

Editor

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New Web Based Desktop User Interface

Finally a web based user interface that mirrors the GoldMine Premium user experience. On a laptop or desktop computer, PC or Mac, your users can connect live to your central GoldMine Premium data, connecting quickly through a web browser such as Internet Explorer, Safari, Firefox or Google Chrome.

High Performance and Scalable Technology

wMobile Phone and Desktop PC Edition will scale to support 100's of users on a single web server. wMobile's light weight web clients support worldwide access to GoldMine from a single web server location.

No Remote Installations

Your wMobile users are up and running in seconds with no software to install. Just add a new web address to your web browser and you are up and running.

No Monthly User Charges

wMobile is an inexpensive one time purchase giving you a perpetual license to web enable your remote CRM users.

New Email Integration to GoldMine

wMobile can be configured to automatically link email sent to and received from contacts to their GoldMine Premium CRM contact interaction history. Remote users can send and receive email using any smart phone or web based email system without plug-ins or any user action to add the email to the central GoldMine contact history.

(Continued on Page 2, Column 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.

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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.

I am your editor:

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GoldMine is a registered trademark of FrontRange Solutions.

(Continued from Page 1 - Introducing wMobile 2.1)

New Support for Multiple GoldMine Contact Sets

For GoldMine Premium systems using multiple contact sets - wMobile now supports users switching at will between contact sets.

New Dedicated Google and LinkedIn Tab

Show Google satellite map, directions, blog or web searches for the currently viewed contact. Check to see if the current contact is in your LinkedIn network.

New Automated Process Support

wMobile users can now attach Automated Processes on Contacts to automate marketing and administrative tasks using GoldMine's powerful Automated Process feature. wMobile also shows the processes tab on contact records to allow users to manage existing tracks.

New Filter Based User Security

Limit user access to contact records by simple standardized filter rules that do not require complex ownership and curtaining configuration.

New Relationship Tree Handling

New Support of GoldMine Premium Relationship Trees in both the Phone and the Desktop PC Editions of wMobile.

Social CRM The Next Level of CRM

by

Neil Saviano



Traditional CRM is going through changes that can almost be classified as a renaissance. The process of gathering, processing and using customer and prospect information is being augmented by the power of social CRM.

What is social CRM and how can companies use it? Explanations abound – but here's one that helps to clarify it:

Social CRM is the use of social networking to connect and collaborate with customers and prospects in order to help them overcome business challenges. Through social networking sites such as Twitter, Facebook, Linked In, YouTube and blog posts, offices can do the following:

- Create compelling attractive content that connects them to customers and prospects and helps them be found on line!
- Start and share in conversations with customers and prospects that identify business challenges, and offer content that induces taking action.

Conversations need not only be between companies and their customers. Social media sites offer the opportunity to share in conversations between customers and their customers, gathering valuable information to help companies make positive changes. All of this new interaction helps bring relationships

(Continued on Page 3, Column 1)

to an entirely new level, and can result in a competitive advantage.

Here are some relevant insights from Boston-based social media and public relations consultant, Rachel Poor:

"Basically, I see Social Media as a powerful tool for companies to gain important insight into the needs and wants of their customers. When activated correctly, Social Media becomes a 'push' and 'pull' channel, meaning you can 'push' information about your company, services, products etc and you can 'pull' information from your customers and competitors. We've all said at some point 'oh to be a fly on the wall' social media allows us to do just that and there is valuable insight to be gained". More from Rachel can be found at www.rachelpoor.com

Rachel explained that it's important for companies to make the distinction between personal and business social media. Facebook is a prime example, as one normally associates this media with the chronicles of personal daily activities.

Business Facebook sites are one example of social media in business that is exploding. In essence they are interactive websites offering a platform to talk about products and services while inviting interaction from customers and prospects. A good example of a business Facebook site that mirrors a website can be seen at www.facebook.com/dell

Activity by companies on social media sites not only form connections to customers and prospects and drive them to their sites, it also helps positioning with search engines to help drive even more traffic to their websites. Among social media sites, YouTube is emerging as one of the biggest search engines. Links from social media sites to YouTube videos, or even more viral videos on a dealer's website, help to draw attention. According to Christina Skillman, President of Boston area based Skillman Video Group:

"Using video is becoming more and more common to help express ideas about your company-who you are-what you do-and how you are different from others". Skillman goes on to say, "all social media sites are video friendly and it helps to draw attention and increase the number of followers".

In fact, at Skillman Video Group they have a new approach called Social Video Marketing. This is another way for companies to help drive traffic to their sites through social media and strategic linking, and turn casual web visitors into viable prospects. Dealers can find out more about this integration of video and social media at: <http://www.skillmanvideogroup.com/wordpress/services/social-video-marketing>.

