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## Are You Saying NO To A GoldMine Upgrade? How to Stretch GoldMine's Utility

by

**David Brydson**



You have been dutifully notified of the GoldMine upgrades available. You probably have been told that FrontRange will no longer support your version of GoldMine. That is sufficient for some of you to make the change. Yet, others say 'No' to an upgrade. You agonize over your company's situation, and your inability to help management see the logic of an upgrade. What can you do to help move the company forward and avert the coming problems of an outdated version of GoldMine? Read further.

### Stranded Companies

Most companies count on their GoldMine VAR's ability to keep them out of trouble. They don't care what kind of magic the VAR must perform to get, and keep, them up and running. They are sure the VAR can. After all, most VARs have demonstrated exactly that over and over again. What most companies don't know is that the VAR's bag of tricks shrinks to a fraction of its previous size once an OEM ceases to support a product. How can a bridge be built for these stranded companies to allow them to use the software they love, and rely upon?

### Still Works

Companies cannot understand why they should upgrade when the software they have works "Just fine, thank you." They are very happy with what they have. They don't see that the new version offers them anything more than they have now, or need. After all, it's only a contact manager, right? They are deaf to new features as long as the software continues to do what it always has.

### Never Going to Change

Other companies appear to have thrown out multiple anchors to be sure they never move from that spot. Their employees may make any change absolute torture for the business owner, painful enough give up on changes. Or, they may find the new software change-over and training so disruptive to business that they intentionally decide to minimize any changes.

### Not Worth It

A few companies have, or will, go through a detailed analysis of the newest version of GoldMine and their current version, and come away with the conclusion that there is not enough ROI for them to pay for the upgrade. Yes, there may be some new features that interest them, but in the end there isn't enough there for them to change.

### They Will Have To Change Anyway

Every one of these companies knows that at some point they will have to make a change. Unfortunately, some of them will move away from GoldMine to another product, abandoning a considerable investment of time and money by their company. In that step they lose a wealth of contact history and customization, and they probably will not consider the true cost of that abandonment before they make the decision to change.

( Continued on Page 2 )

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 information contained in 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. Should you find an error, it would be nice if you e-mailed me so that I may print the exception in the next issue of this newsletter.

All articles are freely contributed by their author, and no compensation is given for any article published in this newsletter. 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@DJHunt.US**

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 a png format or jpg format.

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

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

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## A Real Reason to Upgrade

What do all of these companies want? All of them want to operate their business more effectively, more simply. Only they haven't been given a strong enough reason to make a change. If a GoldMine upgrade is tied together with other software, and the combination gives a huge improvement in effectiveness, that may be sufficient reason to change. Another option is to add BBM to an existing install of GoldMine, since the software works with all SQL based versions back to version 5.7. This can help reduce the cost of upgrading the system and add the ROI needed to justify the expense while still providing much-needed functionality.

## A Small Business Revolution

No matter where you go, software companies are touting their small business software, but a little research into these software packages turns up some very expensive solutions - more expensive than most small businesses can handle. Without a doubt, some of you will not be able to afford our suggestion, but many businesses currently using five ( 5 ) or more seats of GoldMine now will be able to benefit from it. Our recommendation gives small businesses the opportunity to integrate all their operations into a single database.

## Dump Piecemeal Business Systems

Over the years, a lot of software has become available which could be assembled into partial business systems, doing some portion of the business more effectively. Many have created special Access or Excel implementations to help them become more effective. There is nothing wrong with what they have done, but none of these "partial solutions" create a complete business system. None of them create a central database, into which everything goes, and from which everything else is drawn. Our recommendation does create such a database.

