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by

DJ Hunt

GoldMine Premium has been available to the public as GoldMine Premium 8.00.70413, and this was basically a version 1 release for all practical purposes. By the time that you are reading this issue of The GoldMine Advisor, what is version 2 of GoldMine Premium should have been released. You know the old saying: "SOON". Ah well, I thought that I would take a moment to talk about GoldMine Premium with you.

First, and foremost, all of the features that were in GoldMine 7 exist in GoldMine Premium somewhere. The trick is to find them. Hence, my first Pro/Con for GoldMine PE.

Pro: GoldMine Premium has a totally new Graphical User Interface (GUI). For years clients have been complaining the old Windows look and feel of their GoldMine GUI. FrontRange had brought in a new design team to revamp the GoldMine PE interface for User Friendliness.

Con: GoldMine Premium has a totally new Graphical User Interface (GUI), and with that comes a totally new learning curve. Nothing is where you thought it was, and you must search thru each menu item to find what you know must be there somewhere.

For those of you who utilize GoldMine with you screens Maximized, you're going to love the new Tab interface for each screen, Figure 1, Page 5. Any screen that you bring up will be under its own tab for easier access. No more going to the menu to switch screens. For the rest of you, those of you who are like me that is, who utilize GoldMine with multiple screens positioned just so strategically in the main GoldMine frame there is an option for you, Figure 2, Page 5. Notice that I am utilizing multiple screens, three to be exact (Contact, Calendar & E-mail Center) arranged in, what I consider to be, the most efficient solution for my type of work with the GoldMine application.

Pro: I used to make heavy use of the GoldMine Taskbar feature. GoldMine PE has incorporated the old GoldMine Taskbar into its drop menu area. All of my Taskbar items are there for easy access.

Con: GoldMine PE has incorporated the old GoldMine Taskbar into its drop menu area, and, consequently, what use to be one click now requires a minimum of two clicks. The buttons themselves are not clickable. You must click on the little drop arrow to the right of each Taskbar list to produce the available list for that Taskbar, and then you must click on the item in the list that you are after.

You may have noticed, Figure 1, the Getting Started & Customize buttons, or, Figure 2, my Tools, Reference, Applications & Customize buttons. Well this is your new Taskbar. By default the Taskbar is not displayed. One must turn it on under the **System** tab of their **Options**. Options? What is that, you say. User Preferences has been replaced by User Options. Basically, the same dialog forms with a different access label. Back to the Taskbar now. It was announced, at the April Conference, that there are plans to move the Taskbar back to the area were we were all used to seeing it. I haven't seen any changes in this direction as of this writing, however, it would be nice to get rid of that Taskbar Con item above. It may still be in the road map, but I wouldn't hold my breath while waiting if I were you.

Did you notice the **Service** button in the Outlook style buttons to the left in Figures 1 & 2? That's right GoldMine PE incorporates its own Service module into GoldMine instead of linking to the FrontRange Heat application. This Service module in GoldMine Premium is totally self

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Legalese

Editor: **DJ Hunt**



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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.

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

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

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The GMCOMAPI.dll

by

Richard Cluley



When notes appeared on the GoldMine forum about this new part of the API it seemed to be just what I was looking for. This is a new DLL that offers a number of facilities very useful if you are trying to extend the functionality of GoldMine Premium Edition (GMPE). I decided that as GMPE does not have a Web Import tool for Cases, and since we use Web Logging of Support Requests with our customers, this would be a good project to try out the new API facility. It proved to be reasonably straightforward, but there were one or two issues that needed addressing that may not be obvious to people who do this kind of thing less frequently, so I'll outline my "mistakes" (hoping that you can learn from them), and their remedies below.

What we wanted to do was design a web page that would collect the necessary data from a customer, and then create a new Case in GMPE, feeding back the number to the user of the page. Clearly there were various ways of doing this, and FrontRange Solutions have also provided some additional functionality in the traditional parts of the API to do this:

These new calls are NVExecute calls when using the GM7S32.dll

WriteCase creates or modifies a Case for the GoldMine 8.0 Service (Case) module.

WriteCaseAttachment creates or modifies a Case attachment

WriteCaseTeamLink adds a GM User as a Team member for a Case.

There are good reasons for doing it all this way, and I would recommend this approach for most circumstances using the normal logging in to the system.

On this occasion I decided to try using the GMCOMAPI. The major disadvantage of using the GMCOMAPI approach is that you have to look after *everything* yourself. In this case this means updating Sync Logs, and the CaseLastSeed record in the

```
Imports GMCOMAPILib
```

```
Public Class clsGMBits
```

```
Private Function NewRecID() As String
```

```
    'Returns RECID
```

```
    Dim sRecid As String = ""
```

```
Try
```

```
    GCom = New GMCOMAPILib.GMApplication
```

```
    sRecid = GCom.NewRecID("WEBSYS")
```

```
Catch ex As Exception
```

```
    'Handle any errors here)
```

```
End Try
```

```
Return sRecid
```

```
End Function
```

```
End Class
```

Figure 1

(Continued on Page 3)

Environment table (new to GMPE). It also means that you must be very comfortable with the SQL table definitions, and able to interpret them or have access to comprehensive documentation on the GoldMine Tables.

