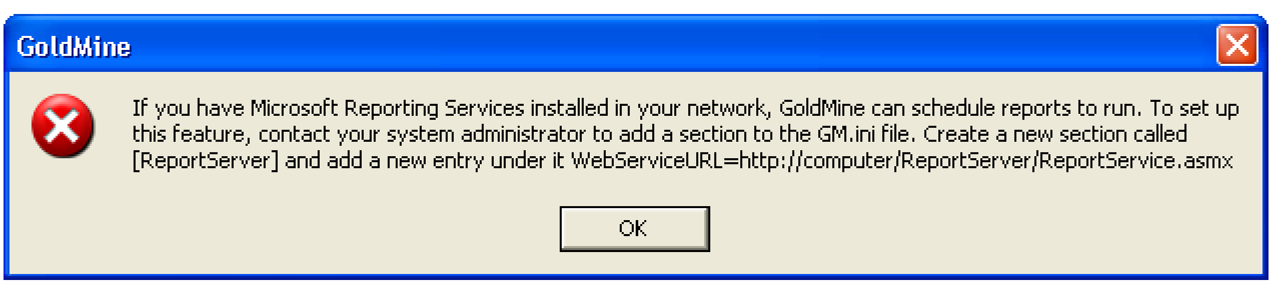
1. Click **Start** on the Windows taskbar and select **Programs>>GoldMine>>Answer Wizard**. The **Answer Wizard** appears.
2. If necessary, click **Preferences** to configure database settings and login information.
3. Expand the tree and select the report you are running. Click **Next** to work through the wizard.

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 Reporting Services** and **Microsoft Visual Studio**. 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 **Go To>>Reports>>Report Scheduling**. If the feature has not been configured, a message appears.

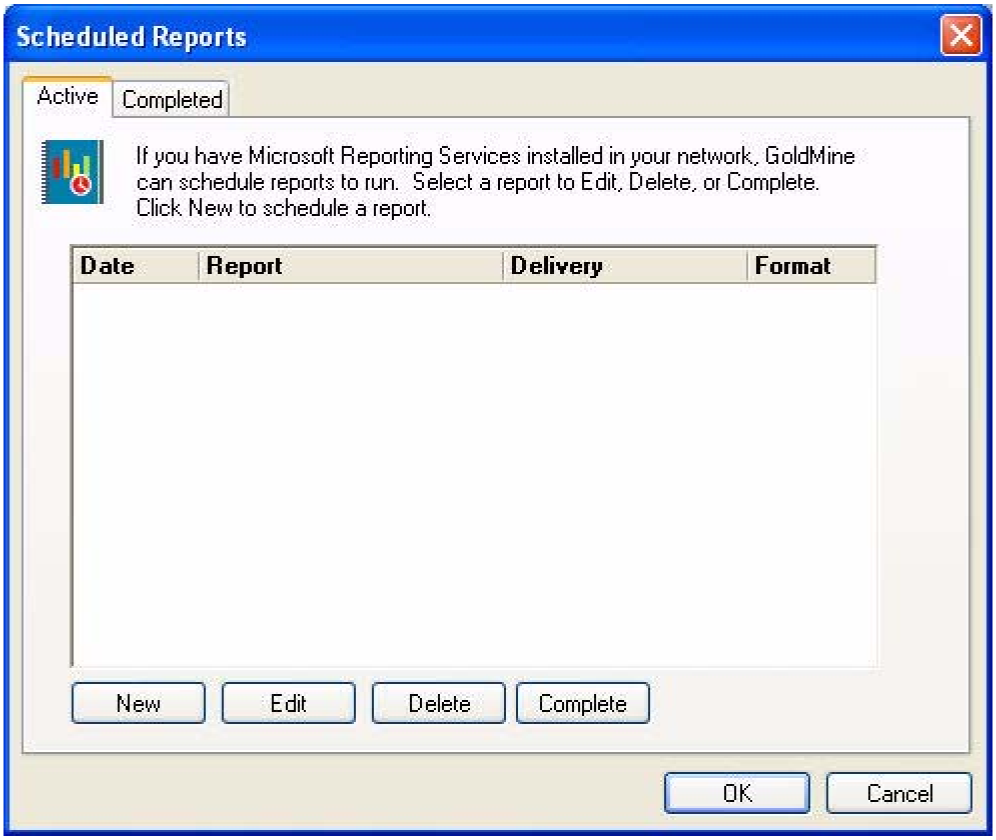


If the feature has been configured, the **Scheduled Reports** dialog box appears.

See Using Scheduled Reports.

Using Scheduled Reports

1. From the menu bar, select **Go To>>Reports>>Report Scheduling**.



The **Scheduled Reports** dialog box opens.

This dialog box is blank until you have scheduled a report and it is pending.

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

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

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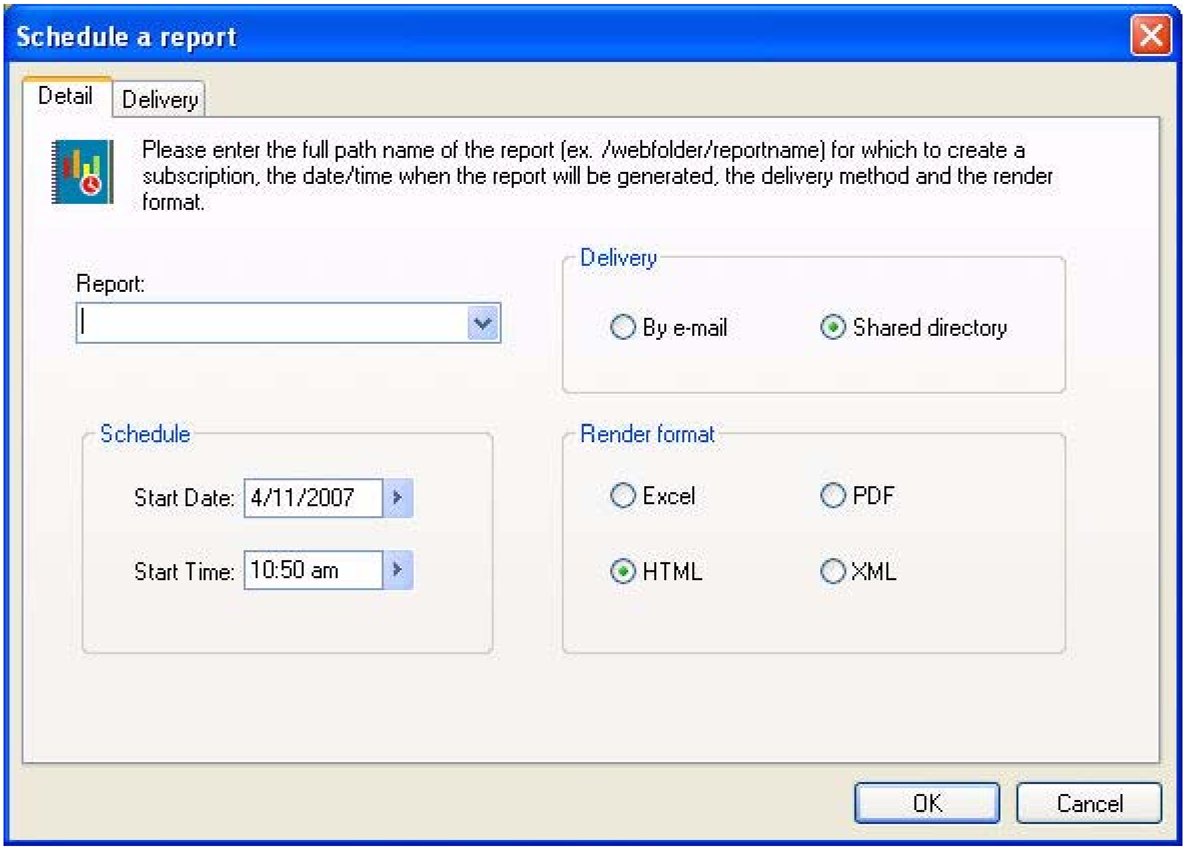
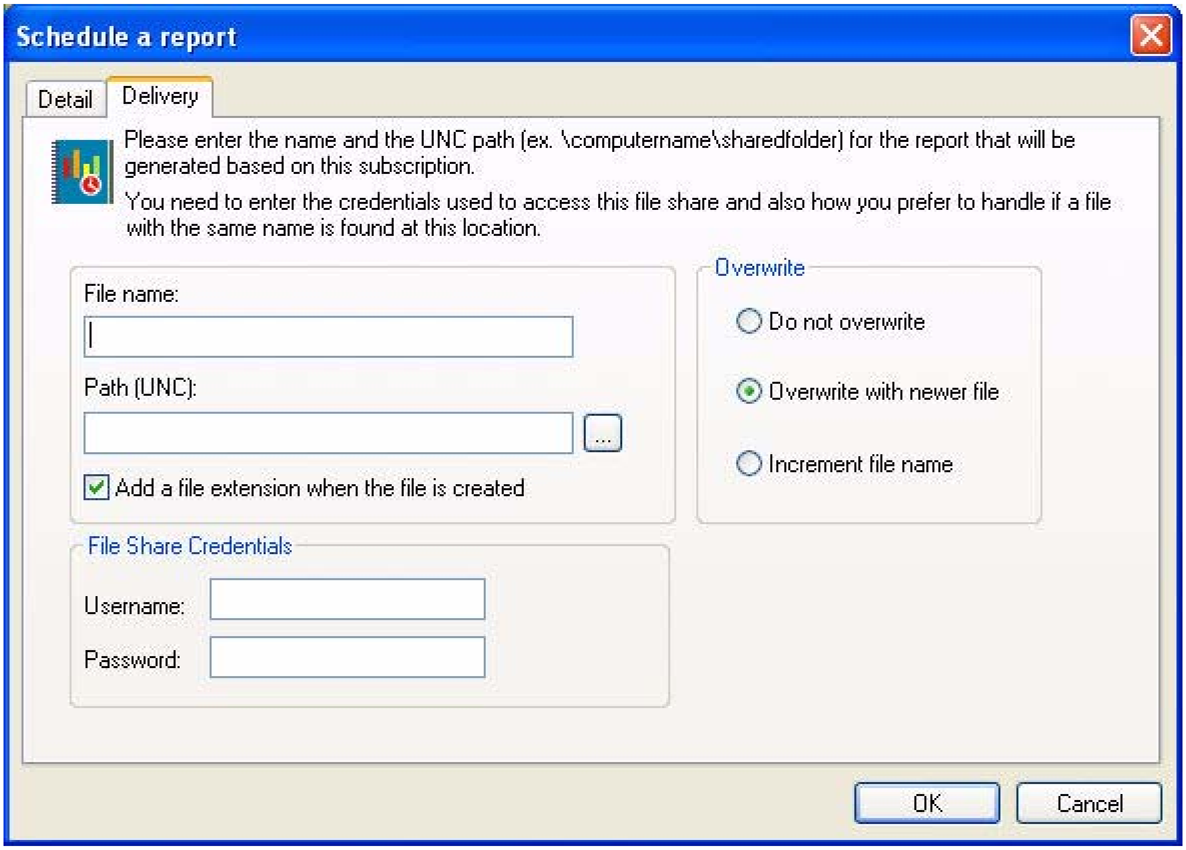


3. Click the **Detail** tab.
4. From the **Report** drop-down list, select one of the reports contained in Microsoft Reporting Services.
5. From the Schedule area, select a Start Date and Start Time.
6. From the **Delivery** area, select **By e-mail** or **Shared directory**.

   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**.
16. The **Scheduled Reports >>Active tab** reopens.

    The report you just scheduled should be listed.

Report 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.

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 configuration 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>

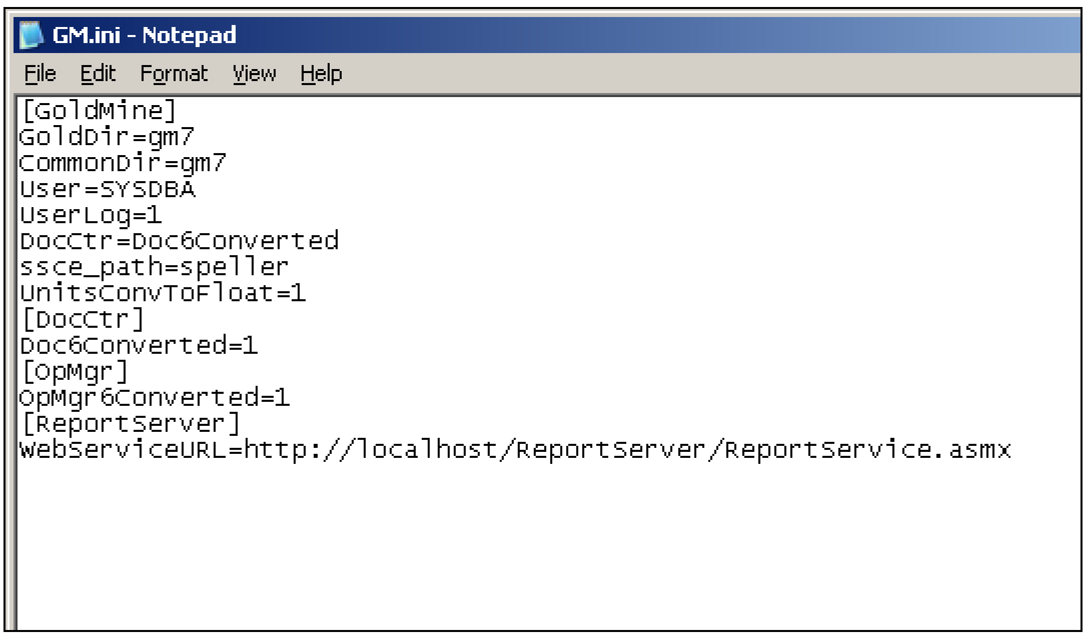
</RSEmailDPConfiguration>

See the article *Configuring a Report Server for E-Mail Delivery* at http://msdn.microsoft.com/.

Configuring the INI File

After you have Microsoft SQL Server Reporting Services installed and configured on your network, the system administrator must add a section to the **gm.ini** file typically located in Program Files/ GoldMine/. This addition tells GoldMine where the Reporting Services is hosted.

1. Close GoldMine and open the **gm.ini** file using Notepad.
2. Type ***[ReportServer] WebServiceURL=http://localhost/ReportServer/ReportService.asmx*** as shown below (where localhost is the IP address, machine name, or domain name of your Microsoft SQL Reporting Server).
3. Click **Save** and close Notepad.
4. Open GoldMine and navigate to **Go To**>>**Reports**>>**Report Scheduling.** If the INI file was successfully revised, the Scheduled Reports dialog box opens.



Automated Processes

About Automated Processes

You can automate routine tasks by setting up a series of predefined actions to perform the tasks on Contacts in the database. These tasks include:

- Administrative and tracking duties
- Generating direct mail
- Validating data

For 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.

Automated Processes Components

The following is a list of the automated process components.

- **Processes.** This is 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. You can link several events to form a process.
- **Events.** An automated process consists of a sequence of one or more events. An event refers to the step-by-step instructions contained in an Automated Process or process GoldMine evaluates to perform a series of activities. An event consists of a trigger and an action. Events within each process perform an action when triggered by a condition.
- **Action.** Each Automated Process event has a triggered action. The trigger is evaluated and if the criteria is met, the event's action is performed.
- **Trigger.** Each Automated Process event is processed based on a trigger. The trigger evaluates and, if the criteria is met, performs the event's action and the processing continues to the next event.

Use the Automated Processes Center to create and edit processes and events and to execute processes. Manage tracks attached to contacts on each record with the Processes tab.Use the available menu options to Execute Processes and Manage Processes.

Designing Automated Processes

When an 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 process 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 process 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.

After GoldMine completes the sequential events, it processes the next process for the Contact, or if there is no process to process, GoldMine goes to the next Contact.

When creating an automated process, define the process, then allocate the events, triggers, and actions to the process.

Example of the planning to do:

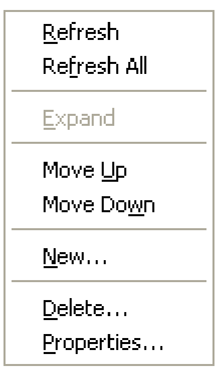
Automated Processes Center Components

Toolbar

The Automated Processes Center toolbar has the following buttons:

- **New Automated Process.** Creates a new automated process.
- **New Event.** Creates a new event.
- **Clone New Process.** Clones an automated process.
- **Delete.** Delete the Automated Process
- **Properties.**
- **Move Event Up.** Moves the event up the list.
- **Move Event Down.** Moves the event down the list.
- **Execute Automated Process.** Executes the automated process.

Event Local Menu



- **Refresh.** Updates the selected Automated Process or event display.
- **Refresh All.** Updates the display of all Automated Processes and events for the selected User.
- **Expand.** Displays all items contained under the selected Automated Process.
- **Move Up.** Moves the selected event up by one line.
- **Move Down.** Moves the selected event down by one line.
- **New.** Displays the GoldMine Automated Process Event Wizard, from which you can create an event.
- **Delete.** Deletes the selected event.
- **Properties.** Displays the GoldMine Automated Process Event Wizard, from which you can make changes to the selected event.

Process Local Menu

- **Refresh.** Updates the selected Automated Process or event display.
- **Refresh All.** Updates the display of all Automated Processes and events for the selected user.
- **Expand.** Displays all items contained under the selected Automated Process.
- **New.** Displays the GoldMine Automated Processes Wizard. Use to create a process.
- **Clone.** Displays the GoldMine Automated Processes Wizard. Use to create a copy of the selected Automated Process.
- **Delete.** Deletes the selected process.
- **Properties.** Displays the GoldMine Automated Processes Wizard to enable you to edit the process.

Process Options Update

The Process Options allows you to determine when and how processes attach and execute.

- **Allow only one attachment of this process per contact.** Prevents multiple attachments of the one process to a contact's record.
- **Execute this process immediately upon attachment.** Starts processing the process as soon as a user attaches the process to one or more contact records.
- **Execute this process only when scanning for processes.** Prevents GoldMine from executing a process attached to a single contact record. Use to restrict process execution to a specific system.
- For example, if a print action requires a special printer that is connected to one workstation, selecting this option and Execute this process immediately upon attachment prevents the printing process from running a different workstation.
- **Restart this process each time that it ends.** Reattaches the process when processing for the process completes.
- **Allow users to attach this process.** Lets other users attach the process.
- **Attach this process to all new contact records.** Attaches the process to each new contact record. Apply to only one Automated Process.

Creating Automated Processes

Create new automated processes using the Automated Process Wizard.

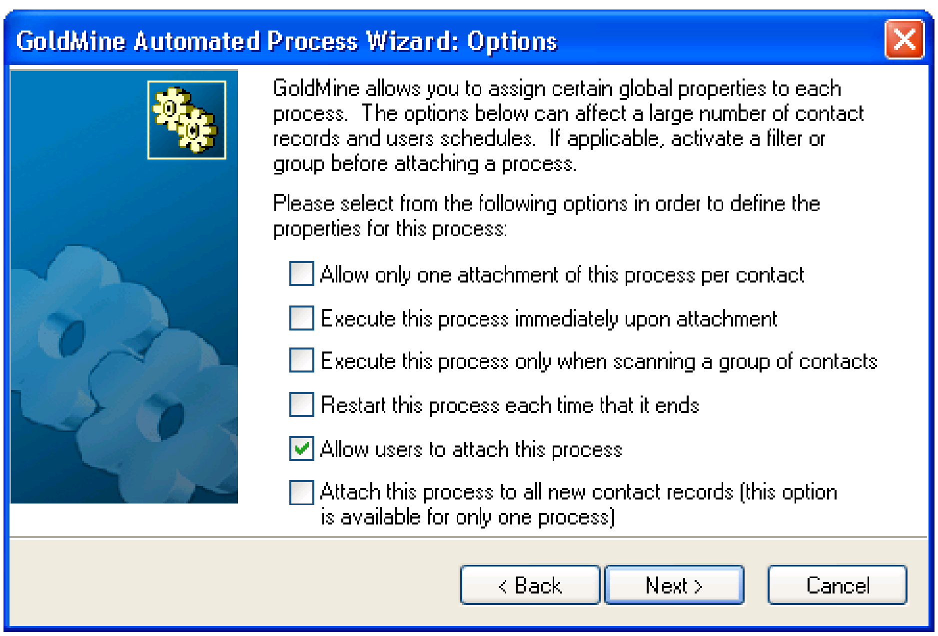
1. Select **Tools>>Automated Processes >>Manage Processes.**

   Click **OK** at the Welcome message. The Automated Processes Center opens.

