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The GoldMine® Advisor

Editor

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Contributors

Steven Kahn

Gene Marks

Articles In This Issue

Tips, Tricks & Things

Enhancing Your CRM System With Customer Data Integration

by

Steven Kahn

Information is critical in helping a representative up-sell and cross-sell existing customers and making the initial sale with a new customer. Further, CRM systems are excellent places to store information for sales and marketing purposes. However, the contact and accompanying information in a CRM system record is usually based on the individuals that you are selling. There may be other information in financial systems, external marketing files, and other systems that would also help sell customers and prospects.

The challenge is that many times these other systems will have different contact and address information. For example, the accounting system may have the billing and shipping department contacts, but not the sales and marketing key contacts. So how are you able to view the information from other systems in your CRM system if you cannot accurately match the different contact and address information?

In order for your CRM system to be integrated with other data sources, there needs to be Common IDs between the CRM system and the other data silos. It has been our experience that when an organization needs to integrate 3 or more data sources, there are almost never complete and accurate Common IDs among the databases. If an organization needs to integrate 2 or more data sources (or even organize a single database), we have often found that there are not complete and accurate Common IDs there as well.

To solve this issue of lack of complete and accurate Common IDs between a CRM system and other database systems, we have developed a Customer Data Integration ("CDI") software application, **SingleVision®**. The SingleVision Cluster Match is the process that builds a single customer view. First, the Cluster Match is able to help identify all of the related records in the multiple systems that are part of the same organization. Then, the Cluster Match links all the records from the same customers and prospects and places Common IDs on each of these same organization's records.

Using Common IDs across the multiple data sources within your organization, you can group records from the same customer. This enables you to have, within a Single Customer View, all the relevant information about a customer or prospect from all internal and external databases. For example, a view could be set-up within the CRM system so that a sales rep could see all of the authorized information regarding a customer that is in the accounting system, the customer service system, and external marketing files.

In addition, the SingleVision Cluster Match Process is able to differentiate the records that are part of the same organization at different locations to help identify corporate hierarchies. Getting this more complete single view of the customer allows you to determine appropriate targets for cross-selling, up-selling, and major account status.

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 information contained in 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. Should you find an error, it would be nice if you e-mailed me so that I may print the exception in the next issue of this newsletter.

All articles are freely contributed by their author, and no compensation is given for any article published in this newsletter. 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@DJHunt.US

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 a png format or jpg format.

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

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

I am your editor:

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Editors Note

Due to a death in my family this edition is late, and will only contain one continued article. All continued article will be in the February 2009 issue. The rest of this newsletter will be a holiday special containing just Tips, Tricks & Things.

Thank you for your understanding.

Tips, Tricks & Things

Learn, Share & Network on FrontRange Connect

Reprint from Tech Tip

FrontRange

A Virtual Community Built For You

The pursuit of CRM best practices shouldn't be a lonely endeavor. Find like-minded peers and valuable information in FrontRange's new virtual customer community, FrontRange Connect— designed and built specifically for you. It's an excellent way to meet peers, make the most of your FrontRange investment, grow your business, and build your professional network.

Join today and enjoy the many benefits of this virtual community:

- Access to a network of FrontRange experts and fellow Front-Range product users
- An opportunity to meet your peers, learn, and share ideas and best practices
- The chance to provide real-time product feedback, 24/7

By developing your own profile, you can collaborate, network, schedule meetings and build relationships with other community members who share like interests. Identify other members based on their profiles and then set up meetings, groups, forums of interest, and much more.

The system is easy-to-use, private and secure. Other members will be able to view the profile information you supply, but they will NEVER know your name, e-mail address, or any other contact information about you—until you are ready and explicitly agree to share it with them.

Here's the simple signup process:

- Access the site here: http://frsconnect.frontrange.com
- Set up your user information and complete your profile
- Describe your background
- Describe what you are looking for
- Share when and how you might like to meet

Next, you will be taken to a personalized page which identifies exactly those individuals which match your profile.

We hope you take an active role in the community by sharing information, networking and making the most of this forum.

Thank you in advance for logging in to FrontRange Connect!

Tips, Tricks & Things

Finding Out If There Are Notes In The Notes Tab

by

Gene Marks

Want to know how to find out if there are notes in the **Note** tab without having to check every time?

Here's a handy indicator to put on the top half of the contact window.

First, while logged in with Master Rights, do a right-click to bring up the local menu and click on the **New Field** option.

