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The GoldMine® Advisor

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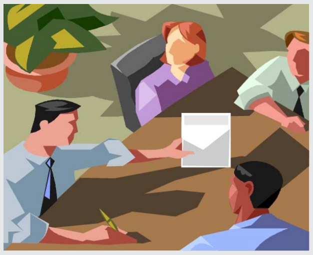
Document Management for GoldMine (Part II)



by

David Brydson

Making it easy for users

A. Use the Info Center of GoldMine to document the style, and conventions your company chooses so that users can refer back to this as they learn the system. Provide examples of the standards that apply, and maybe some variations if needed.

B. If you set up the Word, and Excel applications under the Tools|Options|Save|File locations for each application so that they default to your "Docs" folder; then the application will always start users in the top of the folders where you want them stored. This will not prevent them from saving them in another location, but it will direct them to the preferred location first.

C. As well, change the following registry entry to not allow UNC paths in the document storage. This ensures that documents are stored with a mapped drive only.

Method to Change Registry Setting:

1. Quit all instances of Word, including WordMail.

2. On the Start menu, click Run. In the Open box, type regedit, and then click OK.

3. Locate the following registry key:
HKEY_CURRENT_USER\Software\Microsoft\Office\8.0\Word\Options

4. Double-click the Options key. With the Options key selected, point to New on the Edit menu, and then click DWORD Value. This inserts a new option named New Value #1.

5. In the right pane of the Registry editor window, rename New Value #1 to DontUseUNC, and then press ENTER.

6. With DontUseUNC selected, click Modify on the Edit menu.

7. In the Value Data box, type 1. This setting disables the use of UNC, and forces Word to use a logical drive letter. Setting Value Data to 0 or deleting the DontUseUNC key resets Word to the default, and allows it to resolve file locations using UNC.

Training your user to use the system

Many a well designed, and developed system and process have been derailed by users not following the standardized conventions of your company. We like this because, at some point, it becomes a problem for our clients, and they come to us for a solution that usually requires a lot of work, and therefore, a big bill for us to send. We will use the company/contact centric model for this example because we have found it the easiest for users to understand, and it is also what we use internally.

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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.

All major article contributors will have a business card displayed on the last page of this document. You are encouraged to clip the business card, and save it. Do not contact the author directly unless, at the end of their article, they have made a declaration of sorts that states that you may contact them personally.

All questions, and future articles should be submitted to:

DJ.Hunt@DJ-Hunt.com

If you are including screenshots, they should be no wider than 3.57" US. Their print resolution should be 300 dpi, and they should be in jpg format.

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

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

I am your editor:

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Reportisms Worthy of Knowing

by

Andrea Dominguez

My article, for this issue, is going to be snippets of random thoughts on different things that I have found out over the years, and wished someone would have given me a heads up on. I would have saved my sanity if I had known a few of these things.

Crystal Reports

My most recent battle royale was with ODBC, and using windows authentication for my reports. The environment was Windows 2003 standard server, Crystal 8.5 developer, SQL 2000, GMCE 6.7. What was happening was that the report would give the dreaded #534 error detected in database dll. Technically, that means that the crystal print engine cannot run, but in this case it meant access denied. Buried deep within SQL, you will see access denied. After months (yup, months) of watching this, the access was denied because the NT username would pass, but not the password. If you switched the ODBC to SQL authentication, and manually typed in the sa password it worked great. After much searching, the problem turned out to be a corrupted active directory user group that all report users were a member of. Once the group was removed then everything ran as it should. Just because the report gives an error, it does not necessarily mean the problem lies within GoldMine. You must take a good long look at the environment. 99% of the time the resolution is outside of GoldMine.

Another thing to watch is how your antivirus program interacts with the files. I find sometimes, it is just the best practice to exclude the .rpt as well as the Crystal runtime files from being scanned. A bum active directory group can also prohibit the proper exporting to the users local disk. One would think that it is purely the firewall that can block the data from exporting, but it can also be active directory as well.

Another thing to look for when the #534 error appears is the security settings of the Crystal files. Regardless of where you are running the report from (compiled .exe or from within GoldMine) security rights needs to be given to the Crystal runtime dll's. Especially in a Windows 2003 Server farm.

Sometimes when you write a report, and run it in the RDC, it graphically looks great. Then you install it, and for the users, it looks different. This is a typical issue in large offices where more than one printer is being used. Out of the box, Crystal looks for the default printer driver of the machine when running the report, and not the printer driver from the design machine. If you have lines or boxes in your report, this could drive you up a tree. All you need to do to get around this problem is to alter the print setup on the report in the RDC. There is a checkbox that says 'no printer'. Check that. You might come across a few instances of the report looking different than the RDC, but that would be people with some oddball video cards installed.

If you write a report that accesses the Contact2 table, and you add fields after the report has been written, you could get a whole host of strange issues. I have seen instances that the data doesn't all get returned, different Crystal runtime errors, I

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have even seen the report shut down. And, the saddest of all maladies, the report corrupts, and you have to start over. To make sure these things do not happen to you, open your report in the RDC, and go to the drop down menu 'database' making sure you have a check on 'Verify Database', and 'Verify on Every Print'. It might slow the report down in performance by a few seconds, but it is worth the price paid.

Another thing to pay attention to in the Contact2 fields in reports is if you change the length of a field after you have written the report. There have been a few cases that you would need to remove the field from the report, and then reinsert it.

If you use the Crystal Reports report building wizard, and your report returns different data each time, then you should check the smart linking. GoldMine likes things arranged in a very particular way, and the smart linker isn't all that smart. Typically I only link by AccountNo or userid, never RecID. I am not saying that RecID is bad, I just have found better stability by accountno. Also, what table you claim as primary in linking will sometimes alter your result. If I am doing a history report, then conthist is the primary table linking to contact 1 or 2 (depending on what you want to display with it).

