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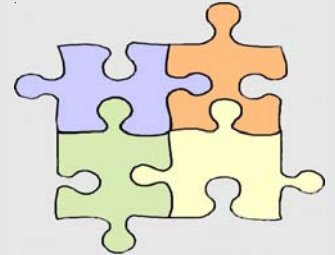
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...and More

Stonefield Query to the Rescue

by

Jason Okrepkie



Have you ever struggled to get your data out of GoldMine quickly for a manager's meeting, client, or co-worker? A simple task such as pulling Company and Contact information can take days or weeks with the back and forth between the report writer, and the person needing the information.

Well, look no further as Stonefield Query for GoldMine is the most user-friendly, ad-hoc query, and report writing tool available for GoldMine. With its intuitive Wizard driven design, Stonefield Query makes report writing a snap for everyone. Elegant and persuasive reports can be created in minutes with little or no technical knowledge required.

Example 1: Database Clean-up

What happens when there are different users creating companies, updating contacts, scheduling and completing activities? Speaking from experience, inevitably, someone forgets to fill out critical information. As diligent as we all are, we make these mistakes anyway. The real question is, how do we clean up the database? Using Stonefield Query we can query the GoldMine database, find the missing data, and "clean-up" the database. In this instance we create a Quick Report, and specify filters that identify the missing data like the misspelled industry of Softwar.

Database Clean Industry equals Softwar	
10/26/2007	Page 1 of 1
Company	Industry
City and County of Denver	Softwar
Clinical Nutrition Center	Softwar
Colorado Cardiovascular Center	Softwar
D & B WESTMINSTER	Softwar
D.F.L ENTERPRISES	Softwar
Totals: 5 records printed	

Figure 1

Once we've found the missing data, we take advantage of GoldMine Groups, and the Global Replace features to update the database. Alternatively, Stonefield Query can link a field in a

Database Clean Industry equals Softwar	
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D.F.L ENTERPRISES	Softwar
Totals: 5 records printed	

Figure 2

(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 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 png or jpg format.

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

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

I am your editor:

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(Continued from Page 1 - Stonefield Query to the Rescue)

report to a GoldMine contact record. In this case you would click on the linked field in the report to find the Contact record within GoldMine. Refer to Figure 2 on the cover page.

Now you can update the missing data, and move-on to the next record. Stonefield Query makes this possible because you don't have to know any of that "technical stuff" behind writing the queries, creating Groups, or linking back to GoldMine.

Example 2: Automated Reports

Do you use GoldMine's Automated Processes? Did you know that Stonefield Query reports can be scheduled to run via an Automated Process? All you need to do is specify the conditions in which the report will run, and call Stonefield Query via a command line. Using Stonefield Query's flexible interface you can easily automate reports to your clients, distributors, co-workers, etc..!

Editorial Note:

One thing that I thought that was extremely nice was that you could have Stonefield Query, Triggered by an Automated Process scan, e-mail that report to anyone, and not just the Primary Contact.

Interested yet? Here are many other uses for Stonefield Query for GoldMine:

- Creating targeted marketing campaigns
- Creating multiple sales management reports
- Creating and sorting mailing labels (in any Avery size and format)
- Searching for specific contact history notes
- Ranking prospects and customers in multiple ways
- Territory realignment
- Extracting GoldMine data to export into other programs
- And much more...

Stonefield Query comes bundled with 40+ pre-defined reports that can be used as-is or modified to meet your needs. Stonefield also offers free online videos, and weekly webinar's designed to help educate prospects and customers about the software and its many uses.

FixCal - Response

by

Troy Mosley



I just read your article (**FixCal - A Free Utility to Fix Cal/Mailbox Tables** by **Paul Redstone, October 2007** issue) in The GoldMine Advisor published by DJ Hunt. Great article!

I have some causes of call record missing from our experiences.

1. Our sales rep were linking e-mails to the wrong Contact record (i.e. when they sent an e-mail outbound they did not pay attention

(Continued on Page 3)

to the GoldMine record in the back ground, and would accidentally link to the record that was showing at the time they composed and sent the e-mail out).

