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## In This Issue

Querying on Details with  
Stonefield Query

Why GoldMine Alone Doesn't  
Increase Sales

FrontRange Abandons the  
Mom & Pop Organizations

Report Writing for GoldMine

Retiring DDE:  
Adopting GoldMine's New  
User-Interface Automation

Tips, Tricks & Things

How Do I Print Just One  
Label

Relinking History to An-  
other Contact Record

Customize Your GoldMine  
Taskbar

What's My Name?

Where Am I?

## Querying on Details with Stonefield Query

by

Doug Hennig  
Stonefield Software Inc.

As Dave Petonic points out in his article in the June issue, "**Are You DETAIL-Oriented**", the Details tab is one of the best features in GoldMine because it allows you to endlessly customize the things you track about your contacts. For example, because my company creates different software packages that we sell to customers all over the world, we have a detail type called "**Products**". We customized the field headings that appear in the **Info** tab of the **Detail Properties** dialog ( the dialog that appears when you create a new detail record or edit an existing one ) by clicking on the **Setup** tab in that dialog and entering the custom field headings we need. We track things such as product name, number of licenses purchased, and maintenance expiry date. Insurance companies could track information such as policy number, type, and premium. Charitable organizations could track campaign name, date, and amount donated. You aren't restricted to a single detail type; you can have as many as you want.

The problem with details, though, is that while putting information into them is a breeze, getting it back out can be difficult. The problem stems from the fact that while they appear on their own tab, details are actually stored in the same table as other contacts, referrals, tracks, and other information: the **CONTSUPP** table. These different record types are distinguished by a record type code in the **RecType** column; "**P**" is used for detail records ( the reason it's "**P**" rather than "**D**" is because details were originally called "profiles" ). To further distinguish the detail types, the **Contact** column contains the detail name.

So, suppose we want to create a group of all customers whose maintenance expires this month so we can email them about renewing. We have to do a SQL query for that, a daunting task for non-technical users at the best of times, but even more so when it comes to details. I won't go into the gory details here, but suffice to say, it involves a multi-condition WHERE clause involving a minimum of three fields and at least one data conversion ( the date values we're interested in must be converted to the character formats they're actually stored as ).

Fortunately, because we use **Stonefield Query for GoldMine** ( it'd be silly not to, since we wrote it! ), this task is actually a piece of cake. Let's take a look at it, step by step.

( Continued on page 2 )



### Editorial Note:

If you don't need all eight fields in the Info page of the **Detail Properties** dialog, enter "\*\*\*" as the heading in the **Setup** tab; this tells GoldMine to not display that field at all. If you need more than eight fields, or need to use different data types than just character, such as date or numeric values, use a third-party GoldMine plug-in such as **Details Plus** from Solica Consulting (<http://www.solica.com>).

# 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 from their author. In many cases the authors have had a technical expert, in the area of the document, prereview 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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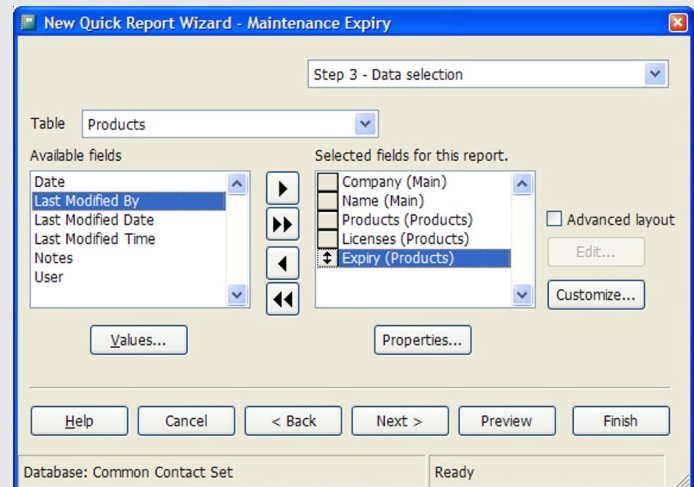
( Continued from page 1 )

## Create a new report

We start by clicking on the New button to create a new report. In Step 1 of the Quick Report Wizard, we specify the report name, such as "Maintenance Expiry." In Step 2, we specify options such as the header and footer for every page.

## Specifying the fields

In Step 3 of the Quick Report Wizard, we select the fields we want on the report. From the Main table (which represents the upper half of the GoldMine main contact screen), we select Company and Name. We then select Products from the table dropdown and choose the Products, Licenses, and Expiry fields. That's right: as you can see in Figure 1, Stonefield Query shows the same names that we see in GoldMine without having to worry about what the real table or field names are.



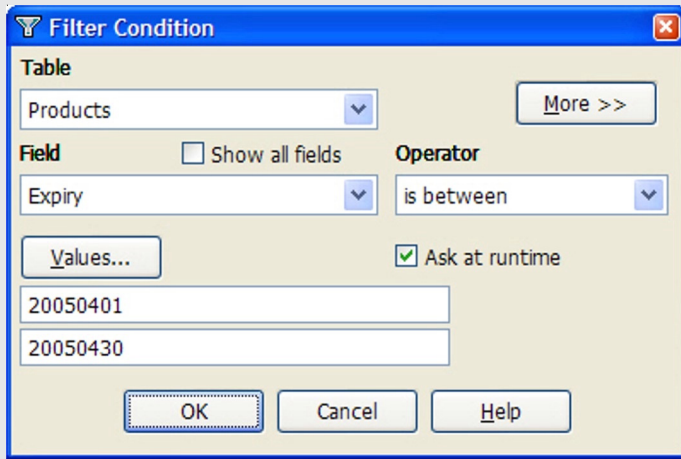
**Figure 1** - Selecting the fields you want is simple because Stonefield Query shows you the same names you see in GoldMine.