On newer versions of GoldMine, you must use HTML interpretation on Notes if e-mail is involved or if your users like to make their Notes very pretty. The field that stores the body of e-mails, RFC822 is not one of the most stable to insert into a report, especially if it is linking to the ContHist table. Most of the time, I see the report shut down, without errors. It also makes the report performance come to a screeching halt. If one must use this table, insert it as a subreport, and pray for the best. Anything out of sorts at all in your database will not let this work.

GoldMine Reports

Writing custom calendar reports can be a painful experience. It is next to impossible to write formulas to display the items based on time formats (i.e., week 1, week 2, etc… or by day of week Monday, Tuesday, etc…) it is so much easier in Crystal. Sometimes I can even get a SQL Query to do it before I can get the report writer to.

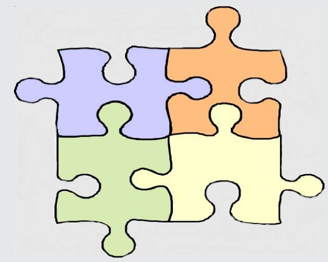
If you use iGoldMine, you cannot change sorts on any Goldmine report. You cannot change date ranges either for that matter. At first I wanted to run away screaming then started inserting dialog fields to prompt the user for input to make it more dynamic. Unfortunately if you have McAfee Enterprise installed, it can scramble those dialog entries, and make the report do odd things.

If your Goldmine report turns up blanks it can mean one of a few things (or all). First check your sorting of your report. If you are running a report for the state of New York and sorting has Montana, then your report will turn up blank. Another thing to look at is your filters if you are using them externally or internally in your report so that it does not conflict with sorting that changes by user or parameters entered at run time.

Many times, it is far easier to write a SQL query instead of a report. I know of several people who can get all of their History activities, Pending, Details, almost anything via a SQL Query, and then export that cursor to Excel for beautification and printing.

Those Avery label reports will never be right unless you alter the layout. I always tell people to first run the label report to the window, and choose a filter that will return more than 20 pages. Print out on the pages on plain paper, and hold it up to a sheet of labels against a window, and see how far the creeping is. Then open the report, and adjust the size first, not moving the data fields. I use to make the mistake of doing this in reverse, and spent an hour altering one label report. By changing the size, it changes the padding around the labels, and most of the time will be all you need. I also change the font to a Sans Serif, and make it smaller. Like a 9 pt. Arial.

Creating a Phone2 Lookup Capability



by

Joe Cigno

Over the years many of our customers have had a need to be able to lookup contact records by Phone2. Although GoldMine only supports lookups via Phone1 out of the box, there is a trick to turning Phone2 into a searchable field. In fact we have used the same technique to create lookups for the address, and fax field as well.

You must take note to the cost of performing this technique. You will have to sacrifice one of your Key fields or the less often used Country field. The key fields are the fields in the 4th quadrant on the main GoldMine screen. However, we have found more time then not that the customer had data in a key field that they never performed contact record lookups against. For example, in many GoldMine installs you will find a key field labeled Contact Type. In this field they could have a lookup list such as Customer, Vendor, Suspect, and Prospect. It is doubtful if they will have perform a record lookup based on this field. The point is, the field you sacrifice to gain this additional lookup needs to be a field that doesn't really get used to lookup records.

Editorial Note:

Now a days the Key1, or Contact Type, field plays an important role in **Record Level**, and **Field Level Record Typing**. As well, Indexed fields allow Filters to perform faster, and many will want to blast against a Filter on the Contact Type field. Say, blasting an e-mail to all of your Prospects.

The following are the steps for this technique. For demonstration purposes, we are going to use Key1 for the new lookup for Phone2, and we will place the data in Key1 field into the custom field u1contype. Note also that Key1 has a field label of Contact Type. You will most likely need master rights to perform these processes.

1) Create a user defined field named u1ConType, C, 20

2) Perform a Global Replace. Choose the "Exchange the values of 2 fields", click next, enter Contact Type (u1ConType) in the left field, and Contact Type (key1) in the right field, click next. Click next, next, and finished. This will move all the data in Key1 to u1ConType.

3) Rename the Key1 label Contact Type to Phone2.

4) Perform a Global Replace to update the field Key1 with the data in the Phone2 field. This is just a little tricky.

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Train users to what your default standard is for creation of a folder for those contacts that need them. Also provide a document that outlines the naming conventions that you're using. Then publish your standard format in the Info Center so that all users can reference the standardized method, as needed, until it is embedded in their use of GoldMine.

The next step is to teach them how to use the various tools inside of GoldMine; and just when to use them. Below are some examples of linked document issues, and some ways to improve your user habits to minimize the administration and management of documents.

An example email with attachment from contact:

Scenario: A contact sends an email to you that includes an attachment. By default GoldMine will store that in the "Mailbox/Attachment/Username" folder (that is how we set up our preferences in GoldMine). As your reading this email you notice at the bottom a pane that displays the attachment with the path G:\GoldMine\Mailbox\Attachments\David. You can double-click on this link to open, and review the attachment (all is good). Most users will reply or file the email, and the attachment is still in the mailbox/attachment folder. They move on, and the attachment is linked to the contact.