This library exposes a section call GMAApplication. In VB.NET you can use this such as in the fragment shown in Figure 1 on the previous page.

The syntax of the call is **.NewRecID(<GMUSER>)**. This is because the RECID in GoldMine uses the GoldMine Username as part of its generating algorithm.

Some of the other functions exposed by the GMAApplication framework are:

CommonFolder() which returns a string

DateToSyncStamp(<SyncStamp as Date>) which gives out a syncstamp string

GoldMineFolder() which returns a string

There are many more than this, but I'll leave you to explore the functions for yourself.

The good news here is, apart from the referencing of the DLL to the project, that is all that there is to it. Just like the old days when getting a new RECID from DDE was very easy, so it is now. There is no need to log in or parse XML as with some of the other alternatives. If all you need is something simple (like a new RECID, or a SYNCSTAMP) then this offers a good way to do it. So why did I have any problems?

The first issue was finding the DLL! I was developing on a Workstation using a networked copy of GoldMine. I had run the Minimal Install, but the DLL was not there. It was on the Server copy, and copying it to the workstation was easy. Using it (referencing it) while leaving it on the server did not work. Once copied across to the workstation it needs to be registered (RegSvr32.exe) before it can be used. This means that you will have extra work to do if you want to use this method with installed software to make sure that the relevant files are in the expected places, and that they are properly registered.

After that it was smooth sailing, and the Web Site was written. It collects the data from the user, and when they press the submit button it checks on whether they have an e-mail address on our GoldMine system, collecting the ACCOUNTNO field in the process. It then creates a new CASEID (the varchar field perversely called *number* in the CASES table), and then loads the data into a new Case record using the RECID function outlined above, paying proper attention to the Not Null requirements for several fields. The page finally refreshes, displaying a message to the user with the new CASEID.

We have since made the page available in a configurable form to clients and others. The main issue in enabling it on a web site is ensuring that the server has access to GoldMine, and the database as it does not provide the functionality the way Web Import pages do when bringing in records to GoldMine etc. They can work remotely (such as on hosted sites) as they only send data to GoldMine which GoldMine processes. Nevertheless, in these days when many clients have their own static IP addresses, and run their web sites or part of them on site this is a valuable addition to the GoldMine tool set.

SQL Queries for the GoldMine Service Center



by

Ian Andrew

With GoldMine Premier Edition came the Service Center, and a whole new area of functionality for GoldMine. We decided here that we would start to use this for tracking, and for recording our support issues as this would be the only way we would be able to find GoldMine Premiums strengths and weaknesses.

Once we had a good number of issues on our system, we predictably wanted to know what we had, and so put together some queries to return some useful information back.

Firstly, it was useful to know how many cases we had dealt with this week or this month and so on. This query gives you the main details of a case (numbers, categories, subjects etc.), as well as the Company and Contact they were logged against within the date range in the query;

```
select Cases.number,
       Cases.Category,
       Cases.Subject,
       Cases.fType,
       Contact1.Contact,
       Contact1.Company,
       Cases.Created_Date
from Cases,
     Contact1
where Contact1.AccountNo=Cases.AccountNo
      and Cases.Created_Date between '06/01/2007' and '07/01/2007'
order by Cases.Created_Date
```

We can then refine this further so that we can find the Cases for a given company between a given date range. To do this edit the 'COMPANY' to the required Company name, and enter the required date ranges;

```
select Cases.number,
       Cases.Category,
       Cases.Subject,
       Cases.fType,
       Contact1.Contact,
       Contact1.Company,
       Cases.Created_Date
from Cases,
     Contact1
where Contact1.AccountNo=Cases.AccountNo
      and Cases.AccountNo in
      (select AccountNo
       from Contact1
       where Company like 'COMPANY%')
      and Cases.Created_Date between '06/01/2007' and '07/01/2007'
order by Cases.Created_Date
```

As we use Outlook and GISMO for our email, we lost the ability that GoldMine gives us of linking emails to the relevant case so it is displayed in the Case History tab. This was a huge shortfall for us when using the Service Center.

We decided that we could overcome this shortfall by creating a SQL Trigger on the CONTHIST table.

The SQL Trigger that we utilized is shown here:

```
set ANSI_NULLS ON
set QUOTED_IDENTIFIER ON
GO

ALTER TRIGGER [dbo].[utr_BDG_Support]
ON [dbo].[CONTHIST]
FOR Insert, Update
AS
    declare @inscount      int
    declare @RECID         varchar          (15)
    declare @RECTYPE       varchar          (1)
    declare @REF           varchar          (80)
    declare @Support       varchar          (25)
    declare @iPos          int
    declare @LinkRec       varchar          (15)

set @inscount = (SELECT count(*)
FROM inserted)

-- SET NOCOUNT ON added to prevent extra result sets from
-- interfering with SELECT statements.
SET NOCOUNT ON

if (@inscount > 0)
BEGIN

    declare trigHistCursor cursor for
    select RECID, REF
    from inserted

    open trigHistCursor
    fetch next from trigHistCursor into @RECID, @REF

    while (@@Fetch_Status = 0) begin
        if @REF like '%BDG_Support.%'
        begin
            Set @iPos = CHARINDEX('BDG_Support.',@REF)
            --get full case id
            set @Support = SUBSTRING(@REF,@iPos,17)
            --get recid of case
            set @LinkRec = (select top 1 RECID
            from Cases
            where number like @Support+'%'
            order by recid desc)
        end
        if @LinkRec is not null
        --Update History record to attach to Case
        begin
            Update CONTHIST
            Set LOPRECID = @LinkRec
            where RECID = @RECID
        end
        fetch next from trigHistCursor into @RECID, @REF
    end
    close trigHistCursor
    deallocate trigHistCursor

END
```

