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Andrea Dominguez

Wayne Miller

Terry Porter

Duncan Moore

Gene Marks

In This Issue

Using Reports in a Network Environment

Importing Records from Microsoft Excel into GoldMine

Tips, Tricks & Things

New Look

Miscellaneous Expressions

Grouping Multiple Forecasted Sales

How often, and how should I rebuild my GoldMine database

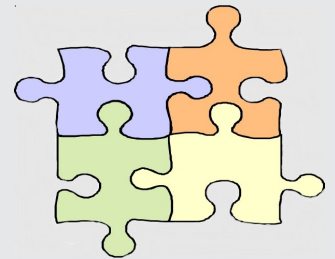
Sending an E-mail to All Contacts within a Company

Worm Viruses & GoldMine

Lack of Participation

by

Your Editor



I'm puzzled. Everyone has told me what a great newsletter this is, and how they really enjoy reading it and that its content is great. They also have mentioned that they love the **Tips, Tricks, and Things** section. Newly joining participants have even asked me to send out back issues so that they can review entire articles that have spanned multiple issues.

What they and you have failed to realize is that I am but the Editor of this newsletter, and it is they, and you that are the authors of the articles. So I hope that you'll understand why this issue is so small. It is small because those that had promised articles didn't follow through. The rest of you readers have chosen to stay just readers instead of becoming the author that are inside of you.

Hence, this issue of the newsletter will be a small issue supported solely by our solid contributors, and I would like to thank them for their participation. This issue will be little more than **Tips, Tricks, and Things** as that is all that I have available.

It is not very hard to contribute a small article. It might take an hour or two out of your time, and it could certainly benefit many ten times over. Additionally, if I do not receive some articles by May 1st for the June issue, there may be no June issue making this issue a collectors item.

Please make a contribution of an article of any kind. I would hate to see a newsletter that is so well read die such a horrible death. The guilt rests solely on your shoulders. You have at least one good article in you, everyone does. Let's get it out, and into my hands by **May 1st, 2006**.

Your Editor,

DJ

PS: At the last minute **Wayne Miller**, and **Andrea Dominguez** came through to pull my butt out of the fire. Thank you both. Saved the lard for the next fire.

Legalese

Editor: **DJ Hunt**

Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is accurate. Should you use anything from this newsletter, you do so at your own risk. All information contained herein is not intended as specific advice, but as a general point of discussion.



All articles are freely contributed by the author. In many cases the authors have had a technical expert, in the area of the document, preview the document for content and accuracy.

All major article contributors will have a business card displayed on the last page of this document. You are encouraged to clip the business card and save it. Do not contact the author directly unless, at the end of their article, they have made a declaration of sorts that states that you may contact them personally.

All questions, and future articles should be submitted to:

DJ.Hunt@DJ-Hunt.com

If you are including screenshots, they should be no wider than 3.57" US. Their Print resolution should be 300 dpi, and they should be in jpg format.

Major contributors are asked to also submit a 1" US wide portrait photo. The Print resolution should be 300 dpi, and the format should also be a jpg format.

We accept all articles, however, the editor reserves the right to determine which articles are included and in which issues they are included.

I am your editor:

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Using Reports in a Network Environment

by

Andrea Dominguez



This article discusses accessing reports in a network environment. I am going to discuss GoldMine reports and Crystal reports. One of my favorite clients just bought a bunch of new Windows 2003 servers, and we have been converting old stuff to use on the new system. I seriously think that the developers for Windows 2003 really wanted to name this OS "Bill's Revenge" because of the super fun security jungle it sets up. I am going to pass on what I have learned to you in the hopes that you save some time (and sanity) in setting up your reports in this type of environment.

Crystal Reports

When installing Crystal reports to run in a network environment, you must give the end user rights to the Crystal system files, ODBC (the actual .dsn being used as well as the registry key), and the reports themselves. Also if your report is utilizing Windows System32 files, you should add that to your list. The easiest thing that you can do in such an environment is to create a user group, and add all of your users to that. Then to turn around and add that group to the above listed items. As you remember from my previous article, the Crystal .dll's should all be in the root of the GoldMine folder which is on the server. This should be all you need. Install your report in the report menu, and try to run it. I would recommend first, as a Network Administrator, to make sure that the report will run then as a general user (making sure that there are no security issues). If the report runs with the Network Administrator login, but not an 'Average Joe' login, then take a look at your security again. Either you had forgotten to include that user in your user group, or there could be something wrong with Active Directory, or if a login script is being used, the securities set by said script can overwrite the manually set up permissions. Make sure you check out everything you can, everywhere you can.