2. Myself, during match backs of prospect and customer records via merge/purge operations (users should use the update a field to mark the record for deletion option, and then select, merge Calendar, ContSupp E-mail, ecetera when setting up the Merge/Purge).

3. Deleting old prospect records two years or older. Our sales staff had linked outbound e-mails to these records, and some of the e-mails were personal e-mails, and e-mails not directly related to those old prospect records. Well when I deleted the old records it destroyed the link, and caused the error message Cal record is missing.

That's my experience with that particular error, and we have educated everyone who uses GoldMine to make sure out bound e-mails are linked to the correct Contact record or not linked if the e-mail is personal or does not pertain to that record.

The Right Side of CRM

Web-based CRM or Not?

by

Dean R. DeLisle

There are many reasons to go Web-based CRM, and just as many reasons not to go in that direction.

If you are on a Dial-up Internet connection anywhere in your life forget about remote access to your CRM or Contact Manager in any way. A major first requirement is good, solid, fast, Internet connectivity.

Once you establish a reliable connection, you must decide which product or platform is best. Remote options come in various flavors.

Web Based CRM - Access from anywhere through a browser, with little or no local software (thin client). You might pay a small startup fee, monthly maintenance fees, and could possibly run on your company's infrastructure.

Hosted CRM - This is served up by an "Internet Service Provider". It usually requires a small startup fee with monthly license fees. You will not own the software, and in most cases, will not be able to run the software on your company's infrastructure.

On Demand CRM - New term for Hosted, mostly the same definition.

Online CRM - Can be accessed anywhere over the Internet. Could either be served up publicly, but mainly is a purchased option to run on your company's infrastructure.

Browser Based CRM - Runs in a browser, a real web browser.



Once you decipher the real meaning of the CRM you are selecting, you must decide the benefits or short falls of being in a Web-based, Hosted or Server-based solution.

The Benefits:

A lower cost of entry, and lower total cost of ownership.

Rapid implementation, although this can vary, depending on the vendor.

Rapid transmission of information across organizational lines, and locations.

Accessibility - you can access web based CRM from anywhere as long as you have Internet access.

No requirement for deployment of backend systems.

No costly hardware server infrastructure necessary.

The burden of data backup is off loaded to Host provider.

The Shortfalls:

Must have a connection to access - not great for rural usage.

Not ideal in a two way synchronization with mobile or portable systems, although this is getting smoother. Q2 2008 should be better!

Back-end integration can be sketchy. Salesforce.com, has a pretty good solution, however, just be ready to get out your wallet. It's not free! Do your homework!

No ownership typically.

Requires planning, and implementation.

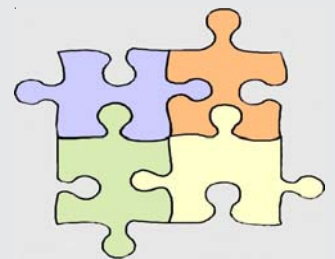
Bottom Line:

Do your homework, and make sure the solution will do what your business and your people need it to do! Determine accessibility! Once you define requirements, double check the list in order to minimize surprises.

The Golden Rule of Matching

by

Bob Taylor



It is better to miss a true match than it is to find and process a false match

OK, OK... it's not a quote from any of the great books of Western Civilization. Yes, I made it up. But when it comes to data, it's a rule that can save your business from some serious grief.

You probably know something about matching... it's how we find duplicate records within a database. Also how we (hopefully) stop them from getting created in the first place.

But if you are under the impression that GoldMine's Import Utility
(Continued on Page 4)

can do a decent job of matching... well, you're going to want to learn more about what's involved in creating a good matching scheme. At the end of this article, I'll point you to a free paper that can help you do just that. In this article, I've got little more than enough room to hint at what the consequences can be if you don't!

Corollary 1 of the Golden Rule of Matching:

The best matching scheme is the one that misses the fewest possible true matches without processing **ANY** false matches.