2. Right-click on **Automated Processes** and select **New.**

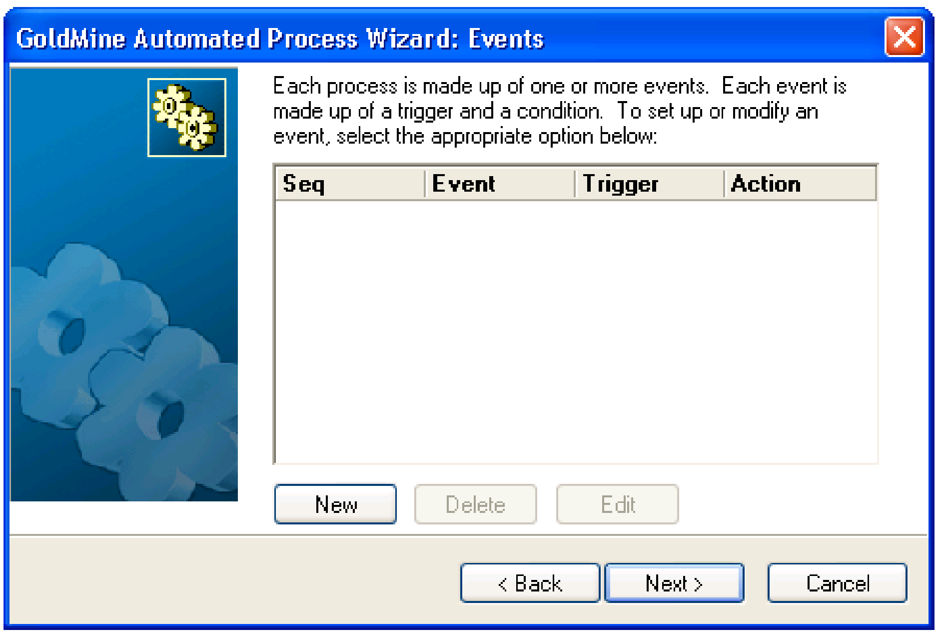
   The **Automated Processes Wizard** opens.

3. Type in a name, then select a process code and then click **Next.**



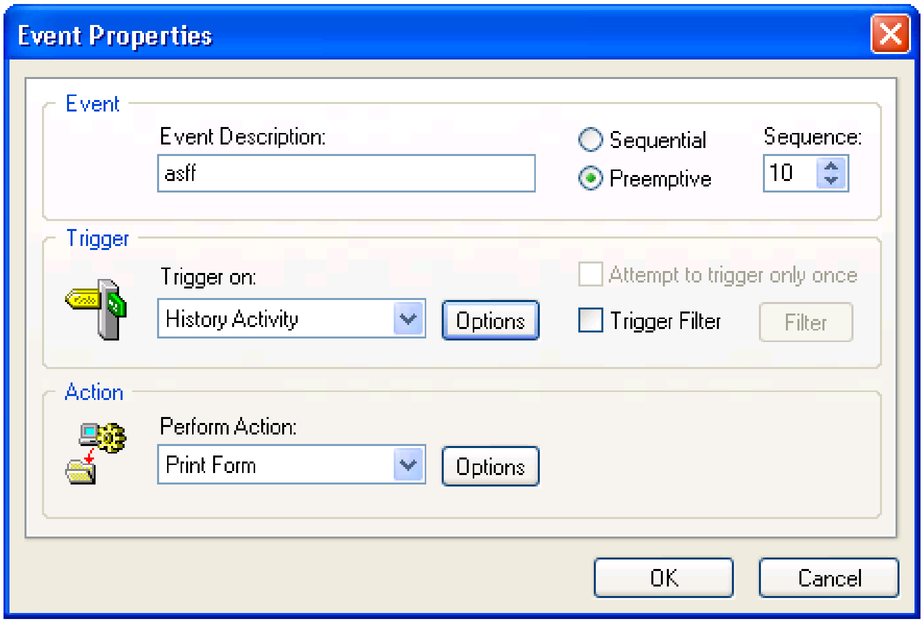
4. Select from the following options and click **Next.**
   - **Allow only one attachment of this process per contact.** Prevents multiple attachments of the one process to a contact's record.
   - **Execute this process immediately upon attachment.** Starts processing the process as soon as a user attaches the process to one or more contact records.
   - **Execute this process only when scanning for processes.** Prevents GoldMine from executing a process attached to a single contact record. Use to restrict process execution to a specific system.

     For example, if a print action requires a special printer that is connected to one workstation, selecting this option and Execute this process immediately upon attachment prevents the printing process from running a different workstation.
   - **Restart this process each time that it ends.** Reattaches the process when processing for the process completes.
   - **Allow users to attach this process.** Lets other users attach the process.
   - **Attach this process to all new contact records.** Attaches the process to each new contact record. Apply to only one Automated Process.



5. Click **New.**

   The **Event Properties** dialog box opens.



6. In the **Event** area, type a description of the event in the **Event Description** field.

   At the radio buttons, select either:

   - **Sequential.** Numbered between 100 - 999, these events evaluate one at a time, starting with the lowest numbered event. The next event is not processed unless the previous event's trigger evaluates as **True**.

     For example, if you create a process with multiple sequential events, where each event is numbered 100, 110, and 120, GoldMine evaluates event 100 but does not evaluate event 110 until the trigger for event 100 is fulfilled.

   - **Preemptive.** Numbered 00 - 99, these events are evaluated individually. The next preemptive event is processed, whether or not the first event is **True.**

   At the **Sequence** drop-down box, type or select the Sequence number (between 100 - 999 for Sequential; 00 - 99 for Preemptive).

7. In the **Trigger** area, at the **Trigger On** drop-down box, select a trigger.

   Depending on the trigger you select, a series of configuration options open.

8. In the **Action** area, at the **Perform Action** box, select an action.

   Click **Options** to configure the selected action.

9. Click **Next** and then click **Finish.**

   The new automated process appears in the Automated Processes Center.

10. Click **Next**.

    The Automated Process Event Wizard: Additional Trigger dialog box appears. Configure using:

    - **Attempt the trigger only once.** If the current event is triggered, it executes the corresponding action, then continues to the trigger of the next event. However, if the event is not triggered, it skips the event and continues to the trigger of the next event. Example: a process includes 2 events (send a gift to contacts purchasing >$30 and print a thank-you to a contact making any purchase). Select this option to just print the thank-you letter.

      NOTE: Trigger only once events function like a loop and are dependant on having an event that can escape from the loop. Therefore, make your **trigger only once** events preemptive; the process will be attached and when the Automatic Process is processed, the preemptive events are also processed.

    - **Trigger Filter.** Select and then click Filter. The Expression Builder dialog box appears, which lets you specify a dBASE expression.

11. Click **Next.** The Automated Process Event Wizard: Action dialog box appears.
12. Click **Next** and click **Finish.**

Working with Automated Processes

Manage processes using these options:

- **Creating Processes.** See "Creating Processes" on page 325
- **Creating Events.** See "Creating Events" on page 327
- **Editing Processes**.See "Editing Processes" on page 327
- **Editing Events**.
- **Attaching Processes**. See "Attaching Processes to a Contact" on page 328
- **Executing Processes**. See "Executing Processes" on page 329
- **Deleting Processes or Events**. See "Removing Attached Automated Processes" on page 330

Creating Processes

Create, clone, or modify Automated Process **processes** 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 process, will fit together.

1. Select **Tools>>Automated Processes>>Manage Processes**. 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 process to a contact's record.

   NOTE: If two duplicate contact records are merged that already have automated processes attached, both processes will be attached to the merged contact record, regardless of whether the above check box was selected.

   - **Execute this process immediately upon attachment:** Starts processing the process as soon as a user attaches the process to one or more contact records.
   - **Execute this process only when scanning a group of contacts:** Prevents GoldMine from executing a process attached to a single contact record. This option is useful to restrict process 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 process from running from any other workstation.
   - **Restart this process each time that it ends:** Reattaches the process as soon as the processing of the process completes.
   - **Allow users to attach this process:** Permits other users to select and attach the process.
   - **Attach this process to all new contact records:** Automatically attaches the process 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 process, 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 opens.
12. Click **New** to add another event, or when you finish adding events, click Next. The Finish dialog box opens.
13. Click **Finish**. For the Automated Process to work, attach the process and process the process.

Editing Processes

1. In the Automated Processes Center, highlight the process you are editing and right-click.
2. Select **Properties** from the local menu. The Automated Process Wizard opens.
3. Use the Wizard to edit. See “Creating Processes” on page 325.
4. Click **Finish.**

Creating Events

Events are the triggered actions that take place in a specific order. Each Automated Process or process, 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.

Using the Automated Processes Center

1. Select **Tools>>Automated Processes>>Manage Process**. The Automated Processes Center opens.
2. Create or modify processes using tool and menu options:
   - **Toolbar**.
   - **Process Local Menu.**
   - **Events Local Menu.**

   NOTE: For information on the toolbar and local menus see “Automated Processes Components” on page 317.

   - **Process Options Update**. See “Process Options Update” on page 321.
3. Manage processes using these options:
   - **Creating Processes**. See “Creating Processes” on page 325
   - **Creating Events.** See “Creating Events” on page 327
   - **Editing Processes.** See “Editing Processes” on page 327
   - Editing Events.
   - **Attaching Processes.** See “Attaching Processes to a Contact” on page 328
   - **Executing Processes.** See “Executing Processes” on page 329
   - **Deleting Tracks or Events.** See “Removing Attached Automated Processes” on page 330

Event Properties Dialog Box

When you are using the Automated Process Wizard to create a process and add events, the Event Properties dialog box opens when selecting **New** (or **Edit**) on the GoldMine Automated Process Wizard: Events dialog box.

1. In the **Event** area, type the **Event Description**.
2. Select either:
   - **Sequential:** Numbered between 100 - 999, these events evaluate one at a time, starting with the lowest numbered event. The next event is not processed unless the previous event's trigger evaluates as true.

   Example: If you create a process with multiple sequential events, where each event is numbered 100, 110, and 120, GoldMine evaluates event 100 but does not evaluate event 110 until the trigger for event 100 is fulfilled.

   - **Preemptive:** Numbered 00 - 99, these events are evaluated individually. The next preemptive event is processed, regardless whether the first event is true.
3. Type or select the Sequence number (between 100 - 999 for Sequential; 00 - 99 for Preemptive).
4. Select a **Trigger**. Configuration options vary depending on the Trigger on option selected.
5. Select an **Action**. Click Options to configure the select action.
6. Click **OK**.

Attaching Processes to a Contact

Before an Automated Process can be executed, the process must be attached to selected Contact Records. One record can have multiple processes assigned to it. GoldMine stores the attached processes on the **Processes** tab. Build your processes in the Automated Processes Center, then manually attach a process to a record.

1. Right-click in the **Processes** tab and select **Attach a Process.**

   The **Attach an Automated Process** dialog box appears.
2. Select the process to add from the **Code** and **Process Name** list.
3. Select **Attaching User** from the drop-down list.
4. Click **OK** to attach the process and continue.

Attaching Processes to Multiple Contact Records

1. Select **Tools>>Automated Processes>>Execute Processes.**

   The Automated Processes Execution dialog box opens.

2. Select one of the following:

   - **Scan current contact.** GoldMine processes only the active contact, then returns to an idle mode.
   - **Scan a group of contact.** 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 processes. In the **Scan Method** area, select from the following:

   - **Scan once.** Executes the process as you attach it.
   - **Scan continuously.** Scans the database continuously as configured in the Server Agents Administrator.
   - **Do not scan.** Attaches the process, but does not evaluate it for execution (available only when selecting **Attach Process to selected contacts)**.

4. Select **Attach Process to selected contacts.**

   - Select the process to be attached from the drop-down list.
   - Click **Process.**
   - The **Process Monitor** opens, processing the attachments and the events triggered.

Executing Processes

Execute a process 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 of the following:

   - **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 processes. 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 time frame designated.
   - **Scan continuously.** GoldMine scans the contact database and processes all processes, 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 Process to selected contacts, which lets you attach processes 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.
   - **Max Contact.** Maximum number of contact records (up to 99,999) evaluated.

     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.

   - **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 Processes

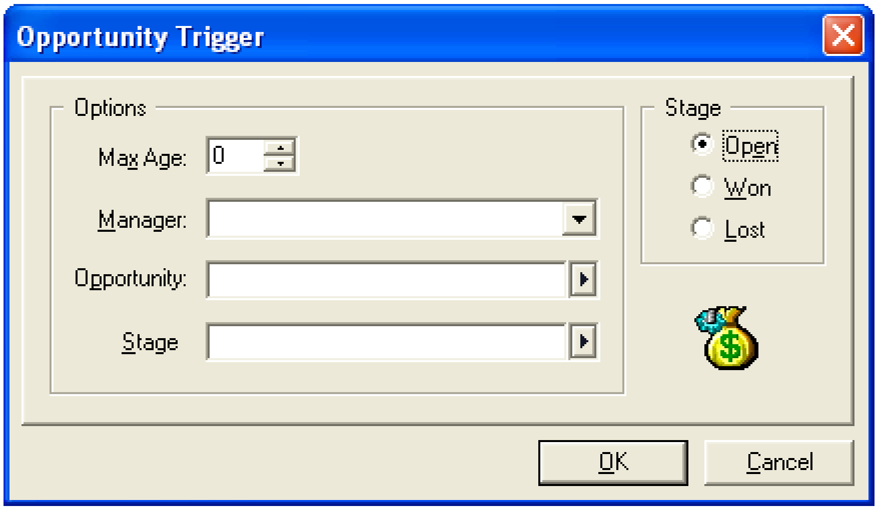
After attaching a track to an individual or many Contact Records, you may need to remove the attached track.

1. Select the **Processes** tab.
2. Right-click the process to be removed and select **Remove Process**.
3. Click **Yes**.

Trigger Dialog Boxes

Opportunity Trigger Dialog Box

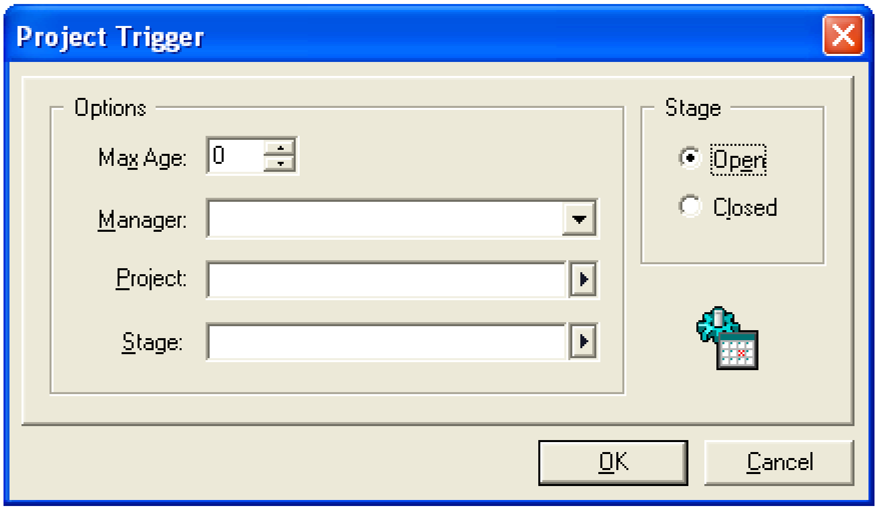
Automated Process events can be triggered based on the opportunity information selected. Trigger based on a single opportunity setting or a combination.



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.



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**.

Schedule Action Dialog Box

1. In the **Schedule Activity** area, select the activity type.
2. In the **User** area, select the user the activity is assigned to based on the following options:
   - **Record Owner.** Owner of the Contact record, if record ownership was set.
   - **Assigned User.** User specified in the Activity Details.
   - **Attaching User.** User attaching the Track to the record.
   - **Logged User.** User currently logged into the workstation executing the Automated Process.
   - **User from Field.** A user can be selected from a Contact1 or Contact2 field, if the fields are configured accordingly. Example: a Sales Rep field.
3. Click **Activity Details.**

   The related Scheduling dialog box appears. Use to specify information about the scheduled activity.

NOTE: Automated Processes do not allow you to schedule and send iCalendar meeting requests as you schedule an action.

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4. Specify how many days out to schedule the activity in the Schedule x days into the future text box.
5. Select one:
   - **From Today.** Starts counting days from the current date.
   - **From Trigger Date.** Starts counting days from the date the event is triggered.
6. Select **Skip Weekends** if you do not want to include weekend days in the total.

NOTE: The weekends are skipped only if the process occurs on a weekend day. For example, you schedule an activity on 02.15 for nine days later on 02.24, which happens to be a Sunday. GoldMine will actually schedule it for 02.25, the following Monday. If you scheduled an activity for eight days which would be a Saturday, then GoldMine schedules for Monday as well. However if you schedule an activity for seven days later, GoldMine will schedule for Friday.

7. Click **OK**.

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. It is useful for 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.

To synchronize, each GoldMine system must have a unique license number (see “About Licensing” on page 371). However, a user working on a GoldMine network can create a GoldMine sublicense to work on an undocked basis.

It is recommended that you run the same version of GoldMine on all systems. 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.

For more information see “About Transfer Sets” on page 337.

During remote synchronization, GoldMine creates a transfer set that 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. (**Tlogs** is 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.) For more information on Goldsync, see “About GoldSync” on page 347.

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.

CAUTION: 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 (see “Configuring Synchronization Settings” on page 342).

Use synchronization in these ways:

- **One-button Sync with GoldSync Server.** See “Synchronizing Using One-Button Synchronization” on page 367.
- **Synchronization Wizard.** See “Using the Synchronization Wizard” on page 346.
- **GoldSync Administration Center.** See “Using the GoldSync Administration Center” on page 353.
- **Synchronization with Outlook, Palm/Treo or Pocket PC.** See “About Synchronizing with Microsoft Outlook, Palm/Treo, or a Pocket PC Device” on page 338.
- **Copy/Move Records**. See “Using Copy/Move Records” on page 344.

About Transfer Sets

Transfer sets are the containers that transport data between systems. They contain the contact and user-related information that is specified by record type, record filters, and specified date ranges.

As a transfer set is built, GoldMine follows a basic protocol. It evaluates the syncstamp (Contains the time and date when the record was last successfully retrieved during synchronization.) if a particular record falls between the cutoff date and the current date and time when the transfer set is being created. If it falls within that range, the record is included in the transfer set (as long as it is not excluded by other criteria, including security settings determining whether a remote site may update the server, the server may update the site, or both update each other). If the cutoff date is older than the oldest Logstamp (Contains the time and date the record was last changed.) in the 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.), GoldSync uses the RecID method to evaluate whether a record in the database was created after the cutoff date. With the RecID method, GoldSync evaluates the first seven characters of the RecID for the date and time the record was created. If the date falls between the cutoff date and the current system date, the record is included in the transfer set. If the syncstamp and Logstamp are set to dates in the future when compared to the current system date, the record will not be included in the transfer set.

NOTE: When a previously synchronized Contact Record's ownership changes, for example, the ownership changes from (public) to a specific user, the Contact Record can still be updated by another non-Master Rights user through synchronization due to the ownership of the record changing on the main site and the remote user updating a field on the same record. The remote user's ability to modify the record is not restricted until after synchronization, nor is the record security able to restrict the update during this synchronization

When the transfer set is created, it contains the data to transfer and the transfer set Tlogs. When GoldSync retrieves a transfer set, it compare the Logstamp of the records in the transfer set with the Logstamp of the records on the retrieval site. If the sending Logstamp is newer than the Logstamp for a record in the retrieval site, the record is retrieved.

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**. See "Configuring Synchronization with Microsoft Outlook" on page 339

NOTE: Outlook must be installed on the GoldMine workstation you are synchronizing.

- **PDA (Palm™/Treo®)**. See "Configuring Synchronization with Palm/Treo" on page 340

- **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 with Microsoft Outlook

Synchronize data between GoldMine and Microsoft Outlook 2003 and 2007.

