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The GoldMine® Advisor

Editor

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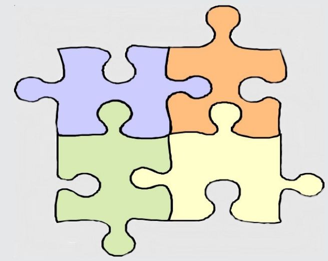
Gene Marks

In This Issue

Details Plus™ as a Simple but Powerful Support Issue Tracker



by

Katie Williams & Paul Redstone

Details Plus is widely used to enhance GoldMine's Detail tab which is used for 'one-to-many' relationships. One such relationship is, of course, a support call, and Details can be used for such support calls.

However, with support calls, you normally want to be able to automatically assign ticket numbers to calls, and to track calls, particularly those which are unresolved. Some of the more advanced features of Details Plus, notably expression fields, and queries, let you do this easily. The same techniques have many other uses, so even if you do not want to use Details for support calls, you may still find this article useful!

To set up Details Plus as your Support Call Manager, you will, of course, need to create a new detail type in GoldMine first. Using the Reference field, create a lookup to log the status (e.g. Being Diagnosed / Resolved). Keep these uniform to enable fast, and accurate queries.

Choose the fields based on how you want it to look in the extended Detail tab, as you cannot re-order these after the fact.

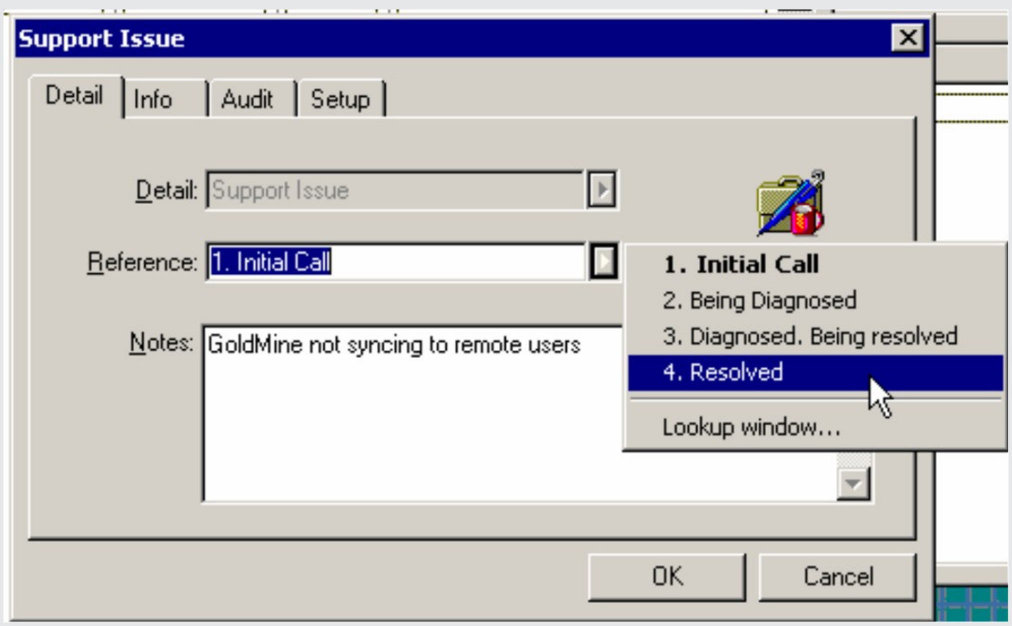


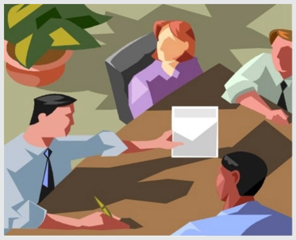
Figure 1

Once the basic detail type is set up, use Details Plus to configure the detailed data for a support call. As we see it, and for this article, the most important information to be stored for any support call is as follows:

- when was the call logged

Legalese

Editor: **DJ Hunt**



Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is 100% accurate. Should you use anything from this newsletter, you do so at your own risk. All information contained herein is not intended as specific advice, but as a general point of discussion.

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

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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.