Why this dread fear of false matches? Well, for GoldMine's **Import with matching option** (also known as an **Update option**), one of two logical things can happen when a **false match** is made:

1. If we have chosen GoldMine's Import option "**Do not import the record**", then the "incoming" record will be ignored. Because we have stipulated that this is a **false** match, ignoring the record means that a record that **should have been Imported** does not get Imported. In other words, a lead is lost.
2. If we have chosen GoldMine's Import option "**Overwrite the existing GoldMine record**", then the data from the incoming (falsely matched) record will overwrite the corresponding data in the existing GoldMine record. **This is the killer option...** a few of these going into a good database can put important accounts at risk, because their data may suddenly become unreliable. And yet, it is by far the more popular of the two options, in my experience.

Because of item 2 above; and because there's no practical way to know which important accounts may be affected by an Import using that option; it follows that the only acceptable number of false matches for an Import is **ZERO**.

Corollary 2 of the Golden Rule of Matching:

Every matching scheme used must be "safe", i.e. must find **no** false matches.

If a **safe** matching scheme is so stringent that it fails to find an unacceptable number of true matches, then **multiple runs** of the Import, each using a **different matching scheme**, may be required.

Now, this scenario involves an option that does not exist in GoldMine (but does exist in GoldBox), the ability of the program to **Write** the Accountno of Contacts that are recognized as matches **Back** to a field in the Source file. This makes it possible to ensure that Source records can be checked many times, but **processed only once**. And finally...

Corollary 3 of the Golden Rule of Matching:

No matter how good the matching scheme(s) used may be, they are limited as follows:

1. **Effectiveness** (i.e. ability to recognize a match) is limited by the extent to which the match field(s) are populated, both in the Source, and in GoldMine.

2. **Safety** depends on filtering out all records in the Source file for which any of the fields in the currently-active matching scheme are not populated.

Here, I've just hinted at how things work with Imports. In the 9 page document on my site, I cover the strategies for safe, effective matching for Imports, Merge-Purge and single file Deduping, using GoldBox. Even if you don't expect to use GoldBox, it's worth a read. Here's the link for the page where you can get the file (it's called "**All About Matching...**"):

<http://www.GoldBoxBob.com/ExamplesZ1.html>

You don't have to fill out a form; just click. Enjoy!

Less Articles = Fewer Pages

The expression tells no lies. Of late the articles from contributors has been few, and far apart. If I don't have articles, I just can't publish this newsletter for you. You may have noticed that the last issue was only 8 pages, while a couple of issues back we were at 12 pages, and today this issue is again only 8 pages long.

I will publish any of your articles that have to do with GoldMine or CRM in general. Have you developed a 3rd party application, and want exposure to over 3,000 readers, submit your article to DJ@DJ-Hunt.com. If you include any pictures in your article, send along a jpg or png file of the picture along with the article.

Are you a reseller, or do you have written a White Paper that you would like to share? Send it along, and I'll publish it. Have you learned something interesting that you would like to pass on to our readers, submit it to me. Without your articles this newsletter will cease to exist.

The 5 Most Annoying Things About GoldMine

(And what to do about them!)



by

Gene Marks

With over 500 GoldMine clients that we serve, there's no doubt that we're big fans of the GoldMine application. It's great for tracking activities, notes, e-mails and other data so that sales and service people can take better care of customers and prospects. But let's face it: as good as GoldMine is, there are some annoying things about the application. Here's my top five, and what to do about them.

1. **Synchronization**

I used to have a full head of hair before working with GoldMine's synchronization (take a look now at the photo on the last page of The GoldMine Advisor, and you'll know exactly what I mean). Even our most disciplined and technical clients find

(Continued on Page 5)

that synchronization works, at best 95-98% of the time. That may be good for some, but not great for others. We tell our

Editorial Note:

This is an issue that I want to strengthen. **Synchronization only has a 95% to 98% accuracy rating.** However, this is what sets GoldMine ahead of the .com CRM market. I always recommend that you utilize GoldSync so as to have the data locally, however, Remotes should access GoldMine via Terminal Services, Citrix or other remote access tools whenever the Internet is available to them.

clients to avoid synchronization whenever possible, and to setup GoldMine for complete web access using Windows Terminal Server, Citrix, iGoldMine or other remote access tools.

