

### Editor

DJ Hunt

### Contributors

David Lee

Neil Saviano

Charles Horan

Terry Porter

Gene Marks

Pam Mannell

### In This Issue

**CRMGold.net: The first CRM tool focused on Ease of Learning**

**Telephone Sales & CRM Technology - a Powerful Combination**

**Anvil GoldMine Organization Tree Wizard**

**10th Anniversary Celebration**

**5 Laws of CRM Success**

**Tips, Tricks & Things**

**Changing Calendar Display**

**Beta Testers Wanted**

**Dangers of Duplicate Contact2 Records**

**Finding that One E-mail Message**

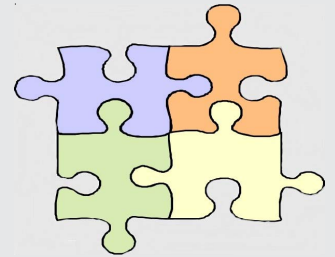
**More...**

## Ease of Use is Not the Answer

### Part 3: CRMGold.net: The first CRM tool focused on Ease of Learning

by

**David Lee**



We have been discussing how important ease of learning is to a successful CRM project. How can you be sure that your own system is easy to learn?

There are many areas you will need to address. Most of these are independent of the CRM software<sup>1</sup> that you select. However, your CRM software choice is one critical element.

Every CRM system reflects the designer's philosophy. All modern systems address issues such as:

- Rich feature sets
- Ease of use
- Flexibility and configurability
- Scalability
- Easy integration
- Security
- Data cleaning
- ....and Ease of Learning

Of the hundreds of CRM systems available, most do a good job in a few of these areas but a bad job overall. The best dozen or so systems address all of these areas reasonably well, but each system gives them different priorities. GoldMine, for example, focuses on Rich Feature Sets, Flexibility, and Configurability. Microsoft CRM focuses on Easy Integration, Flexibility, and Configurability. But no system has given top billing to Ease of Learning. Until now that is.

Since GoldMine already has very good ease-of-learning features, we will compare it to CRMGold.net to show the difference between "very good", and a primary focus on ease of learning. There are two versions of CRMGold.net. The version shown requires that you have sufficient GoldMine user licenses for the number of concurrent users. It allows you to access the tables either from GoldMine or from CRMGold.net.

As you can see in Figure 1, the CRMGold.net interface is similar in some areas to the GoldMine interface. For GoldMine users virtually no training is necessary. They will already know how to use this system.

Since CRMGold.net is web-based, it should remove the need for synchronization. This alone makes the system

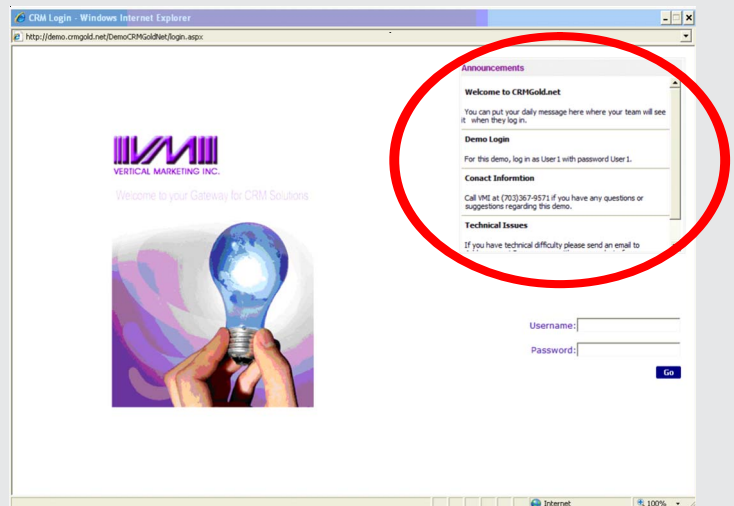


Figure 1

( 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 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:

DJ Hunt  
**Computerese**  
152 Pratt Road  
Fitchburg, MA 01420  
USA

(978)342-3333

DJ.Hunt@DJ-Hunt.com  
www.DJ-Hunt.com

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( Continued from Page 1 )

much easier for the users, and for the database administrator as well.