After creating at least one synchronization profile, configure the Server Agents Administrator to automatically synchronize GoldMine and Outlook regularly.

NOTE: Outlook must be installed on the synchronizing workstation.

8. Select **Tools>>Synchronize>>Synchronize with Outlook.**

The Welcome to the GoldMine - Outlook Synchronization Wizard dialog box opens.

9. Select either:

- **Start a new session.** Configure settings for a new synchronization session.
- **Sync using the setting of the following Profile**. Select a saved profile from the drop-down list.

10. Click **Next**.

- If you select **Sync using the settings of the following Profile,** select **Finish**. The GoldMine Process Monitor shows the status of the process. Edit settings by clicking Next. The Outlook Synchronization Options dialog box appears.
- If you selected **Start a new session**, the Outlook Synchronization Options dialog box appears.

11. Select a send and retrieve options:

- **Send and retrieve: To/From Outlook:** Sends and retrieves data between GoldMine and Outlook.
- **Send Only: To Outlook from GoldMine:** Sends data from GoldMine to Outlook, but does not retrieve data from Outlook to GoldMine.
- **Retrieve only: To GoldMine from Outlook:** Retrieves data from Outlook to GoldMine, but does not send data from GoldMine to Outlook.

12. Select Synchronize Contact Items to send or retrieve contact information.

13. Select Synchronize Calendar Items to send or retrieve calendar information.

14. Click **Advanced** to define options.

The Advanced Options dialog box opens. After configuring advanced options, click **OK** and you return to the Outlook Synchronization Options dialog box.

15. Click **Next**.

    The dialog box appearing depends the options you selected:

    - **Send and retrieve: To/From Outlook:** The Record Selection dialog box opens.
    - **Send Only: To Outlook from GoldMine:** The Record Selection dialog box opens.
    - **Retrieve only: To GoldMine from Outlook:** The Ready to Synchronize dialog box opens.

Configuring Synchronization with Palm/Treo

Within Palm, create activities, link them to contacts, and synchronize them with GoldMine. Synchronization in multi-user environments is secured through the application of GoldMine update and deletion rules to data synchronized from the Palm device.

Minimum Requirements:

- HotSync software version 4.1.0 or 6.1
- Palm OS3 or through OS5.2.8. Older Palm devices support only 4 custom fields for field mapping compared to the 9 custom fields newer Palm devices support.

To define the Palm synchronization for a user

1. Select **Tools>>Synchronize>>Synchronize with Palm/Treo**.

   The GoldMine Palm Synchronization Wizard appears, allowing the administrator to assign user permissions.
2. Click **Next.** The next page of the wizard appears.
3. Select a user from the **Selected user** drop-down list. Then configure and set that user's security settings by selecting the appropriate check boxes.
4. Clone settings from another user by selecting the **Clone settings from use**r check box, choosing a user from the drop-down list, and clicking **Clone.**
5. Click **Next.** The next page of the wizard appears letting you choose the type of data to synchronize (contact information and calendar information) and the direction in which the data synchronizes between GoldMine and your Palm device (two way, to palm, or to GoldMine).
6. Click **Next**. The next page of the wizard appears letting you configure contact synchronization options by choosing a filter, a group of contacts, and other settings.
7. Click **Next**. Map up to 9 GoldMine data fields to custom Palm data fields.
8. Click **Next.** Filter activities based on their type, Reference field value, and other parameters.
9. Click **Next**. Choose which activities synchronizes based on the schedule date.
10. Click **Next**. Choose the type of deletions that synchronize.
11. Click **Next**. Set purge options for previously synchronized data.
12. Click **Next**. Limit the synchronization of Palm information to categories.
13. Click **Next.** The final wizard page appears. If satisfied with the selections, click Finish. To make changes, click Back.

Linking Palm Activities to Contacts

On you Palm Pilot, link activities and to-dos to contacts and synchronize them to GoldMine. You must use a Palm operating system of 4.0.

1. In your Palm Pilot, schedule an activity.
2. After activity creation, the cursor appears on the line next to the starting time. In the graffiti section, write a forward slash (/), activating the Command entry feature.
3. In the graffiti section, write L. The **Phone number lookup** screen opens.
4. Select the contact to whom you are linking the activity and then select **Add.**

   On the new activity's notes screen, Palm displays:

   <first name> <last name> <default phone number> <default field type>

NOTE: The default field type can be W, H, F, O, E, M, or P. For example, W represents "work." For details, see your Palm documentation.

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5. To add text to the reference line, place the cursor immediately after <default field type> and type a colon (:) in the graffiti area. Any text added after the colon appears in the Reference line of the activity when you synchronize it with GoldMine; it does not affect the activities link.

NOTE: Note: If you use the incorrect format (for example ~:~) you strip the prefix from the activity.

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6. Synchronize Palm with GoldMine. See “Configuring Synchronization with Palm/Treo” on page 340.

Configuring the Advanced Synchronization Options (Outlook)

Clicking the Advanced button as you are configuring the Microsoft Outlook synchronization lets you configure options for deletions, field mappings, contacts, calendars, and tasks.

Select these tabs to define synchronization settings:

General. Defines the range of dates from which activities are selected for synchronization, telephone extension separator, the maximum number of characters to include for notes from contact records, override retrieval from Outlook, and RSVP

Deletions. Defines how deletions synchronize between GoldMine and Outlook.

Field Mapping. Defines mapped fields so GoldMine can place data in the corresponding Outlook fields.

Contacts. Specifies the location of the Outlook folder in which GoldMine sends and retrieves contact information.

Calendar. Specifies the Outlook folder in which GoldMine sends and retrieves activity information.

Task. Specifies the Outlook folder in which GoldMine sends and retrieves

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 **Tools>>Synchronize>>Synchronization Settings**. The **Synchronization Settings** dialog box appears.
2. 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 (t he electronic protocol exchanged between two systems when establishing a connection) 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, 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.

3. 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.

NOTE: 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 **Tools>>Data Management>>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: It is recommended that you use the copy feature only. Copy and verify the data in the new contact set, and delete the data in the originating data set.

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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 re-synchronize 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>>Synchronize>>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 Tools>>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.

Sync Spy Local Menu

Right-click in the upper pane or lower pane to display the Sync Spy local menu which contains:

- **Find.** Displays the Find dialog box where you search for contacts based on entered text.
- **Output to.** Sends the data to the printer, Word, Excel, or the clipboard.

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:

- Establish a TCP/IP connection between the server and remote machine. This is the default configuration.
- Have Internet e-mail configured in GoldMine if sending and retrieving transfer sets by e-mail.

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 **Tools>>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.

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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. See
4. To verify or change existing settings, click **Next** to continue to the connection method dialog box.

Configuring the Synchronization Connection Method

When configuring synchronization, select one connection method and click **Next**:

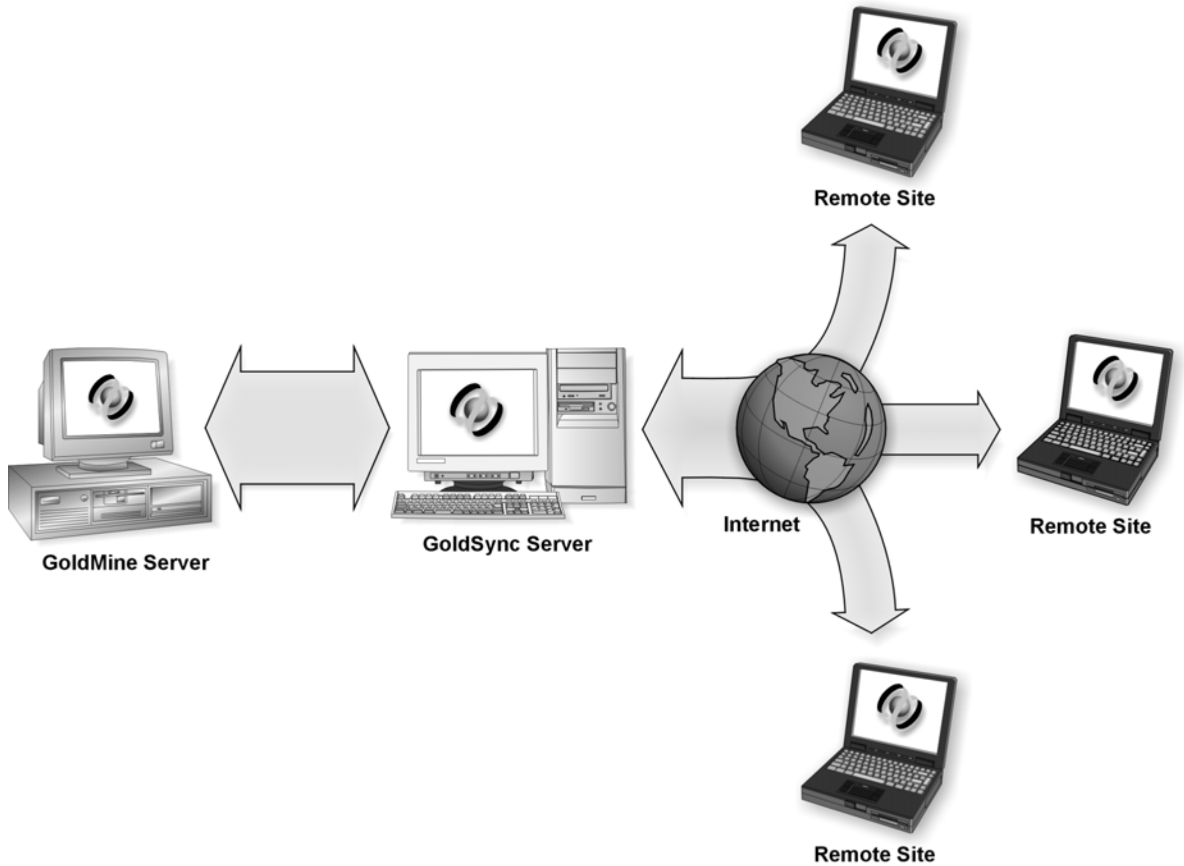
- **Answer an incoming connection.** Sets GoldMine to wait for an incoming connection from another GoldMine or GoldSync system. When the outside system makes contact, GoldMine accepts the connection, establishes a conversation with the remote system, and begins transferring data. The Wait for Incoming Connection dialog box appears.
- **Connect to remote.** Sets GoldMine to contact the remote GoldMine or GoldSync system via modem, direct Internet connection, or network. The Connect/Send E-mail to Remote dialog box appears.

Or select one unconnected method:

- **Send a transfer set to remote by E-mail.** Sets GoldMine to send a transfer set as an attachment to Internet e-mail. The Connect/Send E-mail to Remote dialog box appears.
- **Create a transfer set**. Displays the Create a Transfer Set dialog box where you specify the destination for the transfer set, cutoff time, and an optional password. GoldMine does not attempt to contact another GoldMine or GoldSync system.
- **Retrieve a transfer set.** Displays the Retrieve a Transfer Set dialog box where you define the location where GoldMine can find the transfer set, options for unpacking and deleting the transfer set, and an optional password. GoldMine does not attempt to contact another GoldMine or GoldSync system.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 licenses are included with GoldMine Premium 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.

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 Key Terms and Concepts

Host Site: The GoldMine system accepting incoming connections from one or more remote sites. The site running GoldSync with the Master license typically is called as the host site.

Remote Site. A GoldMine system initiating a connection to the host site. A remote site typically is an undocked user or branch office with a sublicense.

Site Group. A group of remote sites sharing common configuration settings. These settings define which data synchronizes, who sends/receives the data, how often the data synchronizes, and the method of data transport.

Site Group Members. The individual sites belonging to a site group. While the site group members inherit properties of the site group, an individual site group member can also have its own unique settings.

Site Code. An identifier limiting connected and initiated processes and nonconnected processes to only those sites with matching site codes. The site code is assigned to both the process and the site(s).

GoldSync Server. Any network computer GoldMine is installed on and where synchronization processes run. More than one GoldSync Server on a network is allowed. A GoldSync Server is a host site or a remote site depending upon whether it accepts or initiates connections.

Processes. The synchronization tasks performed on a GoldSync Server. Processes pack, send, and retrieve the data. Each process can initiate multiple tasks.

Transfer Set. A file comprising all the changes made in a GoldMine database during a specified time frame, including new Contact records and updates to existing Contact Records. Transfer sets can include changes down to the field level for each type of information stored.

NOTE: The transfer set does not contain all historical changes made to a GoldMine database. It includes records starting with the most recent and spans only to include database changes since a specified cutoff date.

Contact Set. A database of Contact Records.

File Code. A unique identifier used to distinguish one Contact Set from another. File Codes are defined in the main GoldMine application. (Select File>>Open Database, select the Contact File, and click Properties.) When the File Code is set, the Contact Set is available for selection in the Synchronization Wizard and the GoldSync Administration Center. The remote system must have a matching File Code.

RecID. The unique identifier for every record in GoldMine. This value is compared during synchronization to determine if there is a matching record in the respective databases if it is a first-time synchronization or if there are no logs.

GoldSync Administration Center: The command center where synchronization settings are configured. The GoldSync Administration Center lets you administer multiple sites and automate the processing of transfer sets and connection management.

After you configure GoldSync, no further operator intervention is required. the GoldSync Administration Center handles dialing, redialing, and information transfers for remote GoldMine sites.

GoldSync Synchronization Wizard: The tool used by remote sites to manually define configuration settings and initiate synchronization sessions with the host site.

One-button Synchronization: Lets remote users synchronize with GoldSync with a single click. The administrator sets up a one-button sync profile for the remote user in the GoldSync Administration Center.

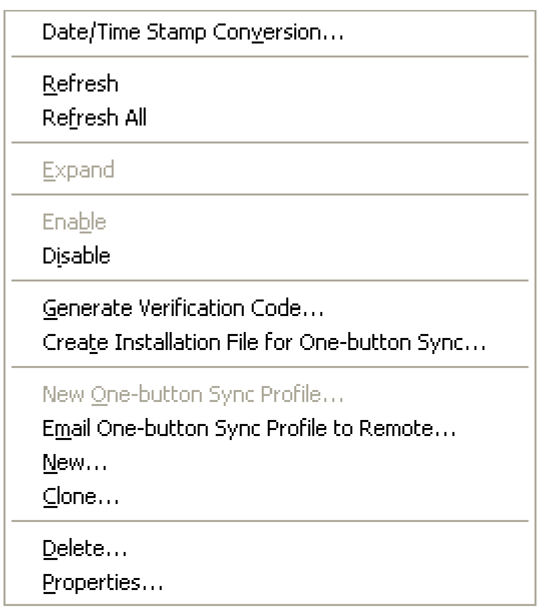
GoldSync Implementation Considerations

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.

GoldSync Sites Local Menu

Use the Sites local menu to configure and manage Site Groups and Sites using:



- **Date/Time Stamp Conversion:** Opens the Date/Time Stamp Conversion dialog box to convert the SyncStamp, LogStamp, and the first seven characters of the RecID to a standard date or convert a regular date to a time stamp. See "Using the Date/Time Stamp Conversion Utility" on page 362.
- **Refresh:** Updates the item.
- **Refresh All:** Updates levels and items in the GoldSync Administration Center.
- **Expand:** Displays items under the selected item.
- **Enable:** Lets the selected site synchronize. GoldSync checks Allow this site to synchronize on the first page of the GoldSync Site Group Member Wizard.
- **Disable:** Prevents the site from synchronizing, but leaves it listed under the site group. When selecting this local menu command, GoldSync clears Allow this site to synchronize on the first page of the GoldSync Site Group Member Wizard.
- **Generate Verification Code:** Displays the Generate Verification Code dialog box. The site must use the code to synchronize with GoldSync. The code is only valid for the site until the remote user uses a different profile. See "Synchronization Verification Codes" on page 365.
- **Create Installation File for One-button Sync:** Creates a GoldMine installation file according to the specifications defined in the user's synchronization profile. Create the synchronization profile for the user before running this command and creating the installation file. When selecting this command, the Create Undocked User(s)' Installation Files appears. See "Creating Installation Files for One-button Synchronization" on page 369.
- **One-button Sync Profile:** Displays the GoldSync Site One-button Synchronization Profile Wizard to create a synchronization profile for an undocked user. This profile enables the undocked user to synchronize via One-button Sync with GoldSync Server. See "Creating One-Button Synchronization Profiles" on page 367.
- **Email One-button Sync Profile to Remote:** Sends the remote synchronization profile as an e-mail attachment to the undocked user. See "E-mailing One-Button Synchronization Profile to Remote" on page 368
- **New:** Creates a site group or site. See "Creating Site Groups" on page 357.
- **Clone:** Displays the New Site Group Member dialog box to create a site based on attributes of the selected site. See "Cloning Site Settings" on page 361.
- **Delete:** Removes the selected site group or site.
- **Properties:** Displays the Site Group Wizard to modify the selected site group or site.

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 **Tools>>Synchronize>>Synchronization Settings**.

   The Synchronization Settings dialog box opens.

2. 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:\SYSDIRdirectory\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:\SYSDIRdirectory\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 (the electronic protocol exchanged between two systems when establishing a connection) 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, 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.

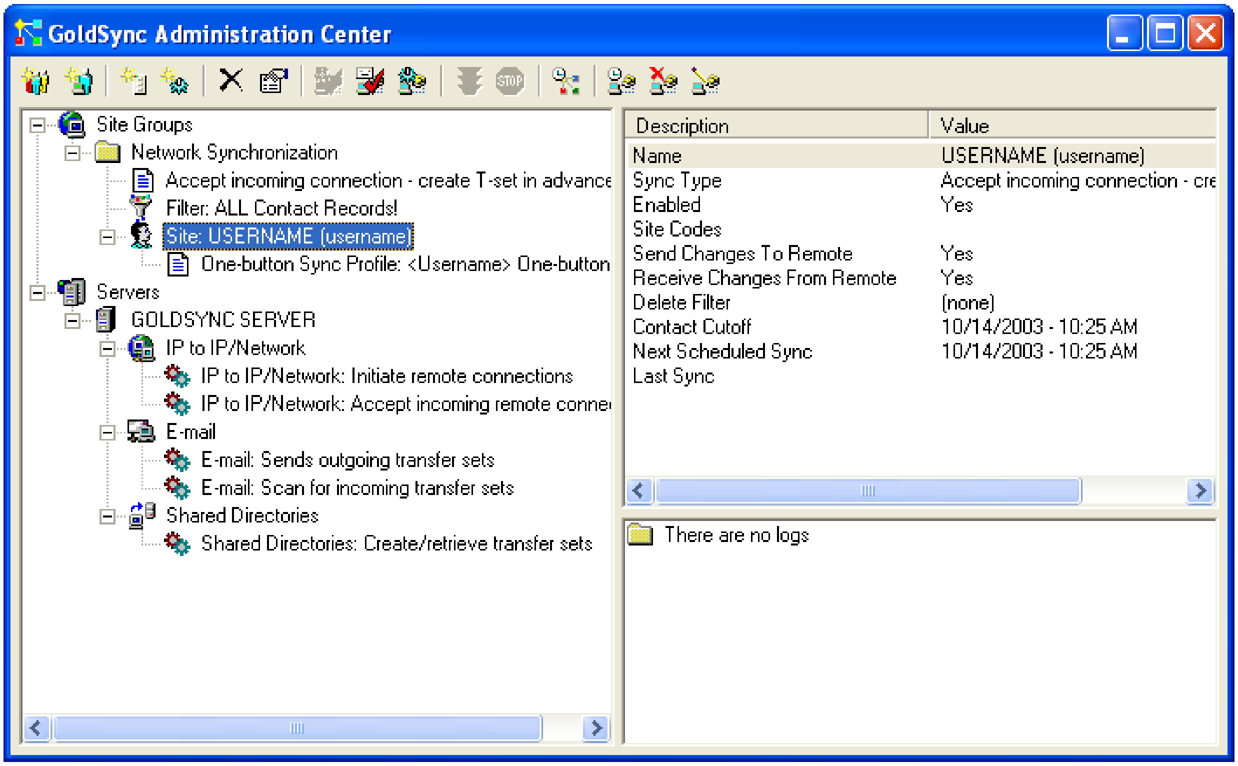
  Install, start, and configure the GoldSync Service from the GoldSync Administration Center toolbar, but use the GoldSync Service tab to manage the service without launching the GoldSync Administration Center.
  - **Set up GoldSync as Service:** Installs the service.
  - **Uninstall GoldSync Service:** Removes the service.
  - **Configure GoldSync Service:** Launches the GoldSync Services Settings dialog box where you start, stop, and automatically start the service.