2. Reporting

Except for the most basic reports, GoldMine's report writer stinks. It's slow, and it's cumbersome. The vendor, FrontRange Solutions, knows this, and that's why they include Crystal Reports when you buy GoldMine Corporate/Premium Edition. Don't bother with complicated reports using GoldMine. Get Crystal training or use Microsoft Access, Excel, Stonefield Query for GoldMine or MasterMine to handle GoldMine's reports. Expect to spend more time than you originally thought getting up to speed with reports.

3. Labels

And while we're on the subject of reports, how come GoldMine's label reports mis-align after printing a page or two? And how come the labels in GoldMine's literature fulfillment center don't work? These have been problems for years. You can use GoldMine's label reports, just print them one page at a time. Or you can connect to GoldMine's database using Microsoft Access, and run the label wizard from there.

Editorial Note:

My personal favorite for labels is the **Dymo LabelWriter 400 Turbo**. Ah! Ah! Ah! - More Power as Tim the Toolman would say. The Dymo comes with an application specifically designed for use with the GoldMine product line.

As Mikie says: **Try It, You'll Like It.**

4. Duplicate Records

It's true that GoldMine warns you if a user is creating a new record that matches an existing record's Company name, Contact name, Phone number or E-mail Address. But then it just lets the user override that warning, and create a duplicate record anyway! Duplicate records are always a headache for our clients. Until FrontRange comes up with a better process your administrator should check for all new records created each day (this can be done with a report or SQL query), and make sure that no duplicates have been inadvertently created.

5. Phone Integration

Why does it seem like such a mystery to dial out from GoldMine? What is a "soft phone" anyway? How come it's so difficult to get a "screen pop" when a user calls? GoldMine CAN be integrated with your phone system, but you'll need help from the guy who sold you the phone system. There are 3rd party applications that

can accomplish this. And FrontRange's GoldMine IP software can (for about \$5-10K) make your GoldMine system talk to just about any software based phone system.

Did you like Genes list?

There's plenty more like it in Gene Marks' best selling book!

It's available at bookstores, and at Amazon.com



Installing Undocked Users for GoldMine 7.0.4

by

Bob Gannett

While we highly recommend GoldMine Premium Edition, many users are committed to the use of GoldMine Corporate Edition, which continues to be an outstanding version of GoldMine.

These instructions provide guidance for the installation of undocked users for GoldMine 7.0.4 (GoldMine 7.00.70302). Some of these instructions may be superseded by the release of GoldMine 7.0.5 (GoldMine 7.50.#####) that is expected before the end of this year (or early next year).

Considerations:

- GoldMine 7 hosts its data in either Firebird or Microsoft SQL. Undocked users have the choice of Firebird or Microsoft SQL Express 2005.
- SQL Express provides much better performance than Firebird.
- SQL Express is free software from Microsoft, and is included on your Microsoft SQL installation CD.
- While installing GoldMine's data to Firebird is pretty-much automatic, as was the installation of dBase in previous versions of GoldMine, you have to do a little work to get SQL Express installed, and to get GoldMine's data hosted over to SQL Express (the improved results more than justifies the effort).
- When installing SQL Express, we highly recommend that you follow the instructions contained in FrontRange's **Installing_MSSQL2005_Server_Express.pdf**. This document also provides instructions on how to download all the Microsoft free software required to support this installation.
- A word about SQL Express. The SQL Express engine supports 1 CPU, 1 GB RAM, and a 4 GB database size.