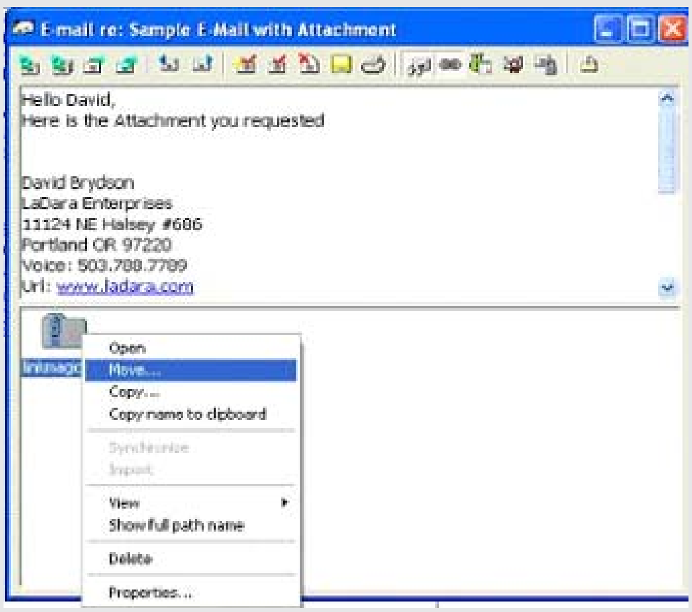

Figure 1

Better Solution:

The user, after receiving the email with attachment, immediately, right clicks on the attachment, and selects "Move" from the options menu. This will bring up the last location a document was saved to; they would then browse to the proper folder for the Contact/Company, and move the file to that location. The link path at the bottom of the email is now updated to reflect the proper path, and then they continue with the reply or file option as before.

Example 2:

Scenario: The user gets an email with attachment, and wants to forward or redirect the email to other users of the system. Most users would forward the email with attachment via the internet email, and the attachment would be received by each user. There will be a copy of the attachment in each user's mailbox; times the number of users sent to (this could be many).

Better Solution:

Have the user place the attachment in the proper folder, and while forwarding; only include the link to the file in the outbound email or send a GoldMine email (which uses the internal client, and places the message on the calendar of the user). This will only have one copy of the file on the hard drive, and therefore save space.

Example 3

Scenario: A user creates a quote for a customer, and they want to cc: the sales manager, their supervisor, etc.... on the email so everyone knows what is going on. This would result in the GoldMine system having a copy in the original folder of the contact, a copy in the "mailbox/attachment/user" folder of each person sent to.

Now if each user does what was outlined above; then, there is a risk of the file being over written or updated with the new file with the current date. If dated material is a concern, then you have a problem. If they don't do a move of the attachment then you have multiple copies of the file on the hard drive. This gets even more complicated when any of the users updates the file and then sends a response to everyone; expanding the problems even further.

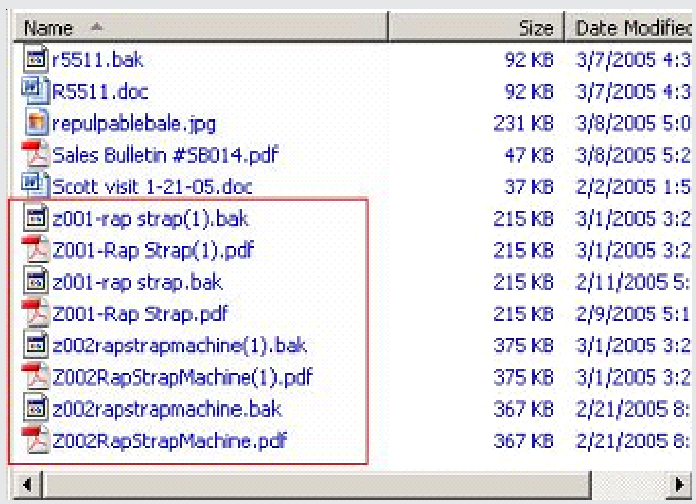

Figure 2

If you use "Automatic Name Assignment" (ANA) in the options of the GoldMine Mail Center; then each time this attachment is received, by each user, the system appends the name with (1), (2), etc in increments of one. This leads to mass amounts of the same document when updates are done by someone, and sent as attachments to the many on the recipient list.

The problem is compounded if you have remote users who Sync back to a Main server. This is because the default settings for Sync are to create a *.bak (backup file) of any original that is already on the server. It only creates ONE backup file, so if you have many remote users it goes something like this:

User on network gets an email, from Contact A with an attachment called Request for Quote.doc. As well, a remote gets a copy of an email with the same attachment from the contact B. Then the network users get another Request for Quote.doc from

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Contact C, and the ANA names the file Request for Quote(1).doc. At the same time, the remotes get a Request for Quote from Contact D, and his system also names it Request for Quote(1).doc.

Now the remote syncs their copy of GoldMine to the server, and the sync process sees the original file and creates a "Request for Quote.bak" file for the document from Contact A because Contact B's file is newer, and creates a "Request for Quote(1).bak" for the document from Contact C as Contact D already has a linked Doc with that name. (By the way, the sync process does not update the link to the existing contact with the new name of the Document.)

If another document comes in with the same name (Request for Quote.doc) then the sync process creates a .bak file of the one from the one from Contact B, and DELETES the Request for Quote.bak from Contact A, as it will only create one bak file. Over time, and with many remote users this ends up an administrative nightmare because no longer are the documents valid for the contact who had that link originally, and some of the linked docs, that have the updated name, are not linked to the contact they belong to.

Better Solution:

User sends email to contact, and then copies and pastes body of email to other users with a link to the attachment for others to view, work on etc. This keeps only one copy of the file, in the proper place, and everyone has the most updated information in one version.

We had a client (6 network, and 8 remotes) that did not do this, and ended up with over 15,000 documents that had the same name, incremented, and it took over 400 hours to straighten this mess out.

You do the math on the cost of correction.