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

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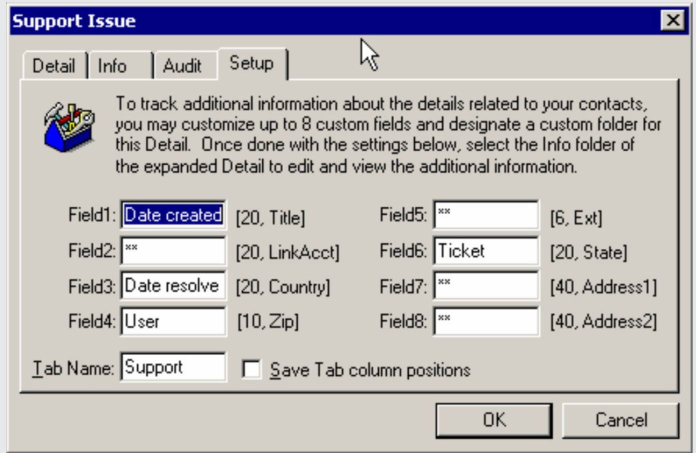

Figure 2

- who logged/is responsible
- a reference number to enable tracking (for both you and your customer)
- the status of the call
- details of the problem / solution

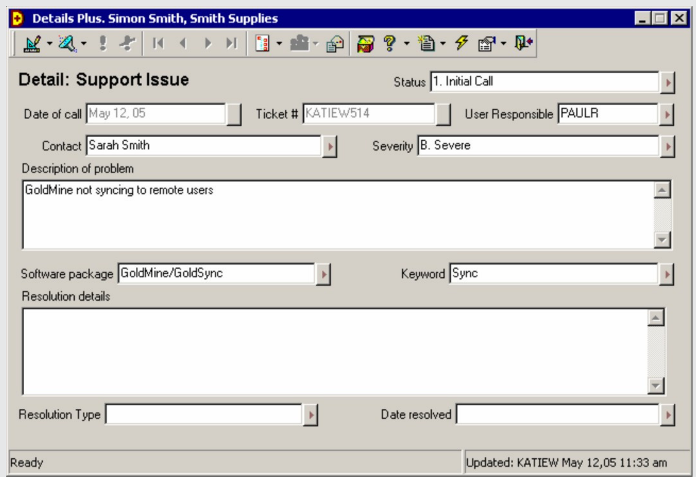

Figure 3

Most of the fields are readily set up using Details Plus standard features, including customized screen layouts, date fields etc. However, we can also set Details Plus to configure some of these fields automatically for us by using some more advanced configuration. Details Plus provides an expression evaluation feature allowing fields to be calculated automatically, and preventing direct entry. This uses a superset of the GoldMine dBase expression evaluator, and is immensely powerful.

The first, and most important field is when the call came in. We can use an expression to automatically input today's date (where the field being used is "Title"). The expression we want is:

iif(isblank(ContSupp->Title), date(), ContSupp->Title)

(Continued on Page 3 - **Details Plus™...**)

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and it is inserted in the attributes dialog form as shown here in Figure 4:

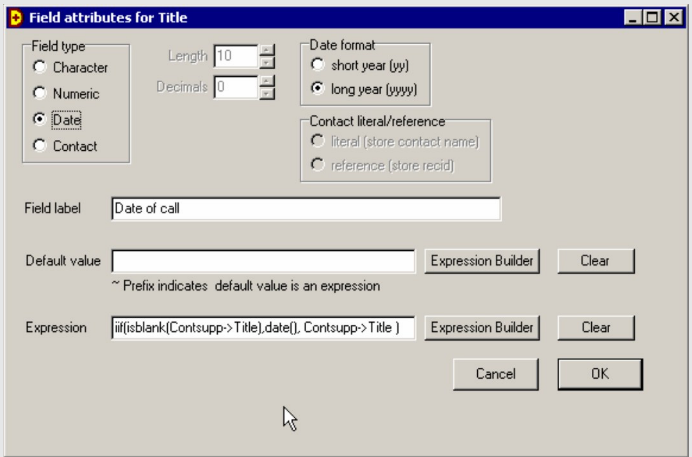

Figure 4

This expression works as follows: if the field is blank, the expression fills in today's date. If the field is not blank, it evaluates its own value so leaves it unchanged.

It is also helpful to operate a number referencing system from which you can identify who logged the call. The following expression creates a ticket number which incorporates the username to help us easily identify who recorded the call. Our counter is identified as 'TX' and sits in the lookup table.