This trigger looks at an e-mails subject line to see if it contains the string 'BDG_Support.', and the relevant case number.

If it does then this e-mail is updated within CONTHIST to contain the required LOPRECID that will link it to the specified Case within the Service Center.

We are finding the Service Center to be a great new addition to GoldMine in Premium Edition, but also find that it doesn't completely provide everything we need. The addition of our web based Case logging form that creates Cases on our system,

and alerts the relevant engineer once a web form is completed and submitted is another way we have enhanced its use.

We feel the Service Center has lots of potential so let's see what we can do with it!

** Please note that the date format in the above queries will need to match the regional date settings, here in these examples ours are set to UK.*

(GoldMine Premium... - Continued from Page 1)

contained, and this is a good thing. Am I right?

Pro: GoldMine PE incorporates its own Service module which utilizes the new **Cases** tables.

Con: GoldMine PE incorporates its own Service module is only a rudimentary copy of the Heat capabilities.

I have heard it stated that FrontRange intentionally kept the Service module of GoldMine PE very rudimentary so as to be a hook into their more expensive Heat application. By adding the Service module to GoldMine PE, along with the new GUI, FrontRange may feel that they have justified the cost differential that they wanted to achieve between GoldMine CE and GoldMine PE. Additional, in their mind, they have established enough difference between the GoldMine CE and GoldMine PE products to force their GoldMine CE users, who where going to upgrade to GoldMine PE under their Maintenance Plans, to now have to purchase the upgrade to GoldMine PE. Let me tell you, there are a lot of disgruntled GoldMine CE users, and there are even talks of Class Action Suits over this.

However, I wander. Back to the Service module, and I would like to apologize right here, and now. I can not shrink the images down to fit these column widths to show you the screenshots that I am talking about. If anyone knows of a way to shrink the image while keeping the sharpness, please send me an e-mail directly. I am told that you cannot do a WebImport into the Service module without a 3rd party add-on. I am told that you can't link Additional Contacts to a Ticket in the Service module (another case for not utilizing Additional Contacts). I am told that you can only utilize one database with the Service module (another case for not utilizing Multiple Databases). You can't use GoldMine E-mail Templates for your e-mails from the Service module, nor can you pull any of the information from the Service module into that e-mail message. Case #, etc. must all be entered into the e-mail message by hand.

Let me state here that I have previously stated that the Service module was intentionally designed to supply rudimentary Service capabilities, hence, the list of items above are not to be considered Cons as much as a list of things that are available in the Heat product that are not available in the Service module of the GoldMine PE product.

GoldMine PE, as public release 70413, had no show stoppers, hence, I have, and continue to, recommend it to my users who would like a new Graphical User Interface. GoldMine PE, in the first patch release, will be an even better product, and I will recommend that as well. You can not have GoldMine CE and GoldMine PE intermixed in an office utilizing the same database. This will not work. If you want a new GUI; if you don't need a robust Service module then I would definitely recommend that you upgrade to GoldMine Premium Edition. To upgrade from GoldMine CE to GoldMine PE is currently \$300.00/seat.