Select **dBASE Expression** from the drop down list, and click **OK**.

Move the field to an area of the screen where you have open space, then double-click on it.

In the **Field Data Expression** area, type in "**Has Notes**" with the double-quotes. You don't need a **Field Data Name** in Database for this function. Choose the Color tab, and in **Data Color** select **Expression**. Type or paste in:

iif(trim(Notes) > ' ', 255, 16777215)

Editors Alternate:

iif(trim(Contact1->Notes) > ' ', 255, -2)

Finally, in the **Layout** tab, set the **Field Label** to be **0**, and the **Data Size** to be **10**. Then click **OK**.

The "**Has Notes**" field will only appear if there are notes in the Notes tab.

One word of caution in GoldMine Premium Edition. If you put a Note in and then Delete it, the Note actually stays in the database so the indicator may still say "Has Notes" even though the tab looks to be empty.

Using SQL Queries to Count Records

by

Gene Marks

Ever wonder how many primary contacts, secondary contacts, or history items you have in your GoldMine database?

Here are three simple SQL Queries to give you an answer.

First, go to **Tools** | **Filters & Groups** | **SQL Query** tab. Copy and paste these queries into the top half of the screen, and then click the **Query** button.

For a count of primary contacts:

```
select count(*)
from Contact1
```

For a count of secondary contacts:

```
select count(*)
from ContSupp
where RecType = 'C'
```

For a count of history records:

```
select count(*)
from ContHist
```

Searching & Filtering Using the MergeCode

by

Gene Marks

A client asks: We've tagged our holiday gifting - now I need to see who we've tagged!

If you are only working with Primary Contacts use a filter that looks like this:

Merge (Mergecodes) Contains HC

In this case, the field you are filtering by is Merge, the operator is Contains, and the code is whatever code you are searching for. Remember to use Contains as your operator since there may be multiple values in that field.

Once you've built your filter you can see the list from the Filter's Preview tab as well as from the Contact Search Center. You can then export from the search center, use GoldMine's reports to print labels, etc. If you want additional contacts as well as primary, use GoldMine's Export Wizard available under **File** | **Import and Export** | **Export Contact Records**. You can choose what type of format you want to export to, whether you want to export primary and/or secondary contacts, and limiting the export to a merge code.

Which brings us to our last method of export: **SQL Query**. You can copy and paste these to your SQL query function, found under **Tools** | **Filters and Groups** | **SQL Query** tab.

Here's one for primary contacts:

```
select Company,
  Contact,
  Title,
  Address1,
  Address2,
  Address3,
  City,
  State,
  Zip,
```

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(Continued from Page 3 - Searching & Filtering Using the MergeCode)

```
  Phone1,
  Contact1.AccountNo
from Contact1
where MergeCodes like ‘HC’
order by Company,
  Contact
```

Here’s one for secondary contacts without an address (it’ll pick up the address from the primary contact):

```
select Contact1.Company,
  ContSupp.Contact,
  ContSupp.Title,
  Contact1.Address1,
  Contact1.Address2,
  Contact1.Address3,
  Contact1.City,
  Contact1.State,
  Contact1.Zip,
  ContSupp.Phone,
  Contact1.AccountNo
from Contact1,
  ContSupp
where RecType = ‘C’
  and (ContSupp.Address1 is null
    or ContSupp.Address1 <= ‘’)
  and Contact1.AccountNo = ContSupp.AccountNo
  and ContSupp.MergeCodes like ‘HC’
order by Company,
  ContSupp.Contact
```

Finally, one for secondary contacts with an address:

```
select Contact1.Company,
  ContSupp.Contact,
  ContSupp.Title,
  ContSupp.Address1,
  ContSupp.Address2,
  ContSupp.Address3,
  ContSupp.City,
  ContSupp.State,
  ContSupp.Zip,
  ContSupp.Phone,
  Contact1.AccountNo
from Contact1,
  ContSupp
where RecType = ‘C’
  and ContSupp.Address1 > ‘ ‘
  and Contact1.AccountNo = ContSupp.AccountNo
  and ContSupp.MergeCodes like ‘HC’
order by Company,
  ContSupp.Contact
```

Just change the ‘HC’ in each query to the MergeCode you’re using. After running each, you can do the Right-Click, select the **Output to Excel** trick and you’re on your way!