## Unify Into a Single Business System

In the simplest of terms, our product, BestFit Business MGR (BBM), integrates with GoldMine and accounting software to create an End-To-End business system. Once integrated with GoldMine and, for example, QuickBooks ( or MAS 90/200 ) BBM has inherent in it ( A partial list ):

- All of GoldMine's features
- Marketing Campaigns
- Accounting Viewer ( Look, don't touch )
- Sophisticated Product/Service Pricing Tools
- Quotations and Proposals
- Click-and-Accept Order Entry
- Contracts
- Projects
- Work Orders
- Ticketing
- Knowledgebase Creation ( dynamically )
- Use of Contractors
- Completed Work Approval
- Order Approval
- Invoice Approval
- Export to Accounting ( per Accounting Rules and Approval )
- 250+ Management Reports
- Integration with Word and Excel ( with their features )
- All of QuickBooks' (or MAS 90/200) features

## PocketMine 4.2 Has Been Released



by

**David Ribera**

The version of PocketMine that is able to manage the GoldMine Email and multiple calendars from the PDA was launched at the end of January 2009.

### Minimizing 'New' Software Resistance

BestFit Business MGR (BBM) operates within GoldMine. Your users see the same GoldMine interface they have always seen. BBM places a floating Dashboard in the screen from which users select actions, and which displays important data. Both global and context-sensitive information are available from the dashboard. Your logos are inserted into documents and reports using a simple setup utility.

### Simplifying Customization

With a program this complex, setup would be very time consuming if every one of the options had to be selected. We did not want to lose the power of ultimate configurability, but we also did not want to saddle you with a blank slate, so we ship the program with most of the options pre-selected. Using the normal install sequence, the program works out of the box. If your business needs a change in setup, you have the ability to choose different options.

### Improving the ROI

The value of a complete business system for a small business can be considerably higher than an update of a CRM. Justifying the expense may be much easier. Other small business systems software cost more than the GoldMine-BBM combination. When you factor in all the additional software and equipment they require, the cost moves to several multiples of the GoldMine-BBM combination. Check the numbers yourself. Visit [www.BestFitBusinessMgr.com](http://www.BestFitBusinessMgr.com) for more details.

### A New Website for GoldMine Users

by



**DJ Hunt**

All the GoldMine tools you will ever need.

Did you ever go looking for GoldMine compatible software, and come up with nothing?

We did too. Some of the places we looked no longer exist. We even went to some of the old powerhouses, only to discover that they no longer carried that application. Well, it happened so often that David Brydson decided to do something about it.

If it works with GoldMine, or is related to GoldMine, they will carry it.

They offer more GoldMine compatible products than any other site, and they are actively looking for more. If you know of a GoldMine compatible product that is not on their site, let them know, so they can add it to their list.

Don't hunt all over for GoldMine compatible software, go to ONE PLACE! Save time, compare products, and get what you need right now.

Go to [www.TheGoldMineStore.com](http://www.TheGoldMineStore.com) and see for yourself



Here is a list of the features that you can find in this software:

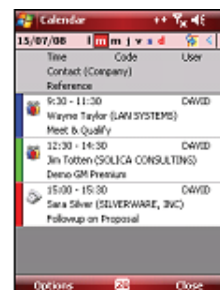
### .NET 2005 and SQL 2005 Technology

The PocketMine Client is being designed under .NET 2005 and Pocket SQL 2005. This database engine allows to handle from the PDA device tables of thousands of records at a lightning speed. If your GoldMine database is beyond 3000 records, forget other solutions and go directly to Pocket SQL.

### Multiple Calendars totally synced with GoldMine

With the multiple calendar option, you can view/manage other people's calendar from the PDA or multiple calendars at the same time, subject to your administrator permissions, of course.

Colour code is enabled, allowing to mark different colours for different type of activities.



### Completing activities and sending to History

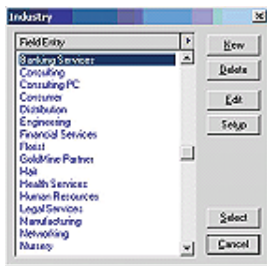


( Continued from Page 3 - PocketMine 4.2 Has Been Released )

In the same way that users can complete and activity and send it to GoldMine's History tab, it is possible to do the same in PocketMine. The program is a perfect tool to schedule activities to the people on the road, and get back the activity reports once they complete the activity in the PDA