Example 4

Scenario: Email linked to wrong contact. User sends another user an email with attachments that relate to a contact (this is common for project management where one department / person designs and another department / person manages the same project). The email came from an internal contact (employee for example) that has their own contact record or is listed under your company's record. Now the email, and the history is linked to the employees or your company record, not the contact that this is actually related to. Then you go to the record of the contact to find the information, and the information is not there because it is linked to an internal record. This also happens in

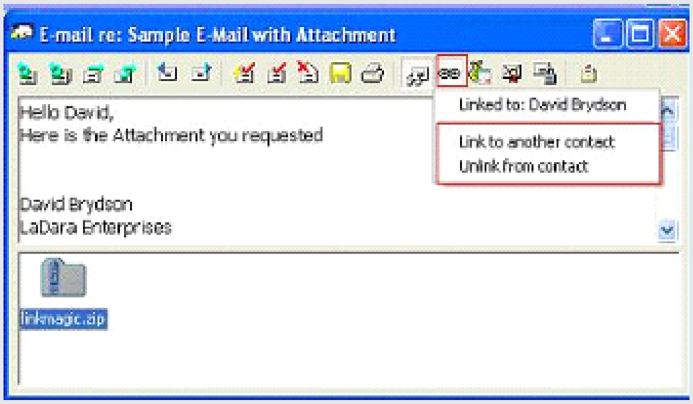

Figure 3

scenarios when a sales assistant or support person receives an email for quote specifications, and the email, and attachments are linked to an internal contact record.

Better Solutions:

Have the receiving user trained to immediately move the attachment into the folder of the contact that it actually relates to. Then click on the "Chain" icon in the message read box, and link the email to the contact it actually belongs to.

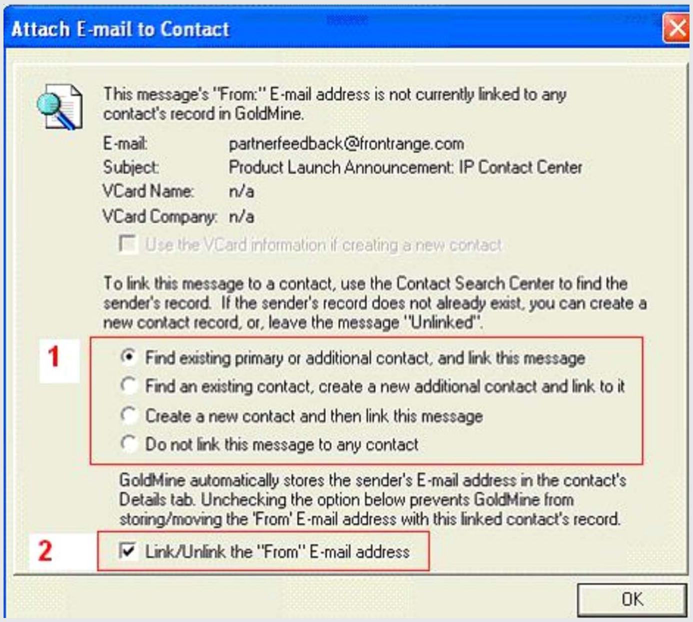

Figure 4

NOTE: There are many times this is done by users that don't pay attention to the check box at the bottom of the re-link window, and the "Employee's email address gets moved to the contact record as well. Then, the next time an email comes from that Employee; it is linked to the contact record it was moved to, and again information, and communication is not properly linked.

Editorial Note:

I can't tell you how many times, we have had to service clients who call us stating that "**GoldMine has screwed up all my e-mail addresses, linking them to the wrong contacts**". As you can see, it is not GoldMine, but careless, untrained end users.

There are ways to minimize or prevent this if you use the following method. In the user or GM.ini file, you can add the following line to the [Internet] section in one or the other file:

UserID.ini:

[Internet]
DefaultLinkAddr=0

GM.ini:

[Internet]
[user-override:internet]
DefaultLinkAddr=0

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I use this often to (un)set the little check box on the Attach E-mail to Contact dialog box. That box prompts you to decide how you want to link messages to contacts. The box I'm talking about appears at the bottom, **Link/Unlink the "From" E-mail address**, to link the e-mail address from the retrieved mail to the contact. To link the message to the contact without linking the e-mail address, do not select this option.

What I find for many customers is that they have employee e-mail addresses on an "employee-type" record. When employees e-mail one another messages about different customers, the incoming message is linked to the employee record. It is the nature of the user to re-link that message to the proper contact record. The problem that I often see is that they fail to uncheck the Link/Unlink option, and their email address is moved to the contact record. Now when they get another email message, the messages are linked to the contact rather than themselves. This causes a mess with the pending/history activities.

As you can see there are a lot of things to consider when dealing with a good document management strategy, and getting your users to follow the rules. The biggest challenge you will face is the "People" factor in any solution you choose. People, by nature, won't know what to do, and will take the path of least resistance in most endeavors, so it is up to you to provide the direction. It will seem a big challenge in the beginning, and everytime you have to train a new employee. The effort will get easier as your users get accustomed to the new methods.

You will need to follow up, and watch for the errors as the system is not fool proof, but it is worth it in the end, and the ease of using a well crafted system becomes apparent. I wish you the best in getting the most out of your GoldMine investment.

About the Author:

David Brydson is the CEO of LaDara Enterprises, Inc; with many years as a GoldMine Solution Provider. He currently holds the title of Certified GoldMine Technician, GoldSync Technician, and GoldMine Trainer. His background includes successfully building 5 companies, of his own, and assisting many more with successful GoldMine implementations over the years.

LaDara Enterprises is a proven consulting company that assists businesses with enhancing, and managing their growth. They do this by focusing their efforts on the acquisition, and retention of customers for businesses using technology products. They are committed to providing solutions to meet businesses challenges. They understand there success lies in the ability to enhance your success, through company-tailored database, and automation solutions.

LaDara Enterprises, Inc. specializes in solutions that center on managing contacts, and centralizing internal and external communications into meaningful valued information. Unlike many software resellers whose origins are technical, LaDara Enterprises' roots are in business development, sales, and marketing. They have combined their business expertise with technically talented individuals to form a team that can communicate, and decipher the special concerns of every individual, department and/or job level.

