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In This Issue



# GoldSync Problems - A White Paper ( Part III )

by

David Lee

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

In installment 2 we discussed the ways in which sync problems occur. You saw that many "synchronization" problems are really database or data problems which are manifested by the synchronization process.

In this third and final installment we discuss how to correct your GoldMine synchronization problems.

## How do I correct sync problems?

- **Attempt to diagnose the problem**
  - Bearing in mind that the problem could have many causes as noted above, review the sync logs, inspect the files, and otherwise do what detective work you can to determine the cause of the problem. This is not an easy task. You may want to call VMI for help in this area.
  - Use diagnostic tools to help identify the problem. A tool called "Sync Spy" is built into GoldMine. It will show you the "Sync stamp" of various Contact1 and Contact2 fields. There are other third party diagnostic tools including many written by VMI.
  - If you are unable to diagnose the problem, you can often cure the sync problems without even knowing what caused them using the following techniques
- **Set back the sync date**
  - Manually set the From date and time to a time earlier than the last date when you are confident that all data was properly synched.
  - Ensure that you have not locked any records or documents, that you have the proper sync settings, etc.
  - Run synchronization to "pick up" individual updates that were missed in prior synchronizations.

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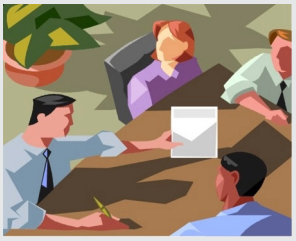
# Legalese

Editor: **DJ Hunt**



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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.

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- Be aware that, depending on where the data is missing, you may have to set back the sync dates on the sync server, on the remote system(s), or both. In most cases it is safest to set back the date on all systems.

- **Correct data problems**
  - Pack/rebuild your files.
  - Use dSalvage or other utility to find and fix BLOB errors (as mentioned above, BLOBs are Binary Large OBjects). In GoldMine, BLOBS are the Notes fields. If a process locks with a BLOB error on a particular transaction, then that transaction (or the one following it) is probably the offending record. An easy cure is to:
    - open GoldMine and go to that record.
    - edit the record and copy the notes onto your Windows notepad.
    - delete the note from the transaction and save the change.
    - open the record in edit mode and paste the notes back in from your Windows notepad.
    - At this point, the BLOB error should be cured.
  - Use VMI utilities to remove duplicate Contact2 records in your database (Please call VMI if you suspect that you have this problem, or if you simply want to have your files checked for this problem for peace of mind).
  - Take other steps as necessary depending on the nature of the corruption: Any database can become corrupted in dozens of ways. The corruption will cause sync problems. It is beyond the scope of this white paper to discuss all possible forms of database corruption, but VMI engineers are expert at detecting and correcting such problems. Please call us if you need help in this area.

- **Delete transaction log entries**
  - Identify the exact RecID of the wrongfully deleted record(s).

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- Find and delete the corresponding deletion transactions in the transaction log of every computer that was affected.
- **WARNING:** If you miss a single computer, and if that computer later syncs, you may need to repeat the entire process. To prevent this problem, you should "turn off" sync in the GoldSync administrator for all remote databases, and "turn on" each only after you have confirmed that it is "clean.".
- This is difficult, but far less difficult than the protocol for deleting the entire transaction log.

- **Delete entire transaction log**
  - All remote computers and the sync server must be backed up.
  - All remote computers must sync all of their data to the sync server. There should be no transmission sync filters.
  - There must be no further entries after this sync.
  - Transaction logs must be deleted from all remote computers and from the sync server.
  - The sync server sends deletion filters as needed.
  - The sync server sends a transfer set dated as far back in time as necessary (depending on your analysis of the data problems).
  - This is a very difficult protocol in practice. If even one remote computer does not follow the protocol, then the problems could be re-introduced.
- **Full sync restore**
  - All remote computers and the sync server must be backed up.
  - All remote computers must sync all of their data to the sync server. There should be no transmission sync filters.
  - Delete all data and all transaction logs from all of the laptops.
  - Set back the sync date of the sync server to day zero and build transfer sets for each remote computer.
  - Completely re-build every remote computer using the new transfer sets.

