

## Editor

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## Contributors

David Lee

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## In This Issue

**GoldSync Problems - A White Paper ( Part II )**

**GoldMine 7.00.5108 Review**

**The Challenge of Migrating from ACT! to GoldMine**

**Technology and Customer Penetration**

**Installing Crystal Reports in GoldMine**

**Tips, Tricks & Things**

**Where Am I**

## GoldSync Problems - A White Paper ( Part II )

by

David Lee



In installment 1 we discussed how GoldMine synchronization works, its advantages and disadvantages, and how you know if you might have a problem.

This installment discusses the ways in which sync problems occur. You will see that many "synchronization" problems are really database or data problems which are manifested by the synchronization process.

The final installment will discuss how to correct your GoldMine synchronization problems.

### How do sync problems happen?

- **Errors in sync filters**

- The sync filter may have been set up incorrectly. Some filters are quite complex and can have faulty logic.
- The logic of the filter may correctly reflect the original specification, but the specification may not give the intended result (for example, I want to sync only records "owned" by a sales rep, but I forgot to sync records common to the whole team. Therefore, the rep feels that he is missing records. He can sync up a team record that he creates, but never gets updates from the sync server. He views this as a sync error.)
- User-introduced sync filter errors. Sometimes users click into the sync area just to see what is going on. They may change a setting or actually load a different filter accidentally.

- **Errors in sync settings**

- In addition to filters, there are many other settings governing what data is sent and what data is accepted during a sync.
- Some settings may have been made in error (for example, settings that prevent syncing all calendar records when the actual intention was to prevent syncing calendar records that do not belong to the user but to allow syncing records that do belong to the user)

( Continued on Page 2 )

# 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.

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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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( Continued from Page 1 )

- Some settings may have been changed by users who are "Browsing" through the sync settings
- It may be difficult to identify these changes, especially if they have been corrected by the time the GoldSync engineer starts to investigate the cause of sync problems.

- **Inappropriate Record Settings**

- You can mark individual documents and records to NOT sync. This is very valuable when the documents are personal, or when very large documents would require excessive transmission times. However, users may forget that they flagged the document or transaction not to sync, and then view the failure to sync as an error.
- GoldMine has a calendar "rollover" feature to automatically forward old, uncompleted activities to the current day. The rollover could involve large numbers of transactions, and there is an option to flag them as a group to not sync. Again, a user could forget that he made this setting and view the failure to sync as an error.

- **Misunderstanding how deletions sync (delete filters vs. deletion logs).**

- When you delete a record, you create a transaction log entry. This entry synchronizes, and causes deletion of the record in the synchronizing computers. The record can never be restored as long as the log exists.
- When you create a deletion filter or a territory realignment, there is a different type of deletion record. It does not remove data from computers other than the target computer, and it does allow records to be restored.
- If you move a record from to another file (such as an archive file), it creates the second type of record. This will not cause the record to be deleted from other systems during sync. This may be incorrectly viewed as an "error" by some users.
- If you want the record deleted from a target computer but not from other computers (such as in a territory

( Continued on Page 3 )

realignment), you must create something called a "deletion filter"

- A user may reassign a record to another user by changing the record owner field or by updating a sales rep field. If his own sync filter does not allow him to see records with the new setting, he will no longer get updates for those records. Moreover, if nobody creates a deletion filter for him, the record will not be removed from his computer. Finally if he gets frustrated and deletes his record, he might delete the record everywhere in the system. All of these could be viewed as sync errors but in fact all can be addressed by proper sync design and sync settings (such as not accepting deletions from the main sync server)
- **Using the wrong default sync settings (not restoring the default)**
  - GoldMine allows many synchronization options. For example, it is the only major CRM system that allows two users to sync to one another and at the same time sync to a primary sync server. Each sync configuration that a user defines can be saved as a "sync profile" and a user can have as many such profiles as he desires.
  - The default profile is always the last one that was used. If a user selects or defines a new profile for a 1-time use or just because he is browsing around the system, that will become the default.
  - If the user does not remember to restore the original default, all future syncs (until he realizes the problem and restores the correct profile) will produce an unplanned result. For example, he may build a new sync file (called a Transfer Set) over and over without actually completing a synchronization. If he realizes his mistake and restores the original settings, it will be difficult for the GoldSync engineer to identify the cause of the problem.
- **Database / index corruption**
  - Many laptop systems (and some network systems) use the dBase database structure rather than MS SQL. DBase uses indexes to associate the GoldMine files, and these indexes are subject to corruption. If the corruption is not corrected (using the reindex or rebuild tools), the system could start losing track of the relationship of the

files that build the record. This could not only cause synchronization problems, but the corruption could even be passed to the server and then from the server to other laptops.