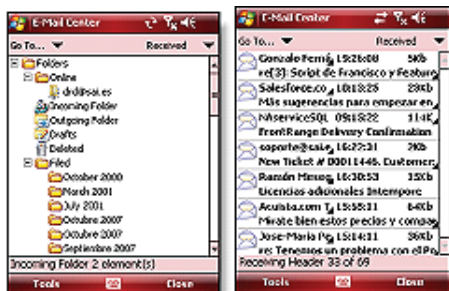
### Lookup lists fully synced

GoldMine F2 Lookup list is synced from GoldMine to PocketMine. That means that data entry works in the same way as in GoldMine, speeding the process, avoiding typos and entering data in the correct way.



### Email Center integrated in PocketMine

This is the most remarkable new feature. New Email Center enables to Send / Receive / Reply emails from the PDA and once synced those will be transferred directly to the GoldMine Email Center.

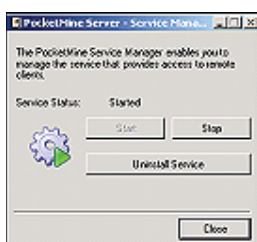


All email interactions made from the PDA will be stored in GoldMine. You can view all email history from the contact's history tab in the PDA.

Preview of messages before downloading is also implemented, allowing spam deletion and the deletion of unwanted messages before download to PocketMine.

### Faster and Safer Sync enables offline work

The new sync in PocketMine 4 compresses and encrypts the data packages before sending via 3g, GPRS, UMTS or Active-Sync using the TCP/IP protocol. PocketMine Server installs as a Service, and attends all incoming PocketMine Client sync connections.



### Just send the data you want to the PDA

Each PocketMine user can have a sync filter in place, avoiding to have unnecessary data in its PDA. The setup of filters works in the same way of GoldMine, and deletion filters can be applied too.

### Touch technology to scroll and open GoldMine records

This new version brings the popular touch technology that enables to scroll and tap to get the information with the finger. This feature is very handy when you want to scroll your screen panel without using your PDA pencil.



### GoldMine Premium 8.50

by



DJ Hunt

Finally, I can announce GoldMine Premium 8.50 is expected to be released in April 2009. You will be able to see all of the exciting new features in GoldMine Premium that we have been testing for you for the last 6 months. Additionally, in preparation for the release of GoldMine Premium 8.50, FrontRange has announced low upgrade pricing for those of you who are ready to take the plug in the month of March in anticipation of the GoldMine Premium 8.50 release. Those of you already on GoldMine Premium please make sure that your Maintenance Plan is active so that you don't miss this update. Before I tell you the upgrade pricing, however, let me tell you a few of the exciting new features.

### End User Requested Enhancements

#### E-mail Center Enhancements

You asked for it, and you got it. For years end users have been asking FrontRange to enhance the E-mail Center, and FrontRange has listened. You now have a much more professional look and feel to the E-mail Center, and your users will have no reason at all to even consider using Outlook any more.

Oh, and did I forget to mention that GoldMine Premium 8.50 now has support for SSI and IMAP?

#### Relational F2 Lookup List

You asked for it, and you got it. For years end users have been asking FrontRange to permit the use of Relational

( Continued on Page 5 )

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F2 Lookup Lists, and now you have it. Let's say that you kept your Account Representatives in the Key2 field, however, representatives are assigned to various States. In GoldMine Premium 8.50, you can have the F2 Lookup List on the Key2 field tied directly to the value in the State field.

### Exposing More Detail Fields

FrontRange saw that many users were utilizing Details Plus to expose more ContSupp fields for Details, and finally decided to make some of these fields available without the need for Details Plus. That is great that FrontRange is exposing more fields, however, I feel that Details Plus still fulfills the need, and better. So yes we have a new feature, but you'll have to judge as to the value.

## FrontRange Introduced Enhancements

### Universal Search

You can now find anything anywhere that it exists within your GoldMine Premium 8.50 database or attachments. Remember how you lost the search capability through GoldMine Notes when you went from Standard Edition to Corporate Edition or even Premium Edition? Well, now you have it back, and more.