It's important, however, to point out that traditional CRM isn't going away! Its strength in the following areas will remain and will always be necessary to drive sales and marketing programs:

- Managing activities to assure that sales and marketing tasks are being carried out.
- Building a database of information about customers and prospects for internal use to help drive sales and marketing programs.
- Making it easier to access customer and prospect information.

- Managing and tracking leads.
- Automating sales and marketing processes and campaigns.
- Increasing then accuracy of sales forecasts.

The synergy between traditional CRM and social CRM offers companies an exciting new level of interaction with customers and prospects; a level that will certainly result in deeper customer penetration and increased new customer development. CRM software programs are now including the capability to link to social media sites and blogs from customer and prospect contact records. The combination of information gathered from traditional methods, and the information gathered from social media sites help turn action to dollars.

Editors Note

Is Social CRM for Everyone?

Mind you, this is my personal opinion only, but I don't feel that Social CRM will find a niche in the corporate world.

Many will argue this point. In fact, one of the founders of GoldMine, Jon Ferrara, has geared his newest productline, Nimble, in the Social CRM market fully believing that this is the wave of the future. Maybe he's correct.

Personally, I put Social Networking Lead Prospecting right up there with Cold Calling (one of my all time fun tasks - NOT!).

This reminds me of the CutCo Knife company tactics. They would hire kids off of the street to sell their knives on a commission basis. The gung-ho kids would sell to their family and friends (aka their Social Network), and then they had no one else to which to sell to so they quit. CutCo didn't mind. They just recruited a new bunch of kids and repeated the whole process.

Maybe, and I mean just maybe, Social CRM has a niche in the SOHO market. Beyond that, in the corporate market, I just don't see it happening.

What corporation wants their employees on Facebook, Twitter and LinkedIn all day? None of which I am aware.

Stonefield Query for GoldMine



by

Jason Okrepkie

Version 4.1 Released

New Features

- You can now define dashboards using the new Dashboard Wizard. A dashboard is a set of chart reports that displays on your desktop in its own window. These charts automatically refresh at an interval you specify so you can always see the most current data.

- Stonefield Query now supports Windows 7:
 - When you run a report, the taskbar button shows a moving green bar indicating something is happening.
 - You can now right-click a report and choose Pin to Taskbar to pin it to the taskbar; choosing that item in the taskbar launches Stonefield Query and previews that report (this obviously works best when Stonefield Query itself is pinned to the taskbar).
 - Stonefield Query report files, which have an SFX extension, now display a nice report icon in Windows Explorer. Double-clicking an SFX file launches Stonefield Query and previews that report.
- You can now create a desktop shortcut for a report. Right-click any report in the Reports Explorer and choose Create Desktop Shortcut. This will create a shortcut on your desktop with the same name as the report. Double-clicking this shortcut previews the report without opening Stonefield Query, which is handy if you just want to run one report without having to find it in the Reports Explorer.
- Usage statistics are now maintained for reports, and the new Usage Reporting function in the Tools menu allows you to report on these statistics. This allows you to determine which reports are actually being used, how often, and by whom.
- A new type of display for date fields is now available in the Field Properties dialog: "Month/Year". This displays the month and year part of the date, which the "Month" option formerly did. "Month" now outputs only the month part of the date, which is handy, for example, in cross-tab reports where you want to show the date in the rows and the year in the columns to compare sales by month and year. Reports you created prior to version 4.1 using "Month" are automatically changed to use "Month/Year" so they work as they did before.
- When you install a new version of Stonefield Query over an existing one, if there are any new or modified sample reports, a dialog appears telling you that and allowing you to select which of those to import. You can also choose the Check New or Updated Sample Reports function in the Tools menu.
- You can now configure how much memory Stonefield Query reserves for itself at startup. This is especially useful in Windows Terminal Server environments where multiple users run Stonefield Query on the same server at the same time.

Charts

- Multi-page charts are now supported. In the new Size/Paging page of the Chart Wizard, turn on Paging and set the number of points you want on each page.
- Linking, such as drilldowns, from charts is now supported. The Properties dialog for the Category (X-axis) field has a Link page that works the same as other report types. This allows you, for example, to display a chart showing sales by salesperson and click a certain salesperson to drill down to a report showing individual sales for that salesperson. Linking even works in charts displayed in a dashboard. To support this feature, a different preview window is used for charts. It has the same features as the preview window used for other report types but cannot use tabbed pages showing other report types, only other charts.
- Charts now use the Segoe UI font for text in Windows Vista

or later because it looks better, especially when rotated.