Using the MergeCode Field to Tag Records

by

Gene Marks

Here’s an easy way to tag which clients get holiday cards, which get gifts, and so on. You can apply this method to any type of specialized contact you want to have with your clients. This method uses the **Merge** field - and is usable for both primary and secondary contacts.

To configure the merge field for Holiday or specialized use, you just have to change the lookup values for the primary contact. The same merge codes will automatically be used for secondary contacts.

Right-Click within the Merge field to bring up the Lookup List. Click on the **New** button to add different merge codes. You may want to use a single one or multiple depending on how you handle cards and gifts. The two in this example are:

HC for Holiday Card
HG for Holiday Gift

Use this format in your F2 Lookup List:

HC; //Holiday Card
HG; //Holiday Gift

Only the code will be placed in the field. With this format (a two-letter code) you can fit up to 5 codes in the merge code field. Select one code, as you normally would when using the lookup list, then select a second as needed in the same manner. GoldMine will automatically place a comma and space between the two instead of replacing one code with another.

Tagging a Group with a Merge-Code

by

DJ Hunt

A. This method may only be utilized against the **Contact1.MergeCodes** field, not the **ContSupp.MergeCodes** field.

B. I recommend that you only utilize a single unique character in the Contact1.MergeCodes field for each merge campaign.

Steps:

1. Activate your Filter or Group
2. Select **Tools** | **Data Management >** | **Global Replace...**
3. Choose to **Update a field using advanced options** | **Next >**
4. **Update Field: Merge (MergeCodes)**
   Expression: iif([X] $ MergeCodes, strtran(MergeCodes, [X], [X]), trim(MergeCodes)+[X])
   Evaluate Value as dBASE Expression
   Next >
   Next >
   Next >
   Finish

dBase Explanation:

This expression first looks for an existing code of this type in the MergeCodes field, in our case **X**, and, if it exists, we simply replace the value in the MergeCodes string with itself. If the **X** does not exist in the MergeCodes string then we append it to the end of the MergeCodes string during our Global Replace.

Tips, Tricks & Things

Enable the GMLink Add On

Reprint from Tech Tip

FrontRange

GoldMine Corporate Edition Tips

Enabling the GMLink Add-On for MSWord 2007 Integration with GoldMine Premium Edition or GoldMine Corporate Edition

Enable your GMLink Add-On for MSWord 2007 integration with GoldMine Premium Edition or GoldMine Corporate Edition 7.04.70304 or higher on a Vista Operating System:

Requirements:

- Local install of GoldMine Premium Edition or GoldMine Corporate Edition 7.04.70304 or higher
- MSXML6 installed
- If applicable, uninstall current link
- If applicable, install GoldMine Plus for Microsoft Office. Version 6.7.217

To enable the Add-on from within MSWord 2007:

1. Open MS Word 2007
2. Right-click on toolbar > customize quick access toolbar >
3. On left hand pane > AddIns > down bottom, open the dropdown to select Disabled Items > click on Go > Enable GMLink.dot

Researching your Customers on the Web through GoldMine

by

Gene Marks

You can use GoldMine's Internet search to find out more about your contacts. All you have to do is:

1. Choose Web on the GoldMine Premium menu bar (for GoldMine 7 or lower, choose "Lookup")
2. Choose Search Online from the drop down menu (for GoldMine 7 or lower, choose "Internet Search")

You will be directed to the Internet Search dialog form, and popular search engines which will throw up results for your contacts. Double-click, or click on the Search Now icon, on the search engine of your choosing from this dialog form. You can also add in your own searches and lookups.

The curious amoung you will want to Toggle the Data View on the Internet Search dialog form.

Displaying In Your Calendar Where Actions Are Linked

by

Gene Marks

A client asks: How can we tell if something is a project or an opportunity?

Insert this expression into your Calendar display preferences to show if a pending action is linked to a Project or Opportunity:

trim(Contact1->Company) + [,] + trim(Cal->Company) + [:] + trim(Cal->Ref) + [ ] + iif(left(Cal->LOPRECID,1) <> [ ],[(Linked Proj/Opp)], [])

Creating A Hot List

by

Gene Marks

A hot list is simply your top prospects or opportunities, something every effective salesperson must have at his or her fingertips.

Here's an easy way to create a Group within GoldMine that will keep these at the top of your list. There are many ways to do this; this particular example offers the individual sales representative the most flexibility, but will also allow managers to report on the lists if necessary.

First, create an empty Group. To create a Group, first, go to **Tools** | **Filters and Groups** and go to the **Groups** tab. In the top half of the Groups window, click **New Group**.