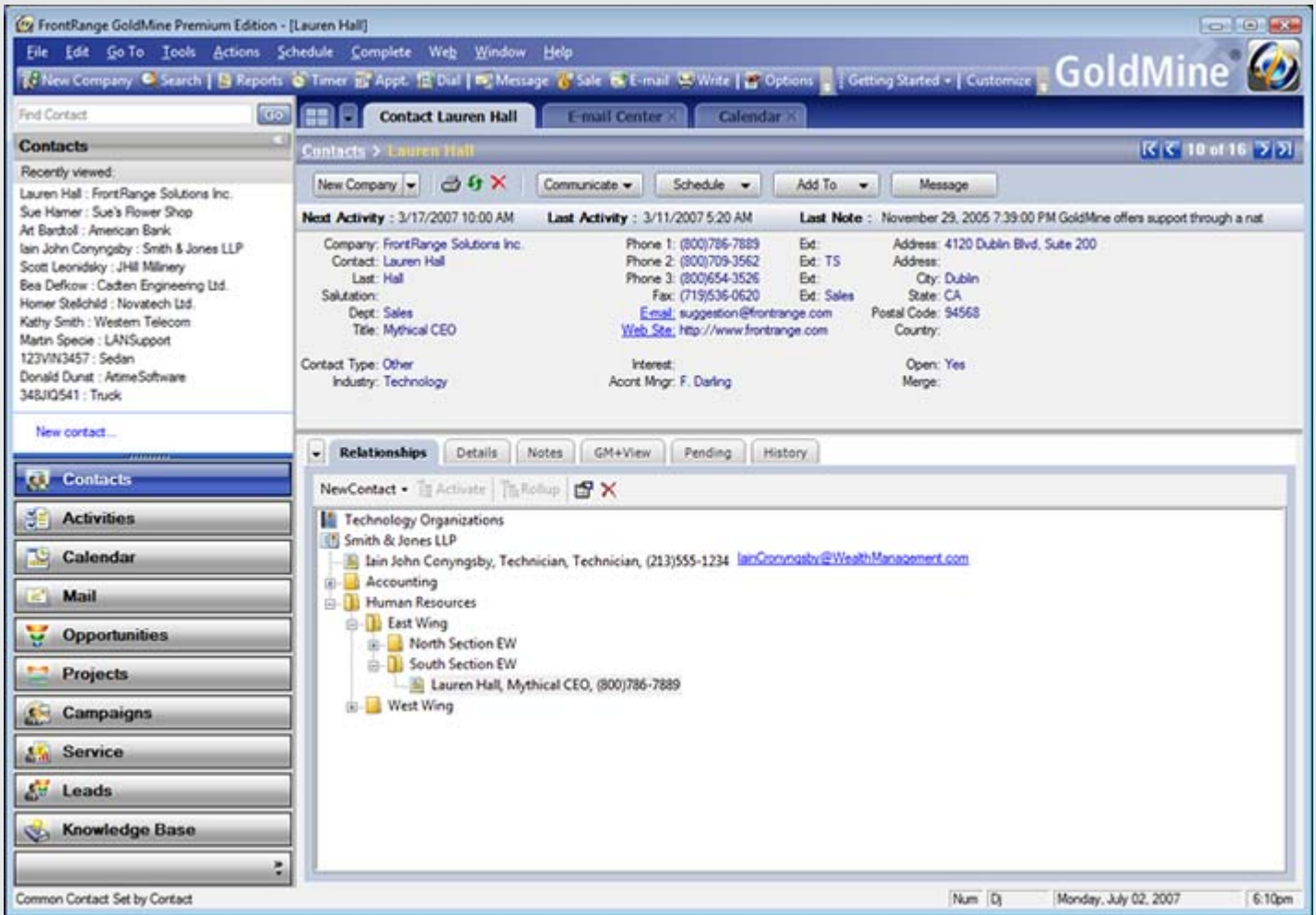


Figure 1

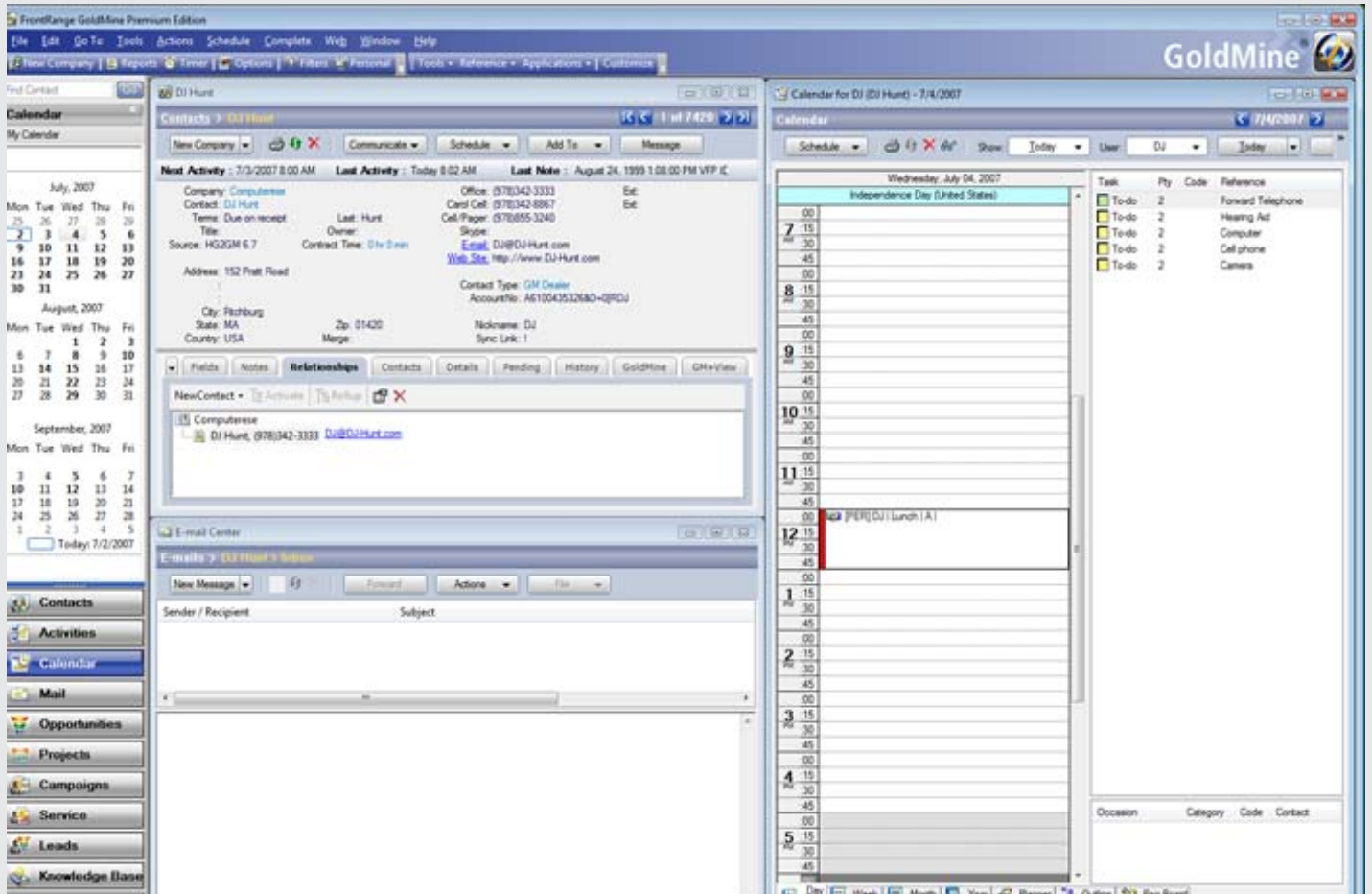
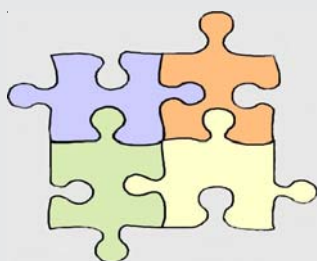