**About the author**

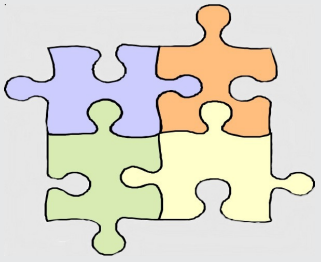
David Lee is a recognized expert in CRM data synchronization, and has configured synchronization for hundreds of GoldMine (and other) CRM systems.

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

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

## The In's and Out's of INI

A guide to understanding and troubleshooting GoldMine's UserID.ini



by

Kevin Day

If you've followed the GoldMine support forums ( or read this newsletter ) for long enough, you will have seen references to the infamous GoldMine USERID.ini files. You also have probably seen many 'experts' suggesting that most GoldMine woes can be fixed by deleting the UserID.ini file.

While it is true that UserID.ini files are at the root of much evil and strange behavior in GoldMine, deleting the files outright is very rarely the correct solution. This article aims at peeling back the covers ( a bit ) of the UserID.ini file and providing a troubleshooting strategy for identifying and fixing the real problems in a UserID.ini file – without losing all of your hard earned settings.

**What is an INI file**

( If you are already familiar with INI files, you may want to skip to the next section )

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Back in the good old days of Windows 3.0, Microsoft realized that they needed an effective mechanism for capturing user preferences. The Microsoft developers decided to use a human readable text file with an INI extension to capture these settings ( for those who don't spend a lot of time around Windows command line geeks, INI is pronounced 'ih-nee' ). Human readable files have some great advantages ( especially when used with a new and incredibly unstable operating system ) as well, they have a couple of drawbacks.

**Advantages of human readable INI files:**

- Easy to read and edit without special software
- Easy to add prototype functionality without adding user interface components
- Relatively easy to fix if they get corrupted

**Disadvantages of human readable INI files:**

- Inefficient with disk space
- Much slower to read (and much, much slower to write)
- Very complicated to make updates dynamic

**INI file structure**

INI files are simple text files that adhere to a relatively simple ( but very flexible ) format. An INI file is divided into what are known as sections. Each section is identified by the name of the section, surrounded by square brackets, as follows:

[Kevins Section Name]

All data following the section title, up to the next title, or the end of the file, belongs to that section.

Each section contains a set of keys and values. Each key/value pair is listed one per line beneath it's associated section name, separated by an equal sign. Each statement line is ended with a chr(10)+chr(13) better known as CRLF as follows:

**Editors Note**

You should try to avoid having spaces in either the key or the section header.

[Kevins Section Name]

Some Key=Some Value
Some other Key=Some Other Value

INI files can contain comments ( preceded by a semi-colon ) and blank lines, which are ignored. For example:

[Kevins Section Name]

Some Key=Some Value
; this is a comment

; there's a blank line above this comment
Some other Key=Some Other Value

That covers the entire basic INI file structure. The actual names of the sections and keys are completely up to the developer ( with certain limitations – i.e. you can't use an equal sign in the name of the key ).

**Editors Note**

A comprehensive listing of most of the UserID.ini and GM.ini settings can be found in **The Hacker's Guide to GoldMine 6.x** series of books.

**How does GoldMine use INI files**

GoldMine uses INI files to capture global and user specific settings. Global settings are captured in a file called **GM.INI** ( stored in your root GoldMine application directory on the network ). User specific settings are stored in an ini file named with the GoldMine UserID ( that's why we always talk about UserID.ini, even though there isn't really a file by that name ). So, my UserID.ini file is **KEVIN.INI**.

The GoldMine developers have decided on a set of section names that they use to break keys and values apart into manageable chunks ( these section names have evolved over time ). For example, all of the settings related to the Calendar user interface are in a section called [CalObj].