3. Click **OK** to save the Synchronization Settings.

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.



1. Select **Tools>>Synchronize>>GoldSync Administration Center**.
2. At the **GoldSync Administration Center** window, configure or edit these settings using the wizards:
   - **Site Group Wizard:** Creates a site group with the connection method and transfer set you select. See “Creating Site Groups” on page 357.
   - **Site Group Member Wizard:** Adds members to the newly created site group. See “Creating Sites” on page 355.
   - **Server Wizard:** Adds servers synchronizing with remote sites. See “Creating Servers” on page 360.
   - **Process Wizard:** Defines the processes performed for the site. See “Creating Server Processes” on page 362.
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

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GoldSync can be also be run as a service.

Configuring GoldSync as a Service

You can access GoldSync Services configurations using either of the following methods:

- On the GoldSync Administration Center toolbar, click the **Configure GoldSync Service** button.

  The GoldSync Services Settings dialog box opens.
- Select **Tools>>Synchronize>>Synchronization Settings**. The Synchronization Settings dialog box opens. Click the GoldSync Services tab and Configure GoldSync Service.

  The GoldSync Services Settings dialog box opens.

NOTE: 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 logon information using a Windows account with full access rights on the GoldSync computer and to the shared mapped or UNC locations where linked documents are stored.

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1. Select the server running GoldSync in the Server drop-down list.
2. Click **Start** or **Stop** to start or stop the service.
3. Select **Automatically start as a service** whenever this computer boots up to start the service.

   The Status box displays indicates whether the service is running.
4. Click **OK** to exit the dialog box.

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**.
2. At the **New Site Group Member** dialog box, 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, see “Creating Undocked User Licenses” on page 374.
   - **Sub-License:** Select the site from the drop-down list. The list includes sites created in the License Manager. For more information see f the site does not exist, see “About Sub-licenses” on page 375.
   - **Other License:** Type the license serial number in the text boxes.
3. Click **OK**.
4. At the **Welcome to the GoldSync Site Wizard** dialog box, type a name for the site.

5. Select **Allow this site to synchronize** to make the site active for synchronization after configuring it. and click **Next**.

   The **Site Group** dialog box opens.

6. To make the site belong to a different group, select the **Site Group** from the drop-down list. and click **Next**.

   The **Cutoff Date/Time** dialog box appears.

7. 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.
8. 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.
9. 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.**
10. 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.

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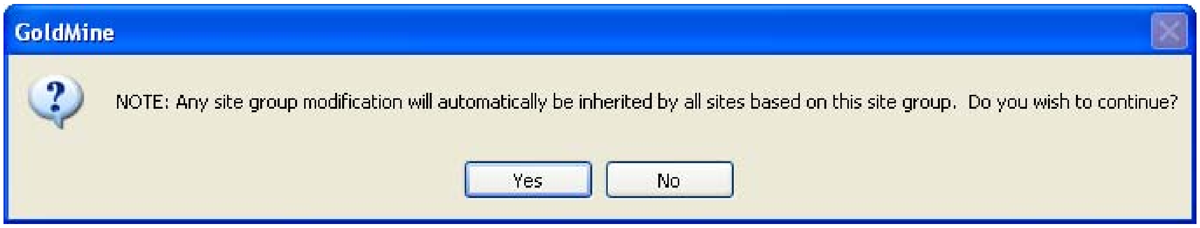
11. Click **Next**. The Override Options dialog box opens, unless configuring a shared directory site (in this case, the Next Synchronization Options dialog box opens).

Configuring the Goldsync Site Group Override Options

Unless configured differently, each site group member synchronizes according to the settings entered for the GoldSync Site Group. However, you can modify settings for a site in the **GoldSync Override Options** dialog box of the **GoldSync Site Group Member** wizard.

To configure special settings for a particular site, check the necessary options on the Override Options screen. For example, if you are creating a site where you want a number of retries before failing a sync session, at the Overrides Options window select the **Number of retries before failing the sync session** option. The wizard will move you to the appropriate window in which you can choose the number of retries needed.

1. To navigate to the Override Options window, do the following:
   - At the GoldSync Administration window select a **Site** and click **Properties.**



   - Click **Yes** at the message.

     The GoldSync Site Wizard opens.
2. Navigate through the wizard to the **Overrides Options** window and select from the list of options.

   Depending on the choices you make, the wizard will move you to the appropriate window on which you can make the necessary selections.
3. Click **Next** and then select **Finish** to the GoldSync Administration Center.

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 **Tools>>Synchronize>>GoldSync Administration**. 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 opens.

Configuring the General Options (Site Groups)

In the General Options set the send and retrieve, password, and log information.

1. Select **Send changed data to site group's members** to let GoldSync accept a request from a remote site to create a transfer set.
2. Select **Retrieve changed data from site group's members** to let GoldSync retrieve a transfer set from the remote site.
3. Type an **Optional connection password** requiring remote users to enter a password when connecting to the server.
4. In the Log Options area, select from:
   - **Log the details of each synchronization session.** Records Process Monitor information in the GoldMine system logs.
   - **Log the transfer set details for the records sent/retrieved.** Records changes made to synchronized records.

NOTE: If information is stored for every synchronization session, the log information storage file could grow very large. Unless you are troubleshooting a sync issue, we recommend disabling log options.

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5. Click **Next.**
   - If you selected **Accept an incoming remote connection** and **Send changed data**, the Transfer Set Creation Method dialog box opens. See "Configuring the Transfer Set Creation Method" on page 359.
   - If you selected another synchronization methods, and selected **Send changed data**, the Send Options dialog box opens. See "Configuring Send Options" on page 370.
   - If you selected only **Retrieve changed data**, the Retrieve Options dialog box opens. See "Configuring the Retrieve Options" on page 359.

Configuring the Transfer Set Creation Method

Use the Transfer Set Creation Method dialog box to determine if the transfer set is created while the remote site is connected or to have the transfer set created in advance for the remote site to pick up.

1. Select an option:
   - **Generate transfer set while site group member waits online.** When the remote sites initiate synchronization, they wait online while the transfer set is built and sent to them.
   - **Generate transfer set in advance for site group member(s) to pick up**. Your system generates the transfer set in advance and stores it in a shared directory. When the remote sites initiate synchronization, they stay online long enough for to send the transfer to them.
2. Click **Next**. The Send Options dialog box appears. See “Configuring Send Options” on page 370.

Configuring the Retrieve Options

The Retrieve Options determine what is considered for addition to the database when retrieving a transfer set from another system.

If you select either **Retrieve a transfer set** from the second dialog box of the Synchronization Wizard or **Retrieve changed data from remote** from the Connect/Send E-mail to Remote or Wait for an Incoming Connection dialog boxes, GoldMine opens the Retrieve Options dialog box.

1. In the **Retrieve record types** area, select the record types to retrieve from a remote site. By default, all record types are selected.

   NOTE: If you are a main site, clear many of the customization types unless retrieving from a remote site responsible for GoldMine customization.

2. In the **Retrieve users' calendar** area, select one or more users whose calendar activities you want to retrieve. To retrieve calendar activities for all users, select (all).

   NOTE: History items are treated as user calendar items, and are only synchronized between users when user calendars are synchronized.

3. Click **Next**. The Retrieve Contact Sets dialog box opens.

Forcing the Override of Tlogs

If the administrator frequently purges the tlogs on the server, the **Force overwirte of values with missing t-logs** option in the **Retrieve record types** area must be used to update records on a computer. This option ignores any existing tlogs that might exist on the computer and forces the record updates.

WARNING: This option **must** be used when tlogs are purged from the server and there are computers that do not frequently connect to the server. Otherwise, the records contained on the computer might accidentally overwrite the files on the server.

NOTE: This option should be set **only** at the computer side, **not** on the server.

Configuring the Retrieve Contact Set Options

Select which multiple contact sets to synchronize.

1. In the **Please specify which contact sets you wish to retrieve from the remote site area**, select the contact sets to retrieve.
2. In the **Default Contact Set** area, select the **Contact Set** in the drop-down list. This is the Contact Set to retrieve data into if there is no matching file code from the incoming transfer set.
3. Click **Next.** If you selected:
   - **Answer an incoming connection** on the connection method dialog box, the Ready to Synchronize dialog box opens.
   - **Connect to remote**, the Connect/Send E-mail to Remote dialog box opens.

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.

To Create a Server

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

Cloning Site Settings

Cloning site setting to create site group members with the same or similar settings.

1. In the GoldSync Administration Center, highlight the site you are using a baseline, right-click and select Clone. The New Site Group Member dialog box appears.
2. Select or create the new undocked user to whom you are assigning the cloned settings.
3. Click **OK**.

    The Welcome to the GoldSync Site Wizard dialog box opens. Wizard settings are based on the source site's configuration. Keep the defaults or make necessary changes using the Override options.

Using the Date/Time Stamp Conversion Utility

You may need to view date and time stamps in a regular date format. The utility converts the seven-character SyncStamp, LogStamp, or the first seven digits of the RecID to a standard date and time format; or it converts a standard date format to a stamp format.

TIP: Use this utility while troubleshooting synchronization issues to verify the date and time in the Tlogs of unpacked transfer sets and compare the information to that in the database.

1. Select **Tools>>Synchronize>>GoldSync Administration Center.** The GoldSync Administration Center window appears.
2. Right-click the **Site Group and Server** area and select **Date/Time Stamp Conversion.**

   The Date/Time Stamp Conversion dialog box opens.
3. In the **Conversion Method** area, select one:
   - **Date and Time>>Sync Stamp:** Converts the date you select from the F2 Lookup calendar and the time from the F2 Lookup graphical clock to a date stamp format.
   - **Sync Stamp>> Date and Time:** Converts a date stamp to a standard date and time format.
4. After selecting the date and time or typing the sync stamp, click Convert. The conversion displays in the Results area with your initial input on the left and the conversion to the right of the arrow. The results box displays multiple results so you can track the time stamps you are researching.
5. Click **Cancel** to close the dialog box.

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. See “Configuring the Number of Connections” on page 363.
   - If configuring **E-mail: Scan for incoming transfer sets**, the Incoming E-mail Settings dialog box opens. See “Configuring Incoming E-mail Settings” on page 363.
   - If configuring **E-mail: Sends outgoing transfer sets**, the Outgoing E-mail Settings dialog box appears. See “Configuring Outgoing E-mail Settings” on page 363.

Configuring the Number of Connections

The Number of Connections dialog box appears when configuring IP/Network and Shared Directories processes.

1. Select the maximum number of concurrent connections. This option controls the number of remote users who can connect at one time.

> **NOTE:** If you have the maximum number of concurrent connections set to 5, only 5 remote users can connect at one time. The next user is refused a connection until there is an open slot. This option prevents your server from running out of resources.

2. If necessary, type another port number in the **Wait for incoming Internet connection at TCP port** field.
3. Click **Next.** The Active Period dialog box appears.

Configuring Incoming E-mail Settings

1. In **The Host name of the inbound (POP3)** mail server field, type the name of the POP3 server.
2. Select **The Frequency period to check for e-mailed transfer sets** by clicking the browse button (...). The Synchronization Frequency dialog box appears. Select the days, hours, or minutes.
3. Type the **User Name** and **Password** for the email account retrieving the transfer sets.
4. Click **Next**. The Active Period dialog box opens. See “Configuring the Active Periods for Synchronization” on page 363.

Configuring Outgoing E-mail Settings

1. Type **The Host name of the outbound (SMTP) mail server** in the text box.
2. Type **The return E-mail address** for the outgoing transfer set.
3. Click **Next**. The Active Period dialog box opens. See “Configuring the Active Periods for Synchronization” on page 363.

Configuring the Active Periods for Synchronization

The Active Periods dialog box defines the days and hours the process is active.

1. On the Active Period dialog box, select **Start this sync process automatically if the GoldSync Agent detects the current time...** to use the GoldSync Server Agent to the start the process automatically.
2. Select the active days.
3. Select the active beginning and ending time using the F2 Lookup clock.

4. Click **Next**. The Finish dialog box opens.
5. If configuring an Accept incoming connection process, click Finish to complete the process construction. If configuring an Initiate remote connection process, type a Site Code in the text box.

> **NOTE:** Assign multiple site codes to a process, separated by a space. A site can be assigned only one site code.

6. Click **Finish**. The process adds to the GoldSync Administration Center.

Using the Date/Time Stamp Conversion Utility

You may need to view date and time stamps in a regular date format. The utility converts the seven-character SyncStamp, LogStamp, or the first seven digits of the RecID to a standard date and time format; or it converts a standard date format to a stamp format.

> **TIP:** Use this utility while troubleshooting synchronization issues to verify the date and time in the Tlogs of unpacked transfer sets and compare the information to that in the database.

1. Select **Tools>>Synchronize>>GoldSync Administration Center.** The GoldSync Administration Center window appears.
2. Right-click the **Site Group and Server** area and select **Date/Time Stamp Conversion.**

   The Date/Time Stamp Conversion dialog box opens.
3. In the **Conversion Method** area, select one:
   - **Date and Time>>Sync Stamp:** Converts the date you select from the F2 Lookup calendar and the time from the F2 Lookup graphical clock to a date stamp format.
   - **Sync Stamp>> Date and Time:** Converts a date stamp to a standard date and time format.
4. After selecting the date and time or typing the sync stamp, click Convert. The conversion displays in the Results area with your initial input on the left and the conversion to the right of the arrow. The results box displays multiple results so you can track the time stamps you are researching.
5. Click **Cancel** to close the dialog box.

Synchronization Verification Codes

Verification codes are a security measure ensuring remote users do not change their synchronization profile without the GoldSync administrator's knowledge. If the remote user receives a message that his or her Verification Code is invalid, the GoldSync Administrator must generate another and send it to the remote user.

1. In the **GoldSync Administration Center**, select the site needing a new Verification Code and right-click. Select Generate Verification Code. The Generate Verification Code dialog box appears.

   The Verification Code generates.

2. Copy the number and click **OK** to close.
3. Send the remote site the code.

   The remote site types in the new verification code (the code remains valid until the remote user tries using another profile).

Running GoldSync as a Service

When your GoldSync server is running on a computer with a Windows 2003 Server or Windows XP 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 opens indicating the GoldSync Service was created successfully.

NOTE: 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

To access GoldSync Services configurations, use either of the following methods.

- On the GoldSync Administration Center toolbar, click the Configure GoldSync service button. The GoldSync Services Settings dialog box opens.
- Select **File>>Configure>>Synchronization Settings**. The Synchronization Settings dialog box appears. Click the GoldSync Services tab and Configure GoldSync Service. The GoldSync Services Settings dialog box opens.

NOTE: 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 logon information using a Windows account with full access rights on the GoldSync computer and to the shared mapped or UNC locations where linked documents are stored

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1. Select the server running GoldSync in the Server drop-down list.
2. Click **Start** or **Stop** to start or stop the service.
3. Select **Automatically start as a service** whenever this computer 'boots' up to start the service.

   The Status box displays indicates whether the service is running.
4. Click **OK** to exit the dialog box.

Uninstalling 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.

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. See “Creating One-Button Synchronization Profiles” on page 367.
- **E-mail the one-button synchronization profiles** to remote, undocked users. See “E-mailing One-Button Synchronization Profile to Remote” on page 368.
- **Create an undocked installer** to install GoldMine on the remote system with the one-button synchronization profile (new GoldMine user). See “Creating Installation Files for One-button Synchronization” on page 369.

After created and sent, the remote user can:

- **Retrieve the one-button synchronization profile**. See "Retrieving One-Button Synchronization Profiles" on page 368.
- **Retrieve the undocked installer file**. See "Retrieving One-Button Synchronization Installation Files" on page 370.
- **Synchronize using one-button synchronization**. See "Synchronizing Using One-Button Synchronization" on page 367.

Synchronizing Using One-Button Synchronization

The GoldSync administrator configures one-button synchronization profiles and sends them to remote users. Once installed, the profile streamlines the remote, undocked user synchronization process.

1. Select **Tools>>Synchronize>>One-button sync with GoldSync Server**. The **One-button Synchronization** dialog box opens, indicating the GoldSync administrator has configured your system for One-button Synchronization.
2. Click **Sync**. The **Process Monitor** opens, 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 (see "Configuring Synchronization Settings" on page 342.) 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 opens.
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 opens for:

   Connect to remote using IP to IP/Network. See Configuring Connect/Send E-mail to Remote (Connect to Remote)368.

   Send transfer set to remote by E-mail. See Configuring Connect/Send E-mail to Remote (Transfer Set by E-mail)368.

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 (see “Configuring Synchronization Settings” on page 351)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.

E-mailing One-Button Synchronization Profile to Remote

The GoldSync administrator can create or change a site's One-Button Synchronization Profile and e-mail it to the remote user.

1. In the **GoldSync Administration Center**, highlight the site, and right-click. Select E-mail One-button Sync Profile to Remote from the local menu.
2. A confirmation dialog box opens. Click **Yes** to email the profile to the remote.

   The profile is emailed to the email address in the One-button Synchronization Profile.

Configuring Connect/Send E-mail to Remote (Connect to Remote)

Set connection options when selecting Connect to remote on the connection method dialog box.

1. Select Send changed data to remote to send changed data from this site to the remote.
2. Select Retrieve changed date from remote to retrieve changed date from the remote to this site.
3. In the Remote's Internet IP Address text box, type the Internet IP address you are connecting to. If creating a one-button synchronization profile, the remote in this case is the GoldSync server the undocked computer is synchronizing with.
4. Type the TCP Port. The default TCP Port is 5993. Typically, do not change this entry; if you override the default port, you must select the same port as the remote system.
5. Click IP to add or edit alternative IP addresses.
6. Type the Optional connection password in the text box.
7. Click Next. If you selected Send changed data to remote, the Send Options dialog box appears.

Configuring Connect/Send E-mail to Remote (Transfer Set by E-mail)

When selecting Send transfer set to remote by E-mail on the connection method dialog box, you can then send the e-mail options.

1. Type the Remote's E-mail address in the text box.
2. Type the Optional connection password in the text box.
3. Click **Next.** The Send Options dialog box appears. See “Configuring Send Options” on page 370.

Creating Installation Files for One-button Synchronization

With One-button Synchronization Profile, create an installation file containing fields and data for a new remote user.

NOTE: Create a synchronization profile for the user before creating an installation file.

1. Highlight the site in the GoldSync Administration Center and select **Create Installation File for One-button Synchronization**.

   The Create Undocked User(s') Installation Files dialog box opens.

2. Select the user or users for whom you are creating the installation files.

   NOTE: Process up to five undocked sites simultaneously. If more than five sites must be processed, GoldSync queues the additional sites until resources are available.

3. Click **OK**.
   - If the **gmsetup.exe** is not in the default location, browse to the correct location. If you cannot locate the .exe in the GoldMine directory, copy the file from the installation CD-ROM.
   - If the **gmsetup.exe** file is in the default location of \GoldMine\Setup\GoldMine then the Process Monitor displays the status of the creation process. GoldSync creates installation files and initial transfer sets based on the profile settings.

     NOTE: Creation of the initial transfer set can be time consuming. GoldSync ignores the cutoff date defined in the user's synchronization profile for these tables and includes all records.The tables are: **Fields, ContUdef, Lookup, Users, InfoCenter, and Resources.**

4. The installation file is placed in the GoldMine directory, \GoldMine\Setup\Remotes\.
5. As the GoldSync administrator, distribute the file to the remote site using these methods:
   - Zip disk
   - CD-ROM
   - FTP
   - E-mail via file attachment
6. The file must be retrieved on the remote computer.

   It installs GoldMine based on the undocked user license for the site, copies the data, and installs the One-button Synchronization Profile.

Retrieving One-Button Synchronization Installation Files

As a remote user, when you receive the Undocked Installer package, install GoldMine by running the installer, named **username.exe** for the remote/undocked user.

The Undocked Installer package installs GoldMine using the undocked user license for your site, copies the data and files selected by the GoldSync administrator, and sets up the configured synchronization profile.