EvalifEmpty(GMDDE('&UserName')+counter('TX'+), 1))

For example for username KATIEW this will give us the sequence "KATIEW1", "KATIEW2". It also allows us to track which users are logging which calls. The field cannot be manually manipulated.

The 'evalifempty' command is a subtlety. In Details Plus this prevents evaluation of the expression if the field is not empty. This is important here to prevent the GoldMine **counter()** function from evaluating (and hence incrementing the counter) if the field already has a ticket. It is possible, of course, to use the counter alone, with no username attached, providing you do not have remote users to cause numbering conflicts.

Editorial Note:

Always plan for the furture. Even if you are not currently synchronizing, you may in the future. You should always work as if this were a possibility, and maintain uniqueness in the ticket number. The best way to achieve this is with the use of the UserName in your expression.

If the users logging calls are remote, set up an individual counter for each user, so that duplicate ticket numbers are not generated. The following expression (a single line expression) gives an example:

evalifempty(GMDDE('&Username')+
counter('TX'+GMDDE('&Username'), 1))

Now we can create fields using the layout screen in Details Plus to store such information as:

- type of support required
- status of the call (e.g. 'Being Diagnosed', 'Resolved')
- details of the problem
- solution
- severity of problem

Remember that in Details Plus both the 'Notes' and 'LinkedDocs' fields can hold extended text, useful for narrative descriptions of problems, and solutions in the above example.

Once you are logging your support calls, you need to be able to track them. In order to add value for your clients, it is useful to be able to see a history of the sorts of problems they are encountering – could this help you to identify a skills shortage / training opportunity? Is there something you can do proactively which will resolve these problems for them in the future?

You can also analyse the information from your own business perspective:

- Which users are logging, and resolving issues?
- How long do your customers have to wait before their problems are solved?
- Which customers are logging high numbers of support calls?

Details Plus has a powerful query management center, and allows us to run queries on a range of topics using combination(s) of filters, and expressions, for example:

- which Calls remain outstanding
- Calls logged by a specific user
- all Calls logged in a particular timeframe
- all Calls logged for a specific client

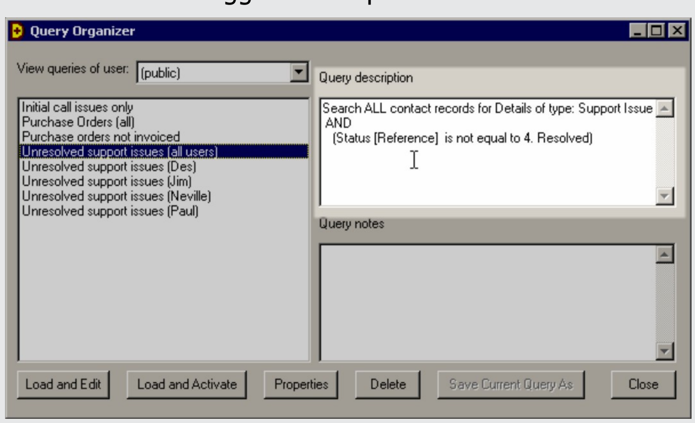

Figure 5

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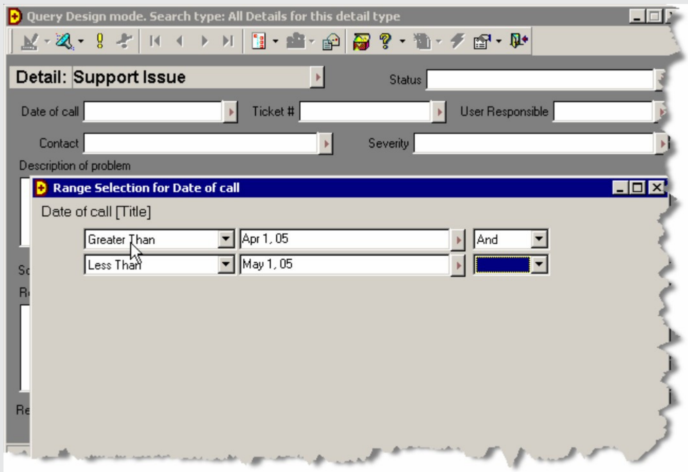