Here are some points where CRMGold.net has improved ease of learning compared to GoldMine, which is itself easier than most other CRM applications:

**The login screen includes the announcements.** ( Figure 1, Page 1 ) This ensures that everyone sees the announcements as he/she logs in. This is not only easier to learn ( you don't have to do anything at all in CRMGold.net ), but it also ensures that the feature is used consistently. Having your own corporate logo on the login screen does not directly make it easier to learn, but it does make you feel more like it is "your" system, and thus makes you more motivated to learn.

Figure 2

**Pull-down arrows on fields.** In GoldMine you must click in the field to see them. This results in a cleaner presentation, but it does require that the user learn to click in the field. The CRMGold.net design shows both the field outline, and the pull-down arrow. This makes it easy for the user to know how to enter data, and how to get the pull-down list. Even more important, the ? icon allows users to click for help about how to fill in that field. CRMGold.net internally documents your business rules. A side benefit is ease of use: It saves a click.

Figure 3

**Subsidiary Fields tabs show all custom Views.** Instead of right-clicking to get a GoldMine local menu ( new GoldMine users are not even aware that this option exists, and thus do not have access to alternative views ), CRMGold.net displays them as a subsidiary row of tabs. This is not only much more intuitive, but it also saves clicks.

( Continued on Page 3 )

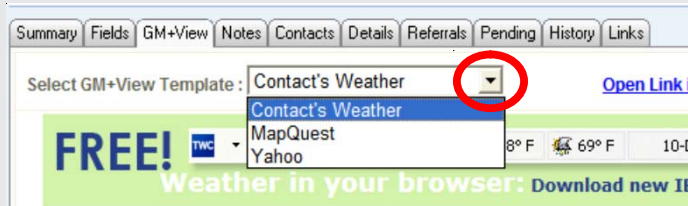


Figure 4

**GM+View pull-down arrow.** You see the arrow to select alternate views, again removing the requirement to know that you can get a local menu, and select a view.

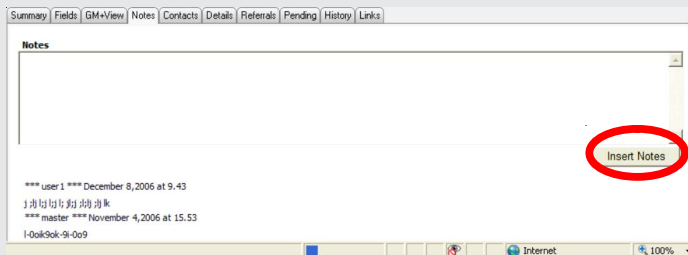


Figure 5

**Notes tab:** A very large percentage of GoldMine users do not know how to enter a Note. They append their notes to the end of the previous note. In addition, they often edit old notes. These are bad practices for a number of both technical, and practical reasons. For example, edits will not synchronize. CRMGold.net does not allow editing of old notes, and it gives you an obvious area for entering new notes. This is not only easier to learn and to use, but it also prevents incorrect use.