1. Locate the file sent to you on a zip disk or CD-ROM, using FTP, or e-mailed as an attachment. The file is named username.exe, where username is your GoldMine user name.
2. Open the file. It extracts the necessary files to the folder defined by the system's Windows Temp variable, usually C:\Windows\Temp.
3. After files are extracted, the Undocked Installer installs GoldMine and imports the data.

Configuring Send Options

1. Use the **Send Options** dialog box to determine what data to include in the transfer set (a database of all changes made to GoldMine contact records during a specified time frame that is sent to other GoldMine locations and retrieved, updating that database with the new information).
2. In the **Send Record Types** area, specify record types to include in the transfer set.

NOTE: Selecting a record type in the send options includes it in the transfer set; however, this does not guarantee the data will be retrieved at the retrieving site

3. In the **Send users' calendar** area, select one or more users whose calendar activities should be included in the transfer set. To include the calendar activities of all users, select **(all)**.

NOTE: For the user name(s) to be made available in the drop-down list of the remote's calendar, the user names(s) must be synchronized with the Users database. Add user names in the Users Master File.

History items are treated as user calendar items, and are only synchronized between users when user calendars are synchronized.

4. Select your **Encryption level** in the drop-down list. All transfer sets are encrypted at 128 or 32 bits.
5. Click **Next**. The Send Contact-related Options dialog box opens.

Monitoring Processes

The GoldMine Process Monitor launches automatically when executing or running processes within GoldMine, including synchronization, Automated Processes, importing and exporting, or merging and purging.

NOTE: Once opened, the Process Monitor can float anywhere on the GoldMine screen, or it can be docked to any of the four sides of the GoldMine screen. The window may also be resized to maximize available workspace. For best results, dock the Process Monitor to the bottom of the GoldMine screen.

The upper pane displays processes running and general status, while the lower pane displays the status of the component tasks.

Use the toolbar or the local menu to manage process options.

The Process Monitor uses color codes, assigned to text or the background, to indicate process status.

Color	Meaning
Black text on default background	Operation normal
Blue text on default background	Notice
Black text on yellow background	Warning
White text on red background	Error
Green text on default background	Task successfully completed

About Licensing

GoldMine has a fully scalable licensing structure to meet the needs of individuals and organizations. As your business matures and GoldMine expands, your organization can change the licensing configurations.

General Information

The single, distributed Master License serves as the authentication mechanism for secure synchronization across the entire organization, and the License Manager keeps track of your licensing configurations.

Most organizations generally buy one license—a Master License with X number of seats. These seats can then be parsed to users in various combinations of sub-licenses. For example, an organization can create Site sub-licenses for their remote office(s) and Undocked sub-licenses for individual remote (mobile) users. One seat should always be set aside for administrators.

License Types

Master License. This is the primary license. It determines what database types are supported by the master site as well as its synchronization capabilities. It is a precursor to executing any sub-licenses which stem from it.

GoldSync and Outlook Integration licenses are issued concurrent with the E or D license.

The licensing serial number schema for Master licenses has been changed for the 7.0.4 release, but remains the same for sub-licenses. See License Serial Number.

Sub-licenses. To issue one of these, install GoldMine with a Master License on your organization's primary network. This ensures all sub-licenses maintain security and are authenticated properly during synchronization.

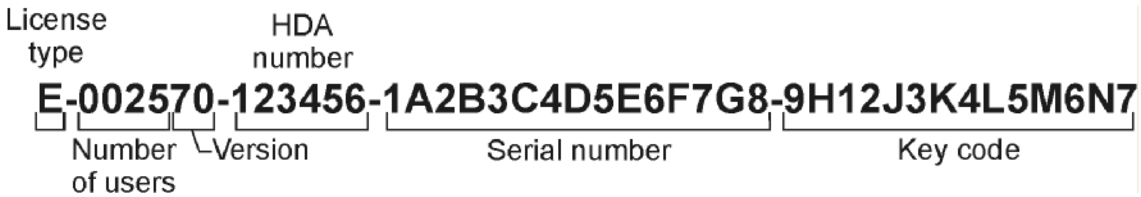
The Undocked license (a special sub-license) is for remote users and can only be licensed for a single user. It can be sub-licensed from the main GoldMine system or from a Site sub-license.

Increases: Previous increases for Corporate Edition, Standard Edition, and GoldSync (J, R, and N), are now facilitated by obtaining a new E, D, or G license (which account for the increase and the Master license count).

Symbol	Product	Description
Master Licenses		
E	GoldMine Corporate Edition GoldMine Premium Edition License	Supports SQL Server and Firebird databases. Includes GoldSync.
G	GoldSync License	GoldSync seat purchased separately and can be added to E-Licenses.
O	GoldMine Outlook Integration Services License	Outlook integration purchased separately for an E-License.
Sublicenses		
U	Undocked License	Single sub-license for a remote GoldMine user.
S	Site License	Multiple-user sub-license for a remote office.
Y	GoldSync License	GoldSync sub-license for a remote office.

Master Licenses

License Serial Number



- **License type:** Alpha-prefix denotes the type of Master license.
- **Number of users:** First 4 numbers indicate the license count or seats available in the license. The license count determines the number of users who can log on to GoldMine at one time but does not limit the total number of named users.
- **Version:** A 2-digit version number.
- **HDA number:** Your 6-digit HDA number.
- **Serial number:** 15-character (alphanumeric) serial number uniquely identifying the license for an organization. It is used for registration and support and identifies all sub-licenses as part of the same organization. Collected in 3 groups of 5 characters during licensing.
- **Key code:** 15-character (alphanumeric) key code is a computer-generated check used by GoldMine to verify the license's validity. Collected in 3 groups of 5 characters during licensing.

NOTE: The key code is required during installation. Keep the license number and key code in a safe place in the event it becomes necessary to reinstall the software.

License Manager

Initial licensing information is collected during installation. Subsequent changes and related management functions are handled through the License Manager.

From the GoldMine File menu, select Configure>>License Manager.

The central text box lists all installed licenses and any sub-licenses created from this location. Status is displayed along the right side. Buttons along the bottom allow you to add a New License, add a New Site, add an Undocked User, Remove License, or View License.

The database support of the Master License is inherited by the site sub-licenses distributed throughout the organization. GoldSync Synchronization capabilities can be distributed separately to sub-licenses.

NOTE: Licensing information is stored in the license file, License.bin, created at the time you register. This file must exist only in the GoldMine root directory of each GoldMine installation.

Creating Undocked User Licenses

GoldMine has a sub-license for an individual user called an **Undocked License (U-License)**. This license type is created for users who work primarily with GoldMine at a remote location on a laptop, notebook, or home office computer but who may also need to log on to the network occasionally. Before creating an undocked consider the following:

- Creating an undocked user decreases the available users of the network site (Master License or Site License) by one; however, when an undocked user logs on to the site from which they were sub-licensed, they do not take up an additional seat.
- Every user supported by the GoldMine license can have an Undocked license to work on a remote computer. For example, on a 5-user GoldMine system, 5 Undocked licenses can be created. This is in contrast to creating an “S” sub-license which requires one seat to remain available from the Master License.
- All undocked users, as well as the total number of users that make up the difference in the total number allowed by the Master License can log on to GoldMine. For example, on a 5-user GoldMine system with 3 undocked users, 3 undocked users plus 2 other users can log on to GoldMine.
- If you undock all users, only those users will be able to log in. If you have not assigned master rights to any of those undocked users, GoldMine administration cannot take place.
- When used in combination with GoldSync, administrators can synchronize security settings to undocked users including new passwords, menu items, and preferences in addition to data.
- To work on an undocked basis, users must have an Undocked license on their laptop. Create an Undocked license from the Master License or a Site license.

To Create an Undocked User License

1. From the GoldMine main menu, selec**t Tools>>Configure>>License Manager.** The License Manager opens.
2. Click the Licenses tab and **Undock Users**. The Create Undocked User Licenses dialog box opens.
3. Select the check box next to the user you want to create a sub-license for, and click Create Undocked License. The Sub-Licenses dialog box opens.
4. Review the information and click **I Agree.**

   The sub-license number for a remote user or an undocked user appears in the Sub-license for Remote Site [Name of Site] dialog box.
5. Write the sub-license number down or copy it to Windows Notepad.

   The sub-license number is needed for each remote computer installation. Send the remote site license number to the remote user who can type the license number during the GoldMine installation.

Creating Site Licenses

1. Select **Tools>>Configure>>License Manager.**

   The GoldMine License Manager dialog box opens.

2. Select the **Licenses** tab and click New Site.

   The Create a Site License dialog box opens.

3. At the **Distributed License Type** area, select **GoldMine Site License.** Instructions for creating the GoldSync License follow.
4. **Type the Site Name.** The name of the site should have no more than 12 characters and spaces, such as Los Angeles.
5. **Type the Number of Users** who will need seats at the site. This will be the total number of users included in the sublicense.
6. **Click Create Site Sub-License.** The Sub-License for Remote Site [site name] dialog box appears. Select I AGREE if you accept the licensing terms.
7. GoldMine displays the new sublicense for the remote site, beginning with the letter **S**, in the field at the bottom of the dialog box. Make a copy of this number; you need it when licensing the site. When finished, select **Close**.

NOTE: : A unique sublicense number is needed for each remote computer installation. Send the remote site number to the remote location. The GoldMine administrator at the remote site can then type the license number during the GoldMine installation.

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8. To complete the process, click **OK** in the Create a Site License dialog box.

   GoldMine adds the sublicense to the Licenses tab browse window under previously installed license(s). The first character of a site sublicense serial number is **S.**

9. To synchronize between the remote site and the Master License site, you need at least one GoldSync License.

About Sub-licenses

With multiple offices and users, create sub-licenses for each site or user from the Master License. A site sub-license installs that license on only one remote server. An undocked user sublicense installs that license on one remote computer. However, create multiple site licenses and undocked licenses up to the maximum permitted by the Master License.

Site License

A Site License is a multiple-user sub-license for a remote office and is designated with the alpha-prefix **S.** Have an S-license for each user at the remote site.

- When creating any sublicense, note the entire license number created by GoldMine. The sub-license includes additional information needed when typing the license number on the remote computer and displays in its entirety during the creation process.
- A GoldSync License (Y-license) is required only if you are using an S-license and want to synchronize using GoldSync. You should have one Y-license to synchronize with the Master License and additional Y-licenses for Undocked users synchronizing with your site.
- Y licenses are not entered in the Enter GoldMine Serial Number dialog box. Only S licenses are entered during registration (the GoldSync Section remains disabled). Clicking Next displays an ALERT: Suggested Action(s)! if you attempt to enter Y licenses in the Enter GoldMine Serial Number dialog box.
- If this installation of GoldMine includes its own GoldSync sites, you may enter the applicable Y-type sub-licenses to properly configure synchronization for this system.

TIP: Highlight the complete serial number in GoldMine, copy it (CTRL+C) and paste it (CTRL+V) into Notepad.

Undocked License

Undocked licenses are sub-licenses created from a Master License or a Site license and are designated by the letter “U.” This license type is created for users who work with GoldMine at another location, on a laptop, or on a workstation disconnected from the server copy of GoldMine. Type the U-license, Key Code, and Site Code created in the License Manager.

Calendars

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 it running in the GoldMine work area.

For procedures on using the Calendar function, please see the GoldMine 8.5 User Guide.

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 two 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:

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 emails 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 to which you publish your GoldMine free/busy time.
- You configure the Record Properties free/busy time to access the URL location to which your contact publishes his free/busy time.

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 opens.
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	Tools>>Options>>Calendar>>More Options>>Free/Busy (.ifb)	Tools>>Options>>Calendar Options>>Free/Busy Options (.vfb) Note: See the Outlook online Help for more detailed information.

Action	GoldMine	Outlook
Initializing user free/busy publishing	**Automatically:** After the Free/ Busy tab is configured, GoldMine begins publishing based on a specified time. **Manually:** Web>>Publish Calendar>>Publish Free/Busy Times.	**Automatically:** After the Free/ Busy Options are configured, Outlook begins publishing based on a specified time.
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.

Scheduling Based on Free/Busy Times

1. Select **Schedule>>an <activity>** and configure **Detail, Resources, and Free/Busy** fields.
2. Click **Options** and select **Show Contacts.**
3. In Calendar, select **Actions>>Select <activity>.**
4. Select **Attendee Availability>>Invite Others** and select contact with published free/busy information.

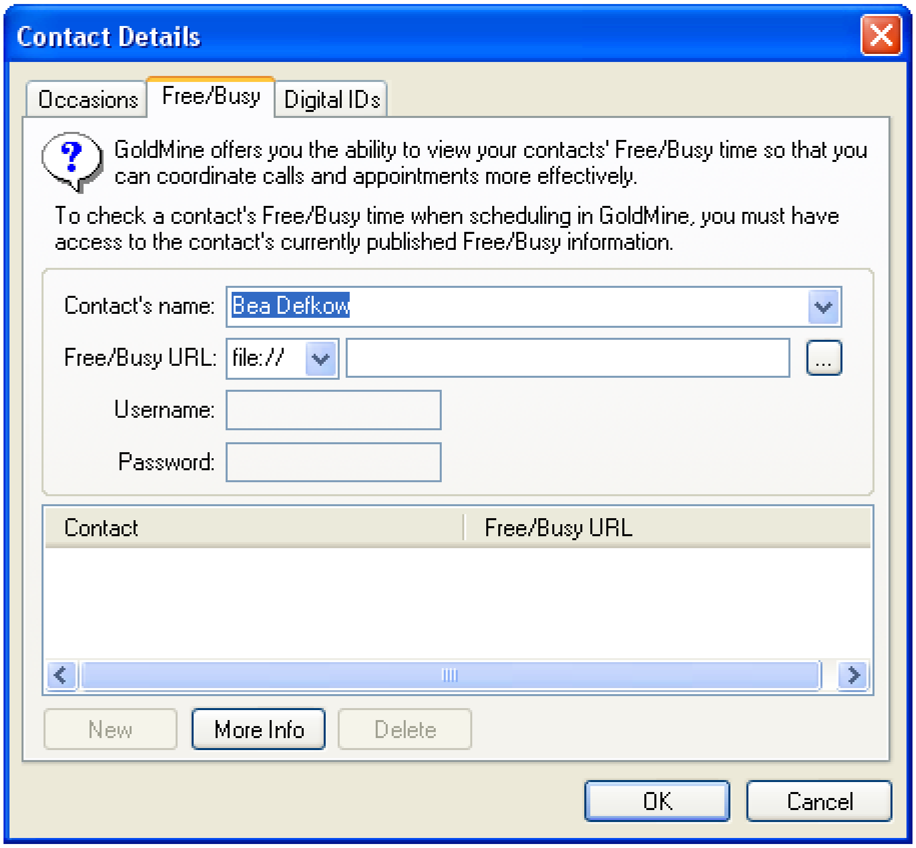
Distributing Your Free/Busy URL to others

1. Copy and paste the URL into an email message to send to a contact.
2. 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.

Setting Free/Busy Times

For GoldMine to read a contact's published free/busy times, you must 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.

1. With the contact record active in GoldMine, select **Edit>>Record Properies>>Contact Details.**



2. At the **Contact Details dialog box**, 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.

   The configured URLs appear in the Contact pane.

5. To add a new contact to the Contact list, click **New** and complete the various drop-down boxes and text boxes as needed.

   To remove a URL from the pane, select the contact and click **Delete.**

6. Click **OK** to close and save the URL.

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

Configuring IIS to Access .ifb File Types

When accessing a contact's free/busy times on an http location, configure your Internet Information Services (IIS) to access .ifb file types.

1. Launch your system Administrative Tools and select **Internet Information Services**.
2. Right-click **Web Sites** in the tree pane and select **Properties.**
3. At the Web Sites Properties dialog box, select the **HTTP Headers tab** and click **File Types.**
4. At the **File Types dialog box,** click **New Type.**
5. At the **File Type dialog box,** at the **Associated Extension** field, type **ifb**.
6. In the **Content Type (MIME)** text box, type **text/calendar.**
7. Click **OK** on each dialog box to save and close.

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 opens.
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).

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

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4. In the text box following the file type, type or browse to the URL and then click **OK**.

Scheduling Activities Based on Available Times

1. Before scheduling a meeting for multiple participants, determine a time when all participants are available. Before GoldMine can scan the participants' Calendars to determine their availability, specify attendees and resources.

   NOTE: All potential attendees must maintain their daily schedules in GoldMine and the contact's free/busy times must be configured in GoldMine. After selecting the meeting time, GoldMine schedules the meeting and informs participants

2. In the **Schedule an activity dialog box**, click the **Free/Busy tab**.

   The busy time pane displays availability of selected users, resources, and the contact.

3. Click **Options** to specify what types of appointments are scanned and your display options.
4. If you selected **Show Contacts**, the contact adds to the display. If the Internet free/busy information is not configured or the contact does not publish his or her free/busy information, the contact's busy time displays the message: Internet Free/Busy information is not available, click here for help. Use the Add Free/Busy URL dialog box to can add the URL where the contact's free/busy time is published. The URL you add in the dialog box is added to the contact's **Edit>>Record Properties>>Contact Details>>Free/Busy tab**.
5. The Scan Settings area initially displays a **Start Date**, **End Date,** and **Duration**. The values in these fields default to the values specified on the Detail tab. To expand the busy time display, select new beginning and ending dates using the F2 graphical calendar and click **Refresh**.
6. If you have not scheduled the activity for a time compatible with all attendees, configure the **Scan Settings** and then locate a suitable time. In the Scan Settings area, configure:
   - **Proposed date.** Select the new proposed date from the F2 graphical calendar.
   - **Time.** Select the new proposed starting time for the activity from the F2 graphical clock.
   - **Duration.** Shorten or lengthen the activity duration. Shortening the time may make it easier to find a mutually compatible meeting time.
   - **Refresh.** If you select **Refresh Only**, the date and time update. If you select **Reset and Refresh**, select an **End** date for the period of time to be scanned.
7. If you are looking for a compatible time and use the **Find Time** scan option, select dates and the activity duration and click **Find Time**. **Scan Settings** changes to display the date being scanned and the time. GoldMine scans for a time based on the duration of the activity. The Duration defaults to the duration specified on the Detail tab but can be modified on the Free/Busy tab in order to successfully schedule an activity.
8. Select another tab or click Schedule to add the activity to the calendar.

About Scheduling from Meeting Requests

The GoldMine Meeting Request option emails 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.

When retrieving email messages from GoldMine's E-mail Center, the incoming messages look like the following:

```
BEGIN:VCALENDAR
PRODID:-//FrontRange Solutions//GoldMine 5.7//EN
VERSION:2.0
METHOD:REQUEST
BEGIN:VEVENT
ORGANIZER:MAILTO:username@global.not
ATTENDEE;CN="Jerry Gooligan";ROLE=REQ-PARTICIPANT;RSVP=TRUE:MAILTO:user1@gl
obal.not
DTSTART:20020608T170000Z
DTEND:20020608T170000Z
TRANSP:OPAQUE
SEQUENCE:0
UID:3930454A334459292E5B244D4F307B@global.not
DTSTAMP:20020607T144210Z
SUMMARY:Train
```

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. On 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.

Sharing Calendar Information

GoldMine enables several calendaring options including sharing your free/busy times or publishing your entire calendar as well as accessing a contact's shared calendar.

> **NOTE:** Users with limited access to others user calendars may not see other users' forecasts.

1. To publish your calendar as .ics and .htm, select **Tools>>Options**.
2. Select the **Calendar** tab, then click **More Options** and select the Publishing Tab.
   - To automate with Server Agents select **Tools>>Services>>Manage Server Agents**. Select the Calendar Publishing tab and adjust settings.
   - To manually publish, select **Web>>Publish Calendar>>Publish Calendar(s)**.
3. To publish your free/busy time as .ifb, select **Tools>>Options**.
4. Select the Calendar tab, then click More Options and then select the Free/Busy Tab.
5. To manually publish, select **Web>>Publish Calendar>>Publish Free/Busy Times**; Note that .ifb is an iCalendar standard extension.
6. To export your calendar as .ics, select **File>>Import/Export>>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 **File>>Import/Export>>Import from an iCalendar File**.