Figure 2

Converting GoldMine SE (dBase) to GoldMine PE



by

Bob Gannett

There are three general ways to convert dBase data to GoldMine Premium Edition (GMPE):

1. Rehost the data in Microsoft SQL, and then bring it into GMPE.
2. Install GMPE on top of your GMSE, and let PE convert the data
3. Install GMPE into a separate location then bring the dBase data in.

While there are many variations of these ways to convert dBase data to GMPE, this article deals with the 3rd method. This method allows you to keep your original GMSE operational while you transition into GMPE. I have used this method several times.

Preparation of GMSE's data.

1. If your GMSE is a version earlier than 6.7, you should begin by upgrading to GoldMine 6.70.50123 or GoldMine 6.7.70226.
2. Backup your entire GoldMine program. I use WinZip, and also copy the entire GoldMine folder to another location. You must be in the position were you can restore the entire program if needed.
3. Perform full Maintenance to include Rebuild and Pack, with the Sort and Verify switches turned on.
4. Again, backup your entire GoldMine program. I use WinZip, and also copy the entire GoldMine folder to another location. You must be in the position were you can restore the entire program if needed.

Next, you have to make a decision as to whether GMPE's data will be hosted in Firebird or Microsoft Server 2005 SQL Express. GMPE will support either (in theory), but the consensus is that SQL Express 2005 is the host of choice (better performance, more stable, etc.).

Memory Requirements. The GoldMine Installation Guide says, "...256 MB RAM is minimum, but 512 MB is recommended". I converted 4000 contacts with lots of GoldMine history, and e-mails on an XP Home with 512 MB RAM. During the conversion process, I got an error message indicating that my system was running low on memory. It took 5 hours to successfully convert the data. The **Bottom Line**, have at least 1 GB RAM on the system.

Next, install SQL Express 2005 following the specific instructions found in FrontRange's **Installing Microsoft SQL Server 2005 Express Edition for use with GoldMine**. Do not automatically accept the Microsoft's default settings during installation because,

if you do, GoldMine may not work. Also make sure that you download, and that you install **Microsoft SQL Server Management Studio Express** as per the above-mentioned guide. I also recommend that you download, and that you install **SQL Server 2005 Online Books**. All of these Microsoft programs can be downloaded free of charge.

You are now ready to install GMPE as a new installation to a separate location from your GMSE. For example, if your GMSE is located at G:\GoldMine, you may want to install GMPE in G:\GoldMine PE. If your GMSE is located in C:\Program Files\GoldMine, you may want to install GMPE is some location like C:\Apps\GoldMine PE (**Editors Note:** especially if this is a Peer-to-Peer Server or a Network Server). Install GMPE to a temporary SQL database.

Using Studio Express, create a second, permanent database in SQL. I gave mine the unique name, GoldMine (your editor recommends something more descriptive like GoldMine PE Main.

Once GMPE is up and running, go to **Tools | Databases | Alias Manager...**, and create a second alias in the DB Alias Manager for your GoldMine Main database. Then go to **Tools | Databases | New Database....** In the next screen, check both **Create or copy data for contact set tables**, and **Create or copy data for base GoldMine tables**. On the next screen select the alias (GoldMine Main) that you just created for the importation your GoldMine 6.7 dBase tables. You will see the option to import GoldMine 6.x dBase in the Wizard. This will import all tables including the user table. At the end of the process, it will ask you if you want to use the database that you just created as your default. Say **Yes**, and then log into the GoldMine Main database.