They also own several GoldMine Add-ons, including LinkMagic. LinkMagic is the premier product for fixing the links, and attachments in GoldMine. Link Magic will allow you to find broken links in the Info Center, Opportunity Manager, Templates, and your GoldMine e-mail and in the Links tab, and to repair them. Using automated, and manual features, you will be able to recover important, lost files faster and easier than with any other application.

(Continued from page 3 - **Reportisms Worth Knowing**)

You must remove the formatting of the phone number in phone2. Choose "Update a field using advanced options". In the update field, select Phone2 (Key1). In the replace field enter this expression, "mid(trim(contact1->phone2),2,3)+mid(trim(contact1->phone2),6,3)+mid(trim(contact1->phone2),10,4)". Click the "Evaluate value of dBase expression", click next, next, and finish. Your phone numbers should appear something like 9725551234.

Editorial Note:

You may decide that you would rather see you use the following expression in case your existing Phone2 numbers were formatted as International.

strtran(strtran(strtran(Contact1->Phone1, [-], []), [)], []), [(], [])

5) Right click on the GoldMine contact screen to open the local menu. Select Screen Design. Click, and double click on the Phone2 label. Click on the Layout tab, and change the field label size to 0. You should only see the Phone2 phone number, the label Phone2 is gone.

6) Click on the Phone2 label in the 4th quadrant (this is Key1 remember), and then double click. Click on the Layout tab, and change field label size to 7, and the data size to 0. All you should see is the label Phone2, the data is not viewable.

7) Now drag Phone2 from the 4th quadrant to the 3rd quadrant placing it where the original Phone2 label was.

8) Now select New from the Screen Design Button Menu. Select the field Contact Type (u1contype), and place the field in the 4th quadrant where you just moved phone2 from. You are now finished in GoldMine, and we will move to the lookup.ini file.

9) Open you lookup.ini file. It is generally located in your GoldMine root directory. If you don't have one, create a text based Lookup.ini file with notepad. Be sure to save as *.*, and enter Lookup.ini as the saved file or notepad will add .txt to your file name.

10) You may have entries already here. The following are the entries needed to make all of this work.

```
[AutoUpdate]
Phone2 = Key1

[Key1]
Otherwise = &mid(trim(contact1->phone2),2,3)
+mid(trim(contact1->phone2),6,3)+mid(trim(contact1-
>phone2),10,4)
Overwrite = 1
```

What this does is every time there is a change in the Phone2 data field, the change will also occur in the Key1 field. This happens as soon as you move the focus out of the Phone2 field.

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(Continued from page 6 - **Reportisms Worth Knowing**)

If you need to perform lookups by address, you only need to modify this Lookup.ini slightly as follows:

```
[AutoUpdate]
Address1 = Key1

[Key1]
Otherwise = &Address1
Overwrite = 1
```

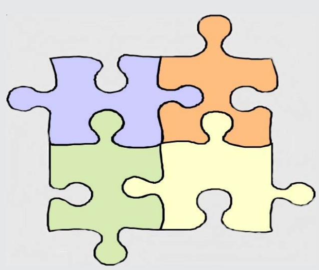
Of course you would need to perform the GoldMine piece of this with the Address field instead of Phone2.

11) The last GoldMine piece is to change the tab position of the new Contact Type (u1contype) field. To do this hold down the control key on your keyboard, and double click on the field below the new Contact Type field. In the field properties click the Layout tab, and note the number in the Position field. Click OK to close the properties screen.

12) Hold the control key on your keyboard, and double click on the new Contact Type field label. In the properties screen go to the Layout tab, and enter 1 number less that you noted above. Now your tab order should work correctly.

Your Phone2 lookup is now complete. You should be able to double click on the Phone2 label, and enter a phone number without formatting, and find a record. If you update the number in phone2 the Lookup.ini file will update the number in Key1 thus syncing the lookup.

Ease of Use is Not the Answer



Part 2: So how do we achieve ease of learning?

by

David Lee

All CRM systems reflect their original design objectives. Simply stated, the way to achieve ease of learning is to make it the central design objective when designing your CRM solution.

To put this in perspective, lets list typical design objectives for CRM systems. Each was once the guiding principal for new system development, and they are listed in roughly chronological order:

- Out-of-the-box functionality for personal productivity
- Extensive productivity features
- Groupware features
- Analytics, and reporting
- Customizable system (functionality through programming)
- Extensive feature sets (lots of functionality)
- Configurable systems (functionality through configuration)
- Business process modeling, and automation
- Ease of use
- Web, and ASP deployment
- Office integration

This list roughly chronicles the maturing of the whole CRM genre. ACT! is a good example of the first design objective, and Microsoft CRM is a good example of the last.

This does not mean that ACT! does not have Office integration features, or that Microsoft CRM does not meet many of the other design goals. In fact, they (and all modern systems) address all of these areas. It is more a matter of focus: They do best what they were originally designed to optimize.

Ease of Learning has always been a design goal (although it has often been confused with Ease of Use). So why do we add Ease of Learning to the list as a new design goal? Because it has never been a primary design focus... Until now that is. The new CRMGold.net system was designed with Ease of Learning as its primary focus.

So what design features make a system easy to learn? Here are four. There are many others, but I have to save something for that book I plan to write some day...

1. CRM should be intuitive

Systems are intuitive when they build on what we already know.

Most of us are used to using Windows systems, and browsing web sites. We recognize certain icons (the maximize, and minimize symbols on a Windows frame, the pull-down arrow allowing us to select options, or the green X symbol for Microsoft Excel). A system that builds on what we already know will be more intuitive.

Editorial Note:

Microsoft has always attempted to have developers, who wish to acquire the Windows logo certification for their product, adhere to a standard in design as set forth in their Guidelines. David clarifies, and emphasizes that point in his article for the layman amoung us.