Cross-Tab Reports

- Cross-tab reports now support displaying the amount and/or percentage change between columns. The Display page of the Properties dialog for a data field has new "Show difference from previous column" and "Show percentage change" options. You can turn on one or both of these.
- You can now specify whether cross-tab reports include row and column totals using new options in Step 5.
- The Select only top option in a cross-tab report now applies to the totals for the first row field rather than the row field itself. For example, setting "Select only top" to 10 now displays the top 10 values rather than the top 10 alphabetically.

Other Features

- Emailing now supports SSL/TSL for SMTP, which means you can now email using Gmail or Hotmail accounts or other SMTP servers that require SSL/TSL. Also, emailing using MAPI with Microsoft Outlook as your email program no longer displays the dreaded Outlook security dialog.
- Certain characters that weren't allowed in the name of a report, such as a period, comma, question mark, slash, and so on, are now allowed. The only character you can't use is a backslash ("\").
- Certain characters that weren't supported in the body or subject of an email, such as "&" or ">", are now allowed.
- You no longer have to contact us if you have to activate the program on a different computer than it was originally activated on. Online activation will automatically activate this computer and deactivate the license on the other one.
- There's better support for adding images stored in your database to reports.
- Output to text, comma-separated (CSV), table, and XML files is now faster.
- Exclusion conditions now work faster than before.
- The Preview window now remembers the setting of the zoom option. If you run a report and change the zoom to 200%, the next time you preview a report, it'll be at 200%.
- The Ask At Runtime filter and report progress dialogs now always appear on top of any other windows so they can't get lost behind something else if you click on a different window.
- The Setup dialog has a new page (page 2) for contact information.
- The activation process is now simpler. Clicking the Click here to activate the program now link in the Welcome dialog (displayed when you're running an unactivated version) now displays the License Manager dialog where you can add as many licenses as you need rather than bringing up a Registration dialog that only allows one license to be activated.
- New templates are automatically imported when you run Stonefield Query.
- The OnSelect script for a report can now access the report using the Report object. This is useful if, for example, you want to change the default filter for a report when it's selected.
- You can now use the built-in RunSQL function in formulas.

(Continued from Page 4 - Stonefield Query for GoldMine)

- It's easier to work with the Dynamics tab in the properties dialog for Pictures and Rectangles in the Advanced Report Designer. You no longer have to enter values in 960th's of a inch; instead, you can enter value in inches or centimeters, depending on how your system is configured.
- File dialogs, such as those displayed when you output to file or export a report, now support Windows Vista and later features, such as search and recent places.
- The ask-at-runtime filter dialog now appears on top of the report progress window so it doesn't get hidden behind other windows.
- The new GetValueForParameter function is like the existing GetValueForField but allows you to specify the caption, data type, and size of the parameter being requested from the user.
- You can now filter on the Source Database field. This allows a report to drill down based on a data source. For example, suppose you have a cross-tab report that retrieves data from multiple data sources and it has Source Database as the column field. Clicking a specific data source should drilldown and run a detail report for that data source only, so the linked report has a filter on Source Database.
- The progress dialog that appears when running a report that retrieves data from multiple databases now shows the name of the database the data is currently being retrieved from and the number of records retrieved.

Keeping Users from Deleting Records

by



Alberto Diaz

How do you keep users from deleting records in GoldMine?

Though there are other levels of control, we will only cover 2 in this lesson. First is keeping users from deleting Activities created by other users while still being able to delete their own items.

As a user with **MASTER** rights, go to:

[Tools](#)
[Users' Settings...](#)

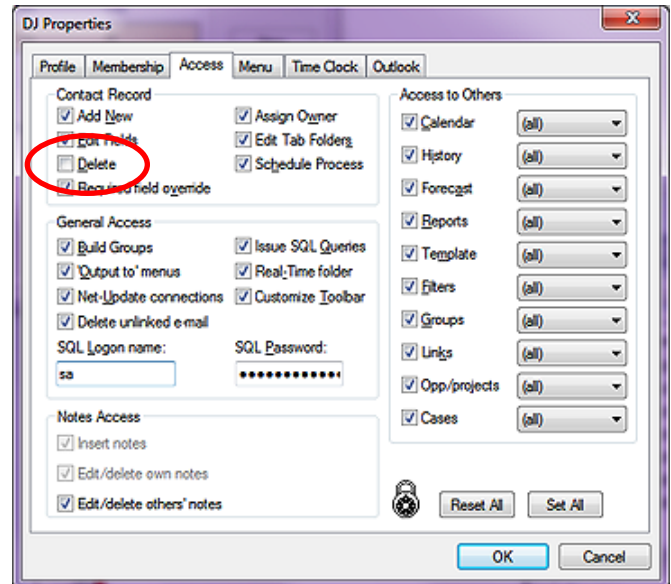
In GoldMine Standard and GoldMine Corporate that's:

[Files](#)
[Configure](#) ►
[Users' Settings...](#)

Highlight the user you want to restrict and click the **Properties** button. Once in the users Properties screen, click on the **Access** tab. Remove the check-mark next to the **Delete** option (refer to image at the top of the next column).