### Case Management

What was once an entry level Help Desk solution has now been enhanced with more tools and functionality. If you weren't using the Case Management ( Service & Support Module ) module before, you might want to reconsider your position. You know what Mikie says, "Try it, you'll like it."

### Compatibility Changes

GoldMine Premium 8.50 will be compatible with Server 2008 32/64 bit, SQL Server 2008. Additionally, the links have been rewritten using Visual Studio Tools for Office so you should see an improvement in your links to Word 2007, Excel 2007 and Outlook 2007.

### Backend Changes

GoldMine Premium 8.50 will be delivered with SQL Server 2008.

So now the ultimate question, "What's this going to cost me?". For those willing to upgrade from Standard Edition or Corporate Edition during the month of March, before the release of GoldMine 8.50, the list pricing to Upgrade from:

Standard Edition: **\$400.00** per seat  
Corporate Edition: **\$299.00** per seat

For those wanting to wait until April to upgrade from Standard Edition or Corporate Edition with the release of GoldMine 8.50, the list pricing to Upgrade from:

Standard Edition: **\$495.00** per seat  
Corporate Edition: **\$325.00** per seat

So that you are not blindsided later, Standard Edition users will also need to purchase the FrontRange Maintenance Plan ( Minimum Purchase 5 Seats ) at \$139.00 per Seat, while you Corporate Edition users will have to pay the prorated difference between your Maintenance Plan and that of GoldMine Premium 8.50.

What can I say, but: **It's a great time to jump on the Gold-Mine Premium parade wagon.**

## GM+Views/GM+Browser and SQL Reporting Services ( Part I )

by

**Paul Lewis**



When I was tasked with replacing a legacy CRM package that had been built by my company and was integrated completely with our accounting system, I knew I had a difficult project to handle. Our sales reps had used this legacy system for many years and were accustomed to getting all relevant information about their customer from one place. Since they did not have access to the accounting portion, special "ties" were built into the CRM to display that information for them.

When I first saw GM+Views/GM+Browser in GoldMine, I knew I had the potential to give the reps even more information than was available in our legacy system.

Using GM+Views/GM+Browser and Microsoft SQL Reporting Services, I am able to deliver live data from our accounting package to the sales reps without having to give up a license in the accounting package for each rep. Also, since the data is live, the reps get much more accurate information for their analysis than if it were having to be updated overnight. This is a win-win situation for all involved. Of course, this requires that you have your GoldMine database in Microsoft SQL Server and that you have installed SQL Server Reporting Service, which comes included with SQL Server 2005/2008.

Microsoft SQL Server Reporting Service is a very powerful tool. It is simple enough for one to begin building reports with little training and complex enough to take years to master. It's also powerful enough to build the most complex reports you can dream up. Since it is such a robust tool, I will only be able to scratch the surface in this article. There are week-long introductory courses available and many books on the subject if you wish to dig deeper into the offerings of this component.

The example I plan to use would not be very useful in the real world, but it will show you the basics for building more complex and useful reports. Frankly, the hard part is getting to the data in the first place. Once you have that, the report is basically drag and drop. To start, I'm going to build a report that will show simple data from the GoldMine database. Suppose you want to show a list of all prospects that are in the same zip code as the currently displayed prospect. Assume you want to list the company name, address1, address2, city and main phone number. The first step is to write your SQL query that will return this information.