Once you are sure that everything is working properly and that your data is accurately imported, you can then remove the temporary alias. Also, you can then remove the database that you created during your initial GMPE installation process.

Copy the Mailbox folder containing your e-mail attachments over from your GMSE to GMPE. Then go to **Tools | Data Management | Move Linked Documents and Attachments...** (**Editors Note:** This is a new feature in GMPE, and is currently only available in GMPE) to change the paths in GMPE to accommodate the attachment's new locations. The alternative is to use GoldBox for this process.

You will need to set your Options for each user you bring into GMPE.

I would like to thank Chris Miles, Presidio CRM Services for providing some of the basic information concerning this method.

If you want to convert your GMSE by installing GMPE on top of your GMSE installation, I recommend you read the updated instructions contained in FrontRange's "README.HTM" which is an addendum, and errata dated June 29, 2007 to the GoldMine Premium Edition Manual.

Editorial Note:

I wanted to thank Bob in this column while making a statement at the same time. Bob stepped up this weekend, and wrote this article because we were short on articles. In order for this newsletter to continue it requires articles from you, whether you are a GoldMine Dealer, a 3rd Party Provider, or an End User. I only publish the articles that I receive from you, and without those you do not have a newsletter. Please contribute an article today.

Before Your E-mail Starts to Disappear...



by

Bob Taylor

If you've been using **GoldMine Standard Edition (SE)** for years, chances are you've already thought about it: How can you reduce the amount of data in GoldMine's Mailbox table? There's a hard 2GB limit on the size of the Mailbox.dbt file (which is where the text of your E-mail is stored). If you reach this limit, E-mail data begins to permanently disappear (**Editors Note:** If you can open GoldMine at all). So, if you are still using SE, and are approaching that limit, you **MUST** take steps before you reach that limit. What steps?

Delete E-mails en mass

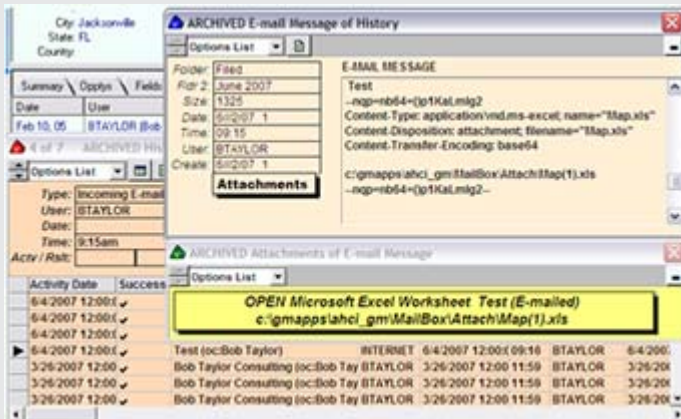
The 3rd party product GoldBox can help you do that, using a filter, while (optionally) leaving the History records for the E-mail in place, as indicators that the mail once existed. You would, of course, need to re-pack the Mailbox table once the deletions have been made to achieve the benefit of the deletions.

Upgrade to GoldMine Corporate Edition

This would be the best choice, if, of course, you can afford it. The Standard Edition of GoldMine has already been discontinued by FrontRange as of April 30th, 2007, so you should consider it ASAP. If you upgrade, you'll be using Microsoft SQL instead of dBase, and the 2GB limit disappears (at least over the LAN; Remote Users may still be subject to limits, however). I wish I could add, "upgrading to GoldMine Premium Edition" as an option here, but at the present time I just don't consider PE to be ready for mission-critical usage. (**Editors Note:** I do consider GoldMine Premium ready for mission-critical usage. We are using it internally ourselves.)

Use GoldBox to Archive E-mail and History

This removes data from the Mailbox table, like Option 1 above, but it also makes the removed data still easily available. A set of GoldBox Views (a downloadable custom interface) will pull whatever **History**, **E-mail**, and **Attachments** have been archived for the current GoldMine Contact at the click of a button.



Option 1 is available to you if you have any version of GoldBox that matches your version of GoldMine. It could even be done using the free tool BR7 (using BR7 would break sync awareness for the deletions). **Option 3** is available for GoldMine 5 or GoldMine 6, provided you have the Professional Version of

GoldBox 5 (GX5), if your data is in dBase; or the Professional Version of GoldBox SQL (GXSQL) if your data is in MSSQL. Also, GoldBox 7 gives the same capability to Users of GoldMine 7, and, when it's ready for use, GoldMine 8 (GoldMine PE).

Would anyone who is already on MSSQL (GoldMine CE) want to remove E-mail from the database, given that the dBase 2GB restriction has been eliminated? If you have not yet updated to GoldMine 7, then **YES**. Your remote dBase installations are still subject to a different 2GB restriction, courtesy of the BDE. But if you have updated to GoldMine 7, then there are no really compelling reasons to do so. (**Editors Note:** I feel that this is a necessary part of data scrubbing that needs to happen on a regular basis, dBase or MSSQL)

However, there may be some convenience issues. For example, GoldMine limits the number of E-mails that can be displayed from any E-mail folder to 1200. If your volume per User is high enough, that might become a problem. But if you can build a filter that will catch the less-critical kinds of E-mail that are sent/received, you can use GoldBox Archiving to remove them from GoldMine, yet still have that information readily available.