(Continued on Page 6)

It will work on systems with multiple CPUs, but only uses one CPU. The 1 GB RAM limit is the memory limit available for the buffer pool. The buffer pool is used to store data pages, and other information. However, memory needed to keep track of connections, locks, and so on is not counted toward the buffer pool limit. It is therefore possible that the server will use more than 1 GB (if available), but it will never use more than 1 GB for the buffer pool. I recommend having 2 GB RAM then you should have plenty of memory for GoldMine and other activities. On a personal note: I might add that I operated GoldMine on SQL Express with only 512 MB RAM though my life got much better when I added more memory. The 4 GB database size limit applies only to data files, and not to log files. You can get more information in a 2-page datasheet (.pdf) from <http://www.microsoft.com/sql/editions/express/default.mspx>

These installation instructions will be presented in three phases:

Phase 1 – Preparation of the undocked system

- Obtain and install SQL Express, and its supporting software as per FrontRange's **Installing_MSSQL2005_Server_Express.pdf**.
- If the undocked system has a previous version of GoldMine installed, copy that existing GoldMine to a new location, preferably off of this system, for backup purposes.
- Download the Free Windows Install Cleanup Tool from Microsoft.
- Use the Windows Install Cleanup Tool to remove the installed instance of GoldMine.
- Rename the old GoldMine folder to GoldMine_Old.

Phase 2 – Installing the undocked copy of GoldMine using the GoldMine 7 setup file

- Copy the appropriate GoldMine 7 setup file to the undocked system.
- Double click on it to begin the installation.
- It will try to install in C:\Program Files\GoldMine. We tend to recommend installing in some other location like C:\GoldMine on the Remote systems.
- During the installation, GoldMine will give you the choice of Firebird or SQL. Select SQL.
- Bring in your Transfer set that contains customizations and data. This should be done in two phases: First customizations then your data.
- Do the normal cleanup to include testing synchronization, and learning how to backup your data, etc. The first sync from the undocked system may take a long time as GoldMine includes all its data in the first sync.

Phase 3 – Installing from the one-button installation file

- Do most of the preparations listed above with the following exception.
- The one-button installation file will **NOT** give you the choice of installing to either Firebird or SQL. You must install to Firebird then manually host your data over to SQL.

We expect that the release of GoldMine 7.50.##### will help automate the process of installing to SQL Express. When GoldMine 7.50.##### is released, we will adjust these instructions as appropriate.

Tips, Tricks & Things

Required Fields

by

Gene Marks



A client asks:

Can I require a field to have information input?

Yes, you can have "required entry fields" in GoldMine. You must have Master Right in order to do this.

- * Right click on the screen in GoldMine and choose Screen Design
- * Click on a field you want to have as a required entry field, and it will appear in a box
- * Double-click on the box, and the Field Properties Box will pop-up
- * Click on the Security Tab, and click the box next to "Required Data Entry"
- * Users will now not be permitted to go past that field or Contact Record until they have entered data

Virtualization

by

Bob Gannett



Virtualization gives you the ability to get more bangs from your Server bucks. Virtualization is the new technology that allows you to have multiple server installations on the same piece of hardware.

Let me cite a recent installation as an example. One Dell Server had multiple hard drives. Each hard drive was a separate, dedicated Server each with its own operating system. We installed GoldMine and SQL on one of these servers (Windows 2003); we dedicated another hard drive/Server to OmniRush, and another hard drive to the GoldSync Server. This Dell is, in fact, six servers. This machine turned out to be a solid, cost effective screamer.

Like everything else in this business, it is best to work with an experienced engineer who knows what he/she is doing. Properly done, the software that enables the virtualization can be obtained at no cost. I can refer you to an experienced firm that can help you design, install, and support such an installation anywhere in the country.

Editorial Note:

Microsoft Virtual PC 2007 may be downloaded, free of charge, from:

<http://www.microsoft.com/windows/products/winfamily/virtualpc/default.mspx>

Tips, Tricks & Things

Learning About Orphan Records

by

Gene Marks

A client asks:

What are orphan records, and how do I know if I have any?

