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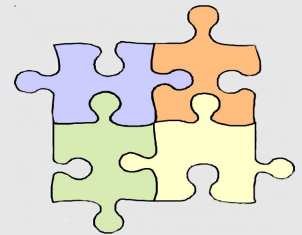
Editorial Note:

An old friend of mine has come out of the woods, and has contributed this article which I thought that a lot of you Windows nah sayers would like to read. I've been waiting for an artilce like this to print for a long time now. Thank you very much Scott for this contribution.

How to use GoldMine on a Mac

by

Scott Sanford



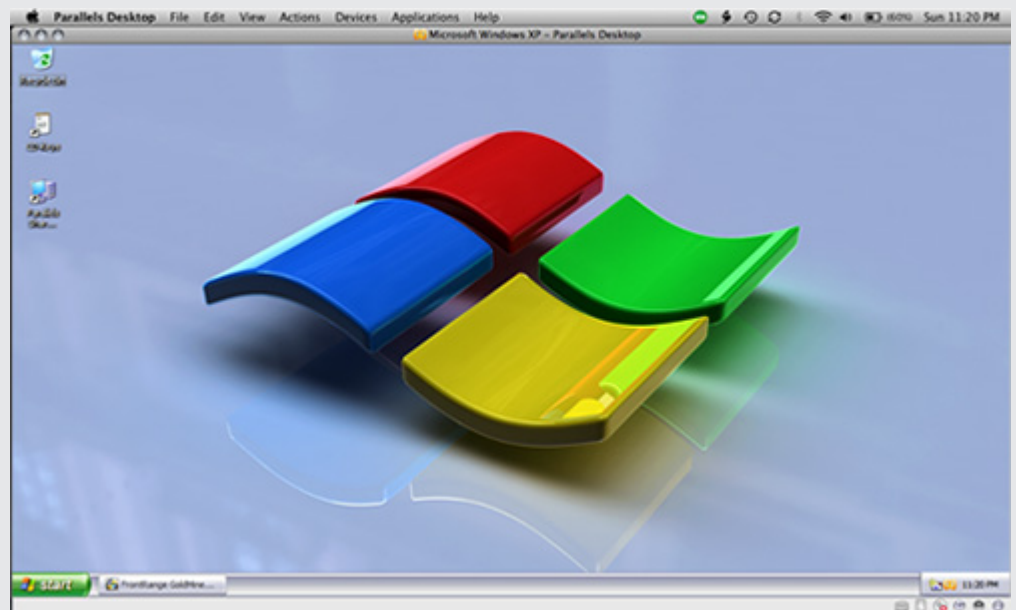
Let me preface this how-to with the fact that I am in no means a Mac Zealot, nor am I especially well accomplished at things Apple. Having been in IT for 12 years, the PC side of things, networking, applications seem logical, however a client with the need for Apple hardware opened me up to the experience of running Windows on Apple hardware.

So... Let's travel down that rabbit hole, shall we?

Assuming you're running a version of OS X, your first stop to GoldMine in Mac-land is to purchase and install a copy of Parallels for Mac. VMWare makes their offering, Fusion, however my experiences and discussion focus specifically on Parallels.

When you install Parallels, and Windows, you're basically running a PC *inside* the Mac OS. While this seems powerful and complicated, it is, and isn't at the same time, much like everything else Mac.

So install Parallels, then install Windows XP or Vista if you must (my personal preference is for XP Pro), and then install GoldMine. This is all done inside the Virtual Machine. The cool stuff has most certainly not taken place yet.



(Continued on Page 2)

Legalese

Editor: **DJ Hunt**



Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is 100% 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 their 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.