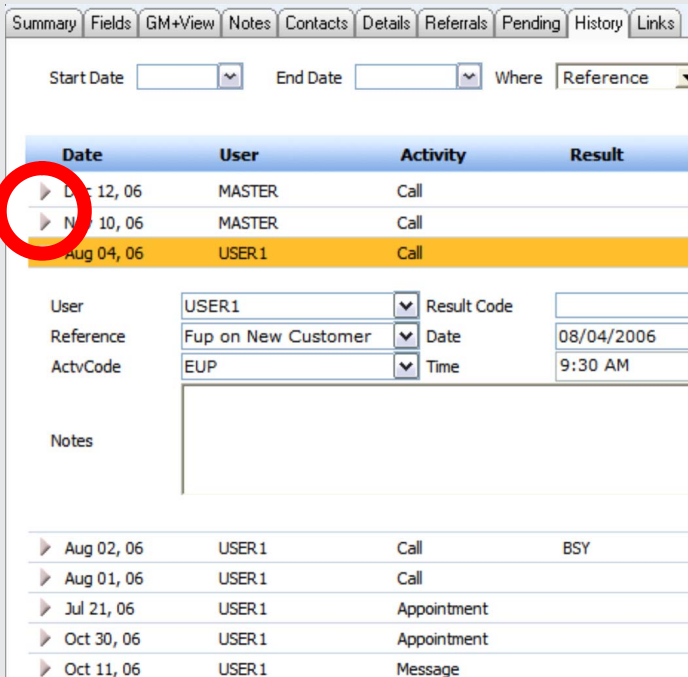


Figure 6

**Simpler and more powerful grid display.** Several GoldMine tabs display grids ( Contacts, Details, Pending, History, Referrals, and Links ). In GoldMine you can right-click on an item, and use the local menu to expand it ( you can also double-click ). This is very simple and powerful, but you must be taught how to do it. CRMGold.net displays a triangle to the left of each line. Clicking on the triangle expands the record, just as it does in many Windows applications. You can open multiple records at the same time thus you have improved ease of learning, of use, and power.

**On-screen grid options:**

Export to Excel, Create a new record, and Delete a record are all GoldMine options you can access by right-clicking, and selecting the option from a local menu. Note that these are all on-screen icons in CRMGold.net such that you don't need to be trained on how to do these functions.

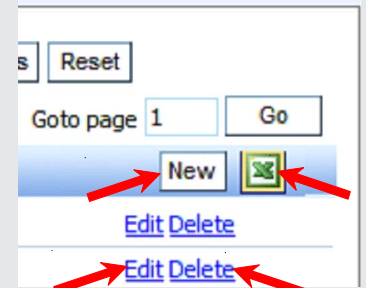


Figure 7

CRMGold.net grids can all be sorted by clicking on any column. There is no icon telling you that this works, because it is such a common feature in Windows applications that we assumed that the user would know that he could give it a try.

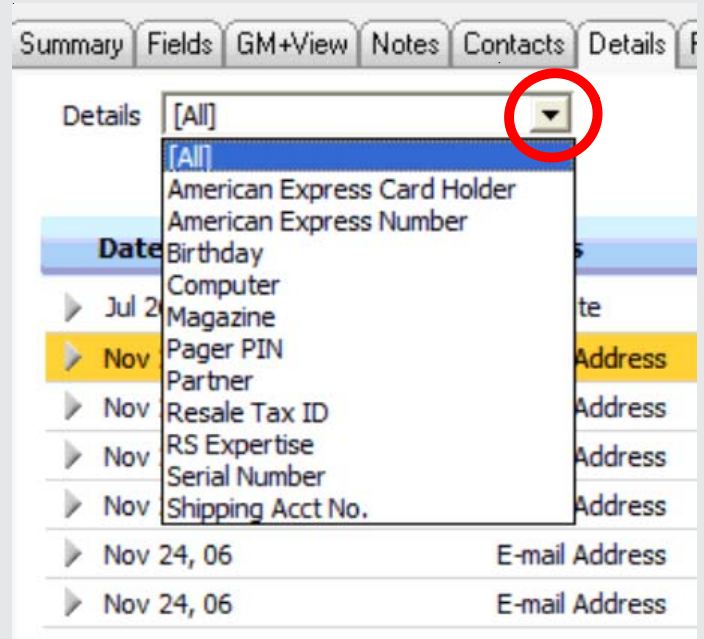


Figure 8

**The Details tab has both ease of use and increased power.**

The Details arrow allows you to select a particular type of detail. This takes the place of the hidden custom details tabs in GoldMine which many users have not learned how to access. It is

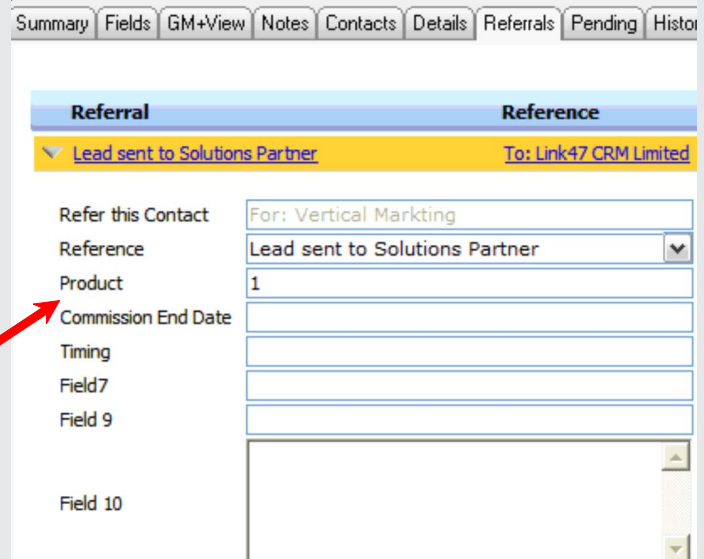


Figure 9

also more powerful since you can select ANY category of details, and even subcategories. Even better, you get to see more fields within each detail record ( compare to the third-party program Details Plus ).