- There could be other database corruption problems such as BLOB (Binary Large Object, or Notes fields) errors. Very large note fields are especially vulnerable to this type of corruption. The best preventative measure is to keep many small notes (such as separate notes for each call or meeting) rather than one very large notes field for several interactions.
- **Duplicate CONTACT2 records**
  - This is a specific kind of data corruption that is especially insidious. Each Contact1 record expects to have a single Contact2 associated record. For a number of reasons, including index corruption or someone restoring a system by overlaying a file, GoldMine may not realize that it has a Contact2 record and may build another one. This creates duplicate Contact2 records. (NOTE: VMI has developed software to find and correct the Duplicate Contact2 record problem. Please call VMI if you suspect that you have this problem, or if you simply want to have your files checked for this problem for peace of mind)
  - When you look at a record or sync a record, you will randomly select one of the contact2 records to associate with the Contact1 record. Depending on which one you see, some fields will have missing or incorrect data. Next time, if you happen to see the other Contact2 record, you will see different values in the fields.
  - Since this problem will synchronize, the resulting issues may be viewed as sync problems.
- **Deleting transaction logs**
  - If possible NEVER purge the Tlogs, although this is highly unlikely as they will bloat in size and cause the system to slow down. If you do purge the logs, make sure that you first create a transfer-set of the Goldmine customizations. (This is the only way you can send customization changes to remote sites.). Also, save a few months worth of TLOGS rather than purging ALL Tlogs

- From time to time, it may become necessary to delete your transaction logs or individual log entries. One reason might be that someone has wrongfully deleted a record and you must delete the offending deletion log entries in order to restore the record.
- The problem is that this is a very difficult process and people tend to do it incorrectly. Often they delete entire files when they should be deleting individual entries.
- When the file is deleted, GoldMine “forgets” information critical to synchronization and “errors” could result.
- There are transaction logs in the main sync server AND in all synchronizing computers so there are many potential points where errors could occur. This makes it difficult to identify the problem.
- The protocols necessary to ensure that you do not lose data when you delete the transaction logs are difficult to follow and few people do it correctly. The protocols require that every synchronizing computer in the entire environment be involved and usually all in the same day.

- **Syncing with a filter active**

- A user may activate a group or filter for any number of very valid reasons. However, if he accidentally leaves it active when he syncs, then only the records defined by the filter or group will sync.
- Note that if a user has active tagged records or has activated an org chart section, it has the same effect as an active filter.
- Next time he syncs, the sync will be from the date and time of the last sync, so the records that were missed will not be synced.

- **Syncing while logged in as someone else**

- Sometimes users log in as someone else for a number of reasons (for example, they may log in as “Master” in order to perform a function that requires master rights).
- If they forget who they are and sync, they will be using a wrong sync filter. In the case of Master, it is probably no filter at all

which will mean that they are syncing all of their records. In addition, Master will be syncing as of the last time he synced (which was probably “never” in the case of a laptop) so it could sync years of data and cause havoc in the main system. Again, proper setup could prevent this or at least make it extremely difficult for the user to make the error.

- **Incompatibility between the GoldSync Server and the Client**

- The server and the remote sites should always use the same encryption level.
- The server and the remote sites should always be on the same version AND build.
- Make sure that the remotes Regional Settings are appropriately selected for where that individual may be based (GoldSync automatically compensates for time differences in different time Zones).

- **Locking an active record**

- If you have a record open in edit mode (including a history or calendar record), it is locked and will not sync. Over time, this could cause an accumulation of unsynced data.

- **Locking a document**

- If you have a document open, then it is locked and will not sync.