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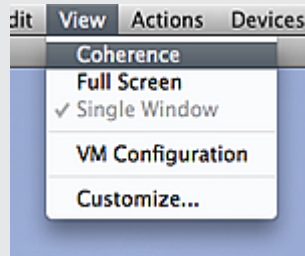
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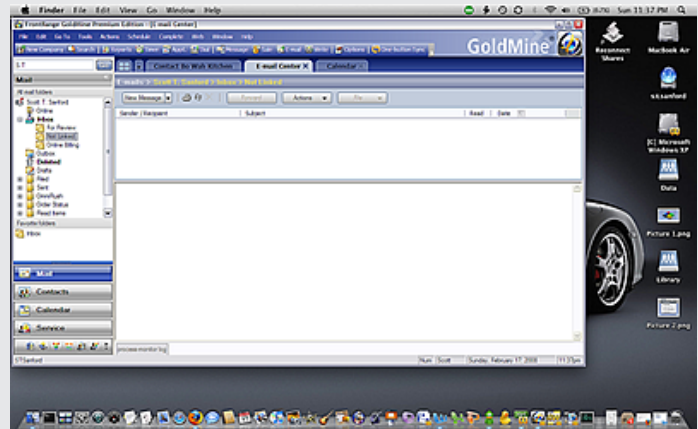
(Continued from Page 1 - How to use GoldMine on a Mac)

Now, when complete, you're going to want to look up on the menu bar for the View option where you will choose Coherence. Coherence allows you to brush away the Windows PC, and liberate your applications to at least appear as if they run natively on Mac OS.



You'll notice, below, that the GoldMine PE Window is showing as an open Window inside Mac OS X.

To further complete the integration, while GoldMine is open, Click and Hold on its dock icon, and select to Keep in the Dock. This is the



equivalent of having the GoldMine icon on the Start Menu for Windows users.



Once on the dock, you can simply click the icon to launch GoldMine. If your virtual machine isn't fired up, no worries, Parallels will start it right up for you.

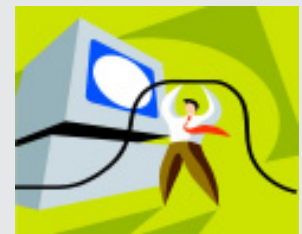
So now when someone says to you that they have Macs and would love to have GoldMine but they don't make a Mac version, you have the knowledge to install, and use our excellent CRM product on that operating system as well. To my knowledge, there are no truly competing CRM products made for Macs. I have looked into a number of the front runners, and have come to the conclusion that Mac people either don't do sales or don't use CRM much.

Seems like a nice wide-open demographic to sell to...

GoldMine Backup Strategies

by

Bob Gannett



In reviewing our Help Desk responses for the past years, the single most recurring problem has been that many GoldMine users have not had adequate backups of their mission critical data. This turned what should have been a routine Help Desk call into a panic situation.

(Continued on Page 3)

There are two kinds of hard drives in the computer world: Those that have crashed, and those that will crash (again). When you unexpectedly loose your hard drive, you will quickly discover that the information stored on it was worth much more than the hardware itself. National statistics show that if a company cannot restore most of their lost data within 2 weeks of the crash, they are out of business. Here is a way to close the barn door BEFORE the horses escape.

There can be no hard and fast rules about backup strategy because every computer system is different. What really matters is that you have a practical, relevant strategy which makes backups, an everyday fact of life for IT staff - a routine process that ensures backups always takes place as and when it should. There are many ways to backup a system: Tape drives, DAT drives, writing to CDs, copying to Remote systems, copying to External USB Drives, etc.

Editorial Note:
Whatever you do, do not rely on GoldMine's internal backup routine. It has proven to be unreliable when restoring data.

The following guidance is based on using a basic tape drive system. This strategy can be modified to meet your particular needs. The critical element is that you should be backing up your data EVERY DAY.

The Ten-Tape Cycle Method

There are many systematic methods for regularly backing up data. One of the more common ones is the ten-tape cycle method because it is easy to implement. It also keeps more than one historical copy of the data so that losing one tape does not mean you have lost your data, and you should only have to renew your tapes once a year, assuming 100 backup/restore passes per tape.