Orphans are records that are not totally deleted in GoldMine (for example, you may only delete the contact information, and not the history or activities; therefore you have an "orphan" record). In order to see if you have orphan records, run the following SQL Query:

- * Go to Lookup/SQL Queries, and copy the query below into the query box

```
select *  
from Contact2  
where AccountNo not in  
(select AccountNo from Contact1)
```

- * Click on save and name the query
- * Click on the Query button, and it will return any orphan records in the Contact2 table as orphaned by the Contact1 table.
- * If you have orphaned records, you should contact your GoldMine support person to have them deleted

Use the Taskbar Luke

by

DJ Hunt

Many clients are complaining about the GoldMine Premium Toolbars, and their lack of ability to maintain settings. This is a known issue, and the work-a-round is to start with a fresh UserID.ini and then to never close GoldMine except via **Eile** | **Exit** from the GoldMine menu.

I would like to add, however, that I worked hard to have the Taskbar maintained in the GoldMine Premium product, and the Taskbar, which is barely distinguishable from the Toolbar in GoldMine Premium, stable. Here is a screenshot of my Toolbar/Taskbar combination.



You can activate your Taskbar via your User Options (formerly known as Preferences), under the **System** tab. Simply checking the box to **Show taskbar** should do it nicely for you. The Taskbar, like everything else in GoldMine Premium, functions as it has in the past, however, it is just a matter of learning where to find it, and how to use it properly again.

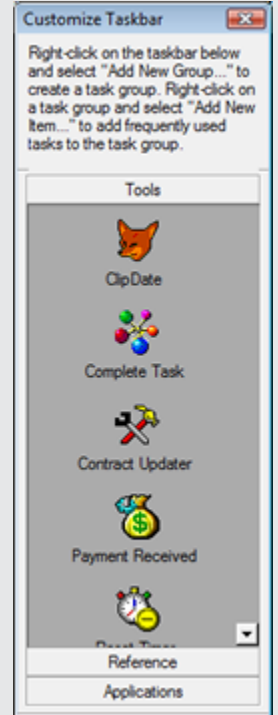


If you click on the **Customize** button, you should recognize our old tried and true Taskbar from which you may customize your new style Taskbar. Simply do as you have done in past versions of GoldMine to add new Items or Groups to the Taskbar.

As before, you may add any GoldMine menu item. You may even recognize your old style GoldMine menu tree. As well, you could add any Users Macro, External Applications, Document Links and/or Website items to your Taskbar. The instructions for doing so are right at the top of the Customize Taskbar dialog form shown here.

In other words, your Taskbar designed just the way you like it, and, most importantly, when compared to the GoldMine Premium Toolbar customization, has been proven, at least for me, to be much more stable.

I have always been a proponent of the Taskbar in the past, and its stability has been carried forward into the GoldMine Premium product.



Choosing Contacts Individually to Send an E-mail To

by

Gene Marks

A client asks:

I want to send an E-mail to a Group of Contacts without using a Filter or a Group?

Just **Tag** records in the Contact Search Center to emulate a filter.

- * Click on the Find Button or View/Company, and the Contact Search Center will pop up.
- * Hold down the Control Key, and highlight any Contacts you want included in the group.
- * Across the top of the active Contact record, GoldMine will keep a count of how many records you have tagged.
- * These tagged records are now your Active Contact Filter, and you can send an e-mail to them, run a report based on them or even merge them into a document.
- * Make sure you return to the Contact Search Center, and release the tagged records. Click to Close the Search Center, and a box will pop up asking if you want to release the tagged records. Choose the Yes option.



Tips, Tricks & Things

Stopping E-mail Addresses from Moving to Different Contacts



by

Gene Marks

A client asks:

My E-mail addresses seem to be moving to different Contacts. Is there a way to alleviate this from happening?

Yes, just change this setting.

- * Go to Options
- * Choose the E-mail Tab from the UserID's Options dialog form
- * Go to **More Options...**, and click on the **Advanced** tab
- * Uncheck the box next to **Link e-mail address to contact record by default.**
- * If you link/unlink an e-mail it will not ask if you want the E-mail Address moved which most people did not realize. It will keep the E-mail Address with the current record, and just move the E-mail itself.

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The 5 Most Annoying Things About GoldMine

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