- **Syncing with the wrong database open**

- You may work on multiple databases (such as a primary and an archive database). If you are in the archive and forget where you are, you might launch a synchronization from that file.
- This will cause the wrong data to synchronize. In some countries it is legal for the sync administrator to shoot you if you do this.

- **Duplicate Record Merging**

- When you merge duplicates you might merge two records representing the same person but which were each “owned” by different reps.

- After the merge, the record may “disappear” from one rep, who will view it as a sync error.
- **Overlaying files**
  - In an effort to restore data or to correct other problems, a GoldMine administrator may copy a file such as the Contact1 file or the Calendar file for dBase systems.
  - This can be a very efficient shortcut to correct problems. However, if it is not done exactly correctly it can cause extensive data corruption and/or sync corruption.
  - DO NOT “selectively” restore Tlogs from a backup. Doing so may cause recently entered records to be tracked incorrectly!
- **Database structure changes**
  - You may have changed the field structure in GoldMine. Assuming that your sync settings allow, these changes will go to your remote sites through sync.
  - If the same sync set that changes the field structure also contains data for these new fields, that data may not sync (because at the time the fields do not exist)
- **Transmission and application errors**
  - The sync files may be corrupted during transmission. If they are not received at all, then GoldSync will re-send them in the next sync session so there will be no long term harm. However, if they are received and the sync process starts, and if it is aborted because of an incomplete file or other transmission problem, GoldSync will think that it got the file and will not realize that data is missing.
  - If GoldMine or Windows freezes while the sync set is being applied, or if there are other application errors, the data that is not applied will be lost. GoldSync will not realize that not all data has been applied.
- **Out of space**
  - If you run out of disk space during a sync, that sync will abort.
  - If you are not paying attention to the progress monitor, you may not realize that you had a problem.
- In most circumstances, GoldMine will realize that the sync did not complete properly and will “catch up” the next time that it is able to run a complete sync.
- **No Transfer Set to Pick Up**
  - In one of the sync options called queued processing, transfer sets are created on a schedule and are then sent when the user syncs. This saves him the time of waiting for the transfer set to be created.
  - In the event that there is no transfer set available, he will get a message in his progress monitor saying that there is no transfer set to pick up. If he does not read the message, he may not realize that he has not gotten any data and he may view the lack of new data as a sync error.
  - In most circumstances, GoldMine will realize that the sync did not complete properly and will “catch up” the next time that it is able to run a complete sync.
- **Restoring a database from a backup**
  - Sometimes a GoldMine database must be restored from backup files. This may be the primary database or it may be a laptop database.
  - Since the database, including all sync logs, has now been restored to an earlier version, some data could fail to sync
  - Even worse, the database administrator may only restore selected files. Depending on the sync rules in force, and the files that were restored, this could cause any number of problems with synchronization. If this happens to you, try your best to find out when the files were restored, what files were restored, and the date(s) of the restored files. Give this information to the person who is helping you to recover.
  - This can create some very complex problems, especially if there have been several synchronizations after the backup restore and before you realize that there is a problem.
- **Main contact record Notes tab**
  - When you enter data into the Notes tab in the main GoldMine record (not the Notes of a calendar or history or Detail tab

transaction), that note is automatically date/time stamped.

- GoldMine will synchronize the new note on the next sync.
- HOWEVER, if it sees the same date/time stamp in the receiving system, then it will assume that it has already been synched and will not apply the new note.
- This means that if you edit such a note after you sync, the edit will never sync (even if you set back the sync clock). This is not a bug: It is the way the system is designed. Nevertheless, many users will view it as a sync problem. The solution is to add new notes when you need to change what you said, rather than editing old notes.

• **Program bugs**

- From time to time we find actual program bugs that could affect sync. These could be bugs that have always existed but occurred so rarely that nobody ever noticed, or new bugs introduced when some part of GoldMine was updated.
- FrontRange will correct these bugs if they are reported and if they can replicate the problem.