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>>Services>>Manage Server Agents**. 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 using the right-facing arrows to access a list of times in thirty minute increments.

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 Web 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.

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: **Tools>>Options>>Calendar(tab)>>More Options>>Free/Busy(tab)**

1. Select **Web>>Publish Calendar>>Publish Free/Busy Times.**
2. At the **Free/Busy Publishing Settings dialog box**, 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.

Calendar Options Dialog Box, Free/Busy Tab

Configure your free/busy times for with those working outside of GoldMine.

1. Select **Tools>>Options>>Calendar. Click More Options.**
2. At the **Calendar Options dialog box,** select the **Free/Busy** tab.
3. To turn on the busy publishing options, select **Publish Busy Time** and configure the following options.

   For the **Filename,** select the location type where you are publishing your calendar information:

   - file://
   - ftp://
   - http://
4. In the text box following Filename, select the file location or type the ftp or http path.

   Your path should conclude with the file name and the .ics extension for iCalendar and .htm or .html for the Web publishing. For example, www.myICSwebsite.com/calendars/MyCal.ics or www.myCALwebsite.com/calendars/MyCal.htm.

   NOTE: Username and Password are active only if you are posting to an ftp location.

5. In the **Date Range** area, select the predefined date range in the drop-down list.

   Use the graphical calendars to select the **From** and **To** dates to publish.
6. Specify the update **Frequency** in day(s), hour(s), or minute(s).
7. Select the **Activity Types** to publish as busy.
8. Select another tab or click **OK**.
9. After configuration, your free/busy information publishes to the designated location and on the specified schedule. Manually publish your Free/Busy time to the specified location by selecting **Tools>>Publish Calendars>>Publish Free/Busy Times.**

Calendar Options Dialog Box, Publishing Tab

Use the Publishing tab to configure iCalendar and Web publishing options for your calendar.

NOTE: Configure and automatically publish you calendar using the Server Agents Administrator. Alternatively, manually publish calendar information using **Tools>>Import/Export Wizard>>Publish Calendar.**

1. Select **Tools>>Options>>Calendar**. Click **More Options**. The Calendar Options dialog box appears. Select the **Publishing** tab.
2. To activate iCalendar publishing options, select **Publish the Calendar as an iCalendar file** or to turn on the Web publishing options, select Publish the calendar as a Web (HTML) Page, and configure the following options.
   - For the Filename, select the location type where you are publishing your calendar information:
     - file://
     - ftp://
     - http://
   - In the text box following the **Filename**, select the file location or type the ftp or http path. Your path should conclude with the file name and the .ics extension for iCalendar and .htm or .html for Web publishing. For example, www.myICSwebsite.com/calendars/MyCal.ics or www.myCALwebsite.com/calendars/MyCal.htm.

   NOTE: Username and Password are active only if you are posting to an ftp location.

3. To configure data that is published, click **Options**. The Publishing Options dialog box opens.
4. Use the Server Agents to publish your calendar on a regular schedule.

Server Agents

Use the Server Agents Administrator to process these operations on a recurring basis:

- Sending and retrieving e-mail from the Internet through GoldMine
- Synchronizing with GoldSync
- Synchronizing with Microsoft Outlook
- Printing and faxing correspondence
- Running Automated Processes
- Publishing Calendar information

Server Agents are configured around a user or user group, active time periods, and frequency. They work with other configurable parts of GoldMine and must be started for the processes to work.

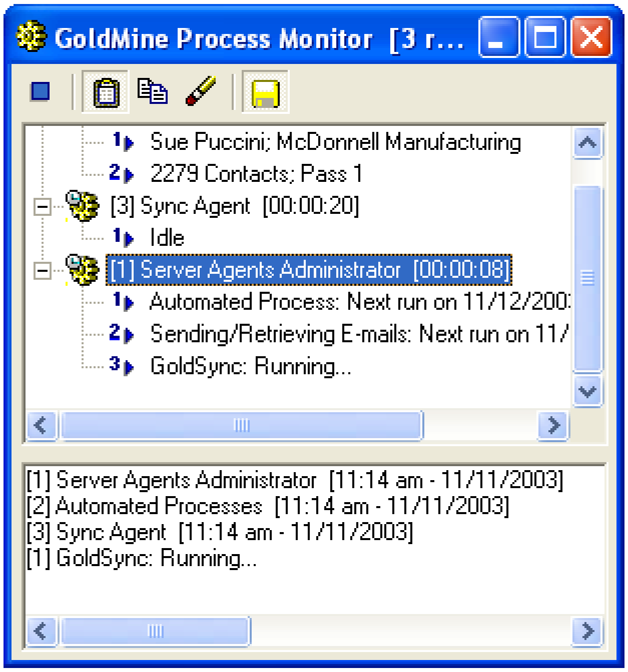
For information about Configuring Automated Processes in the Server Agents Administrator, refer to "Automated Processes" on page 317.

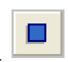
For information about Configuring Calendar Publishing in the Server Agents Administrator, refer to "Calendars" on page 377.

Starting the Server Agents

Start the Server Agents for the settings you configured in the Server Agents Administrator to take effect.

1. Select **Tools>>Services>>Start Server Agents**.
2. The **Process Monitor** appears displaying information about the Server Agents running.



The agents continue to run until you click the **stop processes button**  on the Process Monitor.

Configuring Sending and Retrieving Email in the Server Agents Administrator

Use the Server Agents Administrator to send queued e-mail and retrieved email from the e-mail server on the days and times specified.

1. Select **Tools>>Services>>Manage Server Agents**. The Server Agents Administrator dialog box opens.
2. Click the **Send/Retrieve E-mails** tab.
3. If allowing only one user to send and retrieve e-mail 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. In some cases, you may need to select one scenario over another. For example, you may not want to send queued e-mail until after hours, but you do want to retrieve e-mail throughout the day.

7. In the **Frequency area**, type or select the number of day(s), hour(s), minute(s) GoldMine waits before initiating the operation.

NOTE: The minimum amount of time is 5 minutes

8. Click **OK**.

NOTE: You must start the Server Agents to begin processing. See "Starting the Server Agents" on page 389.

Configuring GoldSync in the Server Agents Administrator

Use the Server Agents Administrator to process GoldSync sites on the days and times specified.

1. Select **Tools>>Services>>Manage Server Agents**. The Server Agents Administrator dialog box appears.
2. Click the **GoldSync** 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 using the right-facing arrows to access a list of times in thirty minute increments.

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, GoldSync can draw upon many network resources and configure GoldSync to run after regular business hours to keep other processes running smoothly.

7. Click **OK**.

NOTE: You must start the Server Agents to begin processing.

Configuring Outlook Sync in the Server Agents Administrator

The Server Agents Administrator allows you to synchronize data between GoldMine and Outlook at the frequency specified.

1. Select Tools>>Services>>Manage Server Agents. The Server Agents Administrator dialog box appears.
2. Click the **Outlook Sync** tab.
3. In the **User's Settings** area, select the user in the drop-down list.

   This is the user whose Outlook account you are synchronizing to GoldMine.
4. In the **Active Period** area, select the days of the week the agent will be active.
5. 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, synchronize your Outlook with GoldMine several times during the business day.

6. Select the **Profile** in the drop-down list.
7. In the **Frequency** area, type or select the number of day(s), hour(s), minute(s) GoldMine waits before initiating the operation.

NOTE: The minimum amount of time is 5 minutes.

8. Click **OK**.

NOTE: You must start the Server Agents to begin processing.

Configuring Printing and Faxing in the Server Agents Administrator

Use the Server Agents Administrator to send queued print and fax jobs on the days and times specified.

1. Select **Tools>>Services>>Manage Server Agents**. The Server Agents Administrator dialog box appears.
2. Click the **Print/Fax** tab.
3. If allowing only one user to print or fax queued jobs 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, printing large mailings during regular business hours could make the printer unavailable to regular daily users. Printing large jobs before or after business hours keeps the printer free.

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7. In the **Frequency** area, type or select the number of day(s), hour(s), minute(s) GoldMine waits before initiating the operation.

NOTE: The minimum amount of time is 5 minutes.

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8. Click **OK**.

NOTE: You must start the Server Agents to begin processing.

F2 Lookup Lists

About F2 Lookup Lists

Use F2 Lookup lists to standardize how users type information in some GoldMine fields. For example, limit entries in the Dear field to a few standard responses, such as Dr., Mr., Mrs., and so on. F2 Lookups also enable quick data entry into these fields. F2 Lookup values are stored in the Lookup table.

The F2 options for date and time fields offer a graphical interface.

F2 Lookup Benefits

Using the F2 Lookup lists helps:

- Force valid entry in a field.
- Set up field dependency between fields
- Enable the standardization of data entry by preventing similar entries, such as Finance Director, Director of Finance, and Financial Director.
- Let users unsure about field entry choose from a list.
- Speed up data entry
- Help prevent spelling errors.
- Simplify report writing and filtration. Set security access on the F2 Lookups to prevent users from altering contents or typing void data. Each F2 Lookup has its own settings; therefore, set the security on each list one-by-one.

A right-facing arrow at the end of the field box identifies fields with F2 Lookups. Access aspects of the F2 Lookups by:

- Clicking **F2** or **F4**
- Clicking the right-facing arrow on the field
- Entering text and then selecting from the auto-fill menu that displays below the field.

Managing F2 Lookup Lists

You can manage F2 Lookup lists by:

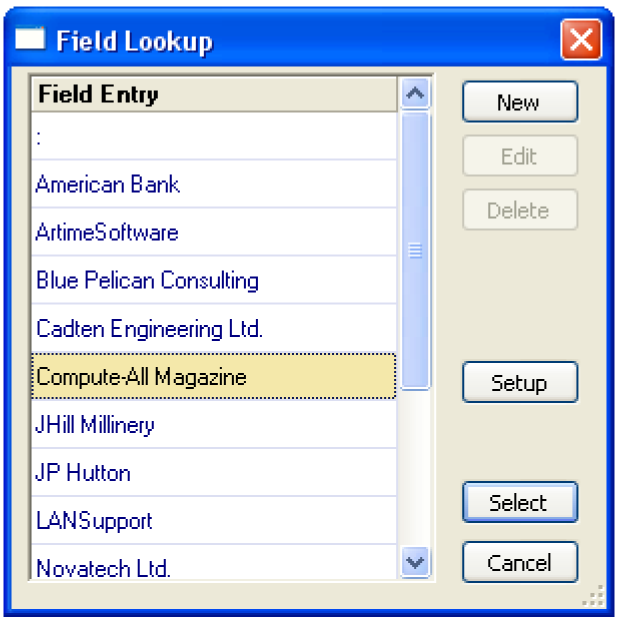
- Using the F2 Lookup (see page 396)
- Configuring F2 Lookup List Security (see page 401)
- Creating F2 Lookup Values (see page 397))
- Editing F2 Lookup Entries (see page 402)

Using the F2 Lookup

You can open, set up, or edit your F2 values on the **Field Lookup dialog box.**

1. Click on a right-facing field arrow of a field or select **F2**.

   The **Field Lookup** dialog box opens.



2. Select one of the following options:
   - **New.** Click this button to open the F2 Entry dialog box. Type in the new name and click **OK**.
   - **Edit.** Click this button to make edits to an entry. First, highlight the value you want to edit and then click Edit. At the F2 Entry dialog box, type over the existing text and click **OK**.
   - **Delete.** Click this button to delete an entry. First highlight the value you want to delete and then click **Delete**. At the prompt, click **Yes**.
   - **Setup.** Click this button to configure settings for a field.
   - **Select.** Click this button to select an entry. Highlight the entry and then click **Select.** The value you selected appears in the field.
   - **Cancel.** Closes the Field Lookup dialog box.

Creating F2 Lookup Values

You can add other values to your F2 Lookup table. For example you can add contact names, addresses, and so on. You can even select which values will display.

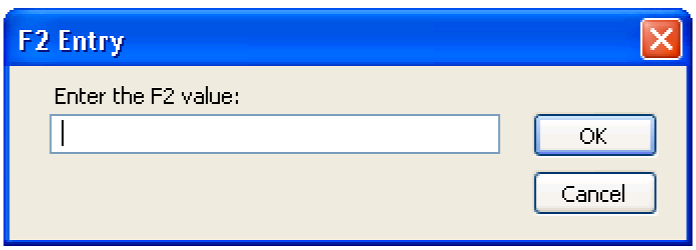
Another lookup feature is the ability to set a limit on the types of values that can be added to a field by another field. For example, if you want to enter only cities (City field) in the state of California (State field) you can set up that limit on the Lookup lists.

NOTE: To place multiple entries in a field, with new entry *after* the existing entry, type a **semi-colon (;)** at the end of the entry. This appends the entry after existing data in the field, separated by a comma.

Be sure to set security options before or after creating the F2 Lookup tables.

1. Click on a right-facing field arrow of a field or select **F2.**
2. At the Field Lookup dialog box, click **New**.

   The **F2 Entry dialog box** opens.



3. Type the new entry and click **OK**.

   The entry is added to the F2 Lookup list.

Dependency Between Lookup Lists

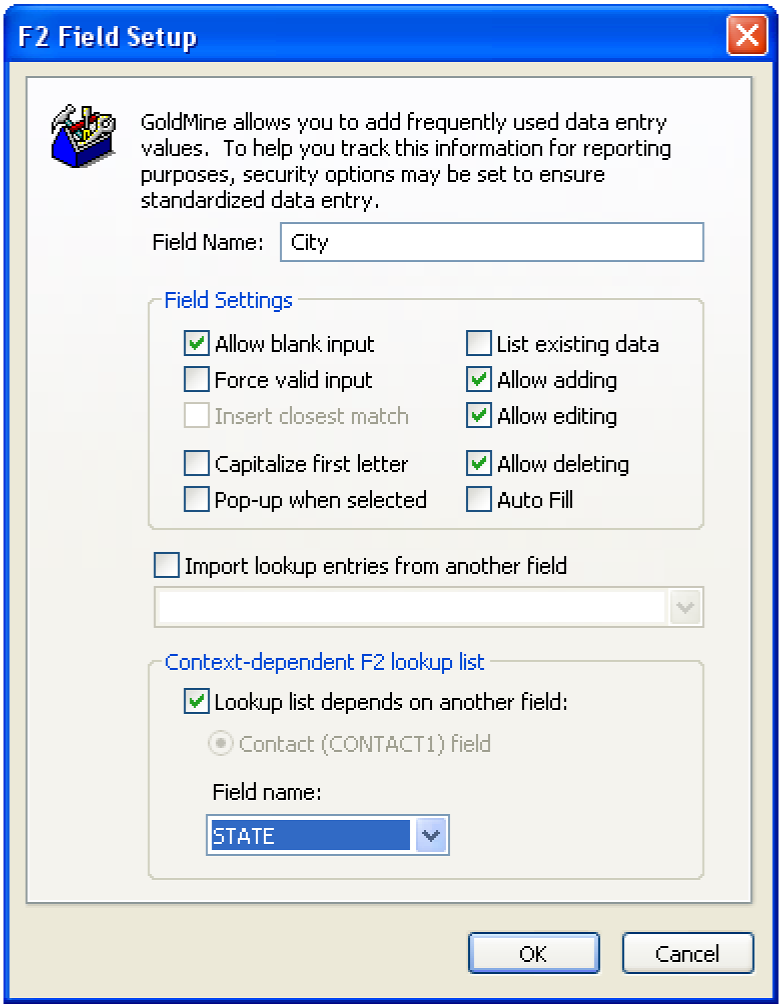
You can set up lookup values that are dependent on values from other fields. Also, you can create, change, or delete necessary relationship.

For example, you set up the two fields **State** and **City**. This enhancement allows you to select only cities from a corresponding state. You can set up the City F2 lookup list to depend on the State field value, then change it to **key1 (record type)** field. The value from the City (that is, from the field which on the field city depends) field is named as **Master Value**.

Setting up a Dependency

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

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



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

2. In the **Field Name** area, select values.
3. In the **Context-dependent F2 lookup list** area, click on the **Lookup list depends on another field** checkbox.

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

---

4. Select the **Contact (CONTACT1)** button to select a master field from the Contact1 table.

   For example you can set an Activities result code which depends on the key 1 (record type) field in the corresponding contact. If you select this button, then the Contact1 fields appear in the **Master field** drop-down box. If you select other fields, fields from the corresponding table appear. For Activities it is the CAL table, for Cases it is the CASES or fields of cases.

   - Select **GoTo>>Service Center**
   - Click **New case** and create a new case
   - Navigate to **Subject** field and press **F2>> setup.**

   The **CASES** table is available for selection.

NOTE: After changing this field all lookup values will not update. Manually edit each field in the list. See "Manually Editing Dependencies" on page -6.

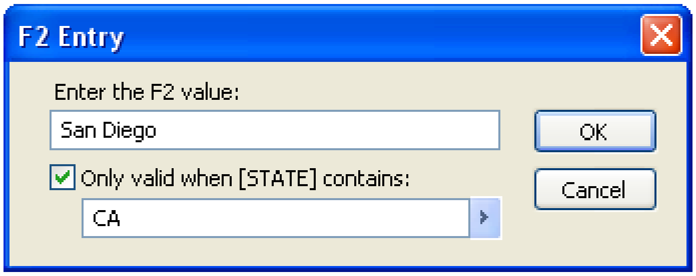
Available Dependency Tables

The following table shows the available dependency tables.

Fields	Table
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
Opportunities and Projects	contact1 and opmgr tables
Cases (Service Center)	contact1 and cases tables

Manually Editing Dependencies

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



3. Click on the **Only valid when** checkbox.

   A *valid* value mean that 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** checkbox 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** checkbox.

Selecting an Entry by Ignoring Dependency Settings

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

1. Open an F2Lookup dialog box.

2. Click the **Show All** checkbox.

   This shows all values independent from the Master field value.

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

Configuring F2 Lookup List Security

To ensure that data entries are consistent in a database, you must set security options for each F2 Lookup. Using these security options standardizes data field values. Set security options before or after you create or edit the lookup entries.

NOTE: To access the F2 Field Setup dialog box, you must have Master Rights.

1. Click on a right-facing field arrow of a field or select **F2**.
2. At the **Field Lookup dialog box**, click **Setup**.

   The F2 Field Setup dialog box opens.
3. In the **Field Name** text box, type the name for the lookup list.

   This can be the name of the field you are creating, its lookup, or a general name if you are planning to use the lookup list with more than one field. To use the lookup with more than one field if you will be importing the lookup entries, type a Field Name.
4. In the **Field Settings** area, select from the following:
   - **Allow blank input.** Keeps the data field blank. Selecting this option lets GoldMine skip the field when the value is unknown.

     NOTE: Selecting Allow blank input for a required field prevents you from determining whether the field was supposed to be empty. Retain more control over field entries by including a lookup value of N/A to indicate that no lookup value applies to the field.

   - **Force valid input.** Requires selection of an F2 Lookup list value to update the field. GoldMine allows only entries that appear in the lookup. If an invalid entry is attempted, GoldMine displays the lookup and highlights the item closest to the actual field entry.
   - **Insert closest match. I**f an entry is typed in a field that does not match existing lookup entries, GoldMine inserts an entry that most closely matches the typed value. GoldMine changes the entry when the cursor is moved from the field. To enable this option, select Force valid input.

     Because GoldMine inserts the entry that appears to be the closest match, Insert closest match can place an incorrect value into a field.
   - **Capitalize first letter. C**apitalizes the first letter of the entry.
   - **Pop-up when selected.** Displays the corresponding F2 Lookup when the field is selected.

- **List existing data.** Lets users look for the existing values.
    - For example, there are contacts with New York, Dublin, Moscow only. So, F2 Lookup will show these cities only. This option will disable new F2 Lookup navigation (by two fields).
    - **Allow adding.** Lets users add entries to the F2 Lookup.
    - **Allow editing.** Lets users edit the entries in the F2 Lookup.
    - **Allow deleting.** Lets users delete entries from the F2 Lookup.
    - **Auto Fill.** As the user types, GoldMine places the closest matching entry from the lookup in the field.
- **Import lookup entries from another field.** Select this when importing an existing F2 Lookup list and then select the field name from the drop-down containing the information to use as entries in the lookup list. After selecting a field and closing the F2 Field Setup dialog box, entries corresponding to the selected field appear in the lookup.
- **Lookup list depends on another field.**When this checkbox is selected the lookup value for a field depends on the value of another field called a *master*. For example, if you want all entries in the *City* field to be in the state of California, then you would check this box and in the **Field name** field, you would select *State*.