Reference Figure 9 on page 3. **The Referrals tab has also been improved** to give you fields with which to categorize your referrals. For example, you can specify the product or service, any finder's fees, etc.

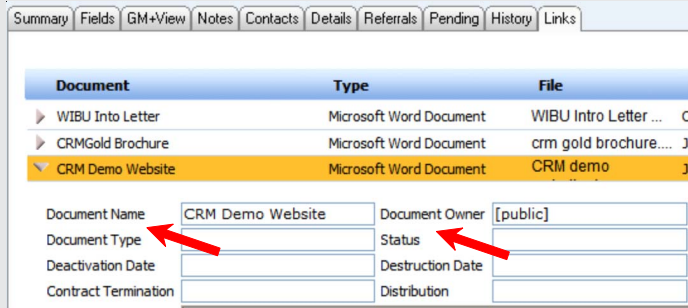


Figure 10

**The Links tab also has new fields.** Specify type (Contract, proposal, resume, etc.) status (draft, approved, archived, etc.), expiration date, contract value, etc. You can make this a much more powerful document management system.

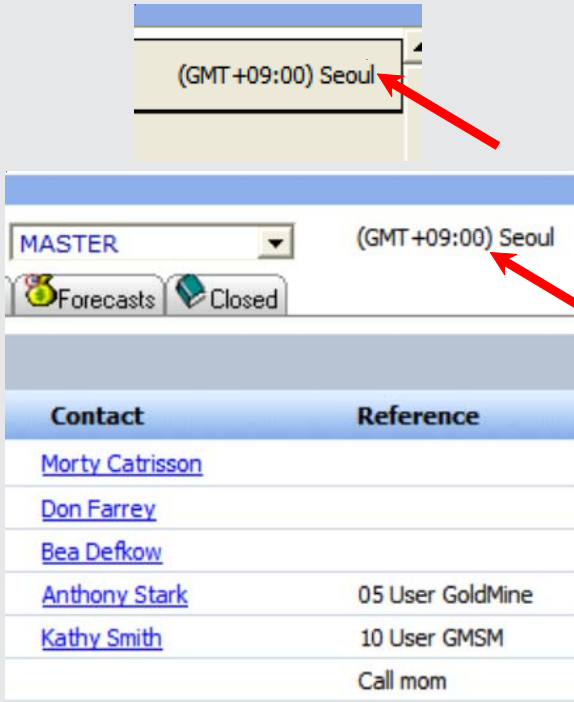


Figure 11

**Enhanced calendar and activity list.** We have surveyed users, and have removed the features that are seldom used, thereby reducing training time. We have also included the time zone of the user. Thus, if you are looking at my calendar, you will know what time zone I am in. This greatly simplifies scheduling for organizations spanning multiple time zones.

**The SQL Query builder is both more powerful,** and simpler than the GoldMine version ( Figure 12 ). It more closely resembles the MasterMine version.