## Filtering the records

We don't want every single record in our entire database coming out on the report; we're only interested in those where the maintenance expires this month. Step 4 in the Quick Report Wizard allows you to create a filter for the report. In this case, we'll indicate that the Expiry must be between 20050401 and 20050430. (Note that because GoldMine stores all detail fields as character values, you must enter dates in YYYYMMDD format for sorting and filtering to work properly. I'll discuss an easier way to deal with this later in the article.) Of course, next month, we'll need a different date range, so to avoid having to change the filter every time we run the report, let's turn on the Ask at Runtime option. This tells Stonefield Query to prompt us for the date range whenever we run the report. Figure 2 shows the filter condition.

( Continued on page 3 )

( Continued from page 2 )



**Figure 2** - This filter will display only those customers whose maintenance expires in the date range we're interested in.

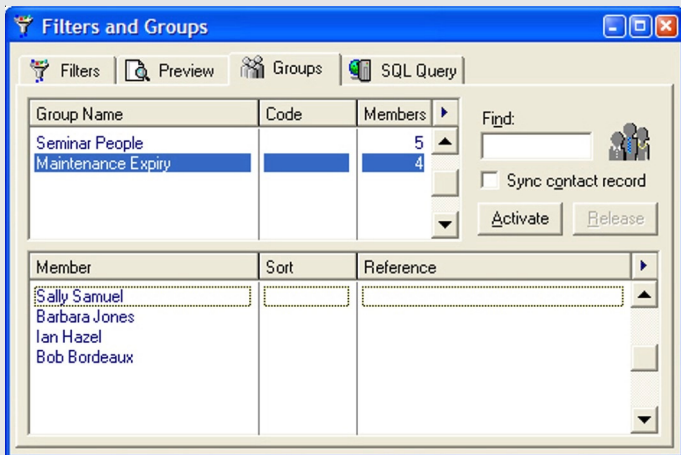
To see what the report looks like, click the Preview button. The results are shown in Figure 3.

Company	Name	Products	Licenses	Expiry
Bartman Company	Barbara Jones	Stonefield Query for GoldMine dBase	5	20050430
Crytler Mechanical Express, Inc.	Sally Samuel	Stonefield Query for GoldMine SQL	2	20050430
Demonstrate Express	Bob Bordeaux	Stonefield Query for GoldMine SQL	10	20050430
Goddard Technologies	Ian Hazel	Stonefield Query for GoldMine SQL	15	20050430

**Figure 3** - Here's our report, showing us exactly who we want included in our group.

## Creating a group in GoldMine

Now that we have a report showing the correct results, we save it by clicking Finish so it's available to run whenever we need it. Creating a group in GoldMine is simple: select



**Figure 4** - Stonefield Query created the group we need for our email blast.

the Create/Update GoldMine Group function in the Tools menu, specify the group name and optionally the code, and click OK. In just a few seconds, Stonefield Query creates the desired group in GoldMine. Figure 4 shows the group as it appears in the Filter and Groups dialog in GoldMine. All we have left to do is compose the email and send it to this group. Total time to create this group: less than five minutes the first time. Even better is that next month, all we have to do is select the report from the reports list, choose the Create/Update GoldMine Group function, select the existing group from the dropdown list, and specify the new date range when prompted. That ought to take no more than 30 seconds!

## Using non-character fields

As I mentioned earlier, GoldMine stores the details values you enter in character fields. That means while you and I think values such as "5" or "04/30/2005" are numeric or date values, GoldMine and Stonefield Query consider them to be character. This has implications for sorting and filtering: because computers compare characters from left to right, "100" will come before "5" in a sorted list because "1" comes before "5." You have three choices to deal with this:

- Be sure to enter values that sort properly. For example, if the range of numeric values is 1 to 100, enter 1 as "001" and 55 as "055." Enter dates in YYYYMMDD format, such as "20050401." While this works, good luck having your staff always remember to enter values properly.
- You can tell Stonefield Query to treat character fields as numeric or date values. The help topic "Using a Script File to Customize Stonefield Query" tells you exactly how to do this and provides examples using detail fields.
- Use Details Plus from Solica Consulting. It allows you to specify that certain fields should be treated as numeric or date values, and only allows you to enter valid values for those data types. Stonefield Query respects the Details Plus settings and will sort and filter these fields properly.

## Summary

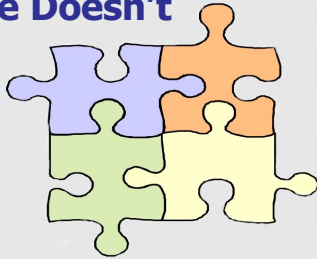
At first glance, the Details tab may seem intimidating, but once you've tried it, you'll find it's easy to use, and provides one of the best customization features available in any CRM or contact management system. Stonefield Query makes it incredibly easy to get the information out of GoldMine that you need to run your business, even the normally tricky queries needed to get at details.