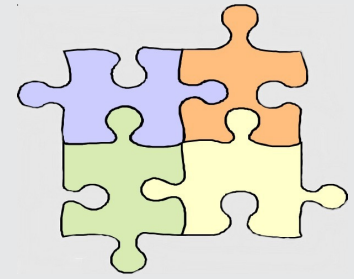
**About the author**

David Lee is a recognized expert in CRM data synchronization, and has configured synchronization for hundreds of GoldMine (and other) CRM systems.

His company, VMI, has worked in over 1,000 CRM implementations since 1985. Almost half of these use the synchronization feature. VMI has actually hosted synchronization for more than 2,000 users over the last 5 years. These clients synchronize data directly to VMI servers. VMI also supports synchronization for many others through remote access to their own servers. In addition, VMI has used synchronization internally since 1993. This gives us more real-world synchronization experience than any other organization (including FrontRange itself).

Mr. Lee has designed dozens of tools and processes to analyze and correct synchronization problems, including SyncRx (whose logic was later incorporated into the GoldMine system itself).

**The Challenge of Migrating from ACT! to GoldMine**



by

David Evans

ACT! and GoldMine have been operating in a similar competitive arena for many years, and users who start out on ACT! often progress to GoldMine. As providers of data integration software for GoldMine, we receive many requests for a solution to make the movement of customer data from ACT! much easier.

Migrations – from any system – are rarely straightforward. Users must often go through a time consuming and costly process, and even then may be left with unsatisfactory results. The key is to find a solution that can perform as much of the migration as possible with a minimum of extra effort.

**Why can migrating from ACT! be so difficult?**

• **Limited export functionality**

Although ACT! does contain an integral export facility, the ACT! Export Wizard only allows export of data to other ACT! databases or to a text delimited file. The text delimited file only contains contact data. If there is a requirement for the migration of notes/history, activity records or sales opportunities, a different approach is needed.

• **Issues with e-mail and file attachment handling**

The way ACT! handles e-mails causes additional problems. ACT! creates e-mails as attachments, meaning special attention is needed to move these into GoldMine as History items. This is exacerbated when the e-mail itself contains a file attachment; it can be difficult to capture and display this information in GoldMine in a way that is easy to use and understand. Where file attachments are concerned, the relevant path names will need to be extracted from ACT! and then copied into GoldMine, or the files themselves may even need to be relocated.

• **Limited direct correlation**

As anyone at FrontRange will tell you, ACT! and GoldMine are very different. ACT! contains some information, such as home address and personal details, that does not have an exact correlation in GoldMine. Additionally, the ACT! installation may have user defined fields for which a correlation in GoldMine needs to be identified or created. It is therefore difficult to find a uniform ACT! to GoldMine migration tool.

- **SDK license constraints**

An important point to note is that migration from ACT! 2005, ACT! 7 etc. to competitive products is expressly prohibited by the ACT! SDK (Software Development Kit) license. This means that some of the migration tools developed for ACT! 6 and earlier may not be available for the very latest version of the software.

### How can I make migrations easier?

- **Create a plan**

We recommend that anyone approaching a migration first create a detailed plan. This should include a backup procedure and testing schedule, and decisions need to be made on whether all records should be exported or if exclusions need to be applied. Having a formal plan at the outset minimizes later confusion and provides formal clarification of the project requirements.

- **Understand the differences**

As ACT! is a highly customizable application, special consideration is needed to ensure the correct data is moved during the migration. Before proceeding with an ACT! export, it is therefore necessary to gain an understanding of where the customization has taken place. There may not be an exact correlation in the GoldMine system, in which case GoldMine may need to be customized as well. In any case, deciding exactly what information is needed in the new system, and where it should best be located will help the migration progress smoothly.

- **Select a tool**

There is a range of migration tools available which promise to be able to make migrations easier. All have advantages and disadvantages, and these must be carefully considered before the appropriate tool is selected.

- **Can I buy a tool to help me migrate from ACT! to GoldMine?**

At InaPlex we hear stories from many of our clients who would benefit from a migration tool to facilitate ACT! to GoldMine migrations. Ease of use, accuracy and cost are all important factors.

Whilst a standard approach reduces the learning curve and provides a solid basis for tackling migrations, we also recognize the need for flexibility, especially where an extensively customizable application such as ACT! is involved.