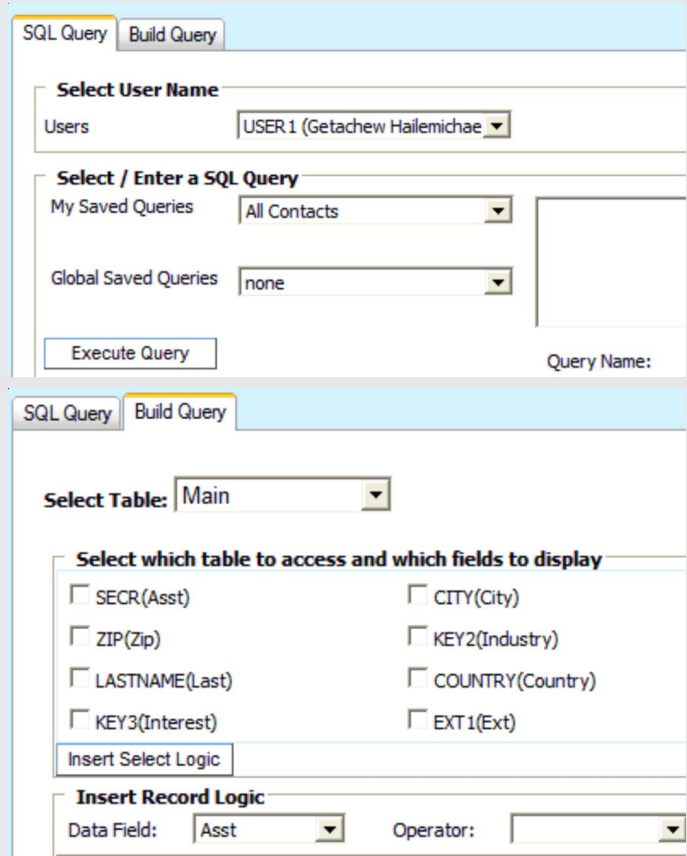


Figure 12



Figure 13

**Recently Viewed Records:**

This shows the last 10 records you have looked at. This is both more useful, and easier to use than the "Cycle Last 5 Records" feature in GoldMine.

Finally, because CRMGold.net operates on the GoldMine database structure, it does not need the complex administrative, and marketing features that other systems need. To develop automated processes, merge duplicate records, realign sales territories, import data, or other administrative tasks, you simply log into GoldMine. But you only need to train one or two administrators to do this, not the whole sales staff.

Each of these is a small item, but in total they, and other features, reflect CRMGold.net's focus on ease of learning. This is not a small thing. It means:

- You spend less on training your users
- Your users take less time on learning, and have more time to make sales
- Your users are less frustrated.
- You are less likely to have bad or missing data in your system so it is more useful for all users
- Your system is more likely to succeed

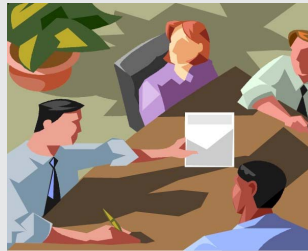


In closing, let me re-state that we believe that GoldMine is an excellent CRM system that is both easy to learn, and easy to use. Comparisons to other CRM systems would show even more dramatic differences. That is because CRMGold.net is the first system where ease of learning was the primary design goal.

**Editorial Note:**

I have been selling CRMGold.net since its release, and I believe that this is an excellent End User GUI to GoldMine. To eliminate synchronization on top of that, well, nothing else needs to be said about **Ease of Use**.

## Telephone Sales & CRM Technology - a Powerful Combination



by

**Neil Saviano**

Telephone sales, integrated with CRM and Sales Force Automation software, is a powerful sales and marketing program for companies of all sizes. This helps drive higher sales, margins, and at the same time results in more cost effective customer coverage.

Historically, telephone sales programs have been an option for companies wanting to lower their cost of sales with smaller customers while maintaining their business. Though this is still a key strategic focus, telephone programs have evolved into a sound new customer development, and penetration strategy for medium, as well as sometimes for large customers. The CRM software component contributes greatly to the strategic effectiveness in all customer segments by providing a high level of information, and contact management as well as automated sales and marketing processes.

Smaller customers for most companies historically do not have the sales or profit margin potential to be covered cost effectively by field sales - where the cost of a sales call is high. Take into account commuting time to and from a prospect or customer's office, time spent in the lobby or reception area, and an hour or two can be spent for a 20-minute meeting. The cost for this business is out of sight, and the losses can be astounding. Conversely, a telephone sales person in many industries can reach at least 40-50 customers and/or prospects a day, and overall can cover as many as 700 customers. The double benefit is that the cost of sales goes way down while the large number of customers covered results in the potential for high sales without needing the success rates of field sales. Economies of scale are surely on the side of telephone sales.