  If this box is not selected, all values can be added to the Lookup list.
- **Contact radio button.** Allows the user to select a master field from the Contact1 table.
- **Case (Opportunity, Calendar, Case and so on) radio button.** This radio button allows you to select a master field from the corresponding table.

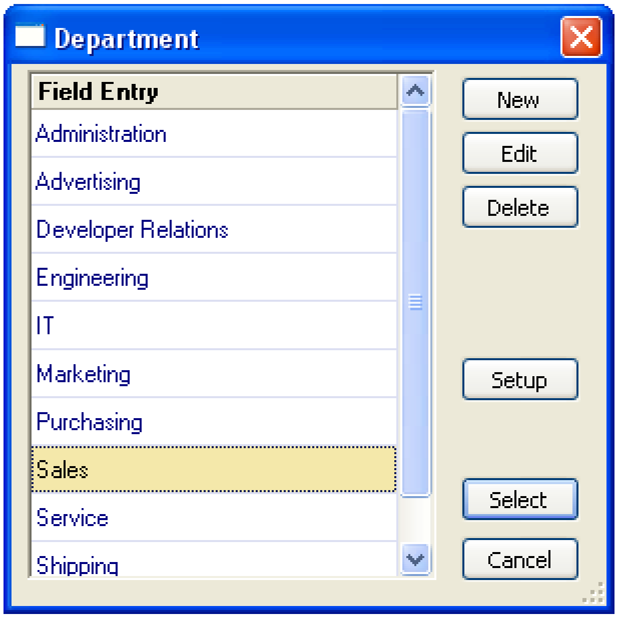
5. When the form is completed click **OK**.

Editing F2 Lookup Entries

You can edit F2 Lookup entries to reflect changes or incorporate special symbols that designate values in a text-based lookup.

NOTE: When editing a lookup entry, make sure you change the security options on the entire table.

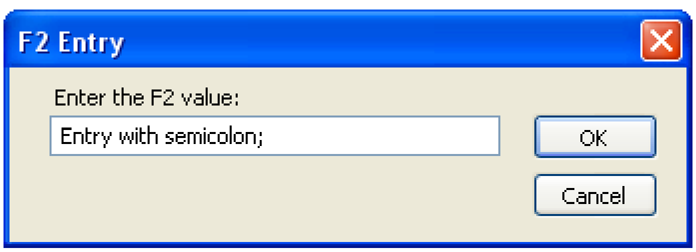
1. Right-click on the field to open the F2Lookup dialog box.



2. At the F2 Entry dialog box, select the entry you want to edit and click **Edit.**
3. In the Enter the F2 value text box, in the **Enter the value field,** type the new entry.

   Use the following methods to designate special handling of values in a field:

   - To place multiple entries in a field, with new entry *after* the existing entry, type a **semi-colon (;)** at the end of the entry. This appends the entry after existing data in the field, separated by a comma.

     This method allows multiple entries in a field. When the entry does not end with a semi-colon, the entry will overwrite any data that already appears in the field.

- To place a coded entry with descriptive information in the lookup list, type a pair of **forward slashes (//)** after the entry, followed by the description. The // symbol indicates breaks the string and treats text after it is treated as informational and displays the text in the field.

  This is useful when working with coded values, for example industrial sector codes, where SIC Codes (for example) are 0 = Agricultural, Forestry and Fishing; 1 = Mining and Construction and so on.

  In GoldMine you may either enter all possible values as real values or you setup the lookup list with 0 // Agricultural, Forestry and Fishing 1 // Mining and Construction. When opening the lookup the user sees the description but in the field only the Code is entered means 0 or 1.

- To add the results of a dBASE expression to a field, type a **tilde sign ~** followed by the expression.

  For example, **~dtoc(date())** in the F2 Lookup list enters the current date in the field.

4. Click **OK**.

   The updated entry adds to the F2 Lookup list.

My GoldMine

About My GoldMine

My GoldMine allows users 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. Users can:

- Add and remove content from My GoldMine to optimize efficiency and instantly access information such as stock quotes, e-mail, weather, pending activities, or other relevant information for planning and managing business.
- Add GoldMine information, including appointments, email 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: The user’s 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

5. To access the My GoldMine configuration options, select **Web>>My GoldMine**. The **My GoldMine** window appears.
6. Click the **Personalize Content** button at the top right of the window.

   The **Configure My GoldMine** dialog box opens.
7. On the **Layout** tab, select the **Page Style** in the drop-down list.

8. Select a 2 or 3 column style in the Column Scheme drop-down list.
   - Default
   - Windows
   - Newspaper
   - XP
9. 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
10. Click the **Contents** tab.
11. 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.
12. To change the display order, select the item and click **Move Up** or **Move Down**.
13. Click **Remove** to delete the selected item.
14. Click the **Settings** tab.
15. 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.
16. 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 **Web>>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 opens.
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.

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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**.

Select a Resource to Add Dialog Box in My GoldMine

Use the Select a Resource to Add dialog box to add, store, and remove resources. The dialog box appears if you click Add on the Content tab of the Configure My GoldMine dialog box or if you select Add Item(s) to Columns on the My GoldMine window.

1. If the GoldMine or Web-based resource is listed, select the item and click OK. The item is added to the selected column.

NOTE: The Select a Resource to Add list displays only items not added to the My GoldMine display. The list is universal, not column specific. To move an item from one column to the next, you must remove it from the display by clicking the X in the title bar of the item in the My GoldMine window. The item is re-added to the Select Item to Add list and can the be added to the column of your choice.

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2. To add a resource to the item list, click Add Resource.

   The **Edit RSS Resource URL dialog box** appears.
3. After adding the RSS resource, it appears on the item list. Select the item and click OK. The item is added to the selected column.
4. To change the name or URL of an item, select the item and click Edit Resource.

   The **Edit RSS Resource URL dialog box** appears.
5. To remove an item from the list, select the item and click Delete Resource. The item is permanently deleted from the item list.
6. Click **OK** to add a highlighted item or Cancel to close the dialog box.

Knowledge Base

The Knowledge Base 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 Knowledge Base consists of the **Knowledge Base**, and the **Personal Base.** 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.

Knowledge Base material is stored in the InfoMine table.

NOTE: Users with Master Rights can set up user access to the Knowledge Base; each connected user can set up information in his or her Personal Base.

Knowledge Base Toolbar

 Adds a book to the Knowledge tree.

 Adds a folder to the selected book

 Adds a topic to the selected book or folder

 Displays the Topic or Section Properties dialog box for the selected item.

 Displays the Attach File tab of the Topic or Section Properties dialog box.

 Deletes the selected item.

 Displays a Table of Contents in the lower right pane of the selected book.

 Displays the Search dialog box and allows you enter search terms.

 Launches attachments, graphics, or other applications

Accessing the Knowledge Base

Use the following steps to access the Knowledge Base.

1. Select **Go To>>Knowledge Base**, or select **Knowledge Base** from the main navigation pane. The **Knowledge Base** window opens.
2. Use the **Knowledge Base toolbar** to navigate and manage.
3. View information by selecting a tab:
   - **Knowledge Base.** Maintains information created by, for, and about an organization and available to multiple users.

     NOTE: Depending on rights, all users can potentially view all Knowledge Base topics. However, only users with Master Rights can add, edit, or delete Knowledge Base items.

   - **Personal Base.** Maintains information useful to an individual user that only the user can view and update.

     NOTE: The only way to access a Personal Base is to log in to GoldMine as the user who created the Personal Base.

4. Create, edit, and search the Knowledge Base and set security and notification for users. See “Creating Knowledge Base Books, Folders, and Topics” on page 411 and “Editing Knowledge Base Books, Folders, and Topics” on page 411.
5. Create and edit topic text and linked files. See “Adding HTML Text to Knowledge Base Topics” on page 413.
6. Click **X** to close.

Creating Knowledge Base Books, Folders, and Topics

Organize information in the either Knowledge Base or Personal Base by creating high level books, internal folders, and pages to address individual topics.

Use the following procedure to create or Knowledge Base material.

1. Select **Go To>>Knowledge Base**, or select **Knowledge Base** from the main navigation panel. The Knowledge Base window opens.
2. To create a Book, click the **New Book** toolbar icon. See “Knowledge Base Toolbar” on page 409.

   The **<new book>** appears in the left pane.
3. Type a name and press **Enter**.
4. Click in the right pane to add HTML text or click the **Attach a file** toolbar icon to add an attachment.

TIP: Adding text or attachments at the book level is possible but will interfere with a book level Table of Contents. Adding a TOC replaces the text on the book, folder, or topic.

5. To add a Folder, highlight the book to add the folder to and click the **New Folder** toolbar icon. See “Knowledge Base Toolbar” on page 409.
   - The **<new folder>** appears under the selected book.
   - Type the name of the folder.
   - Click in the right pane to add HTML text or click the **Attach a file** toolbar icon to add an attachment. See “Adding HTML Text to Knowledge Base Topics” on page 413.
6. To add a Topic Page, highlight the book or the folder to add the topic to, and click the **New Topic Page** toolbar icon. See “Knowledge Base Toolbar” on page 409.
   - The **<new page>** appears under the selected book or folder.
   - Type the name of the topic.
   - Click in the right pane to add HTML text or click the **Attach a file** toolbar icon to add an attachment.

Editing Knowledge Base Books, Folders, and Topics

You can change the structure of the organizational tree, add keywords, attach files, and set security.

1. Select the book or folder to edit.
2. Right-click and select **Edit**.

   The **Section Properties** dialog box opens.

3. Click the **Book**, **Attached File** or **Access** tab.
   - **Book.** Allows you to rename a book or add a subfolder.

     To rename a book, at the **Book** field, type the new name of the book.

     To add a folder, follow the directions on the screen.
   - **Attached File.** Allows you to link existing files to your information.

     To attach a file, at the **Attached** file field, type in the file name or click the ellipse button and then select a file.

     To synchronize the file, check the **Synchronize the file** checkbox to include the attachment when the Knowledge Base information is synchronized to remote users.

     Note that the **File Information** area fields will change according to the file you enter.
   - **Access.** Sets reading and updating security access on books, folders, and topics. See “Setting Security Access on Knowledge Base Topics” on page 413.

     To set the Read access, follow the directions on the screen.
4. To edit a topic, select the topic, right-click on it and then select **Edit**.

   The **Topic Properties** dialog box opens.
   - **Topic.** Allows you to use keywords to speed up searches and to create a tree structure of the book.

     At the **Topic** field, select the topic.

     At the **Keywords** field, type the keywords separating each word using commas (,). See “Adding Keywords to Knowledge Base Topics” on page 412.

     At the **Folder** field, edit the tree structure of the book and folder by typing a new folder name after the book name, separated by semi-colons.

Adding Keywords to Knowledge Base Topics

At the topic level, add keywords (one or more words that succinctly describe a document's contents.) to topics to facilitate organization. Assigning a keyword to related topics makes searching more efficient.

1. Select a topic, right-click, and select **Edit**.

   The **Topic Properties** dialog box opens.
2. In the Keyword text box, type a keyword or select a keyword from the F2 Lookup list.

   > **NOTE:** To input multiple keywords, insert commas between words. When creating F2 Lookup terms, use semi-colons after each word. When selecting multiple entries, the words display with commas between them.

3. Click **OK**.

Setting Security Access on Knowledge Base Topics

Set reading and updating security access on books, folders, and topics.

1. Select a book, folder, or topic and right-click and select **Edit**. The Book, Section, or Topic Properties dialog box opens.
2. Select the **Access** tab.
3. At the **Read Access** drop-down list, select the user or user group to grant Read permission.

   If you want everyone to have access, leave as **(public).**
4. In the **Update Access** drop-down list, select the user or user group to grant Update permission.

   If you want everyone to have access, leave as **(public).**
5. Click **OK**.

Adding HTML Text to Knowledge Base Topics

Use the capabilities of HTML to create pages in the InfoCenter.

NOTE: The information provided here is specifically for the topic level, but is applicable at the Book and Folder levels.

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1. In the Knowledge Base window, click the right pane. A blinking cursor and the HTML toolbar appear.
2. Type the information into the page, or copy and paste it in from other sources.
3. Right-click the text pane and use the local menu options to format your document an add features.

   The HTML lets you format the text in a pleasing display and add Internet hyperlinks and graphics.
4. Click **Save**.

GoldMine Plus for Microsoft Office

About GoldMine Plus for Microsoft Office

GoldMine Plus for Microsoft Office is a powerful add-in for GoldMine that allows seamless integration between Microsoft Office and your GoldMine environment. Create dynamically merged documents such as letters, faxes, and e-mails using your GoldMine contact data, and then leverage the powerful features in the Microsoft Office suite to produce and distribute your work. Easily move data between GoldMine and Microsoft Excel. Tools embedded directly into Excel allow flexible generation of customized invoices, reports, and more, using your GoldMine contact data.

GoldMine Plus for Word

Installing GoldMine Plus for Microsoft Office adds the following features and enhancements to GoldMine and Microsoft Word:

- Complete integration between GoldMine and **Microsoft Word**
- A **GoldMine menu** in Microsoft Word
- Enhanced functionality for GoldMine's **document management** features

Generate form letters, faxes, and e-mails with primary contact field information (Contact1) such as name, address, or primary phone number. Also include information from user-defined fields (Contact2). Create document templates for use with complex merges in GoldMine's Document Management Center, and manage scheduled document production using Automated Processes. GoldMine fields used in templates remain dynamic, updating automatically to reflect changes in your database.

GoldMine Plus for Microsoft Office must be installed. Once installed, a GoldMine menu option is added to the Word main menu, and you may merge templates with groups of contacts using:

- **Document Management Center.** See "About the Document Center" on page 148.
- **Automated Processes.** See "Automated Processes" on page 317

You may also customize the application.

GoldMine Plus for Excel

GoldMine Plus for Microsoft Office installs a GoldMine menu in Excel for accessing integrated functions.

- **Insert GoldMine Fields.** Provides a list of GoldMine fields and a field macros to map to Excel cells. Field mappings remain dynamically linked to GoldMine fields, changing to reflect values in the active GoldMine Contact Record. For example, create a billing form in Excel, insert the appropriate name, address, and user-defined fields. Then use the integrated form to generate a printed bill for the current contact. See "Using GoldMine Fields in Microsoft Excel" on page 421
- **Save as GoldMine Linked Document.** Save a workbook or worksheet that is linked automatically to a GoldMine contact.
- **Export Data to GoldMine.** GoldMine Plus now offers field mapping options for exporting Excel databases into GoldMine. Map Excel fields to GoldMine fields with a simple wizard-style interface, for the fastest, easiest method yet to bring data into GoldMine."Exporting to GoldMine From Microsoft Excel" on page 422.

GoldMine Plus for Microsoft Office must be installed. After the application is installed, create individual spreadsheets with inserted GoldMine fields or create spreadsheet templates accessed through the Document Management Center.

Installing GoldMine Plus for Microsoft Office

GoldMine Plus for Microsoft Office is installed during the GoldMine installation process, however, options during the GoldMine installation process allow you to install GoldMine Plus at a later point in time if desired.

Follow these steps to install GoldMine Plus after the main GoldMine installation.

5. From your desktop, go to: **Start>>Settings>>Control Panel>>Add or Remove Programs**
6. Highlight **GoldMine**. Click the **Change** button.
7. The **Welcome to the Installshield Wizard for GoldMine** dialog box appears. Click **Next**.
8. Select the **Modify** radio button. Click **Next**.

   The **Custom Setup** dialog box opens.
9. Click on the **GoldMine Plus!** icon, and select **This feature will be installed on local hard drive**. Click **Next**.

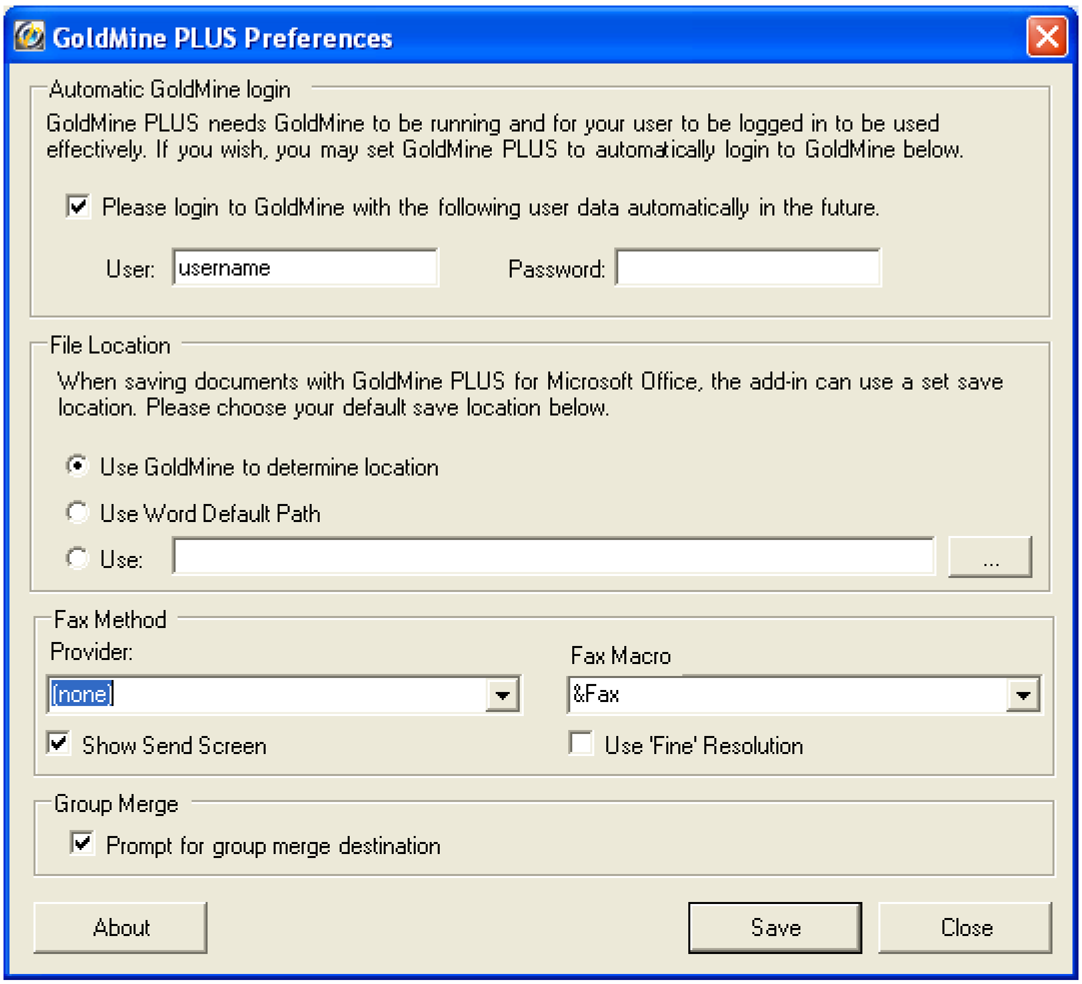
   The **Installing GoldMine** status screen opens.
10. When finished, the **GoldMine Installation Completed** dialog box appears. Click **Finish** to complete the installation process.

NOTE: To uninstall GoldMine Plus! components, follow the steps up to step 6, but instead select This feature will not be available. GoldMine Plus! will be uninstalled from your local hard drive.

Setting Preferences in GoldMine Plus for Microsoft Office

Use the GoldMine Plus Preferences for Microsoft Office dialog box to configure **automatic login**, **file location**, **fax method**, and **group merge** settings. GoldMine Plus preferences are accessed from within Microsoft Word.

1. Open **Microsoft Word**.
2. From the GoldMine menu, select **Setup**.
3. The **GoldMine Plus Preferences** dialog opens.



4. Set GoldMine Plus Preferences using the following options:

   Automatic GoldMine Login: To login to GoldMine automatically when Microsoft Word or Excel are started:

   - Check the box for **Please login to GoldMine with the following user data automatically in the future**.
   - Enter your GoldMine **User name** and **Password**.