Figure 6

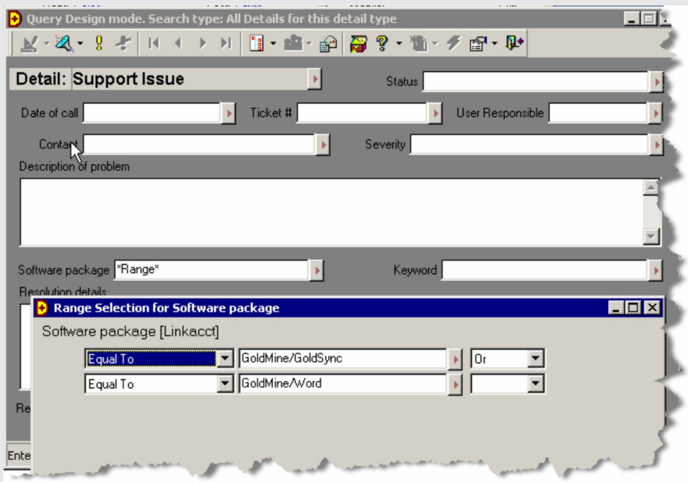


Figure 7

Queries can be stored for future use (left side of the screen shot above), and the data extracted can be exported to a file (choose from Excel, xBase or CSV) for further manipulation or printing. These exports can also be stored for future use.

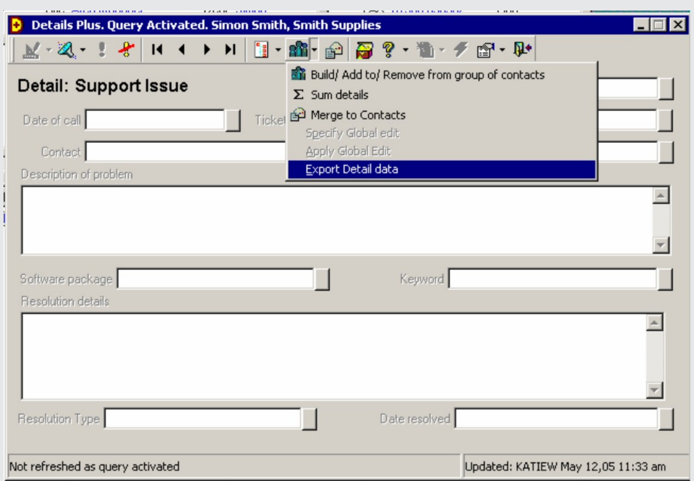


Figure 8

For more information on Details Plus see:
http://www.solica.com/products/detailsplus.php

or send an e-mail to:
info@solica.com

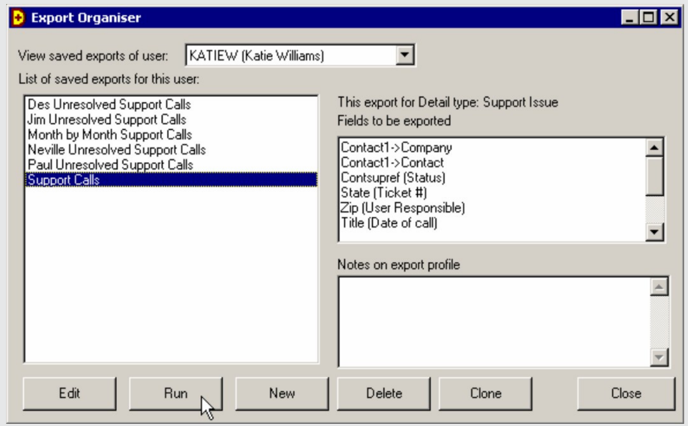


Figure 9

The section of the detailsplus.ini for the above example can also be e-mailed to you on request which makes it easier to set up.

Details Plus is a trademark of **Solica Consulting Limited**.

Data Import: A White Paper

by

David Lee

Why is it hard to quote a price for data import?

Why does the price seem so high?

Will we exceed our budget?

The reason we don't know the answers, is that at the time we are planning, we often have little understanding of our real requirements. Beware of anyone who gives you a quote for data import without understanding this level of detail. The quote will be meaningless since the **change orders** to meet your real requirements will change your costs, and the schedule.

This white paper is intended to help you develop the data import portion of your system implementation plan.

When implementing business systems, you usually need to import your current data into the new system. This paper assumes that you are importing data into a CRM system, although the concepts apply equally to accounting, and other business systems.

Data import is one of the most difficult aspects of a typical CRM implementation plan. It is very hard to project the cost because most people do not have a complete understanding of the processes involved or even the details of their current data at the time that the plan is being developed.