The InaPort ACT! to GoldMine Migration Pack provides a viable solution to these considerations. The Migration Pack comprises a series of InaPort profiles which tackle the

common elements of an ACT! to GoldMine migration yet can be fully customized if required.

By providing a standard approach that is flexible enough to be customized as desired, we believe users can benefit from improved quality of data in their GoldMine system. For more information on how InaPlex can help with ACT! to GoldMine migrations, please contact the InaPlex Development Team ( bCard on page 12 ).

## GoldMine 7.00.51018 Review

by

DJ Hunt



First of all, with the release of GoldMine 7, the GoldMine Development road map becomes more clear. GoldMine 7 was only released to the GoldMine Corporate Edition users new and old. GoldMine Standard Edition users will be permitted to upgrade to GoldMine 6.8 when it is released which is expected to be early in the 1st quarter of 2006. The two products are expected to be merged back into version alignment with the release of GoldMine 8.0, which is road mapped for 3rd quarter 2006.

GoldMine 6.80 will remain in dBase using the BDE, but will be a patch for GoldMine 6.70.50123. Let's not get into the discussion about your having to pay for a patch. They are trying to include a few of the enhancement features that were incorporated into GoldMine 7.00, into the GoldMine 6.80 release. Since they are negligible, I won't even go into them.

GoldMine 7.00.51018 has removed the BDE dependency and now employees ADO as its engine. This required a complete revamping of the code, and, as you might suspect in a brand new application, has many discovered, and yet to be discovered flaws.

Do you currently use WebImporting a lot? I know I do. In GoldMine 7.00 WebImporting works, albeit, crippled. I had to develop a work-a-round to get GoldMine to import a record. After you manage to get the import accomplished, GoldMine doesn't create the record properly. Dates that are brought in as 10/25/2005 populate GoldMine fields as 6/20/2010. The Status field is supposed to have the 2 byte populated with a 1 when there are Notes, and the WebImport does not populate the Status field at all.

Many other things that didn't work previously, now, do work. One that annoyed me was when editing/deleting a multiple activity Cal record, you always had to answer the edit/delete all multiple activities question. Today, once you say, "Don't ask me again", you are not asked again.

Recommendation: I have to use GoldMine 7.0 for my book, however, I do not recommend that any of my clients upgrade to GoldMine 7.00. You should stay at GoldMine 6.70.50123 until GoldMine 7.10 has been released.

# Technology and Customer Penetration



by

Neil Saviano

Two questions commonly asked by most companies are:

**“What process should we use to build a new customer’s business?”**

**“What process should we use to build an existing customer’s business?”**

These questions generally arise after either a successful prospecting process has culminated in some opening business, or the current customer business is just not building. Both dilemmas relate to marketing’s concept of “customer penetration”.

The new and current customer dilemmas include the following: Most opening business is usually a “trial” to see how the new company is going to perform. Unless the opening business is leveraged to create future business that will result in customer penetration and ongoing business, long-term new customer profitability is in doubt. Many current customers’ business is sporadic with no process in place to maximize penetration.

The key to new ( and current ) customer penetration is to have a structured process in place. Unfortunately, structure has not been the norm for most marketing companies. Most recognize the need to build a customer’s business, and they implement various well-intended follow up programs. Arrays of promotional materials are used, but mostly in unstructured sequences that lack strategically timed customer touches. It’s tantamount to “hit and miss” at best. Also lacking is a system for measuring the effectiveness of a penetration program.

Structured customer penetration programs need to be built around CRM ( Customer Relationship Management ) software such as GoldMine. GoldMine can store both demographic as well as business history. Once stored, this information offers a “snapshot” of the level of penetration being achieved. A snapshot could include demographic information such as a customer’s number of employees multiplied by estimated annual business per employee to determine a customer’s annual buying potential. The potential is matched against business history to determine a customer classification based on the level of penetration being achieved. Classifications become the basis for creating customer groups – the groups are attached to structured penetration strategies.