Some systems have secret key combinations to help us do things quickly (does anyone remember WordStar?) Right-clicking for a local menu, double-clicking on a label or other area to get a special result, Control-Key combinations to navigate or launch macros, are all examples of secret key combinations.

A few of these are so common that they have become part of our “intuition”. Think <Ctrl><Alt><Delete>, or clicking the label at the top of a column to sort that column.

Most key combinations help us in the ease of use area, but are in no way intuitive. GoldMine examples are double-clicking on a label to do a search, clicking into an unmarked data area to find a pull-down menu, or right-clicking for a local menu.

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(Continued from page 7 - **Ease of Use is Not the Answer**)

The way to be intuitive is to have on-screen icons that advertise "here I am", and which are so familiar that you will immediately know what will happen if you click on them.

2. CRM should be functionally simple.

I will go way out on a limb with the following claims: Simple things are easier to learn than complex things. Small numbers of features are easier to learn than large numbers of features.

If ease of learning is your objective, then you should group your users (developers, database administrators, marketing and management, customer support and sales). Provide each group with only the modules that they actually need, and protect them from the complexity of the rest.

CRM systems include features for the designers. These include creating new fields, creating new objects (sometimes called Views or Entities), creating security rules, etc. The user has no business doing this, and these functions should be in separate modules. Fortunately, this is the case in many of today's systems. Unfortunately, other systems (including our own GoldMine) put these into a single interface, and use security settings to hide the features from most users. The problem is that the security settings are often neglected, especially for remote users who synchronize from local databases. This means unnecessary complexity for the user.

CRM systems include features for the Database Administrator. These include adding new users, finding and merging duplicate records, realigning sales territories, archiving or backing up data, importing new data, globally updating fields, etc. As with designer functions, the average user should be protected from these inherently complex functions. Unfortunately, most of today's systems do put these into the same interface as the users see, and rely on the administrator or designer to "hide" them through security settings. Ease of learning demands that these, too, be placed in a separate module.

CRM systems include marketing features (as distinct from sales features). These include mass email or mail merging, managing simple or multi-wave campaigns, designing automated business processes, etc. As with the other examples in this section, these are inherently somewhat complex, and sophisticated functions. Most of them should be segregated into a Marketing module to maintain the simplicity, and ease of learning of the primary module. In this case there is a wrinkle: Many sales forces perform marketing functions. Thus, some sales reps might need to send email blasts or launch simple campaigns. Often this is an indication that the sales process itself is wrong, and that a better process would be for sales to request this from marketing. However, the system should be able to provide this ability if needed by the sales team.

Editorial Note:

What David has just stated: "Most of them should be segregated into a Marketing module to maintain simplicity..." still holds true whether the Sales Force performs the Marketing functions (small offices) or you actually have a Marketing team. The logic still remains solid.

In fact, it is my understanding that this is the paradigm behind FrontRanges new entry, **GoldMine Enterprise Edition**. This product is expected to be completely modularized, and customizable.

CRM systems include customer support features. While the sales module is company-centric or contact-centric, the help desk module is ticket-centric or issue-centric. It is a very different paradigm from sales, and it tends to be confusing to the sales users. Fortunately, all modern CRM systems segregate the support and sales functions into separate modules.

With most of the inherently complex functions removed from the primary module, the interface that the sales representatives use will be much simpler, and easier to learn. When more sophisticated functions are needed, the sales representatives can be given access to other modules. If a more sophisticated function is truly needed in the primary module, it should be added. The current paradigm of providing it by default, and allowing it to be hidden by security settings is simply not working in actual deployments.

3. CRM should be integrated

The program should work with other programs that you already use.

These programs fall into two classes: Productivity programs, and Enterprise programs.

The most common family of productivity programs is MS Office. If the CRM e-mail client is Outlook (as it is with Sage or Microsoft CRM), then you will not need to learn only the integration interface. If data can be exported to Excel or Word with a single click, then you can do your own analysis or PDA integration with tools you already use. You have achieved huge gains in ease of learning. The same applies to other Office products. Of course, this assumes that you know MS Office which is the case for most, but not all users.

But the concept of integration goes further than that. CRM should also be integrated with your Enterprise systems. It should link to your accounting, and operational systems so that data can flow between the systems. If you can simply see the year-to-date sales along with the accounts receivable for a client within your CRM system, you do not need to learn to access the accounting system. If you can avoid interacting with three or four systems by integrating them with CRM, there is a huge reduction in your overall learning curve. There is also a huge gain in ease of use, and in data integrity. That, however, is a story for another day.

4. CRM should self-train

Following my pattern of stating the obvious, it is easier to learn a system if you get training. It is even better if you get the training in small doses when, and where you need it.

There are good training documents for most systems. Vertical Marketing, Inc. publishes several training manuals for GoldMine. I developed online training materials for Microsoft CRM while Joel Scott and I co-authored Dummies books for GoldMine, as well as for Microsoft CRM.

The trouble with even the best manuals is that they are best used when you can set aside time for learning. Most users do not have the motivation to do that, and in any case they do not provide the "when and where you need it" training that we mentioned.

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(Continued from page 8 - **Ease of Use is Not the Answer**)

Microsoft CRM and Salesforce.com have excellent training modules available on the web. There is no charge for the Salesforce.com training (other than the monthly access fee for the system), and you can get the modules that you want when you want them.

This is a step in the right direction. But it is still designed for motivated users who have time to sit down for learning sessions. And, as with the manuals, it is not easy to get trained in specific areas when, and where you need it.

All CRM systems have help functions. Many of these have at least some training functionality. In the case of GoldMine, if you press the F1 function key, you get context-sensitive help that takes you to the topic which GoldMine thinks that you need based on where you were in the system when you pressed the key (a truly excellent feature, although pressing the F1 key for context-sensitive help is itself not intuitive). This is again, a positive step.