## Why GoldMine Alone Doesn't Increase Sales

by

Bruce Heath  
Dream On Software



*That's because increasing sales takes much more than just CRM*

GoldMine does an excellent job of managing contacts and tracking communications with them, but that isn't enough. Additional tools are needed to strengthen the sales process. A new software offering, Wheel of Business, which was designed to integrate seamlessly with GoldMine, provides a variety of such tools.

## Sales 'Paperwork' Slashed

Salesmen hate paperwork, or anything like it, such as data entry. DreamOn Software, in developing Wheel of Business (WOB), identified repeated tasks that could be simplified or eliminated by analysis of the context. In WOB, if the salesman makes a choice, it eliminates a population of choices, so, unnecessary choices are not offered. Through the same context-sensitive approach, it populates fields with all the pertinent information available in the database. Since WOB accesses GoldMine's CRM database, none of the data need be re-keyed. This reduces the amount of time a salesman spends in front of a computer, and puts him where he wants to be – in front of a prospect.

Quantity	PricePer	ExtPrice	Descript	PartNum	Ondate	PerCentProb	Add
7	455.4	3187.8	Wheel of Business	WOB-USER	4/21/2005	70	Delete
40	125	5000	Consulting - Installation	Consulting	4/21/2005	70	Delete
20	125	2500	Consulting - Importing	Consulting	4/21/2005	70	Edit
5	500	2500	Training - 2 Hour Classes	Consulting	4/21/2005	70	Delete

Subtotal: 13,187.80 Tax: 765.00 Shipping: 0.00 Total: 13,952.80

## Resolving the Quoting Quandary

There are quoting software packages available other than that offered by Wheel of Business, but none of them were designed with GoldMine as the sole CRM foundation. They also don't have context-sensitive features that eliminate as much as 60% of the key/click strokes from the quote entry process. If you are already using GoldMine, you won't believe the WOB quoting package is not part of the program – **because it has the same user interface!**

You also will love printing the quote **directly via Microsoft Word** with no additional steps (or key/clicks) needed.

## Cracking the Pricing Puzzle

Automating pricing to speed up the quotation process has been a goal of many software packages. Wheel Of Business uses three variables to define the price matrix. They are contact type, customer type, and part number. Within that matrix there can be 8 levels of pricing authorization. Individual salesmen can be given authority to discount more deeply under password protection. Greater discounting can be authorized at the supervisor or manager level, also password protected, but the quote still originates with the salesman. The structure pushes pricing authority closer to the point of order.

## How Flexible Should Pricing Be?

Most pricing systems are inflexible and allow one solution. Wheel of Business permits you to vary the treatment of pricing from rigid enforcement to extreme flexibility, by product or service category. This makes it easier to respond to the way the market moves. It even permits 'No-Charge' samples, and enforces the rules for zero dollar invoicing as well as relieving inventory appropriately.

## Packaging the Sale

Some times, the sale is more easily made by combining offers. Other times, parts or services might be sold individually. The flexibility of being able to do either, and price them differently is usually found only in large systems. Wheel of Business will support bundling or kiting of parts while retaining the ability to price them independently. The price for a complete bill of materials can be different than a list of the individual parts, and setting up the kit takes only a few mouse clicks.

## Frustrated by Forecasting?

Forecasting is one of the biggest time wasters in sales. How many orders does it create? Few, if any. Yet, management must have a forecast to know how they should prepare for the future. Wheel of Business collects each market lead for a product or service, whether it is email, website inquiries, mailers, telesales, a sales contact, or other. It then presents the information to sales management as a potential forecasted sale, and sales management can choose how and who should respond.

( Continued on page 5 )

Multiple responses from a single source identify individuals with high interest. The salesman assigned can promote the lead to a quote if he finds a prospect ready to buy. **Forecasts are generated as a part of doing business**, not as an additional effort. The forecast reports can be viewed by product, service, lead type, salesman, and a variety of other ways that you may choose. Successful activities stand out in the reports. Management can get a valid forecast at any time with the push of a button, and not disturb sales efforts to get new orders.

### One Click Order Entry

With one click, a quotation can be turned into an order. Wheel of Business takes the information contained in the quotation, and turns it into an order. Any other relevant information needed is gathered from the customer, product, or service database without the salesman having to do more than click the 'Sold' button.

### Do You Want Service With That?

Many products sold have service associated with the sale. Installation or calibration are good examples of a typical sale that has a service aspect. Wheel of Business can be configured to generate a work order for such service, allocate service time, schedule the service, and push a request for invoice to the accounting system once the service is complete. Mixing products and services has never been easier.

### What About Those Other Leads, and Lost Orders?

Less than 30% of the leads from all sources turn into orders. With figures like that its small wonder that Sales and Marketing are at odds with one another. Until now, the remaining leads seemed worthless. The same seemed true of lost orders. Wheel of Business gives sales (or marketing) an opportunity to find out what it would take to convert those leads and lost business into orders through the use of the survey capability built into the software. By gathering direct information about prospect's needs, the company can improve what it offers and how it goes to market.