   File Location: Select an option for a default file location where GoldMine Plus documents will be saved:

   - **Use GoldMine to determine location:** The default file location for GoldMine Plus documents will be determined from the GoldMine application.
   - **Use Word Default Path:** GoldMine Plus documents will automatically be saved to Microsoft Word's default file location.
   - **Use (Browse to file location):** Manually browse to a default file location for GoldMine Plus documents.

   Fax Method:

   - **Provider:** Select your fax method in the drop-down list of fax applications:
     - (none)
     - OmniRush
     - WinFax
     - RightFax
     - DelFax
     - Zetafax
   - **Fax Macro:** Select the Fax Number Macro specified by you fax application in the drop-down list.
     - &DIALFAX: The fax number from the active contact record.
     - &FAX: The fax number as it should be sent to an auto-dialer for automatic fax transmission.
   - The **Show Send Screen** and **Use 'Fine' Resolution** options are available in different combinations, depending on the fax application.

   Group Merge: Select **Prompt for group merge destination** (print only) to have GoldMine generate a prompt before printing.

5. Click **Save** to exit the GoldMine Plus Preferences dialog.

Granting User Access to Templates

Many companies no longer allow local users access to certain functionality, such acesss permissions on program installation folders. If the user has local administrator rights, then this is not an issue. However, if user rights are restricted within the network, access to the GoldMine templates are also restricted. Access to the GoldMine installation folder must be set by a Windows user that is designated as a local “Administraton” to allow access to the templates.

The follow instructions use Windows XP for example. If you are using a different operating system, your steps might vary.

To Grant User Access using Word 2003

1. Login to Windows as an Administrator.
2. Disable Simple File Sharing.
   - Open **My Computer** from the Windows Desktop, from the **Start** menu, or by pressing the **Windows Logo key** + **E** simultaneously on the keyboard.
   - Open the **Tools** menu and select **Folder Options**.
   - Click the **View** tab.
   - In the **Advanced Settings** section, clear the **Use simple file sharing (Recommended)** box.
   - Click **OK**.
3. Set the permissions on the GoldMine install directory.
   - Browse to the C:\Program Files\GoldMine\ folder.
   - Right-click the folder and select **Properties**.
   - Click the **Security** tab, select the **Users** group, and then check the **Full Control** check box under the **Allow** column to grant full permission on the folder (making sure to check to propagate to the sub-items and directories).

To Grant User Access using Excel 2003

This process must be performed for each existing and new user, with the exception of the user that installed GoldMine.

1. Start Excel.
2. Open the **Tools** menu and select **Addins**.
3. On the Add-Ins dialog box, click the **Automation** button.
4. On the Automation Servers dialog box, select **GMPlusOffice2007.UserDefined Functions** and then click **OK**.
5. A message box displays and asks if you want to replace the file. Click **No** to close this message.
6. Click **OK** to close the Add-Ins dialog box.
7. Restart Excel for the changes to take effect.

To Grant User Access using Excel 2007

This process must be performed for each existing and new user, with the exception of the user that installed GoldMine.

1. Start Excel.
2. Click the **Office** button.
3. Click **Excel** options.
4. Select **Add-Ins**.
5. On the **Manage** drop-down list, select **Excel Add-ins** and then click **Go**.
6. Click the **Automation** button.
7. Select **GMPlusOffice2007.UserDefined Functions** and then click **OK**.
8. A message box displays and asks if you want to replace the file. Click **No** to close this message.
9. Select **OK**.
10. Restart Excel for the changes to take effect.

Using GoldMine Fields in Microsoft Word

After **GoldMine Plus for Microsoft Office** is installed, you can add GoldMine fields to a Word document. The fields remain dynamic, meaning that when changes are made to the active GoldMine Contact Record, linked field data in Word changes as well.

NOTE: GoldMine linked fields that have changed in Microsoft Word documents will not update until the application's cache is cleared. To do this, close, then reopen Microsoft Word.

Installing GoldMine Fields into a Word Document

NOTE: The steps below describe the process for Microsoft Office 2003. If you are using Microsoft Office 2007, all GoldMine menu items are accessed by selecting the GoldMine Tab from Word’s main menu.

1. **Launch GoldMine** and select a Contact Record as a data source.
2. Open **Microsoft Word**.
3. Select **GoldMine>>Insert GoldMine Field(s)**. The **Insert GoldMine Fields** floating toolbar appears. (To anchor the Insert GoldMine Fields toolbar, drag-and-drop the floating toolbar to the Word toolbar.)

   NOTE: In Microsoft Office 2007, these fields are always located in the toolbar of the GoldMine Tab.

4. Place your cursor at the point in the document where you would like to insert the field.

5. Click the field drop-down list on the **Insert GoldMine Fields** toolbar, and select a field or macro.

   Fields are listed as **TABLE->FIELDNAME** (for example, **CONTACT1->CONTACT**). Macros are listed as **&MacroName** (for example, **&UserFullName**).

6. Continue adding desired fields to the document.
7. **Complete** the process by:
   - **Saving the document for later use: Select File>>Save as** from the Word menu. Save the file as **filename.doc**. To reuse this file with dynamic fields, launch Word and open the saved .doc file. The dynamic fields display data from the active GoldMine Contact Record.
   - **Saving the document as a template: Select File>>Save as** from the Word menu. Save the template as **filename.dot**. If you are using this file as a Word template in GoldMine, save it in the **GoldMine Template** folder.

NOTE: If you are sending a mail merge to a group of contacts using GoldMine Plus for Microsoft Office and a required field is not populated in a contact record, an error message may appear. Ensure all required fields are populated.

For information on setting preferences in GoldMine Plus for Microsoft Office, see “Setting Preferences in GoldMine Plus for Microsoft Office” on page 417.

Using GoldMine Fields in Microsoft Excel

Once **GoldMine Plus for Microsoft Office** is installed, you may add GoldMine fields to an Excel document. The fields remain dynamic, meaning that when changes are made to the active GoldMine Contact Record, linked field data in Excel changes as well.

NOTE: The steps below describe the process for Microsoft Office 2003. If you are using Microsoft Office 2007, all GoldMine menu items are accessed by selecting the GoldMine Tab from Excel’s main menu.

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1. Launch **GoldMine** and select a **Contact Record** as a data source.
2. Open **Excel**.
3. Select **GoldMine>>Insert GoldMine Field**. The **GoldMine Fields** floating toolbar appears. (To anchor the GoldMine Fields toolbar, drag-and-drop it in the Excel toolbar.)

NOTE: In Microsoft Office 2007, the fields toolbar is always available in the **GoldMine** Tab.

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4. Click the field drop-down list on the floating GoldMine Fields toolbar and select a field or macro.

   Fields list as **TABLE->FIELDNAME** (for example, **CONTACT1->CONTACT**). Macros list as **&MacroName** (for example, **&EmailAddress**).

   NOTE: Excel does not support multiple lines per cell, therefore, multi-line macros cannot function in Excel.

5. Continue adding desired fields to cells.
6. **Finish** the process by:
   - **Saving the spreadsheet for later use:** Select **File>>Save as** on the Excel menu. Save the file as **filename.xls**. To reuse the file with dynamic fields, launch Excel and open the saved .xls document. The dynamic fields display data from the active Contact Record.
   - **Saving the spreadsheet as a template:** Select **File>>Save as** on the Excel menu. Save the file as **filename.xlt**. If using it in GoldMine, save the new template in the **GoldMine Template** folder. Then add the template to the Document Management Center.

   NOTE: When running Office 2007 on Microsoft Vista, GoldMine must be running in order to access GoldMine fields in Excel. When Excel attempts to access a GoldMine linked field when GoldMine is not running, the following error message appears: Remote data not accessible... Start application 'GOLDMINE.EXE'?. Select NO. Selecting YES will result in an additional error message. GoldMine must be running in order for Excel to access linked cells

Exporting to GoldMine From Microsoft Excel

Once **GoldMine Plus for Microsoft Office** is installed, data can be exported from Microsoft Excel to your GoldMine database using new menu options in Excel.

GoldMine Plus for Office adds an export feature to the GoldMine menu in Excel. Use this menu option to map Excel columns to GoldMine fields and initiate the export process. Be sure to back up your database before beginning.

NOTE: Before proceeding with the export, verify that phone numbers are formatted consistently and make changes as needed. The format of the phone numbers in your Excel spreadsheet must be the same for the Excel ODBC to interpret the numbers correctly. If formats are inconsistent, the ODBC driver interprets all the values in the column as null and you lose phone number data during the export process. For example, you cannot have one phone number that is 1235557894 and another that is 777-555-1236. Before exporting to GoldMine, specify one format and update all phone numbers in your spreadsheet to match the selected format. When the phone number format is consistent, begin exporting to GoldMine.

To Export from Excel to GoldMine

1. Launch **GoldMine**.
2. **Open** the Excel spreadsheet you are exporting to GoldMine.
3. Select the cells you are exporting to GoldMine and specify the Named Range. In Excel, select **Insert>>Name>>Define**. The **Define Name** dialog box appears. **See Excel Help for details**.

   NOTE: To perform this function in Microsoft Office 2007, select the cells to export to GoldMine, right-click on the selected cell range and select Name a Range from the drop-down menu. You may also select the Formulas tab, then select Define Name>>Define Name... from the Defined Names sub-menu.

4. In the **Names** text box, type the desired name of the range.

   NOTE: The first row of the selected range must contain only header data.

5. Select either **Workbook** or **Sheet** from the **Scope** drop-down menu.
6. Select **GoldMine>>Export Data to GoldMine**. The **Export Data to GoldMine** dialog box appears.
7. The **Welcome to the GoldMine Plus for Microsoft Excel Export Wizard!** appears.
8. Click **Next**.

   The **field mapping** dialog box appears.
9. To map columns to GoldMine fields, highlight the **column** in the **Excel Fields** list and then highlight the **GoldMine field** to map the column to. Click **Add Mapping**.

   Your selection is added to the **Mapped Fields** list (for example, **Column1<=>C1.Company**).
10. Continue to map desired fields. When finished, click **Next**. The **GoldMine is now Ready to export your Excel data!** dialog box appears.
11. Click **Finish**. When the import process completes, a dialog box appears, indicating the number of records imported into GoldMine.

Adding Excel Templates

A template is a spreadsheet created in Microsoft Excel and contains embedded GoldMine DDE link fields. The DDE fields link contact information to cells so the fields remain dynamic, displaying the data from the linked fields in the configured cells.

NOTE: Use the Document Management Center to link to a spreadsheet template and edit as needed; the template must exist as a file. The most common option for creating a spreadsheet document are using Microsoft Excel with GoldMine Plus for Microsoft Office installed.

To Add Excel Templates

1. Select **Go To>>Document Templates**. The **Document Management Center** appears.
2. Select the **User** from the drop-down list.
3. Right-click on **Spreadsheets** in the Document Templates tree 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 spreadsheet 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 **Spreadsheet**.
10. Click **OK**.

Heat Integration

Integrating with HEAT

If using GoldMine with an E-License on an SQL database, integrate with HEAT to:

- Launch HEAT Call Logging from GoldMine and access the database.
- View call ticket information on the Tickets tab in GoldMine (the services and support relationship with the customer).
- Transfer ticket information to the GoldMine Details tab using the Ticket Transfer Utility to synchronize information with remote users without access to the HEAT database.

You cannot transfer data to the Details tab unless you are running GoldMine on an SQL database.

GoldMine users with Master Rights can change the database and login using HEAT/HEAT PowerDesk Options.

From HEAT, users can validate from GoldMine's Contact1 table and use the Customer window to view the primary contact information from the Contact Record, additional contacts, Sales-Pending, and Sales-History.

See the **HEAT Administrator Module** online help for complete instructions.

Advantages of a HEAT Integration

Primarily, the advantage of integrating HEAT and GoldMine Premium Edition is that a single customer record exists and is shared by both applications:

- **HEAT users can view and modify certain GoldMine Premium Edition customer information:** HEAT Call Logging users can view a GoldMine customer’s phone number, address, e-mail address, and so on. GoldMine can also be integrated to display a list of associated contacts for the selected Contact1 customer.
- **HEAT users can view a customer’s Sales-Pending information:** HEAT Call Logging users can view a list of scheduled sales activities for a GoldMine Premium Edition customer.
- **HEAT users can view a customer’s Sales-History information:** HEAT Call Logging users can view a list of prior sales activities for a GoldMine Premium Edition customer.

- **GoldMine Premium Edition users can view Call Logging Information:** GoldMine users can view call history information including information in the Detail, Journal, and Assignment tabs.

NOTE: The Ticket Transfer feature expands Call Logging information viewing in GoldMine Premium Edition by letting Call Record data transfer to the ContSupp table. From there, it can be displayed in the GoldMine Details tab and synchronized to remote, undocked users.

- **HEAT and GoldMine Premium Edition users can send internal e-mail messages to each other:** HEAT and GoldMine users can communicate about customers through e-mail.
- **HEAT and GoldMine Premium Edition users can post alerts to each other:** HEAT and GoldMine users can alert each other about key customer issues.

How the HEAT Integration Works

HEAT and GoldMine Premium Edition communicate by sharing information in their database tables. When integrated, an external link is created from HEAT to two GoldMine database tables: the Contact1 table, and the ContSupp table. The external link is a two-way link used to view and modify data. This lets data flow in both directions between the databases and the applications themselves.

The Contact1 Table

The Contact1 table stores information for GoldMine Premium Edition customers such as phone numbers, addresses, fax numbers, and so on.

HEAT displays Contact1 table information using the Contact1 Customer Type in Call Logging. Information displays in the customer profile (often called the Customer window). Call Logging users can view customer information.

NOTE: Information about pending sales and sales history also displays in the Customer window using the Sales-Pending and Sales-History tabs. This information is read-only.

Call Record information displayed in the GoldMine Premium Edition **Tickets** tab is not actually stored in a GoldMine record. Rather, it is stored in the HEAT database and dynamically viewed by GoldMine Premium Edition users. In comparison, information displayed in the GoldMine Premium Edition Details tab is stored in the ContSupp table. Information is transferred here using the Sales & Marketing Ticket Transfer feature.

The ContSupp Table

The ContSupp table stores information about a GoldMine Premium Edition customer's additional contacts and e-mail addresses for all contacts. Additional contacts display in the Contact tab in the Customer window.

NOTE: The e-mail addresses that autofill in the Contact1 Profile and Subset forms in HEAT Call Logging cannot be modified.

Launching HEAT from GoldMine

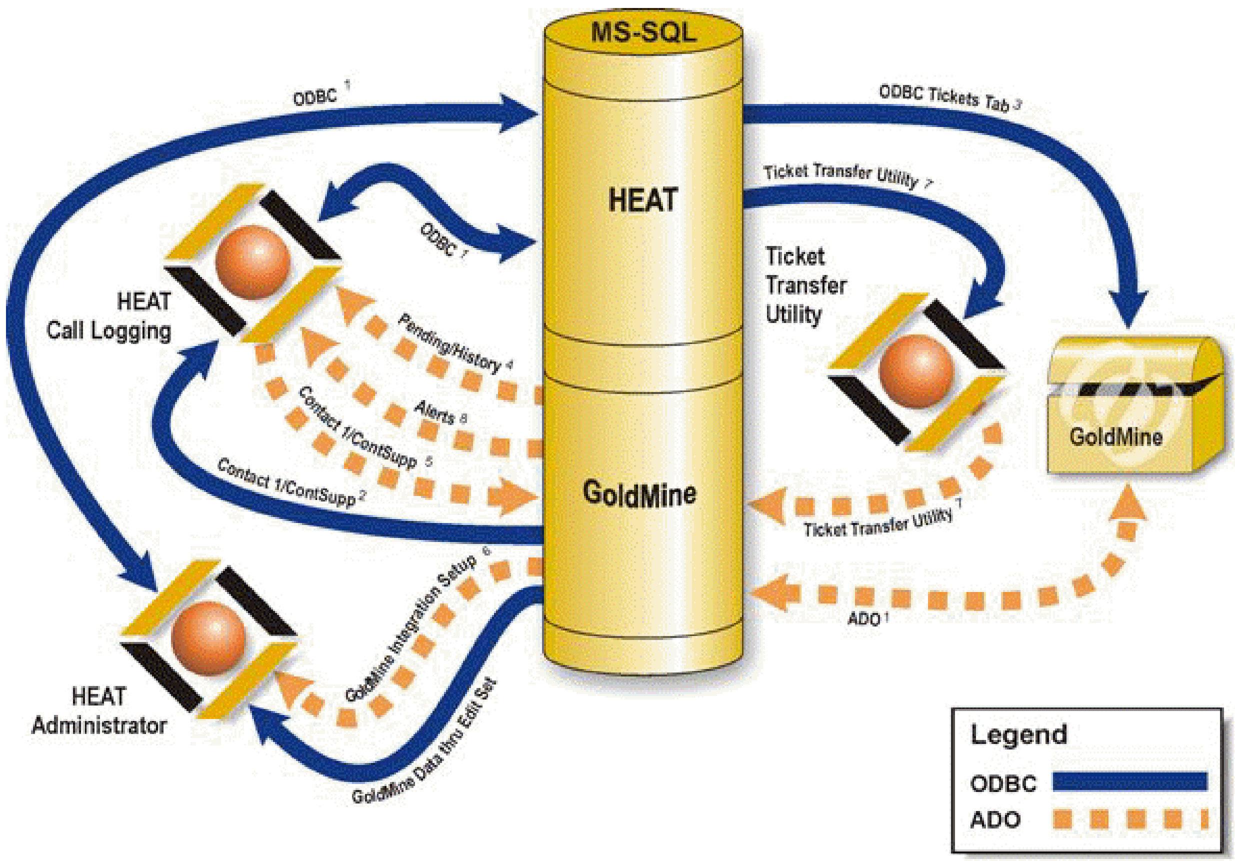
If using GoldMine with an E-License and you configured HEAT integration, launch HEAT from GoldMine.

Select **File>>Login to HEAT**.

Call Logging appears.

Ticket Transfer Utility with HEAT Integration

If using GoldMine with an E-License on an SQL database and you integrate with HEAT, the processes work together as shown.



1. Data flows two-way between the databases and the applications using ODBC between the HEAT database and the HEAT modules. It flows between the GoldMine SQL database and the GoldMine application by way of the ActiveX Data Objects (ADO).
2. Contact information is validated from the GoldMine SQL database through the Contact1 and ContSupp tables and flows to the HEAT application. This allows HEAT users to view GoldMine customer information and additional contacts.
3. Call Records created in HEAT flow to the Tickets tab in the GoldMine application by DDE and ODBC.
4. View GoldMine Pending and History activities in HEAT Call Logging (read-only). Data flows from the GoldMine database to the HEAT application by ADO.
   - GoldMine contact information and the additional contacts (Contact1 and ContSupp tables), which are created or updated in the HEAT application, are sent to the GoldMine database using ADO to transport.
   - The SPFiles table in the GoldMine database stores data that ADO can validate in the HEAT Administrator module.
   - A Call Record is created and stored in the HEAT database. The Ticket Transfer Utility converts these Call Records into detail records on the GoldMine Details tab. The data flows from the HEAT database to the Ticket Transfer Utility by ODBC and then to the GoldMine database by ODBC.
   - Alert data flows between GoldMine and HEAT Call Logging. Enable both HEAT and GoldMine to assign and display the other application's alerts.

Integrating with .NET

The new API integrates with GoldMine by providing an XML-based programming interface and COM server. It is compatible with Microsoft .NET development tools (VB.NET and C#). The XML wrapper provides access to functions from the non-XML capable API available of previous GoldMine versions.

Also, user-interface integration tools let developers interact. For instance, replace DDE with COM, to gain:

- Implementation of current technology instead of DDE.
- Compatibility with COM-capable development tools.
- Compatibility with .NET applications.
- Ability to grow into a full UI API.
- Ability to rewrite the Excel/Word link.
- Easier implementation of an XML-based interface.

The COM server implements the relevant DDE functions. An application that previously used DDE can communicate to GoldMine using this interface.

The description has 2 parts:

- The XML API
- The UI API to run

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

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

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

The XML API wraps the existing GM API into a simpler interface. Low-level functions performing actions needed by the non-XML API programmer are hidden. Failures are self-documented (no return messages).

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)

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 web sites)

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)

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(Rev. May 2009)

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