One of the greatest things about Crystal Reports 8.5 is the ability to create distribution kits. If you are in a rather large GoldMine user base, then perhaps installing the report as an .exe will work better for you. For this particular client the distribution kit worked out great. Not only is it easier to locate reports (I put them on their own taskbar), but the kit installed all of the needed .dll's, .exe's and most importantly, the registry keys along with access for the users. The distribution kit is free from Business Objects, and Crystal Reports 8.5 was the last version of Crystal for which the distribution kit was created. If you decide to go this route, then I would highly recommend

creating your kit for the biggest charting report you have. What I do for this type of setup is to create the kit for 1 really big report, and then just compile subsequent reports and paste them into the distributed reports directory. The .dll's that I use for the smaller reports will be included in the monster distribution kit.

**one note about the ODBC.

I am finding, in general, for Windows 2003 server, use the SQL login for your file .dsn instead of the Windows Authentication. With multiple users and reports, it sure acts a lot more stable. Sure it adds a login screen when the report prints, but well worth it, and it is far more forgiving than a flaky Active Directory structure or login scripts.

GoldMine Reports

The only thing, security wise, to be set in Windows 2003 is access to the reports folder. If your user is already logged into the program, 9.9 times out of 10 they have the proper access. I have found that if Active Directory is not at 100%, accessing reports, and the Document Management Center hangs the program. If yours hangs as well, try adding the user manually to the main GoldMine folder security, and seeing if that corrects the problem. I have come across this in more than one setup so I guess it is 'Bill's Revenge' at work.

If your setup does not allow the end user to have access to customize reports like the history wide line report, then they are not capable of going into sorts or options and changing the username and activities, or even date ranges. In this scenario, you have 2 choices as the Administrator, either go and clone the report for each user, and set the username or take the one report, and have it work for all users. The example I gave, 'History Wide Line Report' was fairly simple to alter. I went into customize reports on the server, and altered the sorts for this report. I made the Primary Sort for OnDate, and left the Start At: and End At: empty, and then I made the Secondary Sort ContHist.UserID and in the Start At: and End At: I put &User into each field. The report now knows to look for the UserName currently logged in. So if Joe Schmoie was currently accessing the report, the report will only look for his UserName in the ContHist table. I then went to the options tab and selected all of the history activities. I then opened the report, and in the Sort 1 Header, I added a dialog field (I called mine start_date), and put a filter in the Sort 1 Header: ContHist->OnDate >= DLG->Start_Date. The report knows to pull everything from the date entered until today.

** a word to the wise in running a history report in a network environment.

Keep in mind the size of the history table. If you have a big history table, then you might want to consider activating a filter before running a report like this. It will speed up processing significantly, and if your server is underpowered to begin with, this type of report will slow you down (and

everyone else down). For the client that I altered the report for, their history table has approximately 1.5 million records with about 100,000 contact records. If you do not use the filter, the report will take a look at all of the 1.5 million records for the criteria that is entered in the report. If you create a filter for just the users section of the database, and activate it, the report will limit it's search. So instead of 100,000 records, it will only look at 1,000 records.

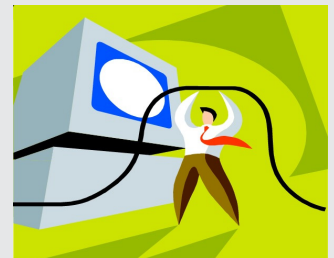
** one other word to the wise.

Using the Microsoft Document Imaging as the default printer on your server for these reports is not exactly a good idea. If this is a citrix, terminal services or iGoldMine setup where there is no printer on the server, it is client session installs, I will load drivers for an HP laserjet 4 as a local printer and make that the default.

Editorial Note:

Andrea has contributed a Reports article for almost every issue of **The GoldMine Advisor** since its inception almost two years ago. I would like to take this time to thank Andrea for her continued support of **The GoldMine Advisor**.

Importing Records from Microsoft Excel into GoldMine



by

Wayne Miller

Editorial Note:

Wayne has been distributing this whitepaper for years thru **Miller Service\$,** and has kindly consented to allowing me to publish it for you, our readers. We all thank you Wayne.

Preparing the Data

1. Load the source data into Excel, and save the spreadsheet.
2. Note: Zip codes with leading zero will have the lead zero automatically stripped by Excel. In order to avoid this issue, format the zip column as text before loading data. If you have existing data or forget this step, it can be fixed in Goldmine after import by global update. (See end note)
3. Change the field labels (column headers, row 1) to match Goldmine standard, and user defined field names. This greatly reduces the time for field matching in later steps. When counting characters, remember that all user defined fields in Goldmine

must begin with the letter "U." This reduces the character count for custom fields to 9 that may be used.