The method involves maintaining a daily, weekly and monthly backup. Every three months the monthly tapes are recycled. The advantages of this method are:

Simplicity. It is very easy to recover data.

Easy access. Data backed up any time during the last two months can be easily found and restored.

How Many Tapes? If all the data you wish to back up in a single session will fit onto a single tape, you will need ten tapes, plus any extra tapes you may need for archival storage or file transfers. If you require more than one tape per backup, you will need ten sets of tapes, a set being the smallest number of tapes that will hold a full backup.

Before making a backup, label each of the ten tapes as follows:

Monday	Tuesday	Wednesday	Thursday
Friday 1	Friday 2	Friday 3	
Month 1	Month 2	Month 3	

You should also record on the label the date you first start using the tape, the name of the system you are backing up, as well as the backup software used.

If you need more than one tape to perform a full daily backup, remember to record the tape number, for example, 'Tape 1 of 2.'

Tape Rotation

1. On Monday, Tuesday, Wednesday and Thursday, make a full backup of ...\\Goldmine ,and the SQL's *.BAK file (if data is hosted in SQL) to the tape labeled for that day.
2. On the first, second and third Friday of the month, make a full backup to the tape labeled for that day.
3. On the fourth Friday of the month, perform the backup on the tape labeled for that month.
4. At the end of the fourth month, recycle the monthly tapes. In other words, start again with the tape labeled 'Month 1.'
5. For extra security, place each of the Fridays and monthly tapes in a fireproof safe or store them away from the site.

Extending Your Backup Strategy

1. Ideally, you should extend the ten-tape backup routine by using more monthly tapes and/or building in an extra, occasional cycle. Twelve monthly tapes would provide backup cover for a whole year without having to perform a quarterly tape rotation, and a set of quarterly tapes would allow for a full backup on the last working day of each quarter.
2. Workstations are often neglected, particularly those production files that are commonly stored in the local "my documents" folder. On modern networks and peer-to-peer networks, it is easy to periodically backup to one tape the contents of all local ...\\My Documents.

Make Cleaning Part of Your Routine

Cleaning the drive's tape heads regularly should be an integral part of your data security program. Build a cleaning cycle into your backup regime, so that it cannot be overlooked. Use the recommendations in your user guide to decide how often you should schedule head-cleaning.

One last suggestion. If GoldMine is "mission critical" to your business, and if someone else is backing up your data (your IT department, your office manager, etc.), do not assume that all of GoldMine is being backed up properly. I highly recommend that you personally verify that backups are being accomplished. More than once we have gone into corporate environments to solve GoldMine related problems only to find that, for one reason or another, the GoldMine server had not been included in the corporation's backup routine or that the backup itself is corrupted.

In Summary:

1. Backup on a daily basis (assuming that your GoldMine is mission critical to your operations).
2. Make sure that everything is backed up: GoldMine's program, data, and linked documents.
3. Verify your backups to make sure that you actually have the desired data. The best way to verify is (1) review the logs (if any) and (2) restore a backup to some temporary location so that you can check the results.

- 4. Take some backups off site as protection from fire, theft, employee problems, etc.
- 5. Have redundancy and depth in your backups. If you have problems with GoldMine this morning, chances are that the problem existed in last night's backup. In this case, hopefully you can go back to a previous backup to get the desired files.

You Have A Dirty Database!



by

Alan Disher

According to the Postal Service, 24% of all the mail they handle has an address error that results in the mail being returned, delayed or destroyed. Yes, the postal service destroys tons of mail everyday and some of it is yours. If you use your Goldmine data to mail to customers or prospects, you are not reaching everyone you think you are. Imagine how effective your contact manager would be if 24% of your phone numbers or 24% of your email addresses contained an error!

You are losing opportunities. Bad addresses cost the Postal Service 1.9 BILLION dollars a year, and they think it cost the senders a similar amount in wasted printing, postage and lost opportunities.