### Losing Orders Because of Long Buying Cycles?

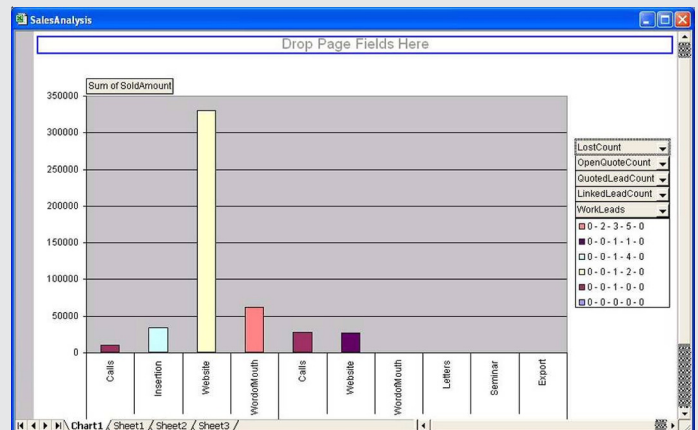
High value products and services normally take a long time to close. Since the average salesman gives up after 2 attempts, many companies fail to close on high value orders. With the information obtained through Wheel of Business surveys, you can plot the sales cycle from beginning to end. Wheel of Business gives you a tool to begin educating the customer, test the customer's readiness to buy, and close the order – months or years later. You can also determine your customer's readiness to buy, at appropriate times, via the survey mechanism included in Wheel of Business.

## Handling Recurring Orders

This is simplicity itself. When you have a recurring order such as license renewal, annual fee, rent, membership dues, or recurring maintenance, Wheel of Business gives the option of scheduling the events repetitively in accordance with the initial order. At the appropriate time, WOB either generates the relevant work order, or pushes an invoice request to the accounting system along with a description of charges for the invoice. At your option, you can directly import the order to the accounting system, or be subject to approval before import – as is normally the case.

### How Did You Get That Order?

Getting an order is great. Knowing how to do it again is much better. Because it is possible to see the entire sales process, from first lead through delivering the order, the effectiveness of the process can be evaluated. Which marketing material produced the most leads? Which educational material kept the most prospects engaged in the process? Which products or services contributed the most to booking orders? Why were they chosen over other, equal-seeming, offerings? Easy questions with difficult



answers. Only by being able to view the entirety of the process can the answers to the questions of **what works and what doesn't** be found. That is the visibility possible with Wheel of Business.

**Want To Make More Money In Less Time?**

See Money Makers in Your Business  
Eliminate Money Wasters—FAST  
Boost Sales & Marketing Effectiveness  
Banish Double Data Entry  
Operates Inside GoldMine  
Links To QuickBooks & MAS 90/200  
Quotes, work orders, tele-marketing & much,  
much more, all in one program

[www.wheelofbusiness.com](http://www.wheelofbusiness.com)



Register  
For FREE  
DEMO

# FrontRange Abandons the Mom & Pop Organizations

by

DJ Hunt

What am I calling a **Mom & Pop Organization**? Any organization that owns, or plans to own **GoldMine Standard Edition** using between 11 to 25 licenses. They do not have an IT person on staff, nor anyone that knows Microsoft SQL. Nor do they have a budget to support such a staff/purchase. Based on my clientele, this represents about 75% of the organizations that I support.

For some time now, GoldMine Corporate Edition has been \$495.00 per seat with a mandatory Annual Maintenance Plan of \$99.00 per seat. Thereby making a single seat of GoldMine Corporate Edition cost \$594.00. As of August 1 those prices will be increased further moving GoldMine Corporate Edition away from the purchasing capability of the mom & pop organizations. FrontRange has decided to implement policies and price structures to make the mom & pop organizations reevaluate their current GoldMine implementations, while forfeiting potential new GoldMine accounts to other, more reasonably priced, CRM solutions.

Effective August 1st, the new pricing for GoldMine Corporate Edition will be \$595.00 and \$119.00 respectively or \$714.00 per seat. FrontRange has also decided to raise the price of their upgrades from GoldMine Standard Edition to GoldMine Corporate Edition. These will now be at \$499.00 and \$119.00 respectively or \$618.00 per seat.

Additionally, as of August 1, all GoldMine Standard Edition customers having more than 10 seats will not be allowed to upgrade their systems beyond GoldMine 6.5/6.7. They will be forced to upgrade to the GoldMine Corporate Edition at \$618.00 per seat if they wish to move to GoldMine 7.00. If they have more than 10 seats or they are just considering upgrading their Standard Edition system to version 6.70.50123, they must do so before August 1st. Looking at this from the Mom & Pops point of view ( \$ ), moving to GoldMine Corporate Edition does not just mean an additional layout of \$9,270.00 ( based on an fifteen user upgrade from dBase GoldMine ), but the additional expense of an qualified IT person or outside service experienced in Microsoft SQL.

Kevin Smith, of FrontRange, was asked to comment on this, and, over the telephone, he stated that anyone that currently has an active UPP, regardless of their number of dBase licenses, will receive an upgrade to GoldMine 7.00 Standard ( Firebird ) version. He added that these users will not be required to upgrade to the GoldMine Corporate Edition. Kevin further stated that those GoldMine Standard Edition users that do not have a current UPP, who wish to upgrade to GoldMine 7.0 after August 1st, will not be able to do so if they have more then 10 dBase licenses. These users will be required to upgrade to the GoldMine Corporate Edition if they wish to move on to GoldMine 7.00.