- a. Field Labels have a **10 Character Maximum** (see above note on user defined fields).
 - b. Each Field Label must be unique
 - c. Each field label must begin with an A-Z (not case sensitive) character
 - d. The remaining (9 maximum) characters may be A-Z (upper or lower case, it is not case sensitive), 0-9, or underscore (_) only (underscore has been known to cause problems and should be avoided even though it is technically a legal character). You may **not** use special characters (@, #, \$, ^, %, etc) anywhere in the Field Label.
4. Make sure every column has a matching and unique label.
 5. Highlight the entire worksheet by clicking the upper left corner.
 6. Select: **Format | Cells | Font** and choose a non proportional font such as "Courier". This insures that during the next step you will not lose the last character during AutoFit.
 7. Select: **Format | Column | AutoFit Selection**. This will automatically adjust column width for the longest data contained in a cell in each column. This is necessary to avoid truncated data after import.
 8. Now select only the spreadsheet area containing the data to be imported. Make sure to include the **Column Headers** (Row 1)
 9. Select: **File | Save As**; Specify a unique (8 Character Maximum) name; "**Change file Type**" (Lower Pull down Box) to DBF 4 (dbase IV), Click **Ok** to save. Write down file location (complete path) as you will need to find the file during import.
 10. Click **OK** to message box regarding saving only one data sheet. This is your last opportunity to be certain that you are saving the data intended.
 11. Click **YES** to any other message boxes.
 12. Close all open Spreadsheets. When Prompted to **Save the Changes to the DBF** file again, Select **No**.
 13. Close Excel.

Importing the Data

1. **Backup** your Goldmine system, and all databases.
2. Open the **Destination** Goldmine database. Goldmine will only import to the currently open database. I recommend creating a blank temporary database for this. Using the temporary database you are then able to do global updates and other maintenance, (i.e. entering data in the source or Key Fields) to the imported data before moving it into the active database. This also protects your active database from accidental changes.

Editorial Note:

As long as you have one key identifiable field (**Source**), you could import directly into your normal database. Heck, that's why you made your backup isn't it?

3. Select: **Tools | Import | Export Wizard/Import Contact Records | Next**
4. Select Radio buttons: **Import a new file; file format dBase | Next**
5. Specify the import file location (as saved in Step 9 previously). Click on the browse ("... "), and navigate to the file and select **Open**. The file must not be open anywhere else or Goldmine will generate an error message. At this point the correct file name, and path should be in the Import file window. **Next**.
6. The preview screen allows you to see the data you are about to import. After review (use the Preview and Next buttons to view actual data), **Next** (the one used to proceed, not the one used above to view records, yes it is unfortunate that there are 2 buttons on this screen with the same name).
7. Field Mapping: You now have to map the fields from the data source to the fields in Goldmine. The fields from the data source are displayed on the left hand side, under "**Import fields**". Because your field names were changed in the source to match those of Goldmine's, you can double click on the fields on the left hand side. This will automatically match the fields with Goldmine's on the right. The fields will appear under the "**Expression**" column on the right hand side. Highlighting any matched field and clicking "**Properties**" allows further formatting options while the data is being imported. i.e. case conversion or manipulation by dBase expression. **Next**
8. You are now given the opportunity to save this import profile for future use. Click "**Yes**", and enter a profile name. This will enable you to use the same field mappings again without having to configure them. To use the saved profile you would select in step 4 above, "**Import a new file using an existing profile**" and select the named profile.

10. When you are satisfied that you have properly configured all settings, click "**Finish**". The records will then be added to the current database.
11. Perform a **Pack & Rebuild**, **Sort**, and **Verify** against all **Individual** tables using the normal procedure.
12. If you need to do any global updates in a newly created database as mentioned above, do them now. Then, using **File | Synchronize | Copy/Move Records**, Copy (**NOT MOVE**) the records to the active database. Once you are sure they are as you want them in the active database, then you can delete them from the temporary database. However, unless you are short of storage capacity, I would recommend that you keep the temporary database as a permanent record of what you imported.

Note: Global Update to insert missing leading zero in zip code.

1. Create and activate a filter as follows to identify all records with a 4 digit zip code.

`len(trim(contact1->zip))=4`
2. Global Update contact1->zip with statement:
`"0"+contact1->zip.`
3. Release Filter, pack and rebuild.