A problem with the training options mentioned is that they are generic to the CRM tool. Since each tool is customized to your organization's requirements and processes, the training should likewise be customized. For example, I might want to know what happens when I change the status of an account from active to inactive. Does this trigger some Automated Processes? Will marketing do something reactivate to the account? Will my boss throw eggs or vegetables at me for letting it go inactive?

A truly easy-to-learn system would have field-level help/training as well as the traditional help/training, and the very-cool GoldMine context-sensitive help. You should be able to click on an easily recognizable icon such as to get help and/or training. The system administrator or designer should create the help/training based on your organization's rules. This is so much better than traditional training that we might want to call it something else. Maybe self-coaching.

And yet, it can still get better. I should be able to flag areas where I need help or training, and where what I have is insufficient. Over time, as the administrator adds more help as requested by users during actual usage, the system will grow ever easier to learn.

This is much more exciting than it sounds. It is exactly the opposite of current systems which grow more difficult over time. And you can call your college Physics Professor, and tell him he was wrong: You found a way to reverse entropy.

While you are at it, call your boss, and tell him you reversed the cash flow resulting from excessive ongoing training requirements.

Editorial Note:

I have a personal view on Training, specifically Self-Paced Training. It simply doesn't work unless the managers allocate segments of the day that are dedicated to this endeavor. "In your free time..." just doesn't cut it. Regimented training sessions that include goal based incentives, and that are progress monitored by management have proven themselves to be very effect.

Part 3: **CRMGold.net: The first CRM tool focused on Ease of Learning** should be published in the February 2007 issue of **The GoldMine Advisor**. I look forward to reading that articlel.

Thank you again David for your continuing support of **GoldMine**, and our readers of **The GoldMine Advisor**.

About the Author:

David Lee is president of Vertical Marketing, Inc., and Chairman of the Board of Trustees for the University of Northern Virginia.

David is the technical editor for GoldMine for Dummies, and author of Microsoft CRM for Dummies. He authors a very successful series of GoldMine training manuals, and writes for several magazines, and newsletters.

He has been in the CRM business since 1985, and has implemented CRM systems for more than 1,000 organizations. He is certified in GoldMine, HEAT, ACT!, Microsoft CRM, Sage CRM, SalesLogix, Maximizer, and many other titles. Within the GoldMine arena he is also a Certified Trainer, Certified GoldMine Technician, GoldSync Technician. He has worked with hundreds of third party products.

Vertical Marketing Inc. has 17 GoldMine Programmers, 5 GoldMine Engineers, and 4 GoldMine Consultants on staff, plus a number of partnership relationships. They have an average of more than ten years of software experience, and more than 7 years of GoldMine experience. VMI has been a perennial Top-10 GoldMine VAR since 1993. VMI has developed dozens of GoldMine add-on products, and supports dozens more.

Finally, VMI has written the only true .NET interface to the GoldMine database structure called **CRMGold.net** which you will learn much more about in Part 3 of Davids article.

GoldMine the Latest

by

DJ

GoldMine Standard Edition:

Internet Explorer 7 is being automatically installed on Windows systems currently set to auto-update, and GoldMine 6.7, and under have issues with it. FrontRange has annouced that they will fix GoldMine 6.7 only to work with IE7 as well as fixing a few other issues while they are at it. This free update for GoldMine 6.7 users may even be available by the time that you read this.

There will be no GoldMine 6.8, and you will not be allowed to upgrade any further until, possibly, GoldMine 8. Take that with a grain of salt.

GoldMine Corporate Edition:

Internet Explorer 7 is being automatically installed on Windows systems currently set to auto-update, and GoldMine 6.7, and under have issues with it. FrontRange has annouced that they will fix GoldMine 6.7 only to work with IE7 as well as fixing a few other issues while they are at it. This free update for GoldMine 6.7 users may even be available by the time that you read this. GoldMine 7 users are not seeing any issues with IE7.

There will be a new release of GoldMine 7 soon. Rumor has it by November 15th, which would mean that it should be released by the time that you read this newsletter. I have found, during the Beta testing, that FrontRange has fix all of the show stopper issues, and most of the annoyance issues. I firmly believe that when GoldMine 7.0.4 goes Gold that it will be a viable product. I will be recommending GoldMine 7 to my present clients, and I will be selling GoldMine 7 to my new clients that are capable of purchasing the Corporate Edition.

Tips, Tricks & Things

Editorial Note:

This issues **Tips**, **Tricks & Things** comes to you completely thru the contributions of **Gene Marks** so there will be no by lines, however, I would personally like to thank Gene for all of his contributions to the GoldMine community.

Editing Filters

Uh oh. You created a filter, and put in an **and** instead of an **or**. Can you edit the filter to change the **and** to an **or** rather than recreating the entire filter?

Here's how:

- Go to Lookup/Filters
- Highlight the filter you would like to edit
- Choose the dBase Expr. option
- Click on the Edit Expression button
- Find the .AND. in the expression
- Replace the .AND. with .OR.
- Click the OK button
- Click the OK button again.

Your filter has now been edited.

Sending Notifications

A client asks: Can I send notification of a phone message to another user in GoldMine?

Yes, you can send another user notification of a phone message:

- Choose Contact/Take a Phone Message
- Click in the To User field, and choose the user from the drop down list
- Click on the please call option
- You can create an Activity Code or choose one from an F2 lookup list
- You can choose the message you want the recipient to receive from an F2 lookup list. This is the same lookup as the schedule a call dialog so you are actually scheduling a call back for the recipient with this message.
- You may input any notes that the recipient may need
- Click on the Alarm to activate the message
- If you click on RSVP, you will be notified as to the outcome of the call
- If Link is chosen the message will be linked to the active contact record. If this is not activated the message will be sent just as a message with no associated activity.