The **Group Name:** is how you'll reference the Group. You may simply call it **Hot List**, or, perhaps, you want to have a couple of hot lists, so you can name it something more specific, such as **Gadgets Hot List**.

Uncheck **Build the Group**. If you are in a sync environment with laptops and you want others to see the group then check **Synchronize Group**.

Click **OK**. You'll now see your **Gadgets Hot List** group with **0** members.

To add someone to the hot list, find the **Members** tab in the bottom half of their Contact record. In the Members tab do a right-click and select **New...** from within the open area under the tab. In the **Add a Group Member** window, choose the Group from the lookup list to add the contact; in this case our **Gadgets Hot List**. The contact is added to the group.

You can also easily add contacts to a group by opening the Contact Search Center. Highlight the contact you want in your group, and drag and drop them into the members area of the

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Tips, Tricks & Things

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Groups window (make sure the group you want to add them to is also highlighted).

You'll see the complete list of contacts in a group from the Filters and Groups window (**Tools** | **Filters and Groups**, go to **Groups** tab). Your Group's member count is listed there in the top half of the window. From here you can also right-click in the bottom half of the screen, where the members are listed, and choose **Output to** to print the members list in **Excel** or **Word** or just straight to the **Printer**.

Once the Hot List is built you can run reports against it, schedule calls against everyone in the group, print them out from the Contact Search Center, etc.

Assigning Automatic Colors to Activities in the GoldMine Calendar

by

Gene Marks

A client asks: How can I have my work stand out?

With the Lookup.ini (held in your central GoldMine folder) you can assign colors to activity types (such as calls and appointments) and activity codes. Using the Rectype and Activity codes you can automatically specify what color to show the activity on the calendar as.

Adding the example code below to your Lookup.ini will make all appointments blue, appointments with a activity code of 'HOL' yellow, calls red and other actions black.

```
[CalClrCode]
A-Hol=5
A=0
C=2
O=15
```

Use the Rectype values and Color codes below to help assign the auto colors according to your preferences.

Rectype Values:	Calendar Color Codes:
A = Appointment	**0 = Bright Blue**
C = Call Back	**1 = Bright Purple**
T = Next Action	**2 = Bright Red**
D = To-Do	**3 = Bright Cyan**
M = Message	**4 = Bright Green**
S = Forecasted Sale	**5 = Bright Yellow**
O = Other	**6 = Cyan**
E = Event	**7 = White**
	8 = Gray
	9 = Red
	10 = Green
	11 = Yellow
	12 = Blue
	13 = Purple
	14 = Dark Gray
	15 = Black

Using the Dear Field

by

Gene Marks

The Dear field in GoldMine is given top billing in the upper-left quadrant - but how should it be used?

The Dear field should contain whatever comes after the word "Dear" in a letter or email, for example:

- **Dear Jeremy**
- **Dear Mr. Davis**
- **Dear Dr. Davis**

This allows for personalized marketing via letter merges with Microsoft Word or email blasts with GoldMine.

You may be on a more informal acquaintance with some of your clients, in which case "Dear Jeremy" would be the correct choice. Others you may wish to address more formally.

To make this a quick, easy, and error free entry enter the following codes in your F2 Lookup List for the Dear field:

```
~[Dr. ]+Contact1->Lastname
~[Mr. ]+Contact1->Lastname
~[Mrs. ]+Contact1->Lastname
~[Ms. ]+Contact1->Lastname
~&FirstName
```

When you choose one of these selections the Dear field will automatically populate with the salutation you want to use.

Merging & Purging

by

Gene Marks

A client asked: What do I do with duplicate entries?

You can easily combine two records into one with a Merge/Purge. Information on the Contacts, Details, Referrals, History, Links, Opportunity, and Project tabs will be combined into a single record.

The record tagged first will be designated as the primary record, and all the information in the second record will be subordinate to it. Empty fields in the first record will be automatically populated from the filled fields of the second record.

In the Contact Search Center, tag the two records you want to merge by clicking on the ticky boxes on the left of the line (in GM 7.X and lower, do this by holding down the Ctrl key and left-clicking on the two records you want to merge together).

There is no way to undo a merge/purge so be sure you have the correct two records tagged. Check and Double-Check! If

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Tips, Tricks & Things

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you want to un-tag the records simply click on the ticky box again, or close the Contact Search Center.