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Tips, Tricks & Things

New Look

by

Terry Porter



Does Goldmine look the same to you day in and day out? Are you getting a little tired of the blue check background? Change it up! Here are a couple of ideas:

- Different color checks – I opened up the file backtile.bmp that ships with Goldmine in my photo editor, and I changed the checks to other colors. I saved the file with a new name like backtilered.bmp.

Tips, Tricks & Things

- Fun images - Windows XP includes some fun images that are teamed with user accounts. I found these on my hard drive under C:\Documents and Settings\All Users\Application Data\Microsoft\User Account Pictures\Default Pictures. I used snowflakes for January and hearts for February.
- Other backgrounds – Windows XP also comes with a lot of background type images. I found these in my root Windows directory. I like Santa Fe Stucco.

How do you change it? Select **Edit | Custom Background** from the GoldMine menu. The Edit Background dialog box appears. The section you want is under User Background Bitmap settings. Simply browse to the file you want. I use tile which repeats the graphic to fill the area, but there are lots of other options. Choose apply and enjoy Goldmine's new look!

Editorial Note:

I agree with Terry. Personally, I use the Prairie Wind.bmp from the C:\Windows folder on my system. While you are in this area, you may also want to look at the verbiage on your screen. As I have some 70 different GoldMine installations on my system, I use this area to identify each GoldMine uniquely so that I don't end up working on the wrong installation of GoldMine.

Miscellaneous Expressions

by

Duncan Moore



Are you having trouble remembering to use **IIF()** instead of **IFF()**? In dbase it is **Inline IF:** or **IIF.**

Editorial Note:

I agree with Duncan that words are easier to remember then the function syntax itself. For the **iif()** function, I have always thought of it as the **immediate if** or **iif()** function.

Want to calculate the number of days in a month or the last day of a month?

Code:

```
iif(Month(Contact1->LastDate) = 2 .and. year(Contact1->LastDate) % 100 <> 0 .and. year(Contact1->LastDate) % 4 = 0, 29, val(word('31 28 31 30 31 30 31 31 30 31 30 31', month(Contact1->LastDate))))
```

Tips, Tricks & Things

Grouping Multiple Forecasted Sales

by

Gene Marks



When a customer has multiple **Forecast Sales**, is there a way to group related forecasts together?

Yes, this can be done using the **Opportunity Manager**. Many forecasted sales start out as a scheduled activity, and then are promoted to an Opportunity as the sale process becomes more complex.

To do this, an Opportunity must be created first. Then forecasted sales can be assigned to the Opportunity. There are also other features that the Opportunity Manager offers besides grouping multiple forecast sales. These include tracking influencers, contacts, teams involved, issues that need to be resolved and potential competitors.

To create an Opportunity:

- * Select the **Opportunity** tab
- * Right click and select **New**
- * Select **Opportunity Wizard**
- * Enter a **Name**
- * Provide as much detail as currently available to wizard forms
- * Click **Finish** to create the Opportunity

Once this Opportunity is created, you can add your existing forecasted sales.

To add a forecasted sale to an Opportunity:

- * **Edit** the existing Forecast Sale under Pending
- * Select the **Opportunity** from the drop down list
- * Click **OK** to save the change

The Forecast Sale should now appear under the Opportunity selected under the Pending tab. You can also create Forecast Sales while in the Pending tab of the Opportunity.

Editorial Note:

Caveate: This editor has always professed that the users should not use the **Opportunity Manager** if they must have paper reports to show their colleges or managers unless, that is, the default **Opportunity Reports** adequately meet your needs.

You see, creating a **New** Opportunity Report is one of the most difficult tasks within the GoldMine Reporting Tool. Even modifying one of the existing reports is nearly impossible, and not for the faint of heart.

How often, and how should I rebuild my GoldMine database

by

DJ Hunt



This is an often asked question that I thought that I would put my answer to written form once and for all as it is so very import to the GoldMine community. Although I cannot speak to the **Firebird** community, I can assume that there must be an equivalent to the **Microsoft SQL Maintenance Plan**.