GoldMine can be very effective in implementing structured penetration strategies. Consider the following example: Historical information shows that a group of customers are

buying little if any of a particular product or service. They are classified in GoldMine based on their status and subsequently are placed into a sequential process of promotional touches that could also include appointments and/or phone calls by sales people. This is an example of Goldmine Automated Processes and represents a part of sales force automation. Most companies have well-intended follow up programs; unless they employ some kind of sales force automation they are plagued with the inconsistencies and low return of investment that plague manual unstructured programs. The scenario sighted above is only one example of how companies can build business with GoldMine and sales force automation. Unlimited processes and sales and marketing campaigns are possible.

An added benefit from a software-based customer penetration strategy is the built in sales person accountability. All process events can be coded and automatically posted to call reports within GoldMine, providing a synopsis of not only the events being carried out but the effectiveness of the calls and appointments as well.

There is no doubt that customer penetration is at the core of a typical company’s level of profitability. New customers are of little value unless their new business can be leveraged to create future ongoing business, and perhaps from a wider array of products and/or services. At the same time under achieving current customers represent much lost opportunity unless they are constantly analyzed for their profitability and buying status. Subsequently their status should determine a follow up program and GoldMine’s CRM and sales force automation functionality must be at the center of the effort.

The automated process scenario sighted above is only one example of software-based penetration strategies. Customer information used properly provides many penetration opportunities if used effectively. Consider the following example from a reseller of office products:

A customer is listed as a wholesaler of air conditioners. A sales person has noted ( in GoldMine ) that their customer has its own sales force. This information, if used properly by the sales person, presents an opportunity to target this customer with audio visual supplies for conducting better sales meetings, or binding equipment and binding supplies for the customer’s presentations to its own customers. This scenario not only results in more business from a wider array of products, but has the spin off effect of enhancing the relationship with the customer by providing the savings associated with having to buy from multiple vendors. It’s been estimated that it costs a typical company \$75.00 to create one purchase order.

CRM software-based strategies ( using GoldMine ) must be at the forefront of most company penetration programs. Customer information must be used to constantly identify more business opportunities and subsequently turned into processes and campaigns for structured follow up.

Importantly, each customer's buying status must provide a snapshot of where a company is with a customer's penetration and where a company wants to take a customer. More business and more profits usually ensue.

#### Editorial Note:

Neil practices what he preaches. One of Neils clients developed an **Automated Process** system which works as a client barometer, placing the clients in a certain category based on their past sales history. Longbow Consulting Group has implemented many of the **Barometer** solutions into his clients GoldMine practices.

I can't advocate enough the power of the Automated Process when implemented properly.

## Installing Crystal Reports in GoldMine

by

Andrea Dominguez



As mentioned previously, Crystal Reports by Business Objects is one of the most in depth reporting tools on the market today. The pros of Crystal are that you can almost pick your database's nose. The cons to it are that you need to know the programming language that Crystal uses in order to pick said nose. There are several different versions of Crystal available. GoldMine in my opinion has done the best with Crystal Reports version 8.5. Typically, I use 8.5 developer when I write reports. You can use Crystal 7 or 9, whatever your preference. Using Crystal 10 or 11 is not recommended due to the dll's as well as indexing. GoldMine likes things in a very certain way.

Even though the files that GoldMine will need are located in a few different places on the machine that has Crystal installed, you need to remember to put all of these files in the root of the GoldMine folder. ( that means c:\Program Files\GoldMine\ -or wherever you've installed GoldMine ) There are basics that every report needs to run and then there are extra files needed for reports that use graphs, maps, etc...

The basic files that are required are as follows:

#### **Crystal 8.5**

CRPE32.dll  
CRPAIG80.dll  
IMPLODE.dll  
P2BxBSE.dll  
P2SODBC.dll

#### **Crystal 9**

CR9Deploy.reg  
craxdrt9.dll  
crdb\_odbc.dll  
crdb\_p2bbde.dll  
crdb\_p2bxbse.dll  
crpe32.dll  
crqe.dll  
crviewer9.dll  
Implode.dll  
msvc60.dll  
querybuilder.dll  
ufmanager.dll  
unicows.dll

If you have a graph, map or anything else out of the ordinary, you will need to figure out which files are used by Crystal to generate the image and add them to the root of GoldMine. I downloaded from the Business Object website a file called modules.zip. This .exe allows you to see what is exactly being used on your PC at anytime. You just click on the process ( meaning the application ) or the .dll itself to see what is accessing it at the current time. This utility works for Crystal versions 4 thru 9 and it is free. From there you can find the graphic files that Crystal uses to make your map, chart, graph work. Once you have your files, just paste them into the root of your GoldMine folder. If you don't want to monkey around with searching for the dll's and you have Crystal 8.5, I have seen a good download at the Prior-Analytics website ( <http://www.Prior-Analytics.com> ) of common dll's used.