(Continued on Page 5 - **Data Import...**)

(Continued from Page 4 - **Data Import...**)

I have rarely seen projects where we simply mapped fields from an import file into the system, and then ran the import. Yet many project budgets are based on this assumption. Here is a list of questions you must ask about your data import:

1. **Is this a 1-time initial import?**

    a. Import for initial data loading only

    b. Import on an ongoing basis to update the database (in which case we will also need rules to tell us how to associate new data with existing records, how frequently we will update, whether it will be launched manually or automatically, etc.). A typical example is to update the year-do-date sales, receivables, or available credit from the accounting system.

    c. How will the import file be updated

2. **Where does the data reside (you will need to do an analysis for each data source since the answers may be different for every data source)?**

    a. In what system does the data reside?

    b. Where physically is the data?

    c. Make sure to survey everyone who might have data that would need to be imported. You do not want to find new data files after you finalize the plan or, worse, start the import process.

3. **Is this static or dynamic data?**

    a. Static data does not change, so we can take our time importing it.

    b. Dynamic data changes, so we must "freeze" the systems that are updating that data while we are importing it into the new system. Changes made after we extract the data for import will not be reflected in the new system.

4. **How many records are there?**

    a. Very large files take longer to import than smaller ones.

    b. Since there are often false starts, and re-imports, large files can add more time to the import than you might first think.

    c. Large files are also more likely to dictate separate test-import files to test the entire process.

5. **What is the logical structure?**

    a. A "flat" file is a list of records such as you would see in an Excel table

    b. A relational file includes tables linked to other tables, such as lists of transactions linked to an account, or lists of inventory items linked to a forecasted sale. These are more complicated to import.

    c. For relational files, identify the field(s) that associate (link) the tables (such as account number, record identifier, etc.)

    d. You may have extensive "lookup" tables to allow the user to select a value for a field when entering data. Some such tables can contain very large lists. Are these lookup tables a part of the import, or will they be manually entered?

6. **What is the record format?**

    a. What are the field (column) names?

    b. What is the field format (date, numeric, character, memo (blob), etc.)?

    c. What is the field size (number of characters)?

7. **Who "owns" the data.**

    a. What person, or department owns the data?

    b. Will we have problems in getting the data?

    c. Is the data politically sensitive?

    d. What is the process for getting the data?

8. **Security**

    a. Will the data be encrypted?

    b. Are there any special handling requirements?

    c. Must the data be screened from others within the organization?

    d. How will this affect the import testing?

    e. Will different records allow access by different people?

    f. What are the access rules?

    g. Does this mean that we need to also create access rights data within each record (sometimes called record ownership)?

(Continued on Page 6 - **Data Import...**)

(Continued from Page 5 - **Data Import...**)

h. Are there multiple types of access within a record?

i. Are there different types of access to specific fields or transactions within a record?

j. What are the import rules for this data?

9. Timing issues

a. When will the import be run?

b. Will other systems need to be frozen while we import the data?

c. Will we need to do this over a weekend?

d. For multiple files, is the sequence of import important?

10. Field Mapping

a. Develop a map to associate fields in the import table(s) to fields, and tables in the application.

b. Note that some tables are easier to import than others. In most CRM systems, it is easier to import information about people, and companies than to import notes, and transaction data.

c. In most cases, we cannot simply import data into the CRM tables at the database level. We normally need to import them through the program so that critical "housekeeping" functions can be performed.

11. Data Parsing

a. Re-organize data within a field (for example, convert "Doe, John" to "John Doe")

b. Split a field into multiple fields (for example, convert a phone number 800-123-4567 into three fields for area code, exchange, and number).

12. Data cleaning

a. Compare data to a post office list to update addresses.

b. Update telephone area codes based on new exchange/area code combinations.

c. Normal Case: Convert all-caps data to leading caps (Proper Case).

d. Insert salutation (Mr. or Ms.) based on genderizing software.

e. Identify and flag, or correct bad data based on specific business rules (flag all records missing an e-mail address, flag telephone numbers that are not 10 characters, flag all records with values outside of a defined range, etc.). You will need to define the fields to be tested, and the rules to be used on the fields.

f. Table lookups: convert data based on table lookup values. For example, the user names in the data in your old system must be changed to the new user names in the new system. You will need to define the fields that will need table lookups, and the size of the lookup tables.

g. Field size limitations: Identify data that will exceed maximum field sizes. Possible actions: Flag the field, apply abbreviations by comparing to a table of abbreviations.