Microsoft SQL Backend:

There is no reason for not **Verifying, Optimizing, and Backing Up** your Microsoft SQL database every day. This can be accomplished via a **Maintenance Plan** set up in the **SQL Enterprise Manager**, however, the GoldMine Administrator is reminded that all users must have exited GoldMine for this plan to be successful. It is incumbent upon the GoldMine Administrator to check the logs each day to assure that the Maintenance Plan completed successfully for the previous day.

dBase Backend:

There is no reason for not **Rebuilding, Sorting, and Verifying** your dBase tables daily. The method that I recommend by hand is:

```
select File
select Maintain Databases...
select Individual Files
click on Next >
click on Set All
click on Next >
select Rebuild
select Sort
select Verify
click on Next >
click on Finish
```

Now if you would rather automate this a little using the **Windows Task Scheduler**, you can use a modification of this commandline:

```
... \GoldMine\GMW6.exe /u:UserID /p:Password /m:196, 3
```

As with our SQL backend users, it is incumbent upon the GoldMine Administrator to check the GoldMine logs each day to assure that the Maintenance completed successfully for the previous day.

Tips, Tricks & Things

Sending An E-mail to All Contacts within a Company

by

Gene Marks

Sending An Email To All Contacts Within A Company

Is there a way to send an email to all contacts within a single company?

Yes, you can use record tagging to select a company and send an email to all email addresses contained within the contact record.

- * Select **Lookup | Contact** and find the contact you want to email.
- * Hold down the **Control** key, and click the contact. You should notice that the title of the contact record is now '1 Tagged Record; Gene Marks'
- * Compose an email and select the **Mail-Merge** tab (the fourth tab on the left side of the top portion of the e-mail window)
- * Check '**Merge this email to a group of contacts**', and **Active Contact Filter** should appear as the default value.
- * Check the **Primary**, **Additional** and **Other** checkboxes to send to all e-mail addresses within the tagged contact

Editorial Note:

Obviously, this only applies if you are using the paradigm of one contact record for each Company, and the use of **Primary**, and **Additional Contacts** on that record for the contacts.

I have long been a proponent of the use of one record for each contact, and having the contact records related via the **Organization Tree**. One could simply activated the **Section** of the Organization Tree to which they wished their e-mail blast to be sent, and Merge to the Filter.

Globally Changing Record Ownership

by

Gene Marks

Can you globally change record ownership of contact records from a previous UserID to a new UserID using SQL Queries along with the use of Territory Re-Alignment?



Yes, and here is how you would accomplish that:

* Select **Lookup | SQL Queries**

* Type the following Query:

```
select * from Contact1 where Owner = 'UserID'  
( username of previous owner )
```

then click on **Query**

* Click on the **Groups** tab and create a group based on the SQL Query records

* Go to **Tools | Territory Realignment**

* Select the **Group** created from the SQL query

* On the third field down, select **Owner** then replace it with the new UserID

* Click **Next, Next** and then **Finish**.

This will globally change record ownership from the previous owner to the new owner.

Worm Viruses & GoldMine

by

Gene Marks



A client asked: "A worm virus recently used my address book to send itself to my contacts' e-mail addresses. How can I prevent this from happening?"

This is **very** unusual. GoldMine's e-mail, though as powerful as Microsoft Outlook, does not have anywhere near the number of users as Outlook. It is extremely unlikely that someone would write a worm virus that would affect GoldMine. But if a worm affects your Outlook system and you're integrating Outlook and GoldMine together then this could affect your GoldMine database as well.

Here's a useful tip.

First, you should have a good anti-virus, and anti-spyware software in place on your system. If, however, a worm manages to get past your anti-virus software, you can prevent it from spreading itself further.

When a worm virus gets into your computer it heads to your Outlook email address book, and sends itself to everyone in there, infecting all your contacts. Using the technique below, you can stop the worm from using your address book to spread further, and also be alerted that a worm has gotten into your system.

Tips, Tricks & Things

To "worm-proof" your address book:

- * Open your address book, and create a new contact
- * In the First Name field, type in: **!000** (an exclamation mark followed by 3 zeros). In the window below where it prompts you to enter the new email address, type in: **WormEmail**.
- * Complete the entry by clicking **OK**.

The new contact !000 will be placed at the top of your address book as the first entry. This will be where the worm

will start in an effort to send itself to all your contacts. But when it tries to send itself to !000, it will be undeliverable because of the e-mail address you entered (WormEmail). If the first attempt fails (which it will because of the address), the worm goes no further, and your contacts will not be infected.

Also, if an e-mail cannot be delivered, you will be notified of this in your **InBox** almost immediately. So, if you get an e-mail telling you that an e-mail to WormEmail could not be delivered, you know that you have a worm virus in your system, and you can take proper steps to get rid of it.

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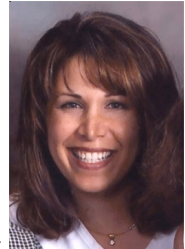


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