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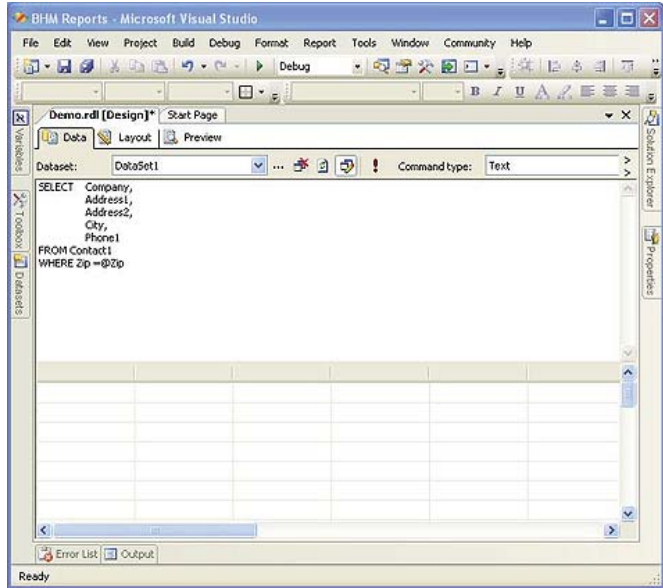
Your SQL query would be as follows;

```
select Company,  
Address1,  
Address2,  
City,  
Phone1  
from Contact1  
where Zip = @Zip
```

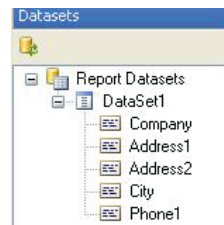
When the query is run, @Zip will be the zip code for the currently displayed prospect.

When SQL Server Reporting Service is installed, it includes the SQL Server Business Intelligence Development Studio or BIDS. BIDS is a scaled down version of Microsoft Visual Studio and is where you will create your report.

Here I've created a new report called Demo. We start with a completely blank pallet and begin building our report.

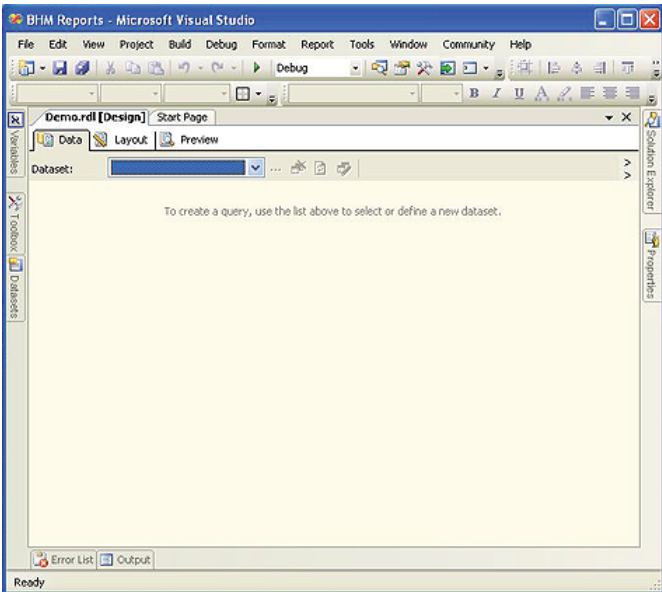


Notice the **Datasets** tab on the left of the screen. If you click on this tab, you should see the Dataset listed with the fields you specified.

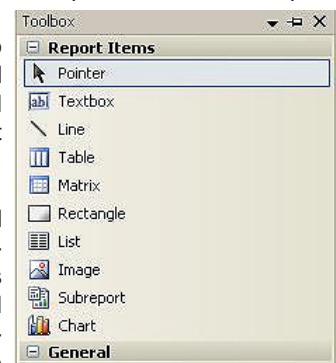


Now you are ready to begin creating the layout of your report. This is a simple listing of accounts, so we will put the report in a table format. This will also make it very easy to export to

Microsoft Excel. To do this, you'll need to click on the **Layout** tab at the top of the **Demo.rdl** report.

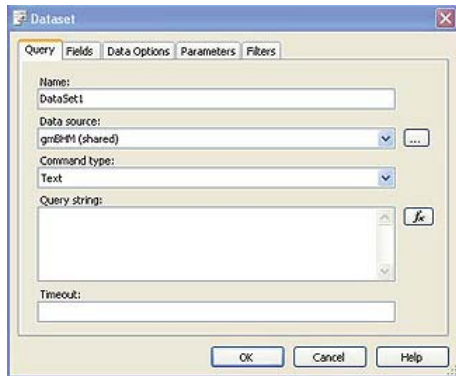


Then click on the **Toolbox** tab along the left where you found the **Datasets** tab. This will show you the various report items available to you.