13. Duplicate Records

a. Decide if you will merge duplicates within a single file or import all files, and then merge duplicates for the whole database at once

b. Create rules for identifying duplicates. Most rules (also called algorithms) are a trade-off between catching all duplicates, and falsely identifying records as possible duplicates.

c. Create rules for how you will handle duplicates (merge the records, one record "wins", display the records side-by-side and let a human decide, etc.).

d. You can create multiple algorithms, and do a multi-pass process (start with a very "tight" rule, and let the system run automatically to merge definite duplicates, then run again with a "loose" algorithm, and let a human decide which possible duplicate record pairs are actually duplicates).

14. Grouping records

a. "Householding" algorithms group people by household.

b. "Organization" algorithms group records of people within the same organization.

15. Technical data corruption

a. Individual files are corrupt (cannot be read).

b. Individual records are corrupt (cannot be read).

(Continued on Page 7 - **Data Import...**)

(Continued from Page 6 - **Data Import...**)

c. You will need to decide what to do when you encounter these problems. Do you ignore the data, or try to fix the corruption (this could be expensive and time consuming)?

16. Manual data entry

a. How much manual processing will be involved in the import? For example, you may need to do a lot of preprocessing of the import files before the actual import.

b. Who will do the manual processing?

17. Testing the import

a. You will need to certify that the import was done correctly?

b. What tests will you run to certify the import?

c. Will you require a custom report to certify the import?

d. Will you need test data to test the import process before you do the live import?

e. Who will develop the test data?

f. Will you approve the import process based on the test data?

18. Live import

a. When will you do the live import?

b. Will the live data be used for training?

c. Will the data be imported only into the main server, or will individual laptops need individual data loads?

19. Other

a. What will you do when you encounter unexpected data problems?

b. What will you do when you find new data files that you did not know about when making the plan?

c. What is the backup plan if the import fails certification?

20. Project plan

a. Estimate the time required for each of these items. Assume that you will make some errors, and need to rerun some processes.

b. Estimate the time needed to manage this portion of the project.

c. This becomes your "low" time estimate for both costing and scheduling.

d. Consider what could go wrong in each step, and add the time that this would add to that step. This would be the "high" estimate. For example, suppose that your computer locked up during a long import process, or suppose that you found an error in the record mapping, and had to redo several steps. An example of a very serious problem would be if you found an error in some of the data cleaning steps, but did not find it until the final certification step.

e. Even the "high" estimate would not include major changes such as finding new data files or changing the program file structure after it has been approved.

As you can see, planning for the data import is not simple. Designing the import processes, and writing any custom code necessary for the import, is even more challenging.

One way to get some clarity into the process is to work with an experienced Value Added Reseller (VAR) such as Vertical Marketing, who has a library of software, survey forms, analysis forms, documentation, and processes designed to expedite the planning, and the process itself.

Editorial Note:

David brings up a lot of excellent points in this white paper. The most pungent point, yet only eluded to, is that it is virtually impossible for the **Value Added Reseller** to **Quote** an **Import** job. Most of us would rather **Estimate** the **Import** job. To often we have seen "scope creep" take hold, and blowing the Quote out of the water.

I think, after your having read this white paper by David, that it is virtually impossible for anyone to give you a quotation. I would venture to say, now that you know everything that must be considered, that you also would have a difficult time in estimating how large a project an Import can be.

Editorial Note:

I am always seeking articles for future issues of **The GoldMine Advisor**. I keep hitting on the same people each issue. As of today, I have no more articles in the bank for future issues of **The GoldMine Advisor**. If you like **The GoldMine Advisor**, please contribute articles, tips, tricks or things to share with other readers.

We now have over 3,000 readers, plus GoldMine Dealers that redistribute to countless more. Do you have a issue with GoldMine that you want to air, do it here. Do you have an add-on product that you want to get the word out on, do it here. Do you have some GoldMine knowledge that you've been hoarding for years, release it here.

Articles for the **October** issue are due by **September 1st, 2006**.
E-mail your articles to: **DJ.Hunt@DJ-Hunt.com**

Tips, Tricks & Things

Are you using the right version of GoldMine?

by

Gene Marks

If you're using GoldMine Corporate Edition, the most recent (and relatively bug-free) version is 7.0.3 (7.00.60526). As long as you're current on your maintenance you can download this build directly from Help | Net Update.