So before your E-mail starts to disappear, do not fear...get GoldBox...or get updated to GoldMine 7!

5 Laws for CRM Success



by

Gene Marks

Purchasing a Customer Relationship Management (CRM) System? Here's some bad news: You'll probably fail. It may very well be a disappointment. You could be wasting your money. At best, you may only have a glorified rolodex.

My company services over 500 small and medium sized clients that use the CRM applications we support (GoldMine and Microsoft CRM). We've had lot of successes, but also a good share of disasters too. I got sick of the bad projects, and one day sat down to try and figure out why our great projects were so great. Here's what I found.

Law 1: One individual stepped up to the plate

Every project needs an internal champion. The projects that succeeded all had one. I'm not talking about a Microsoft-Trained-Dungeons-And-Dragons-IT-Propeller-Head either. They're only good for backups and security. I'm talking about a really good administrative person. Someone who has a brain, and who isn't afraid to use it. Or a baseball bat too if necessary. The champion is not afraid to make mistakes. Or yell and scream if necessary. The champion is authorized by management to get the job done, and is evaluated on its success. The champion should know everything about the system. He/she should get all the advanced training they need. The champion is responsible for the accuracy of the CRM database. The outside consultants are used to back up the champion. If you don't have someone like this in place then you will fail, fail, fail!

Law 2: There were black and white deliverables

Don't try to "get more sales" or "service our customers better." That's a joke. You buy a piece of equipment to cut metal. You purchase a truck to deliver your product. What's the specific

Tips, Tricks & Things

Dust-Off the Killer of Children



by

Bob Gannett

Dust-Off, the can of compressed air that we use to clean keyboards is killing our young people.

Many young people, ranging in ages 6-19, are participating in what has become known as "Inhalant Abuse." Most of this abuse is with aerosol products found in the home.

Too many deaths have been reported from "dusting" the "huffing" of Dust-Off. The problem is that Dust-Off is not compressed air: It is compressed R2 refrigerant. It causes frostbite of the tongue, and the back of the throat while it also destroys the lungs. It kills quickly, and there is no cure.

If you have Dust-Off near your computer, and have young people in your home/office, take heed. If you think that this cannot happen in your fine family, go to the following website, and read about a police officer who lost his son to "dusting".

<http://www.snopes.com/medical/toxins/dustoff.asp>

Creating an Organizational Tree



by

Gene Marks

Want to take an Account Level view of a company's contacts. GoldMine allows you to do this through organizational trees. Here's how to set up an organization:

- * Find the record that you want at the top of your Org Tree
- * Click on the Org Tree toolbar button (it looks like an org tree)
- * Click on the New Org Tree Button in the top left or right click, and choose New Organization
- * You have the option to create the Org Tree based on the current record or you can look for another record
- * Use the record you are currently on, and choose Okay
- * GoldMine will create the top of the Org Tree with this contact record
- * Highlight the contact listed, and right click and then choose New Contact/Lookup an existing contact, and add it to the Org Tree
- * The Contact Search Center opens, and allows you to search for the contact you want to add to the Org Tree
- * Click on the contact, and it will be added to the Tree

thing that your CRM system should be doing? How about 2-3 needed reports that you're not getting? How about replacing 2 databases with one combined system? Come up with an exact deliverable, and then have your CRM consultant tell you just how much it will cost to deliver it. Justify this investment by how much more sales or less expenses will result. Pay them when you see it, and it's working. My best clients go into their implementations with a clear, measurable goal in mind.

Law 3: Management were not "girly-men"

Schwarzenegger doesn't like them, and neither do I. This is not a "win-win" situation. You're not trying to make people happy. You're putting in a system to help you generate more sales from existing and new customers. Your competitors are doing it. Don't listen to those whining salespeople who don't want to use this system – CRM applications are standard stuff nowadays. The strongest managers I know look at CRM as just a tool to use to get them the information they need so they can manage their sales and service groups effectively. People don't like change. Everyone's got their own system. Well, it's not about them, is it? It's about the company. If you're a girly-man with your direct reports, then avoid putting in a CRM system. Take your people to the opera instead.

Law 4: They took small steps at a reasonable pace

No one turned the place upside down. Our successful clients took the attitude that their CRM implementation would take place over a long period of time and broke the project down into chunks. Many figured out early that a "test group" of users (especially users with the right attitude) is the right place to start. This way they could get their feet wet, and work out the kinks. And assuming success, the test group of users could help spread the gospel – train other employees, and help with issues. Each phase would be about 30 days or so. And of course these phases were part of an overall plan. By doing it this way, management could make sure things were going according to plan, and give themselves the opportunity to cut their losses if things weren't really happening the way they hoped.