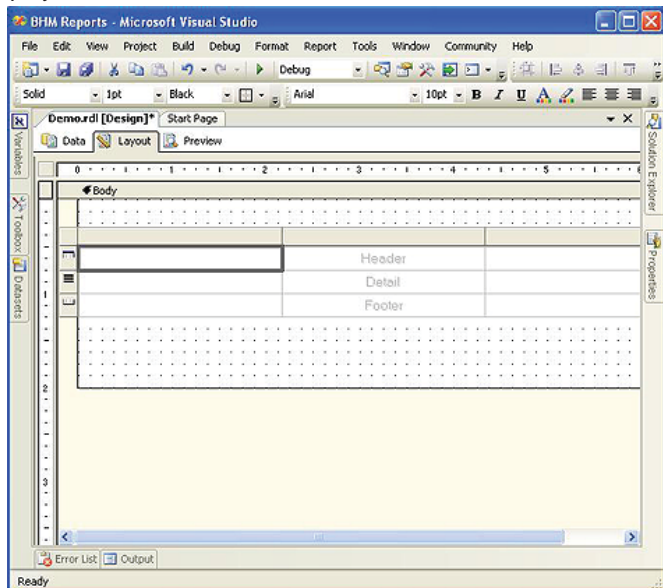


Just grab the **Table** item and drag it onto the design surface. The table only gives you 3 columns initially, so we'll need to add columns to display all of the data we have

To begin, we create a new dataset using our query from above. To do this, click on the drop down arrow in the Dataset box. The only option will be **<New Dataset...>**. Click on this option and the following screen will appear.



I'll leave the name as **DataSet1**. I've already created a **Data source**: by clicking on the ellipses button to the right of the Data source box. I'll leave the **Command type**: as **Text**. Now we just enter the query above right into the **Query string**: box. Leave the **Timeout**: field blank and click **OK**. Now your Report should appear like this.