Please e-mail your GoldMine Dealer if you'd like information about GoldMine Corporate Edition 7.00.

If you're using GoldMine Standard Version, the most recent version is 6.7.50123, and probably the most stable of all of the GoldMine products. If you subscribe to the UPP program then upgrades are included. If not, then upgrades are $79.95 per license.

Please e-mail your GoldMine Dealer if you'd like information about GoldMine Standard Version 6.70.

Changing Calendar Views

by

Gene Marks

When you open your calendar it can sometimes be cluttered with activities(especially e-mails), and completed activities. How can you change the view to just see certain activities?

Just follow these steps:

-Open the calendar (**View** | **Calendar**)

-Right click in the calendar area, and choose activities

-In the pop-up window you can select or de-select any activities you want to show on your calendar as well as any completed activities you would like to show on your calendar.

GoldMine Help is Gone

by

Gene Marks

A client panics: "**When I go to Help I see "Page cannot be displayed**", and no help topics are available. Can I get my Help to be displayed?"

Yes, you can restore the help file. Phew. Just follow these steps:

-Locate the GoldMine.chm file under the root folder of GoldMine

-Right-click on the file, and select Copy

-Go to your desktop, and right-click, and choose Paste

-Open GoldMine

-Right click on the grey space in the taskbar (if you do not see the taskbar go to the Window tab on the toolbar at the top and choose Taskbar)

-After right clicking on the grey area of the taskbar, choose Add New Item

-In the "Item Type" box click on the dropdown, and choose Document Link

-In the Caption box type in "Help Topics"

-In the Document box, choose the dropdown, and browse to your desktop (be sure to choose "All Files")

-Highlight the GoldMine.chm file, and choose OK

-On the taskbar in GoldMine you will see a yellow question mark, if you click on it, the Help files will open!

Editorial Note:

Thanks Gene this is a great tip as this is something that anyone can do to get their Help working again. The only other solution that I know of is a Microsoft Registry hack that lowers your system security. As we all know, we really don't want to lower the system security, nor do we want our users anywhere near the Registry.

It is helpful tips like this that keep Gene at the top of my Tipster list.

I would like others to start contributing tips, tricks and things. If you have something, do not hesitate to e-mail it to me at: **DJ.Hunt@DJ-Hunt.com**.

Contacts with No History

by

Gene Marks

Can you find records that have no history?

Yes, you can find records with no history by running the following SQL Query:

Tips, Tricks & Things

```
SELECT c1.contact,
    c1.company
FROM contact1 as c1
WHERE NOT EXISTS(
   SELECT ch.accountno
   FROM conthist as ch
   WHERE c1.accountno = ch.accountno
   )
```

Counting the Number of E-mails

by

Gene Marks

Can you count the number of Internet E-Mails between a certain date sent or received in GoldMine?

You can do this with an SQL query (**Lookup** | **SQL Queries**):

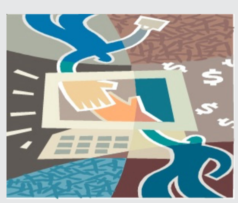
```
select Count(*)
from Cal
where UserID = 'JON'
   and OnDate >= '1/1/1999'
   and OnDate <= '1/25/1999'
   and RecType = 'M'
   and LinkRecid > ''
```

(Records without LinkRecid are not Internet E-mails)

To see a count of all messages (including Internet E-mails & internal GM mail):

```
select Count(*)
from Cal
where UserID = 'JON'
   and OnDate >= '1/1/1999'
   and OnDate <= '1/25/1999'
   and RecType = 'M'
```

Blocking Out Vacation Days in GoldMine



by

Gene Marks

A client asks: "**How do I block days on my calendar for vacation so nothing can be scheduled for me at this time?**"

Suppose that you will be vacationing from 8/7/2006 to 8/11/2006.
-Select **Schedule** | **Event....**

-Change the Date to 8/7/06

-Change the Duration to 5 days.

Note: A scheduled event will not conflict if another user tries to schedule an activity.

Editorial Note:

Personally, I prefer to schedule a Recurring Appointment for the very reason that Gene gives in his Note:. Doing it this way, under my UserID means that a conflict will be thrown if another user attempts to schedule an activity for me during this scheduled time.