Law 5: They weren't afraid to fail

Look, some really great and successful companies just don't embrace CRM. Their culture isn't right for it. They've succeeded without it. Some of our clients' CRM failures really weren't failures at all. Management knew that CRM was a new concept for their company, and they were willing to take a chance (remember about taking those small steps) on it. CRM systems fail all the time, and for many reasons beyond management's control. Don't be afraid to walk away from something that's just not a good fit. If it was an affordable learning exercise, then it really wasn't a failure at all.

Source:

Like this list? There's 500 more just like it in the [Streetwise Small Business Book of Lists](http://www.smallbizlists.net) (Adams Media, 2006 – www.smallbizlists.net).

Editorial Note:

Gene Marks is the owner of The Marks Group PC (www.marksgroup.net), a ten person CRM consulting firm based outside of Philadelphia, PA. Gene has written four books and speaks frequently on small business topics. His "Penny Pincher's Almanac" column appears nationwide in American City Business Journals.

Tips, Tricks & Things

GoldMine on Vista

by

DJ Hunt



Just today I had someone ask me, yet again: **Will GoldMine run on a Vista operating system?** To which the one word answer is: **Yes**.

Let me make it perfectly clear that only GoldMine Premium is approved for the Vista operating system, however, GoldMine 6.7 SE & CE will work just fine on Vista as will GoldMine 7.0. The problem is that one cannot **install** GoldMine 6.7/7.0 on to a Vista solution. Here is how one would go about running GoldMine 6.7/7.0 on a Vista solution:

Vista solution as a Workstation on a Network

1. Map your network drive to a common drive letter.
2. Drag GMW6.exe/GMW7.exe through the mapped location as a shortcut, and drop the shortcut on the Workstation Desktop.
3. Start GoldMine

Vista solution as a Stand-alone GoldMine 6.7

1. Install your GoldMine onto any XP Pro/Server 2003 system into the C:\GoldMine folder.
2. Make certain that your new installation is running entirely from that folder (**Help | About | System**) including the BDE (if GoldMine 6.7) which should be under the C:\GoldMine\Setup\BDEShare folder.
3. Copy the entire GoldMine folder from the installation system to your Vista solution.
4. Drag GMW6.exe/GMW7.exe through the local drive as a shortcut, and drop the shortcut on the Workstation Desktop.
5. Start GoldMine.

The article: **Converting GoldMine SE (dBase) to GoldMine PE** by Bob Gannett, earlier in this edition, should be read, and should be utilized in conjunction with this tip for our MSSQL readers.

Records Created Today

by

Gene Marks



- * Go to Lookup/SQL Queries, and paste the following into the SQL Query box

```
select Company,  
Contact,  
CreateOn  
from Contact1  
where CreateOn = '08/01/2007' ( Date to be queried )
```

- * Click on Save, and name the query

- * You can change the actual date to retrieve the contacts for the creation date that you require

- * Click on the Query button, and it will return any Contact records that were created on the specified date.

How Many E-mails in a Users Inbox

by

Gene Marks



When you have a user that has too many E-mails in their Inbox, and they are not all displayed, and you want to find out how many they have in their inbox, run the following SQL Query:

- * Go to Lookup/SQL Queries, and paste the following into the SQL Query box

```
select count (*),  
UserID  
from Mailbox  
where Folder = 'X-GM-INBOX'  
group by USERID  
order by USERID
```

- * Click on Save, and name the query

- * Click on the Query button, and it will return all users and the amount of E-mails contained within their Inbox

Filters, Groups & SQL Queries

by

Bruce Naylor



Within GoldMine Filters, Groups, and SQL Queries are ways of segmenting the database to pull specific records for targeted marketing, creating lists, and performing GoldMine administrative functions. Once built, a Filter or Group can be used for activities such as:

- Mass scheduling of activities such as calls or appointments
- Mass emailing
- Mass mails using merge with Microsoft® Word
- Global Replaces, and Territory Realignment
- Mass Deletes
- Running Reports

Here is a 'cheat sheet' to use to get the desired data:

For 'On What': Each has different criteria on which you can select data and criteria from.

(Continued on page 10)

Tips, Tricks & Things

(Continued from page 9)

For 'Static vs. Dynamic': This refers to how 'fresh' the data is. For Filters & SQL Queries whenever they are executed they return the database as how it exists currently. For Groups, they exist as they are built at the point in time they are built, they are a snapshot of the database at a specific point in time.

For 'Speed': Groups are the fastest. If you are using GoldMine Standard Edition Filters & SQL Queries can be slow to access because they have to scan the entire database when they are run. Groups will be faster because they are pre-built. If you are using GoldMine Corporate Edition they will almost always be incredibly fast because Microsoft SQL Sever is very efficient at performing these operations.

For 'Difficulty': Filters are the easiest as they provide the last number of options. As one might expect, as your options increase so does the difficulty.

The majority of the time we can use a Filter or Group to segment our data, however, there are also times that nothing but a SQL Query will work. For example, suppose you wanted to find:

- All Contacts without an E-mail Address
- All Customers you have not spoken with in 60 months
- All Customers without a Forecasted Sale, etc.

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