A division of our company does mailings for customers. When a customer exports their file from Goldmine or any other Contact Manager, we check the addresses for address quality. Typically we will find 10 to 20% of the addresses have a problem, and more than once over 50% of the addresses were not deliverable.

The first group of records we will eliminate are records with partial or missing addresses. They are records a sales representative started with a name and phone number, maybe added a street name or email, and then moved on to another record. There is simply not enough information to mail.

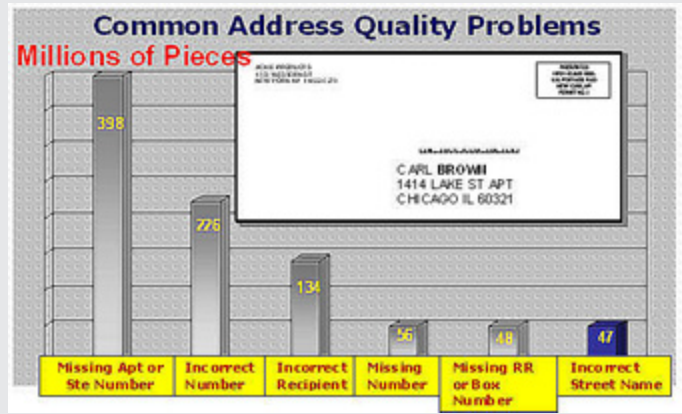
Then we CASS certify the list. The CASS process matches the list against the postal service database, and verifies that you have a valid address. We will have a percentage of addresses that are missing directionals, prefixes, and suffixes or have numbers out of range. They won't get delivered until they are fixed.

If you imagine you are the mail carrier, you will begin to have a better understanding of the problem. The address says 100 Main Street, but you have 100 east main and 100 west main in your zip code. It's not your job to figure out the intended address.

The address is "Smith and Jones street. There are four 5 story office buildings at Smith and Jones, one on each corner. Its not your job...

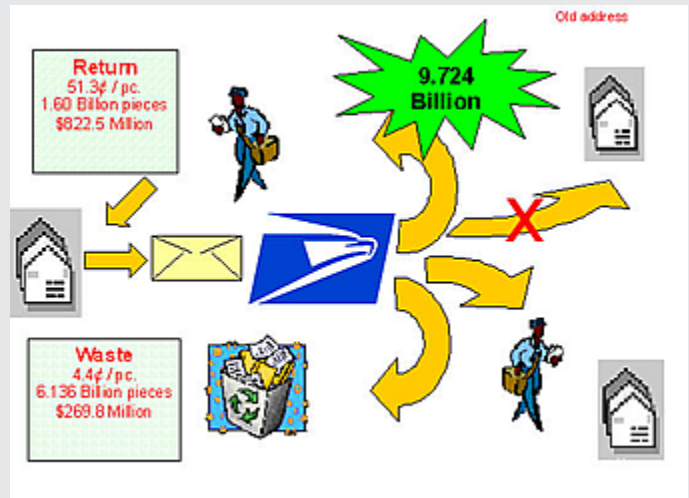
The address is 9300 Reed Avenue, but Reed Avenue only goes to 4000. (Transposing 3900 to 9300 is not uncommon) Its not your job...

The address is 2352 North Washington Ave. Its a 100 unit apartment building. There is no apartment number on the envelope. Its not your job...



After we clean the addresses and send problem records back to the customer to see if they can fix them, we process the file against the National Change of Address File. Each year over 40 million people move. Many (about 84%) complete the change of address form at the Post Office, and inform critical vendors and relatives, but they don't inform you. Processing the file against the NCOA file can update people that have moved over the last 48 months. (Thats over 160 million moves!)

On average, 17% of you data base moves each year. (That includes businesses) If you are working with college students or military personnel you will see more moves.