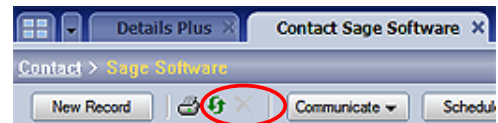
Many customers have found this setting to be too restricting, and would just like to keep users from Deleting entire contacts. Here's how to do that: As a user with **MASTER** rights, go to:

[Tools](#)
[Users' Settings...](#)



Highlight the user you want to restrict and click the **Properties** button. Once in the users Properties screen, click on the **Menu** tab. Scroll down to the **Edit** menu item and expand the folder. Click on the push-pin next to **Delete Contact** to change the color from green to red.

As an added bonus to the Premium Edition users, it removes the all-to-powerful red X in the contact window.



Enjoy!!

Editors Note

This is an excellent and often asked for solution, but there is also another piece to this that Alberto forgets to mention.

If you take away the rights of a user to delete a record then you **must** supply another way for them to identify the records that are no longer required such that an Administrator can Filter out these records and make the corporate decision as to whether they should, in fact, be deleted or just moved to, let's say, an archive dataset.

It is important that you establish some sort of Standard Operating Procedure for your organization if you are taking away the rights of certain users to delete records in your corporate dataset.

Google, Smart Devices & Companion-Link



by

DJ Hunt

I own CompanionLink Pro. I have an iPad, iTouch, and a Droid X cellphone. Also, for years I've had a GMail account.

(Continued on Page 6, Column 1)

So where is this leading?

I was getting darn sick of using CompanionLink Pro to sync to Microsoft Outlook from GoldMine, and the GoldMine Outlook sync never worked properly. Because of Windows Security it could not be done automatically as MS Outlook had to be opened before the sync began. Then, in turn, I would have to plug in my iPad, iTouch and then Droid X to synchronize those units with MS Outlook utilizing their individual software. iTunes for the iPad and iTouch, and Deja Office on the Droid X. What a PITA.

And along came Chet Marinos article last month **Using CompanionLink with GoldMine Premium v9**. What the heck, I read the article, and I thought that I would try it out. Now, I can say that I I don't have to do anything at all, any more on any of my devices. It is all automatic and hands free. Woo Hoo!

Step 1:

Set up CompanionLink Pro to synchronize a Filtered Set of GoldMine Records and their Calendars to Google GMail Contacts and Calendars.

Step 2:

Set up CompanionLink Pro **Auto-Sync** to synchronize automatically at defined intervals. I happened to have chosen 1 hour intervals, but you would have to determine what's best for your needs.

Step 3:

After the set interval has elapsed confirm that your Google GMail Contacts and Calendars have been updated.

Step 4:

Set up your devices to auto synchronize with Google GMail Contacts and Calendars:

- A. My iPad and iTouch had to utilize the same instructions which I downloaded from the web:

From www.SimonBlog.com:

Configure Google Sync on iPhone

Now, you should be ready to configure Google Sync on iPhone.

1. On your iPhone home screen, tap "Settings" application.
2. Next, tap "Mail, Contacts, Calendars"
3. Tap "Add Account...", followed by "Microsoft Exchange" (refer to Image 1 in next column).
4. In the Email field, enter the name of the Google account (refer to Image 2 in next column).
5. Leave it blank for the "Domain" field.
6. Enter your Google Account email address for the "Username" field.
7. For "Password" field, type in your Google Account password.
8. Tap "Next" at the top of your screen.
9. Next, a new "Server" field will show up. Enter "m.google.com".
10. Tap "Next" at the top of your screen again. You may be prompted with a warning message. Just "Accept" it (refer to Image 3 in next column).
11. Select the "Contacts" and "Calendar" for sync. Presently, the "Mail" option is not supported yet. So, only enable "Contacts" and "Calendar" (refer Image 4, Page 7, Column 1).