# Intermediate Corner

## Report Writing for GoldMine

### Part Two: Creating Filtering for Reports

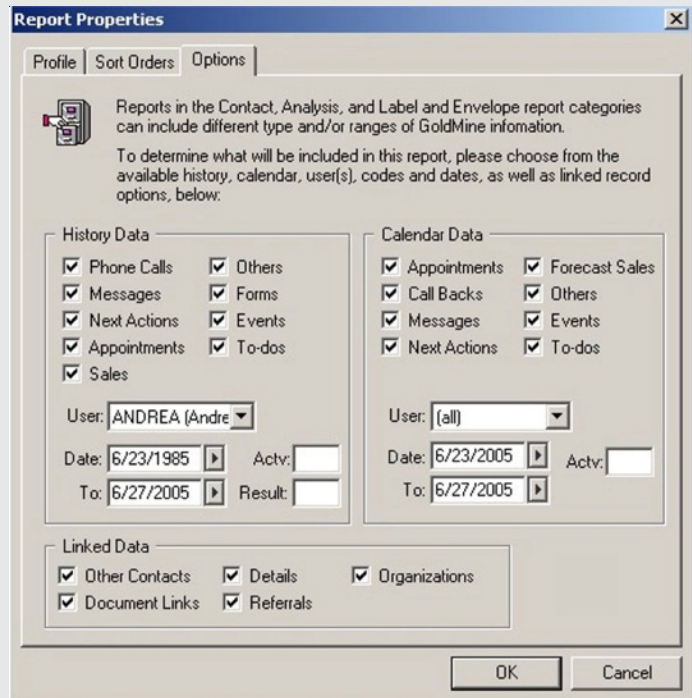
by

Andrea Dominguez

Before you actually start writing your report you need to plan what exactly is the report looking for. Our example is a history report, so we need to first figure out are we looking for user's activities or are we looking for traffic on a group of records? This will determine the main sort - is it by username or accountno.



You should know when making this choice that GoldMine reports can filter internally. That means that you can program a filter to run when the report is activated. That has a plus - you just click and go. And it has a minus - the filter does not filter until runtime and can seriously slow the report performance down. One thing that you can do to get around a large database table is to use the filters and groups. Some of my clients that have rather large conthist tables utilize one of the key fields to identify the territories and then create filters based off of that field. When you activate a filter or group, the processing is already done and has completed some of the report's job. Also, it should be mentioned again that if you have a very large database table, you should consider using a third party program like Crystal.



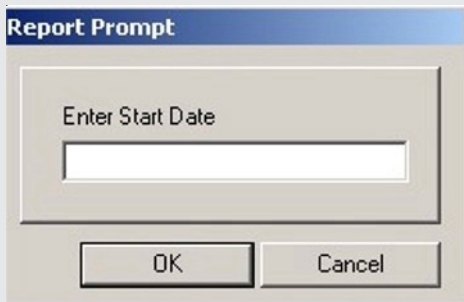
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( Continued from page 6 )

My example will be for a user activity summary report. I want this report to show a user's activities within a certain date range and I only need to see totals - how many phone calls, appointments, etc... were completed. I now need to decide two other things. Do I want to type in the date range at runtime or do I want to use GoldMine's Options section? Do I want to search on just one user or all users? And as a subquestion to the previous, do I want to type the name in at runtime or use GoldMine's Options section? Some of you may be wondering what on earth I am talking about.

You can open the Options and Sorts by right clicking on your report in the Customize Reports dialog form. As you can see from the image ( page 6 ), we can not only select the user (the top of the user menu allows you to select all users), but we can choose the date range as well as the activities that we want to see.

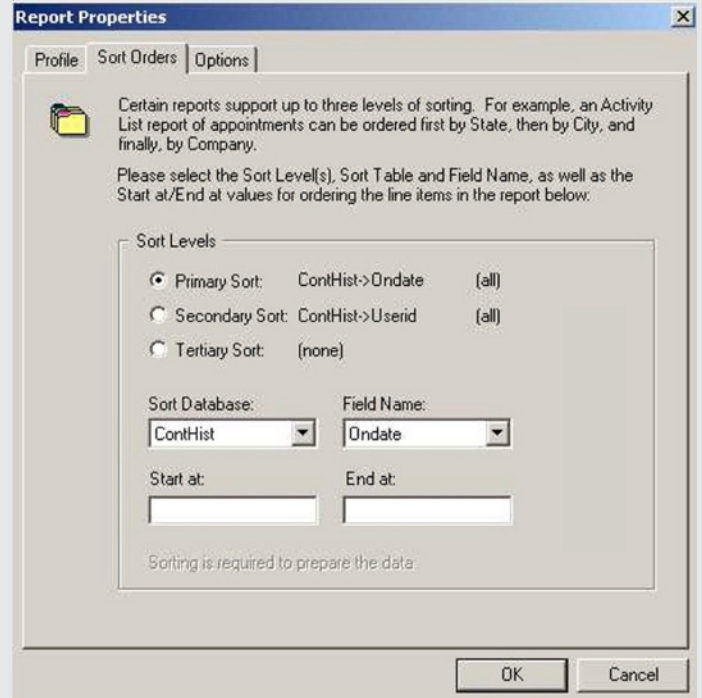
To have the report prompt you, a type of questionnaire would appear:



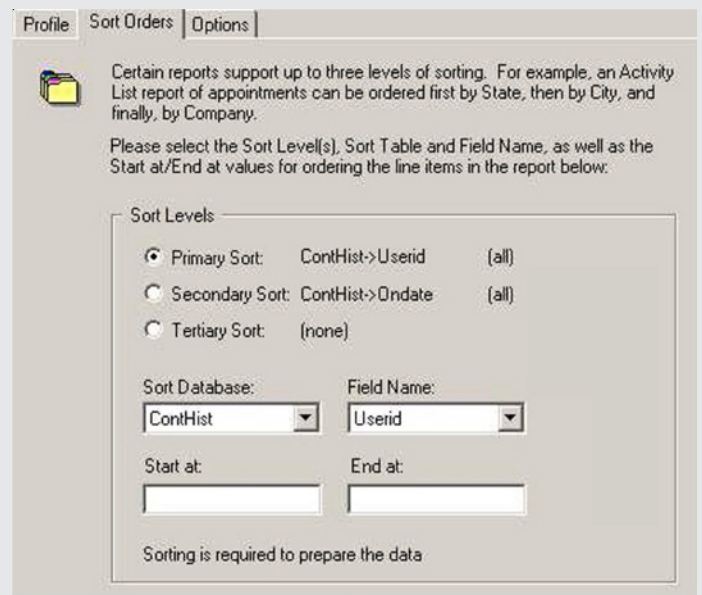
Technically, this is called a report parameter. You can write one to ask for start and end dates as well as username. (please note that this does not say usernames, this is a one user at a time scenario) Since my example will work best with the report options, I will very briefly describe how to create a report parameter so you can try it on your own. In your report, place your cursor on the report and right mouse click. The choice on the menu is dialog. Left-click on dialog / create. From there you can chose the prompt and type (date, text, numeric, etc...) then you need to tell the report to only return those records. To do that, right-click again on the report and select report settings then filter. My example above is for a start date. This is what the filter would look like: `conthist->ondate>=dlg->Enter Start Date`. In layman's terms, this means show me all the activities that were completed after the date that is typed in. If I were using this for a user then I would make a text dialog and call it username and my filter would then be: `conthist->userid>=dlg->username`. Just remember that you can have a series of report prompts, just not for the same thing. i.e., selecting multiple users.

Usually when selecting a method, I decide what is the quickest way from point "A" to point "B". When using the Report Options, you do not need to set a filter within the report like a parameter. The Options work similar to a standard GoldMine filter or Group.

Now that we have selected our method of filtering users and dates, we now must tell the report where to look for this information. The Sorts tab is where we select the database sorting.



There are three sorting choices that you can make. From the example pictured, the date will be displayed first then what everyone did on that date. You need to make a decision on how you want your report to sort. Based on the report example being used, a decision needs to be made about displaying the username first then see everything that user did within the time frame entered. Or should the timeframe be displayed first then all of the activities that all of the selected users did. You can also filter further by typing criteria into the 'start at' and 'end at'. This is a range. If you were to use `contact1->company` as your primary sort and then type an "A" for your 'start at' and then type an "M" for your 'end at' the report will only look at records that the company starts with an A thru M



Continued on page 11 )

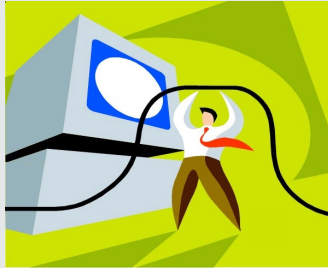
# Programmers Corner

## Retiring DDE: Adopting GoldMine's New User-Interface Automation

### Part Two: Getting Your Feet Wet

by

Frances Corazza



In our previous article we scratched the surface of the New GoldMine COM Server functionality now offered in GoldMine 6.7. By now, hopefully, you have researched XML and the tools available for building your XML documents programmatically. This month's article will introduce you to the four classes exposed by the COM Server and give a brief explanation to the purpose of each.

### GoldMine.GoldMineData

The GoldMineData class exposes commands that give you access to the GoldMine tables. While GoldMine is required to be running in order to use the COM Server, the GoldMineData class is not returning information based on the current state of the running application. It simply provides a means of executing all Business Logic and Low-level API functionality without the need of logging in or loading the BDE.

The same commands can be executed using the GMXMLAPI.DLL, however, the GMXMLAPI.DLL requires the loading of BDE, in addition to using a GoldMine seat. So, if your application will be running concurrently with GoldMine, it is preferred to use the COM Server, so as to not require your users to purchase more GoldMine seats than necessary.

### Example XML:

The following snippet of XML displays how the WriteContact call would be made using the GoldMineData class:

```
<GMAPI call="WriteContact">
  <data name="Contact">Frances Corazza</data>
  <data name="Company">The Crossbearer Corporation</data>
  <data name="Phone1">3602800204</data>
</GMAPI>
```

If using the low-level API calls, each command would be executed in separate calls, each with their own XML Document.

To create a contact, the following series of XML documents would need to be executed:

```
<GMAPI call="DB_Open">
  <data name="Table">contact1</data>
</GMAPI>
```

The returned XML would include the workarea handle, to be used in the following calls:

```
<GMAPI call="DB_Append">
  <data name="Area">76021592</data>
</GMAPI>
```

To complete the processing, the DB\_Replace, DB\_Unlock, and DB\_Close commands would need to be executed.

### GoldMine.UI

The GoldMine.UI class provides all of the existing functionality of DDE, in addition to some exciting new features such as executing menu commands, vetoing dialog boxes, and changing the state and values of controls.

If your existing application utilizes DDE and you want to convert it to the newer technology, there is not a large learning curve. The commands have basically the same names and accept the same parameters. It is only a matter of reformatting and sending the commands via the COM Server instead of through a DDE Request.