This is so important to the Postal Service that to qualify for automation rates (bar coded mail) they will require NCOA processing or the "Return Service Requested" endorsement on any presorted mailings beginning November 2008. "Return Service Requested" endorsement means that instead of destroying undeliverable mail, the Postal Service will return the undeliverable mail to you and charge you for each piece. (Approximately 89 cents each, depending upon the weight of the piece)

You can see that it makes sense to have a clean mailing list. Make sure your Goldmine users know that you will be mailing to the addresses so that they will know you need a complete address. If you are shipping from those addresses, you will reduce late or lost shipments and you will avoid address correction charges from the shipper. Many people dont realize UPS and other shippers will correct a bad zip code and get the package delivered. There will be a charge on your weekly shipping invoice for the correction.

(Continued from Page 4 - You Have A Dirty Database!)

If you don't correct the error in your database, you will be paying for the correction each time you ship, and that can be up to \$10 per package!

There is software available that will allow users to verify and check addresses at the time of entry. This is the best time, (and least costly) to stop address errors from getting into the database. It helps to verify the correct spelling of the street, "did he say Vine Street or Fine Street?"

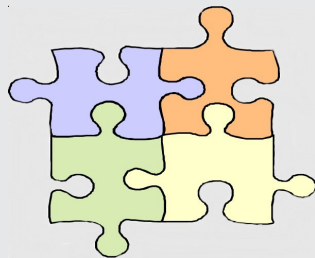
It verifies the zip code is correct. (Have you ever given someone you home phone or home zip code instead of the work number by accident?) Some of this software can also be hooked to your website to validate the customer or prospects information at the time of entry.

Plan ahead and get the list cleaned up, and an accurate count before you print your newsletter or direct mail piece. No need to print more than you really need. A clean mailing list will save printing and mailing expenses and increase your response rates.

Record Typing - Two Cases Studies

by

Richard Cluley



Record Typing in GoldMine is a very useful facility, but it has to be admitted that it has not been introduced to the product without some pain. Even now, there are idiosyncrasies that make it tricky to use. That said, the two examples outlined here have made GoldMine very useful to the clients in ways that would not have been achievable before. The article sets out the two case studies, and explains where the Record Typing was used, and how it benefits the client. In the final section, I have summarized the key lessons I have learned on how to make it work well and reliably.

Client 1- Manufacturing for Construction

The client manufactures materials, treatments and solutions for the construction industry. They have been GoldMine (from 4 – 6.7) Standard Edition, but wanted to upgrade to the Corporate Edition to gain the benefits of SQL etc. The new system was increasing the user count from 5 to 20.

As a result of the way their products are sold they need to keep track of two very different types of "Record":

- Projects – such as a Car Park, Bridge, Culvert or a major road building project to name but a few. Each of these projects raises the requirement for the client's products, and several companies may be bidding for the same project, all using the products sold by the Client. Attempts in the past to use the Opportunity Manager for this part of the process had been frustrated by its limits on customization.
- Contacts – such as Building Contractors, Architects, Chief Engineers, etc. These are the people who will actually buy or specify the product for a given project.

Since rolling out the solution, another division of the company has required a third type – "Contract" as they offer services as well as the products. I will not go into that here as it will only confuse.

The two main record types have very different data requirements, but with some significant overlap. There are some complex "security" requirements controlling who can see which records, and GoldSync was a key component of the solution. The Marketing people had developed a screen design for the Contact records that they were happy having been the only users for the past 5 years or more.

Benefits

- ✓ Far more data is stored for a Project than was possible before.
- ✓ Security of Project data is easier to manage (record Ownership) so that Sales Representatives only see the Projects they are supposed to see.
- ✓ Details Plus can be used for the one or many Products specified for each Project.
- ✓ Contacts associated with each Project can be linked to the Project via Referrals.
- ✓ Crystal Reports can give complex analysis data on Projects, Products and Contacts to Directors who do not need detailed database knowledge.