With the two records tagged, from the main menu choose:

- **Tools**
  - **Data Management >**
    - **Merge/Purge Records... >**
      - **Merge Tagged Records...**

GoldMine will ask if you're sure - click Yes to complete the Merge/Purge.

Look at Two Records at Once

by

Gene Marks

Have you ever had the need to look a two contact records at once?

By default, GoldMine opens one contact window, which must stay open. If you need to see a second window at the same time, go to **Window** | **New Contact Window**.

This will bring up the Contact List, from which you can choose the second contact you want to see. Double-click on that contact.

The second contact window will open. You will see a second record tab at the top of your screen unless you are using the Windowed mode where you will see another Window. If you want to view the records as tiled, click on the Tile tab at the top left of the record - the small tab with four small boxes on it.

Logging Changes to History

by

Gene Marks

A client says: Someone is changing the information in our database!

Nothing can be more frustrating than trying to figure out who changed the information in a field and trying to remember what the previous value was. A name changed, a company misspelled, addresses changed incorrectly can all put a damper on your day.

Fortunately, there is a quick and easy solution! Note: you will need master rights to do this.

Right-Click on the field in question and select Properties on the field label. Then select the Security tab and check Log changes in history. This setting is universal (affects all users and all contacts).

Now, whenever changes are made to that field, the user making the change, the date, the old value, and the new value will be logged on the history tab.

Editors Note

You must be aware that if the field was empty to begin with, and someone changes the field to hold a value that **no** history record will be created as GoldMine does not consider this a change of the value.

Who's Got the Giant Mailbox?

by

Gene Marks

A client asked: "My Mailbox table is HUGE! WHY?"

This SQL Query will help you figure out who's got the giant mailbox:

```
SELECT
userid, folder, count(*)
FROM
MailBox
WHERE folder not in ('X-GM-INBOX', 'Sent', 'Filed', 'X-GM-DRAFTS', 'X-GM-FOLDERS', 'X-GM-GROUPS', 'X-GM-ICALINFO', 'X-GM-OUTBOX', 'X-GM-PROP-HTMLTAB', 'X-GM-HTMLTAB', 'X-GM-RULES', 'X-GM-TEMPLATES', 'X-GM-SUBSENT', 'X-GM-SUBFILED', 'X-GM-WEBIMPORT', 'X-GM-SMIME-CA', 'X-GM-TD-ITEMS')
GROUP BY
userid, folder
ORDER BY
userid, folder
```

Note that the long list of folders in the not in section of the query will rule out the more legitimate locations in the mailbox file for mail to collect. The common results of this query will be Liz in accounting and her TRASH folder with 32,000 messages in it.

For a fun variation, run this one:

```
SELECT
userid, count(*)
FROM
MailBox
WHERE
folder = 'X-GM-OUTBOX'
GROUP BY
userid
```

...to see who has a bunch of mail in the Outbox that they probably have no idea was never sent.

Tips, Tricks & Things

Long OR Query Strings

by

Gene Marks

Ever need to really dig in with a filter but keep going over the character limit? There is a limit of 255 characters for a filter expression. Often when doing a large OR comparison this limit can be reached.

For example, you may want to filter based on a certain group of individual states by gathering up contact records whose state is CA, MA, NY, KY, OH, and so on.

A filter expression for this COULD look like the following, but the more states you add to the criteria, the closer the expression gets to exceeding the 255-character limit:

```
trim(Contact1->State) = ”CA” .or.
trim(Contact1->State) = ”MA” .or.
trim(Contact1->State) = ”NY” .or.
trim(Contact1->State) = ”KY” .or.
trim(Contact1->State) = ”OH”
```

A better way to do this in a shorter expression and without the added concern of exceeding the character limit would be to use the $ (the “contains” operator).

For example, the previous filter can be shortened to the following:

```
trim(Contact1->State) $ “CA MA NY KY OH”
```

This essentially limits the filter to records whose state is contained within the list of states shown.

Auto Follow-Ups When Completing Activities

by

Gene Marks

Want to know how to make scheduling follow-up appointments and calls automatic? Here’s how to have the **Schedule a Follow-up:** check-box on by default.

First, open up your <<username>>.ini file, which will be located in the root of your GoldMine directory, e.g. Jen.ini. Find the [GoldMine] section, add FollowUp=1 underneath it, and then save the file.

Upon opening GoldMine after adding this, when you complete an activity you’ll find the Follow-up box automatically checked!

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Tips, Tricks & Things

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