### Changing the Current Contact

The following sequence of XML documents is used to switch the currently displayed contact record. You will notice the commands are identical to DDE.

```
<GMAPI call="RecordObj">
  <data name="Command">SetObject</data>
</GMAPI>

<GMAPI call="RecordObj">
  <data name="Command">Goto</data>
  <data name="Argument"> 9LQ985V!EV_I3\T</data>
</GMAPI>
```

### Advanced Control of the User Interface

There are two commands in the GoldMine.UI class that offer detailed information about the windows available within GoldMine and the windows that are currently displayed. They are GetAvailableWindowsList and GetActiveWindowsList. GetActiveWindowsList will give you detailed state information about all windows and dialogs currently displayed in the user's GoldMine. In addition, the information provided by GetAvailableWindowsList is needed for effectively using the commands that alter control text and state.

( Continued on page 9 )

## Staying Informed with Events

The GoldMine.UI class also provides three very useful events for your listening pleasure. They are NotifyControlCommand, VetoWindow, and WindowUpDown.

**NotifyControlCommand:** This event notifies your application when a checkbox has been marked, a button pressed, or any other control change event.

**VetoWindow:** This event notifies your application that a dialog box is about to be displayed and gives you the opportunity to veto this action.

**WindowUpDown:** This event notifies your application that a dialog box is about to either come up or go down.

Before your application can receive the notification events, your application must register with GoldMine by calling RegisterCommandexec, RegisterVetoWindowLaunch, and RegisterWindowUpDown respectively.

## Changing Controls

There are a number of commands available for changing certain aspects of dialog controls. I will list them here, and as you will read later, there is an easy way to learn more about how to use these commands.

- PressButton
- SetControlText
- SetCheckBox
- SelectRadio
- SetListBox/SetComboBox
- SelectTab
- EnableCtrl

## GoldMine.RecObj

The GoldMine.RecObj class exposes three events, with no other commands accepted. They are RecordObjectHasChanged, RecordFieldHasUpdated, and RecordTabHasChanged. The purpose of these events is self-explanatory. There is no need to register for any of these events, simply provide a handler for them.

## GoldMine.GMSystemEvents

As with the GoldMine.RecObj class, the GoldMine.GMSys-temEvents class only exposes an event, the GoldMineShutDown event. You do not want to leave your application running after GoldMine has shut down while you are using the GoldMine COM Server. To ensure your application is not left stranded, simply handle the GoldMineShutDown event to close yourself down.

## Self-Documenting Commands

For a number of the commands in the COM Server, you can easily get a snapshot of the parameters the command is expecting by sending the command with no parameters. For example, sending

```
<GMAPI call="MenuCommand"/>
```

Would return:

```
<GMAPI call="MenuCommand">  
  <status code="-31718">The MenuCommand function will perform  
  an menu command if access to that item is allowed. Parameter  
  Command: This is the name of the menu command to be applied.  
  Please see your guide for a full list.  
  </status>  
</GMAPI>
```

## The UI COM Server Test Application

Most of the above functionality can easily be tried out, with no actual programming required, by using the **UI API Test Application**. This application was written by John Stillman from FrontRange Solutions and is available for download from The Crossbearer Corporation's website. To download the test application, go to <http://www.thecrossbearercorporation.com>, then select Support. On the left-hand navigation bar, select Programming Utilities. The utility to download is titled "GoldMine 6.7 UI API Example".

### Editorial Note:

It is our understanding that FrontRange now has or plans to incorporate into the EULA for the API the forbidding of anyone from developing against GoldMine using the API unless they are a member of the FrontRange Technology Partner Program. Currently this is the only way to get a legal copy of the API documentation. FrontRange is now forcing programmers to pay FrontRange to enhance their GoldMine application. Programmers of add-ons are fleeing this FrontRange policy while trying to sell off their current asset applications. FrontRange is also losing its own personnel to this policy, and other recent GoldMine related mandates. We'll have to look at this again later to see how the actual fallout occurs.

See our article **FrontRange Abandons the Mom & Pop Organizations** on page 6.

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# Tips, Tricks & Things

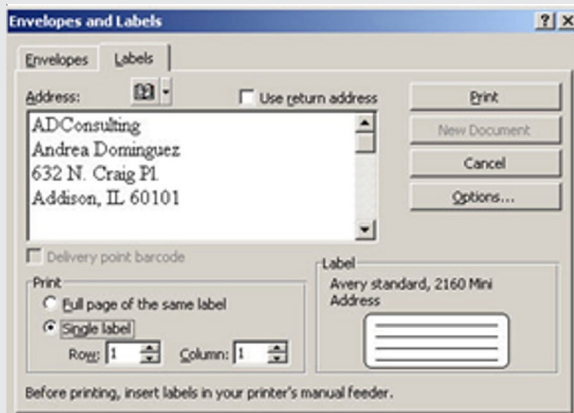
## How do I Print Just One Label

by

Andrea Dominguez



I get asked from clients often, "If I create a letter, how do I print just one label without wasting the entire sheet?"



When you create your merge letter, highlight the address on your letter then in Word go to **Tools | Labels and Envelopes**. You will see that GoldMine automatically passes the address to the label and then you can click on the Labels tab to select **Row** and **Column**.