Redirecting E-mail

A client asks: One of our employees left the company, and we want to redirect his/her e-mail to another user for a period of time. Is this possible in GoldMine e-mail?

Yes, using E-mail rules you can redirect the email:

- Open your email center, and click on the E-mail Rules icon
- The E-mail rules center will pop-up
- You want to direct all of Mary's e-mail to Joan
- Right click, and choose New Rule Set
- The E-mail Rules Wizard will pop-up, and walk you through creating the rule, its condition, and action
- Name the rule (i.e., Redirect Mary's e-mail to Joan), and choose Incoming Mail as the type of mail this rule should handle
- Click next
- You will now define a condition
- Choose ALL of the following condition must be true
- Click on the New button
- In the Mail Field choose To
- In the Logical condition field choose Equal to
- In the value field type in Mary's email address (i.e., mary@mail.com)
- Click on OK
- Click Next
- On the next screen you will specify what action to take when mail comes in for Mary's email address
- Click on New
- Click on Action on Mail field, and choose Re-direct from the drop-down list
- Choose the GoldMine user option, and choose Joan from the Address field's drop-down list
- Click the Send Immediately option to activate it
- Click on OK
- Click on Finish.

You will now see the rule in the E-mail rule center

Finding Duplicate Records

How can you find duplicate records in GoldMine?

You can run the following SQL Query that will display duplicates where the Company, and Contact name are the same on 2 or more records.

Tips, Tricks & Things

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

```
select *
from Contact1
where Company in (select Company
  from Contact1
  group by Company having count(*) >1)
and Contact in (select Contact
  from Contact1
  group by Contact having count(*) >1)
order by Company
```

Click on save, and name the query. Click on the Query button, and it will return any duplicates it finds. You can then right click in the area where the records were returned, and choose Output to. Output the information to an Excel spreadsheet or a Word document.

Unlinked Calendar Items

Can you schedule an action that is unrelated to a contact record?

Yes, you can schedule a To-do action that is unrelated to a contact record.

- Go to Schedule/To-do
- In the Schedule To-do box type in your action in To do: (you can also create an F2 lookup list here)
- Add any notes for the To-do
- Assign a priority number from 1 to 9 (one being the most important, 9 being the least important)
- You can assign a code if you desire (you can create an F2 lookup list here)
- Choose yourself as the User
- Click on OK

Insufficient Disk Space When Rebuilding GoldMine

A very common problem is that many of our GoldMine Standard (dBase) clients, when they try to rebuild their system during normal maintenance, get the message **Insufficient Disk Space**. This is a known bug with the Borland Database Engine (BDE).

Unfortunately, the problem is that the Borland Database Engine has a problem if the amount of free space that you actually have (in GB) is evenly divisible by 4. So machines with 4.3GB, 16.8GB, 24.5GB, 88.2GB, etc. all choke on the regular BDE free-space request, and report that there isn't enough free space available. Some of our clients have chosen to manually change the free disk space by either adding or removing files as is appropriate, but this is a pain.

We have a fix for this issue - a specific file that you can place in your \windows directory after the IDAPI32.dll has been reconfigured on the Server. If you'd like this fix, please E-Mail me (Gene@MarksGroup.net), and I'll send to you.

Required Fields in GoldMine

Would you like to make a field "required" in GoldMine 6 or above?

Here's how:

To Edit the Security Field Properties (you must have Administrative rights) right-click on the field label, and select Properties from the local menu. The Field Properties dialog box appears.

Select the Security tab. The Security tab allows you to specify whether the field requires data, configure fields access, and turn on auditing.

In the Field Data Entry Requirement area, select Required Data Entry if you want to force the user to enter data in the field. A required field is displayed on the Contact Record with a red box around it.

If the field requires data, and the user has neglected to provide data in the field when saving the record, the Required Fields Alert warning appears allowing authorized users to override the requirement. When a required field is overridden, an Override activity is added to the associated History tab with a Result code of OVR. The record is not removed when the field is updated, and can only be deleted by a user with Master rights.

If Required Data Entry is selected, the field must have (public) read, and update rights.

Note: This setting does not override record ownership, and record curtaining. If record ownership has been assigned, and record curtaining has been activated, only the owning User or User Group will see the field.

Creating a Filter from the Detail Tab

A client asks: How can I create filters from information contained in the Detail Tab?

You can't filter based on the Detail tab (because it contains a one-to-many relationship). Filters only work on the primary contact record, and user defined fields. This means that you can create a filter for all the fields that show on the main screen, and the Fields tab. But, if you want to filter your records based on WebSites, E-Mail Addresses, Additional Contact information, or any other information in the Detail tab (ContSupp table), you'll need to create a Group. This is found under Lookup | Filters, and then choose the Groups tab.

If you want to create a report that limits the Detail tab data, you can do this by building an expression. Examples of this are in the Contacts with Profile Tab report or the Contact Profile (Detailed) report.

Tips, Tricks & Things

Notifying Sales People When a New Record is Created

A clients asks: I want to generate a notice to the salesman every time a new contact is loaded into each one's territory in GoldMine. How do I do this?

Create an Automated Process (Tools | Automated Processes | Automated Processes Center) that attaches to all contact records upon creation.

In this case, you would attach a basic AP that would schedule a follow-up (Next Action or Call). In the options of that follow-up, make sure to schedule for the **User from a field**. Just make sure the sales person's UserID is in a Key field, and that is the field to which you point. You could also, at this point, Alarm the activity at a specific time. Let's say 9:00am.

Now whenever a new record is created, GoldMine will automatically schedule an activity for that salesperson at the specified time. If you chose the in your face approach, the Alarm will trigger at the specified time, popping a notification in their face. If you are following DJ's eBook paradigm this would be a good Event to add to your Observer Track.

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