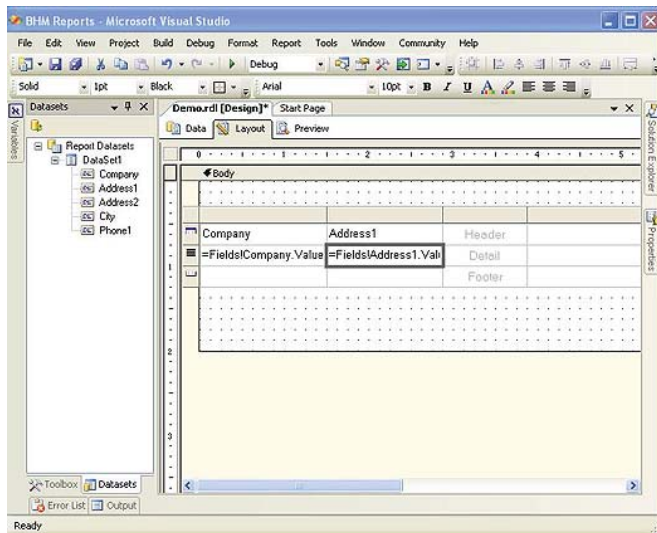


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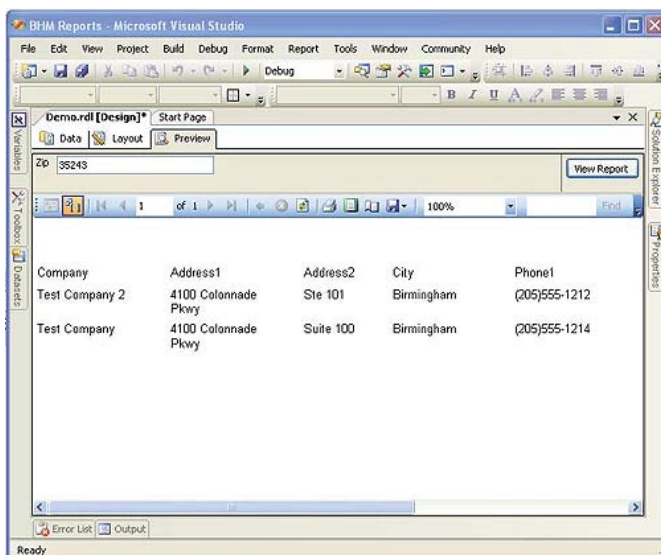
selected. You'll also notice that there are 3 rows. The top row is the **Table Header**, the middle row is the **Table Details Row** and the bottom row is the **Table Footer**. To add a column to the table, just right-click on one of the top tabs of any column, and click **Insert Column to the Right**. Since we want to report 5 columns of data, repeat this step. The columns can be resized just as you do in

Excel.

Now it's as simple as opening the **Dataset** tab again and dragging the fields onto the **Table Details** row. You'll notice that BIDS assumes you want the column header to display the field name, and it automatically inserts it. If you had the field name as **CompanyName**, it would assume the header should be Company Name and automatically insert the space between the **y** and **N** for you, ( notice it does this with **Address1** making the header name **Address 1** ).



Once you have all of the columns populated, all you do is click on the **Preview** tab and supply the **Zip Code** and the report is displayed. Once you have the report complete, you can go



back and apply any formatting you want to make the report more presentable, but the hard part is done!

In my next article, I'll show you how to take this report and put it into GoldMine so that it will automatically take the Zip Code from the currently displayed prospect, plug it in as the parameter of your SQL Query and report the results under the GM+Views tab.

## Tips, Tricks & Things

### A Quick Google Search for any GoldMine Contact



by

#### Gene Marks

The GM+View/GM+Browser can display relevant information about the active contact record from just about any web site out there, but sometimes confusion can occur when a contact has a common name.

This GM+View/GM+Browser uses email address instead of name to identify a contact.

To set this up go to **File > Configure > GM+View or Web > Setup GM+View...** in GoldMine Premium Edition. Note: You do need Master Rights to do this.

Then click the **New** button.

Type in the Template name, e.g. **Google Contact Info**, then click down into the white space below, then click on the **<H>** button in the upper right. This allows us to tell the view what we want to display.

After clicking **<H>** you'll see some HTML code... Highlight all of it and delete it.

In its place enter the following ( DO NOT Copy & Paste from the pdf ):

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
  <head>
    <!--
```

This GM+View Template is provided as part of The Hacker's Guide to GoldMine series of books,

and the author is providing this without guarantee or additional support.

```
-->
  <meta http-equiv="Content-Type"
content="text/html; charset=iso-8859-1" />
  <meta content="MSHTML
6.00.6000.16546" name=GENERATOR>
  <title>Google Search</title>
  <SCRIPT language=JavaScript>
  <!--
  function redirect()
  {
  window.location = "http://www.google.
```

```

com/search?source=ig&hl=en&rlz=&=&q=&lt;&lt;&amp;Em
ailAddress&gt;&gt;&btnG=Google+Search&aq=f"
}
setTimeout ("redirect();", 0000)
// -->
</SCRIPT>
</head>
<body leftMargin=1 topMargin=1 rightMargin=1>
</body>
</html>

```

Then choose **Save & Exit**.

Click **OK** from the **GM+View Tab Settings** screen.

Now, within the GM+View/GM+Browser you can quickly find out more about your contact!

## Editors Note

I cannot say this enough. This newsletter is possible based on your article contributions. Without those I would have nothing to publish. I would like to thank Paul Lewis, a first time contributor, for his SQL Reporting article. I would also like to thank are regular contributors. I can't forget them now, can I?

We cannot put all of the weight on our regular contributors. We need new articles from new contributors for every issue.

Please consider writing an article for one of the upcoming issues, and share your GoldMine knowledge with over 200 GoldMine Partners, and over 1,500 Subscribers in my pool alone.

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### Are you saying NO to a GoldMine upgrade

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### PocketMine 4.2 has been released

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