I really dislike Events, and discourage their usage, however, this is Genes tip, and a good one just the same.

Double Checking Data Entry

by

Gene Marks

Sometimes there's critical data entered, and you'd like there to be a double-check. GoldMine's Lookup.ini feature can check the value in two fields, and if they don't match put the word "Re-Enter" into one of the fields so your administrator is alerted.

Start by creating a text file using Notepad in the \GoldMine folder, and name it Lookup.ini or open your Lookup.ini.

This example uses two userdefs, uTemp1 and uTemp2. Type the following into the Lookup.ini file (you can substitute your actual field values for the temp fields here).

```
[AutoUpdate]
uTemp2=uTemp1, uTemp2

[UTEMP1]
Otherwise=&iif(Contact2->uTemp1=Contact2->uTemp2,
Contact2->uTemp1, "Re-Enter")
Overwrite=1

[UTEMP2]
Lookup1=uTemp1
Bad=&""
Overwrite=1
```

If they match the uTemp2 becomes blank, if they do not uTemp2 becomes blank and uTemp1 becomes "Re-Enter". You could even get fancy, and make uTemp1 turn red if the data value is "Re-Enter". Just hold down the control key, and doubleclick on the field's label. Then go the color tab, and set the expression!

Then log back into GoldMine, and test it out!

Have a Fixed IP for GoldSync at No Cost

by

DJ Hunt

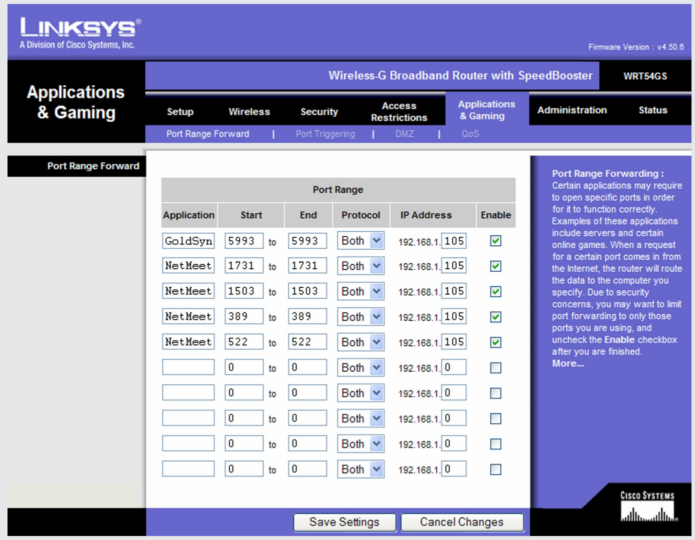
Like most SOHOs, you have a router to connect your DSL/Cable Modem to your Network. You have GoldSync running on a Server with a fixed Internal IP address, something like 192.168.1.105, however, you can't afford a fixed IP address for your router. This is a very common scenario in the US today, and I have a solution that I have been using for years. Gail Darling of InfoSpectrum reminded me of this, and suggested that I submit my own tip.

http://www.no-ip.com/services/managed_dns/free_dynamic_dns.html

I have been using this service for years, and it is a free account that you too can set up. There is a little application that must run on your system, however, it is very unobtrusive. This application constantly sends your current router IP to the No-IP Server, and matches that to your domain, as in DJHunt.No-IP.Org. No matter how many times a day Verizon flips my IP address, No-IP is updated with the new IP address.

In your Remote GoldMine setup for Synchronization, the Remote user simply points to: **DJHunt.No-IP.Org** in the **Remote's Internet IP address:** via the Synchronization Wizard. Everything else is exactly the same in the Wizard.

Well, there is one other thing that you would have to do, however, that you would have had to do anyway. You have to make certain that you redirect anything that hits DJHunt.No-IP.Org on port 5993 on the router to the Internal IP address of the GoldSync Server. Each router has its own software interface that you access via the Internet to configure their router, and it is way over my head to configure all the varying routers. Here is my setup:



Can it get any easier, or cheaper to have a fixed IP for your router?

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Data Import: A White Paper

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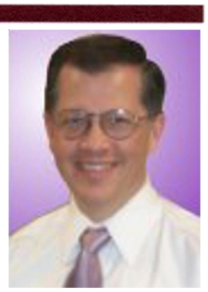

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Tips, Tips and more Tips

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