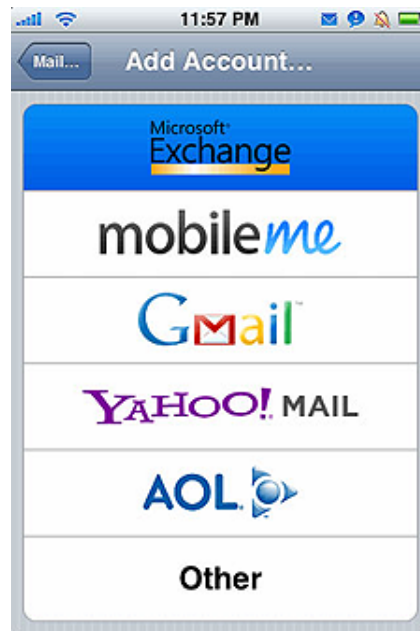


Image 1



Image 2

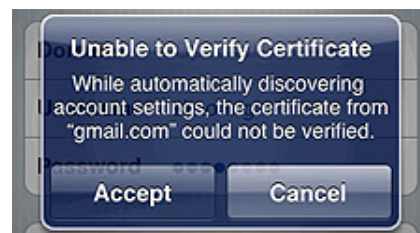


Image 3

12. Tap "Sync" to confirm the synchronization and then tap "Sync" again for the data loss warning (refer Image 5, Page 7, Column 1).

That's it. Google Sync should now erase all your Contacts and start synchronizing them from your Google account. So, if you go to "Contacts" on iPhone, you may find it empty. But don't worry. Wait for a while and you'll see the Contacts come up after complete the Sync.



Image 4



Image 5

- B. My Droid X, well that was even easier. As my Droid X is on the Verizon Service, they require that it be initially configured to your Gmail account. All that is required is that you go into **Settings | Accounts** and then click on your Gmail Account under **My Accounts**. Now comes the really difficult part, check, if not already checked, Sync Contacts, Sync Gmail, and Sync Calendar. That's all there is to it.

From here on out everything Synchronizes Automatically and hands free whenever your devices are connected to the Internet.

Mine has worked flawlessly since Chets article inspired me in the last issue of The GoldMine Advisor.

Announcement

Ralph Copley of FrontRange Support re-emphasised in our meeting of March 21, 2011 that the FrontRange Support Team will not support Networking Issues. The FrontRange Support Team is only responsible for GoldMine Issues, and not any issues that may be caused by your Server or Peer-to-Peer Network.

Tips, Tricks & Things

GoldMine SysTray (aka GMTray)

by



DJ Hunt

Originally developed by John Stillman to demonstrate new API features to Developers, GMTray is now Freeware, and has been so for some time. Many have downloaded this application from the linked website, but I haven't discussed it in a long time. It is such a neat application in that it sort of works like the GoldMine Lookup.ini, but even better.

For instance, you can set GoldMine to Start (Run) and Stop on Workstations automatically on any day or days of the week. So this is a great tool if say you want GoldSync to only run during certain times of the day on week days only.

How about if you want your users to enter a Date type field into the Key2 field in a consistent manner. Well, we all know that the Key2 field is a Character based field of 20 characters in length, and that leaves a lot of room for the dreaded **User Input Inconsistencies**. Why not have GMTray watch the Key2, and when the User enters information into the Key2 field, say 3-23-2011 and GMTray knows that the Key2 field is configured for a short date format, that entry will automatically be converted to 3/23/2011. This provides a nice, consistent, searchable, and filterable format for your Key2 field regardless of your User quality. GMTray virtual eliminates the GIGO effect, and it's absolutely free.

Automatic Followups

by



Gene Marks

I've heard from a salesperson or two over the years that there is truly no "last" thing that happens to a Prospect or Customer. For those of you who have been thinking about instituting a Follow Up policy can do so relatively easily in GoldMine.

You must first enable automatic followups by going to

- Tools
- Options
- Schedule tab

Select the checkbox labeled **Prompt to schedule a follow-up activity when completing an activity**

Tips, Tricks & Things

(Continued from Page 7 - Automatic Followups)

OK your way out.

Now, when you go to (for example) to

[Complete
Unscheduled Call
Incoming Call...](#) ►

you'll notice that the **Schedule a Follow-up:** checkbox on the lower left is automatically enabled. What this does is open up a **Schedule Call** dialog form immediately after the user clicks **OK** to finish the Completion.

Announcement

The GoldMine Advisor Moves to an As Needed Publication

by

DJ Hunt

Unfortunately there is not enough participation in this news letter, that is articles, to permit me to keep this newsletter active at the current interval. Although The GoldMine Advisor has over 3,000 subscribers, there are not enough GoldMine Partners et al submitting articles for each edition, and I am unable to always and continually make up fillers.

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