The following summarizes the most common UserID.ini sections and what they are used for ( there are many others, so don't take this list as exhaustive ):

**GoldMine**

General configuration items (which contact set the user opened last, their recent filter list, date related settings)

**CalObj**

Store and configure all aspects of calendaring, including user interface settings ( which tab is displayed, which user is selected, split bar positions )

**Internet**

All settings for retrieving and displaying email, including server names, passwords ( encrypted ), settings for the Mail Center user interface ( i.e. where the split bars are positioned, which column is sorted, etc… )

**GM_MAIL_READER**

A few extra settings for the email center

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**ProcMon**

Settings for the process monitor, including whether logs get created when the process monitor runs

**OpMgr**

Project and opportunity manager user interface settings

**AL*Tab**

Where * is 'Actions, Email, RealTime, etc… - the user interface settings for the activity list

**Tool16**

Settings for the GoldMine toolbars ( NOT the taskbars ) – including which buttons to show, where the toolbar is displayed, etc…

**So where can all of this go wrong?**

GoldMine **does not** check the values stored in the INI files to ensure that they are valid ( an example is if a value in the INI file specifies a negative window width ). GoldMine assumes that because it wrote the INI file ( which it does in most cases ), then the data in the INI file can't be invalid.

This is a reasonable assumption in most cases, but there are times when GoldMine does NOT write valid data to the INI file, or the INI file becomes corrupted or a user manually changes the INI file to contain an invalid value. If this happens, then GoldMine can exhibit all sorts of interesting behavior. Some examples:

GoldMine may crash without warning ( this will usually occur during launch, but could also happen when bringing up a new GoldMine window ):

- GoldMine crashes without warning
- GoldMine windows display oddly ( for example, the tabs along the bottom of the Calendar don't display )
- Windows may appear, but be way outside the regular viewable area in GoldMine

**Troubleshooting Strategy**

Often times, the knee-jerk response to an unexplainable problem is to delete the UserID.ini file and see if that fixes the problem. This is a fine first step, but it very rarely is the entire appropriate solution to a given problem. In the following section, I outline a methodology for determining exactly what in the UserID.ini file has become corrupted, and how to fix it.

**Finding what's wrong**

The primary goal for troubleshooting a problem with a UserID.ini file is to determine which section, key and value are involved in turning the problem off and on. We do this by selectively removing sections and/or keys until the problem goes away, then add them back in to confirm that we have truly identified the problem. To keep this somewhat efficient we use a divide-and-conquer ( binary search ) approach. Here is the process:

**Make sure the problem still exists**

The first step of this strategy is to make sure that the problem is actually repeatable. Open Goldmine and re-produce the problem a few times, just to make sure that it is indeed repeatable ( there's nothing more frustrating than debugging an INI file, only to find that the problem somehow corrected itself ).

**Make sure the problem is in the UserID.ini file**

Next, we will reset the UserID.ini file completely, and see if that fixes a problem ( there's no sense messing around inside the file if that isn't the problem! ). Here's how:

1. Click File->Login Another User ( see the Important Tip below for why we do this )
2. Change the extension on the UserID.ini file from **ini** to **inix**

**Important Tip:** GoldMine re-writes the UserID.ini file when it shuts down, so you can not make changes to UserID.ini files and expect them to stick unless you ensure that the user is logged out. This also applies if you are trying to edit the INI files directly to make changes to settings, toolbars, etc…

3. Next, log in to GoldMine as the user in question and confirm that the problem has gone away ( if the problem is still occurring, fiddling with UserID.ini will do you no good ).
4. Change the extension of the UserID.ini file back to **ini**

**Use divide-and-conquer to find the Culprit Section**

The next step of the process is to identify which section in the UserID.ini file is causing problems. We will selectively delete half of the sections in the UserID.ini file and see if the problem is fixed. If it is, then we restore the deleted sections, then delete half of them and try again.

Here's how:

1. In GoldMine, click File->Login Another User

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2. Make a backup copy the UserID.ini file called UserID.ini_1 ( note, the 1 will change depending on which iteration you are doing ).