Client 2 - Mortgage Broker

The client is a successful Mortgage Broker, who has 8 years of using GoldMine (SE), and they have recently upgraded to PE. They have taken real advantage of the Record Typing functionality to offer several Record Types. The use of record types has permitted the storing of more structured data than is possible with Details Plus (an excellent product but one limited by GoldMine's data structure):

- Contacts – Customers, Prospects, Lenders etc.
- Mortgages – various regulatory requirements, trigger dates and financial measures are stored in these records.
- Insurance Policies – various specific regulatory requirements, trigger dates and financial measures are stored in these records.
- Investments - various specific regulatory requirements, trigger dates, and financial measures are stored in these records.
- Pensions - various specific regulatory requirements, trigger dates, and financial measures are stored in these records.

Using SQL, Organization Trees are maintained to collate the various policies etc. held by a customer into single trees "owned" by the customer. Crystal Reports give very detailed summaries of key business data while assisting in the fulfillment of stringent regulatory requirements.

(Continued on Page 6)

Benefits

- ✓ Far more data can be stored for each Record Type than was possible before without cluttering up the screen with irrelevant fields or multiple screens and tabs.
- ✓ Crystal Reports can provide the Regulatory Reporting very easily owing to the easy segmentation of the data.
- ✓ Marketing can be more easily and accurately targeted – whether it be for particular promotions and offers or to particular types of customer (Buy to Let versus Owner Occupiers for example).
- ✓ Fewer mistakes are being made in entering the data due to the screen layouts being more easily tailored to the Product being displayed at the time.

Lessons Learned

Some of these points will appear obvious! So obvious that I had to ignore some of them, and learn the hard way to prove how obvious they were!

1. Be very thorough in the design process – particularly when identifying the common data between the Record Types. This makes designing the screens much easier, and permits sensible 'overloading' of the fields while keeping the overall User Defined Field count down.
2. In CE/PE be very careful in allocating the Key Fields, and the other indexed fields - doing this poorly can almost cripple the system; doing it well makes it easy to use. In the first Case Study, we got this wrong the first time, and had some heavy use of Global Replace to put it right.
3. Design and test the Views (Main, Fields Tab and GM+View) **before** implementing the record types.
4. Design the View with the most shared Fields first, then clone it to create the others.
5. Where there are shared fields keep them in the same place on each view to aid the users. Position the other fields in zones that collect fields of similar type (e.g. all Financials together).
6. Make use of sensible color changes to emphasize key data and views.
7. Put a clear and bold label on each View to declare which it is.
8. Train, train and train again on the use of Rule Based Selection – if I could disable the View selection local menu for non-master users, I would! (FRS developers please note).
9. If you are using PE then use Wide views, and forget the use of the Fields tab altogether. Remember that in PE you can locate/search data in the Search Centre using any of these fields, and not just the Key fields.
10. When you create the Record Types themselves make sure that the Default Record Type is chosen early on,

and try not to change it. In both case above, we have used a discreet Default Type which is clearly displayed as "Incomplete" data. This has allowed extensive use of the "Required Data Entry" setting on the core Record Types. It also requires effective management to make the most of it.

11. Post information of the use of the Record Types in the Knowledge Base (users will be pleased that they can check without owing up to not knowing).
12. Implement New Record Layout for the key record types, and add them to the Taskbar (needs a macro) - this produces fewer mistakes, and facilitates Required Data Entry.
13. Document the design very thoroughly. Altering things while developing is easy, but woe betide a change made later on without full awareness of its effects on reports and business processes.

Tips, Tricks & Things

GoldMine Workstation Install

by

Alex Wotke



I have a tip for you on the GM Workstation install.

An easier way to get the minimum install option, if you can't see it, is to remove the App path for GMW.exe from the Registry:

`HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\App Paths\gmw`

Once this is removed you always get the Minimal Install option.



E-mail Signature Template

by

Gene Marks



In GoldMine you can easily set up an E-mail Template with your signature line, and use this for all of your e-mails.