Once you have the .dll's in place and your report written, all you need to do is to open the reports menu. Go to **File, Customize Reports....** Once the menu is open you will see a section for Crystal Reports. It is very important to pay attention to this area. This is the section of the program where the report accesses the correct .dlls'.

You will notice several sections to organize your report. Left mouse click on the section your report belongs under and click on the **New** button on the toolbar. A window will appear asking for you to name this report and for file path. Once you have that information entered push the **OK** button.

Since the data source is set in the report, I am finding, in a dbase environment, that simple reports run just fine without setting the ODBC data source. Typically, when I write a report, I create a file.dsn in the ODBC as my data source for Crystal. You can set the source in GoldMine as well by right clicking on your newly added report and left click on set ODBC data source. What I find confusing is that all three of those lines would usually be from the same data source (or .dsn). In a SQL environment setting the ODBC source is a good idea. When you type in your .dsn name, also make sure that you put in your SQL login (i.e., "sa")

## CRMGold.net

Simple, fast, reliable .NET web access to your GoldMine database. 15 minutes learning time for GoldMine users, 1-2 hours for non-users. No setup. CRMGold.net uses your GoldMine setup files to self-configure.



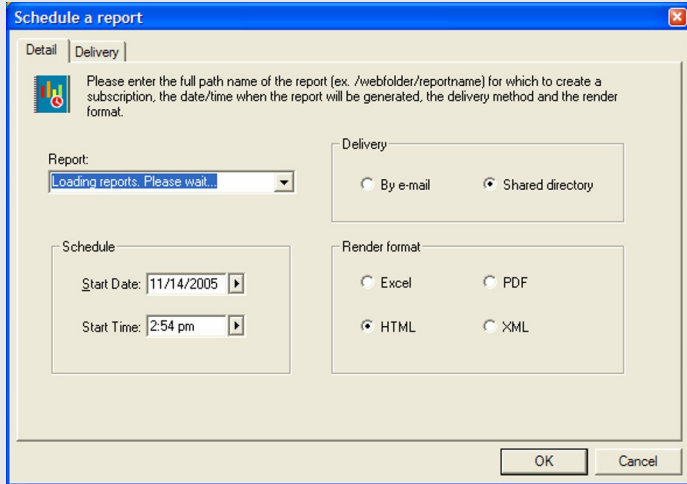
Contact **David Lee**  
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# Tips, Tricks & Things

## Where am I?

by

DJ Hunt



Most of you won't be able to find this as most of you have not upgraded to GoldMine 7.00. That's right, there are some new features in GoldMine 7.00, albeit few.

In GoldMine 7, after you have installed **Reporting Services** ( dll supplied with GoldMine 7 ), and after you have included in your GM.ini:

```
[ReportServer]
WebServiceURL=http://Computer/ReportServer/ReportService.asmx
```

You will be able to use **View | Scheduled Reports...**, and, yes you will be able to schedule reports. You will be able to schedule reports to be created for a certain **Start Date** and **Start Time** to be delivered by **Email** or **Shared Directory** after being rendered in **Excel, PDF, HTML** or **XML** format.

Now there is a feature that many have been asking for.

## Apply Security Rules to an Organization Chart

by

Gene Marks



Can you apply security rules to an Org Chart to limit who can view related contacts?

If you want to apply security to either the **Organizational, Section** or **Contact** level of an Organization Chart, you can select **Write** and **Read** rights by user group or individual user.

To assign Organization Chart Security:

- \* Open an Org Chart and right click in the open area
- \* Select Properties
- \* Select a user or group for Read and/or Write rights
- \* If a section or contact is not selected, then rights will be inherited from the parent organization security level

Once security is assigned, the contact or section will be marked Private to the user or user group.