3. Open UserID.ini and scroll about half way down. Find the nearest section start ( e.g. [CalObj] ) and delete it and all the other sections through the bottom of the file.

4. Save UserID.ini

5. Log in to GoldMine as the user in question

6. Check if the problem has gone away.

   - If the problem has **not** gone away, then repeat this procedure ( deleting half of the sections still remaining )

   - If the problem **has** gone away, then restore from the last backup and only delete half of what you deleted last time

**Use divide-and-conquer to find the Culprit value**

You can use a similar divide-and-conquer technique to remove half of the key/value pairs in the culprit section, and whittle it down until you find the exact key/value pair that is causing the problem.

**Fixing the problem**

At this point, you have narrowed the search down to one key/value pair ( or maybe a handful of those pairs ). What you do at this point depends on the problem. In the vast majority of cases, just deleting the problem statement lines is sufficient. GoldMine will re-create the uncorrupted key/value pair when you log in again, and you won't lose many of your settings.

**Conclusions**

UserID.ini files are the source of many problems in GoldMine, but deleting the UserID.ini file outright causes users to lose settings. It is better to use a surgical approach to find and address the actual problem in the UserID.ini file instead.

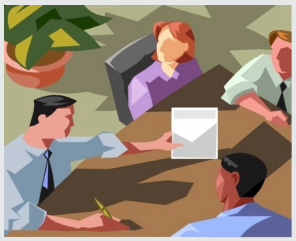
As a final comment, in many cases, you can intuit the culprit section based on the misbehavior you are experiencing. For example, if the Calendar view is not displaying it's bottom tabs properly, then chances are pretty good that the issue is in the [CalObj] section.

Happy hunting!

**About the Author**

**Kevin Day** is the CTO of **Trumpet, Inc.** and **Attach Plus, LLC**

# New GoldMine Products for 2006 as Announced by FrontRange



from

**DJ Hunt/Gene Marks**

At the convention back in November 2005, FrontRange, the maker of GoldMine, announced a pretty ambitious year for their developers. Here are some of the new products they've announced for 2006:

**GoldMine IP Voice Suite** - a product that integrates GoldMine with any Voice Over IP based phone system.

**GoldMine Corporate Edition 7.1** - expect to see more bug fixes to 7.0 plus basic service and support functionality.

**GoldMine Service** - a service module for GoldMine.

**GoldMine Standard and Corporate Editions 8.0** - expect more bug fixes, and a total revamping of the GoldMine GUI to be more granular and more user friendly. You may expect to see a more webish interface. Alas, we may see the lose of our beloved Taskbar as well. At this junction, all of the GoldMine products should be back in sync as far as supported databases as well. You may expect that the Borland Database Engine will be totally removed for all GoldMine users in favor of ADO. You may expect a more account centric GoldMine as well.

**GoldMine Enterprise** - the next generation of GoldMine with more account and contact centric interfaces, unlimited fields, ability to add new forms and build new relationship. This product is being built on the .NET platform.

**GoldMine MSP** - a hosted version of GoldMine (ala SalesForce.com).

**Stand Alone Modules** - new modules for Opportunity Management, Lead Management, Campaign Management and Quoting to add to the GoldMine Corporate Edition. FrontRange is also expecting Service and Support modules, and some that they haven't discussed as yet. We should see everything being more granular, as FrontRange calls it, modular as I define it. Corporations can purchase as much or as little as they need, and will be able to always add the plug-ins later. These plug-ins will work within the GoldMine framework, and should integrate seamlessly within GoldMine.

I have been discussing this modularity with FrontRange for a couple of years now. GoldMine 7 users, and I still don't recommend upgrading to GoldMine 7, are seeing the first of these implementations as more and more developers have joined to develope their new applications as plug-ins. The portal has opened, all we need is for the add-on developers to begin their journey through the portal.

# Tips, Tricks & Things

## Query Tips

from

**Byte-Size™ Newsletter**

These work in both dBase and SQL.