### Editorial Note:

In Microsoft Word 2003 the path would be:

**Tools**  
**Letters and Mailings**  
**Envelopes and Labels...**  
**Labels** ( tab)

## Relinking History to Another Contact Record

by

David Corlew ( from NewsGroup )



You can re-link a history record from one GoldMine contact record to another GoldMine contact record. Right-click on the history record and select **Edit**. The link-to box will be greyed out at the bottom of the edit window. Leave this edit window open and go lookup the desired contact to link it to, so that contact's window is active. Return to the edit history window and the link-to box will be input capable. Check it and click OK to re-link this history record to the new contact record.

## Customize Your GoldMine® Taskbar

by

DJ Hunt & GoldMine FYI



I can't tell you how many times I have tried to explain that the best use of the GoldMine screen real estate is to remove the Toolbars, and use only the Taskbar. With the Taskbar you can do everything that you can do from the GoldMine Toolbars, and so very much more.

Customize your GoldMine Taskbar to gain quick access to the frequently used GoldMine menu commands and macros, launch external applications and Web sites and easily display documents and files. Follow the steps below to view the taskbar and customize it for your needs.

### Displaying the Taskbar

To display the Taskbar in GoldMine, simply go to the Windows drop down menu and click on the option named Taskbar. The Taskbar will display on the left side of your computer screen within the GoldMine window.

### Adding Items to the Taskbar

To add items to the Taskbar, right-click anywhere within the Taskbar window and choose Add New Item to open the Taskbar Group Item Selection window.

In this window, choose from five item types in the drop-down menu:

**Main Menu** - Gives you access to the GoldMine menu options.

**GoldMine Users Macro** - Adds a macro that has already been created within GoldMine.

**External Application** - Creates a path for launching other programs on your computer.

**Document Link** - Allows you to set a path to a specific document.

**Web site** - Set a specific URL to launch a Web site.

### Customizing the Appearance of the Taskbar

You can customize the appearance of the Taskbar by choosing to display large icons or small icons as well as setting the order of the icons.

### Adding a Task Group

You can have up to 20 different groups in the Taskbar and up to 50 different items for each group. To add a Task Group, right-click anywhere within the Taskbar window and choose Add New Group. You can then choose icon size and whether the new group will be available to one or many GoldMine users.

# Tips, Tricks & Things

( Continued from page 7 )

## Report Writing for GoldMine

### What's My Name

by

David Lee



Most people have a field in their GoldMine records for the sales representatives name. They have the names of all of their sales representatives in the F2 Lookup table, and they enter the name of the appropriate person.

Here is the tip: **DON'T**

Instead, enter the person's login name (you can show the full name in the lookup by adding // to the end of the login name, followed by the full name)

Why? Because sometime in the future you might want to use GoldMine Automated Processes. When you are scheduling an activity through an automated process, you will probably want it to be scheduled for the sales representative. There is no easy way to do this unless you can meet one of the following conditions:

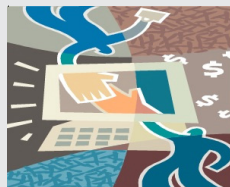
The sales representative is the "Owner" of the record (there are many reasons why you might not want him to own the record in the GoldMine sense of the word), or the sales representatives login name is in a field.

If you need the full name in a field for some other reason, you can have this automatically done using the GoldMine lookup.ini feature, but that is a tip for another time....

### Where am I?

by

Daniel K. Martin



This dialog form exists within GoldMine today, but how can it be displayed/used? Answer in October issue of The GoldMine Advisor.

### Part Two: Creating Filtering for Reports

(that includes B,C,D, - etc..). Since we are creating a user activity report, the primary sort would be conthist ->userid. The secondary sort would be conthist->ondate. For this type of report, a tertiary sort is not necessary since we are creating a summary.

If you were only going to select one user at a time when viewing this report, you can make the primary sort for conthist->ondate and remove the conthist->userid. This is not really going to change the processing time, but making things as simple as possible is good.

A few good tips on filtering/ sorting to remember:

1. if you create a filter for one criteria such as state is equal to MN and then tell your primary sort of contact1->state start at IL and end at IL, your report will be blank. This sounds kind of silly, but it is important and saves grief in the future if you design your filters and sorting properly from the beginning. This is the most common mistake made.
2. If you are designing a report for a large table like the history table and are doing this over the network, don't do it on a day that the network is being taxed. Let's say for instance, your accounting department is running something big like payroll and you then start your report design. If you have a less than perfect server, you will slow everyone in your office down. Until you have a good understanding of sorting and filtering over your network, stick to days that not much is going on over the network. That will also give you good idea of how long the report really needs to run.
3. When you create your filter and sorting, and you know that it is 100% correct, but the report pulls up a blank, then investigate the health of your GoldMine. Sometimes when poorly protected machines have power problems or viruses, it affects the indexes on your databases. Not to mention the program itself.

In the next segment, we will cover writing the summary formulas as well as some troubleshooting.

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## Editorial Comment:

I firmly believe that GoldMine is a viable and great CRM solution for the mid to lower market place. I have been using/distributing GoldMine solutions since 1989, and I still feel the same way today about GoldMine as I did when I first heard of it way back then.

I feel strongly that FrontRange should reconsider its 10 user GoldMine Standard Edition limitation, and raise that limitation to 20 or even 25 users to keep itself strongly entrenched in the mid to lower market. There is such a strong GoldMine Standard Edition base already in this range that I find it difficult to believe that FrontRange would be willing to let that market share go as did the developers of Act with their similar policy change. We have had many converts from Act to GoldMine recently because of this Act policy, and, now, FrontRange seems willing to close that door of opportunity by instituting their own policy changes in this area.