## Wildcards

by

Eric Turnipseed



How many times have users of the Corporate Edition of GoldMine wanted to see an entire list of candidates for a match just as their Standard Edition counter parts can? Well, according to Eric's tip you can do just that.

You can use the **'%'** key in your search as a wildcard to return all records.

The **'\_'** works as a single wildcard character.

Therefore, to find all domains of the same type when doing an E-mail lookup one might enter:

### %FrontRange.com

To find all Zip codes in the same local one might enter:

**\_14%** ( **014.., 114.., 214.., 314..**, etc. )

## GoldMine Timeline

by

Conference Notes



GoldMine Standard Edition	6.8	Q1 2006
	8.0	Q3 2006
GoldMine Corporate Edition	7.1	Q1 2006
	8.0	Q3 2006
GoldMine Enterprise Edition	5.1	Q1 2006
	5.2	Q2 2006
	8.0	Q3 2006
GoldMine .NET ( Web Interface )		Q2 2006

# Tips, Tricks & Things

## GoldMine 7 - Did You Know

by

DJ Hunt



GoldMine 7.00.51018 has a new feature that I found very useful in my GoldMine support activities. In past versions of GoldMine, one would start the Timer and when a Call was Completed the time would be entered into the Duration field, and the timer would stop. This was great, however, it only applied to Calls.

In GoldMine 7.00, FrontRange has taken this to all activities that are being Completed. If the Timer was running, and the Duration is 00:00:00, then GoldMine 7.00 will enter the Timer value into the Duration field as GoldMine writes the record to the ContHist table.

As I use the Timer to record support time, and Next Actions ( that work in conjunction with my **Contract Updater** application ) to record my activity with clients, this is perfect for GoldMine Support. I no longer have to record the time by hand into each activity, and the Contract Updater deducts/adds contract time to their records based on the value in the Duration field of a Completed Next Action.

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## Moving a SQL Database to Another Server

by

Gene Marks



Can you move SQL Server to a separate server instead of the GoldMine server?

Yes, to move SQL to a separate server, you would do the following:

- \* Install SQL Server (if not already present) on a separate server
- \* Create a empty SQL database in Enterprise Manager on the new server
- \* Name the database the same name as the database on the GoldMine server
- \* Use Enterprise Manager to make a backup of the empty database on the new SQL Server
- \* On the old GoldMine server, use Enterprise Manager to backup the current database
- \* (Name the backups on the new server and current server with the same name)
- \* Copy the backup file (.bak) to the new server under the folder where the empty database backup was saved
- \* Use Enterprise Manager to restore the bak from the GoldMine database to the empty database (use the Force Restore Over Existing Database option)
- \* On the GoldMine server, use BDE Administrator to create a new alias pointing to the SQL Server (same settings except server name)
- \* Open GoldMine on the server to test, you may be prompted to select the new alias
- \* If GoldMine does not appear to be pointing to the new SQL database, open Edit > Preferences > Login tab and select the new alias as the GoldMine and Default databases

When GoldMine is working on the new server, you should test on the workstations.

The users will usually be prompted for the alias (only on the first login).

Also, any ODBC DSNs for Crystal reports should be configured to point at the new server.

### Editorial Note:

Someone in the Forum was asking for this just the other day. Thanks Mark for this timely tip.

Another approach that I like to use is to **Detach** the database from the old SQL Server, and **Attach** a copy of that database to the new SQL Server. This approach eliminates the backup and restore process described by Mark, however, it never ever hurts to backup before doing anything of this nature.

By the way, did you know that the **News Groups** have been shut down, and replaced by the **Forum**?

<http://forums.fronrange.com>

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## Contributors Needed

**The GoldMine Advisor** cannot exist as a one person show. I do not mind publishing the newsletter for the GoldMine community, but I must have articles to publish. Be you an enduser with a tip, or a 3rd party add-on developer who would like to expose their product to the GoldMine community, or a GoldMine dealer with a great article or story, please send in your articles today for the February issue of **The GoldMine Advisor**.

Let's try to keep this newsletter going strong, and this can only be done with your help. Send your articles, stories and tips to:

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