1. E-mail Inbox – There is a limitation ( 1,000 ) as to the number of emails that can be safely displayed in GoldMine's **Inbox**. We have seen a rash of problems where users have left too many emails in their Inbox. This query will tell you how many emails are in your Inbox. Run the query and clean out your inbox.

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

2. Search for e-mail by domain – Want to search for all e-mail addresses from a certain domain? Try:

```
select Accountno,
  Company,
  Contact
from Contact1
where Accountno in
  (Select Accountno
   from Contsupp
   where RecType = 'P'
    and Contact = 'E-mail Address'
    and Contsupref like '%aol.com')
```

3. Do you need a list of all e-mail addresses with a certain merge code? Try:

```
select Contact1.Company,
  Contact1.Contact,
  ContSupp.ContSupRef+ContSupp.Address1 as Email,
  ContSupp.Address2
from Contact1,
  Contsupp
where Contact1.Accountno = ContSupp.Accountno
  and ContSupp.Contact = 'E-mail Address'
  and ContSupp.MergeCodes like '%T%'
```

**Editors Note**

**Gene Marks** always gives me a slew of great tips for my readers. This next tip is one that few GoldMine users know about, the ability to update contact records during a Goldmine Import. That's right, within GoldMine without the need of a 3rd party add-on product.

## Updating Contacts with the Import Wizard

from

**Gene Marks**

Can the GoldMine Import Wizard update existing contacts as well as create new ones?

Yes, provided your import source file contains a field with a value that exactly matches GoldMine field value in the existing records. Provided that this GoldMine field is a GoldMine indexed field, and finally, provided that the value in the field is unique within GoldMine. To run an update import:

Select Tools > Import/Export Wizard

Select Import File > Ascii Text

Click Next to until you reach the screen to map fields

Map the fields to update > click Profile Options button

Select Contact as your Match Field

Click Next > select Overwrite the Existing GoldMine record

Click Finish and save the profile

Note: always make sure you have a backup of your GoldMine database before running any import. There is no recoverer from this Import process except for restoring from a backup, hence, even though you can have people working in GoldMine while you do your Import, in this case, you would not want them doing so. The information in GoldMine must not change from the point of backup forward, until such time that the Import has been deemed successful.

**Editors Note**

**Gene Marks** has come up with a tip that I think is fantastic, and one that has been long asked for. On the next page you will see one of the most useful tips that I have seen, and it answers the age old question:

**Is it possible to create a filter that searches the Conthist table or tables other than Contact1 or Contact2?**

Alas, for Corporate Edition users only.

## Filtering on Other Tables

from

**Gene Marks**

*Is it possible to create a filter that searches the Conthist table or tables other than Contact1 or Contact2?*

**Yes**, you can create a filter and then edit the SQL Expression to add a SQL statement to search **any** table including History, Details, or Calendar.

Below is an example of a filter that includes only accounts with a phone call or appointment completed within the last 7 days:

Create and save a Filter, any filter, such as Account is not Empty

In the list of filters highlight the filter and click **Properties**

Under the **Properties** tab select the **SQL Query** option and click **Edit Expression**

Replace the initial SQL with a **WHERE** clause that picks the accounts with the data you want. For this example it is:

**where c1.AccountNo in (select AccountNo from ContHist where sRecType in ('A','C') and OnDate > getdate()-7 and ResultCode = 'COM')**

**Editors Note**

Notice the getdate() function in the select statement. Even if it wasn't before, this function alone makes this select statement only possible within a SQL environment.

I'm sorry but, you cannot copy and paste the statement from here as this document uses special characters that are not recognized properly by the GoldMine editor.

Click **OK**, Also, you **do not** need to edit anything in the dBase expression window

**Preview** or **Activate** the filter to view the results

This process can be used to include SQL statements in the Filters window instead of the SQL queries window so you no longer need to build a SQL Query and then build a Group from the results. Your SQL Query is now dynamic as opposed to be static.

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