- * Go to the Document Center (click on the Write button)
- * Right click on E-mail Templates, and choose New
- * A blank e-mail template will open
- * In the subject line type in what you want the template to be named, i.e., "Genes Signature"

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Tips, Tricks & Things

(Continued from Page 6 - E-mail Signature Template)

- * In the body of the e-mail enter two or three lines and type in your e-mail signature, i.e. (don't be afraid of HTML)

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- * Click on save template (the disc icon in the upper left corner)
- * If your alerts are on a alert box will pop up, click okay
- * The Mail Merge Property Box will pop up, and click on Cancel as you will not be merging this template
- * Right click on the template itself, and choose Set as Default and then choose New Message
- * Repeat the process for Reply, and Forwarding Message
- * Close the Document Center, and each e-mail you create will now have your signature on the bottom

QDA

by

Bob Taylor



For several years now, I've been offering an alternative to GoldMine's Automated Processes. It's called **Q**uery-**D**riven **A**utomation, and is implemented using the 3rd party product **GoldBox**.

Compared to GoldMine's APs, QDA is a radically different approach. There are no Track records...in fact, there are no Tracks. There are no Preemptive Events. Strictly speaking, there are no Sequential Events, either, although we do tend to organize things as if there were.

What we do use are:

- **Actions** – roughly the same as GoldMine's Events, but there's nothing comparable to the "pseudo-Events" in GoldMine..., things like checking to see if the Contact has an E-mail Address. All the Actions in QDA are "real" actions, involving making a field edit, or scheduling an Activity, or attaching a new record to one of GoldMine's Tabs, or sending a letter, or...
- **Conditions** – these replace GM's Triggers, and also its Preemptive Events. Each Action has its own set of Conditions, which we turn into a Query. For Action X, we run Query X. The Query returns a list of GoldMine Contacts who are **currently qualified** for Action X. So, we perform Action X on those Contacts.

It really is just about that simple.

We use a variety of capabilities within GoldBox to accomplish these Actions, and then we tie all the Queries and Actions together into an Automation Q-file script. Finally, we use Windows Task Scheduler to run that script at the proper times.

Most folks like to have some visual evidence of what is/has been happening with automation. GoldMine gives you the Track records, but they really don't tell you much, in many cases. So QDA includes creating a User-Defined Detail Tab for each Process. Each Action that's performed generates a Detail record under the appropriate Tab that gives all the information you might want to see. This means you have a full record of everything that's happened, in chronological order. If preferred, these records can be stored in GoldMine in such a way that GoldMine will not display them, but a highly secure GoldBox View will.

Other benefits of QDA include:

- **Far more power available in the Conditions.** A single Query can handle more Conditions than the longest, most complex AP Track, and it searches the entire database all at once, not one record at a time!
- **Self-documenting.** In addition to the inherent self-documentation of the Actions and Queries, I've put together a collaborative Views Set. My client and I can both work in the same "space", and the result is a database documenting exactly how the automation was developed.
- **Provides a venue for other kinds of automation.** Although the major purpose of QDA is Contact automation, there is nothing to stand in the way to adding other types of automation into the same script. For example, use GoldBox's query to Excel capability to prepare regular internal reports, and file them to specific network folders.

Tabs

by

Gene Marks



Here is an easy tip for the tabs in GoldMine Premium Edition!

- * In previous versions of GoldMine, if you wanted to move your tabs, you had to go through your Preferences and rearrange the order. Additionally, you could not move any custom tabs.
- * In GoldMine Premium Edition, you can "Drag and Drop" all the tabs into the position you want them.
- * You can also still move the tabs as you did in previous versions of GoldMine. Just click on the down arrow with the bar above it to the left of the tabs and choose customize.
- * The Display Tabs screen will pop-up which will allow you to Choose/Remove/Move tabs as in previous versions of GoldMine.

This is a big improvement over previous versions of GoldMine.

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