CRM and Sales Force Automation software drastically enhances the power of telephone sales. This type of software, depending on the industry, has the capacity to store large amounts of information, such as: customer status, customer buying habits, special products or services, as well as demographic information at both the company, and contact person/s level. A key benefit is that this powerful combination of information is always available to a telephone sales person while in contact with a customer,

resulting in very effective use of information, and strategically timed presentations. Some examples of use of information are: letting customers know of product or service specials that can address their needs, or products that fit key customer applications. In many industries this allows for considerable cross selling into higher profit margins, and deeper customer penetration. Field sales people simply do not have this access to information during the selling process as easily, if at all.

A key CRM software component that results in powerful use of information for telephone sales people is the capacity for emailing ( and sometimes faxes ) of pertinent promotional or product information. Seamlessly integrated fax, and email software is available on most CRM software solutions; this means that an HTML e-mail piece or a promotional fax is only a mouse click away. A spin-off of this feature is the capacity for very effective target marketing. Virtually all of the stored information can be combined into targeted groups; groups can be set up for customers using specific products, buying history or many possible demographic breakdowns, such as customer type, industry type or competitor. Promotional and informational pieces can be aimed at these targeted groups at any time by inside sales people or inside sales management. Follow up calls can automatically be scheduled for telephone sales people, adding greatly to the effectiveness of a campaign.

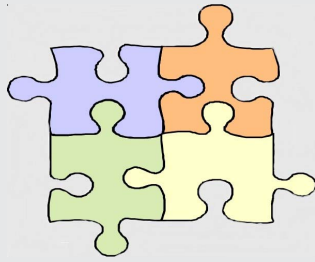
Telephone sales, of most company sales and marketing strategies, works best with CRM software's most powerful feature: automated processes. An automated process represents the automation of a series of repetitive sales and marketing tasks that historically fall through the cracks. Examples of tasks addressed by automated processes include: penetrating underachieving customers, following up with "not interested" prospects, and touching current good customers at strategic intervals to help assure retention. Automated processes are only a mouse click away for telephone sales people. In essence they gain the help of a virtual sales assistant to address tasks that would be impossible to perform while having to cope with every day crisis management, and other administrative tasks.

The benefits of technology-driven telephone sales related here are not intended to denigrate field sales. Companies need to make market segmentation decisions, and within their segmentation decisions the need for more cost effective coverage of smaller and medium sized customers is paramount. The cost-of-sale losses from smaller, and unprofitable customers in particular, can drastically impact bottom line - taking away from the impact of larger, and more profitable customers that require a field sales concentration.

Field sales can obviously benefit from CRM software as well. All CRM software is equipped with remote synchronization or direct access to data via any internet connection from the field. Thus, the same benefits accorded telephone sales people can be realized by field sales people. This technology can help field sales people segment their customers and decide upon more cost effective customer coverage. In fact, technology, combined with easily accessible internet connections, can result in mini telephone sales programs for field sales people.

Many companies may also consider the traditional hunter/farmer sales and marketing model; this strategy combines a best of both worlds. For instance, field sales people team with inside sales people, and customer service in covering all size customers. CRM software helps them team-manage all customer processes/contact, using all of the software features, and related benefits. The result is more strategically timed customer coverage, deeper penetration, and far greater retention of all size customers, not to mention a higher ratio of new customer acquisitions.

# Anvil GoldMine Organization Tree Wizard



by

Charles Horan

## Overview

The Anvil GoldMine™ Organization Tree Wizard generates organization trees from your GoldMine contacts. It also will automate the maintenance of the organization trees. This wizard is accessed from the Wizards menu in the Designer. There is a four step process to complete before the wizard generates the required job file.

## Step 1 - Data Options

1) Press this button to select the type of database that holds your GoldMine data. In most cases you should select dbase, Microsoft SQL, or Firebird. Once you have selected the database type follow the ensuing dialog to complete a connection.

2) Since GoldMine can have more than a single contact set; the next step is to select the contact set that you want to organize.

3) The wizard can either generate a single organization tree or multiple organization trees. If you want to create a single organization tree, you will have to supply a name for your new tree.

4) You must supply the user name that will be recorded as the tree(s) creator. In most cases MASTER or some other super user would be appropriate.

## Step 2 - Filtering

5) The wizard can generate two different maintenance models:

a. Prune will clear contacts from an organization tree that no longer belong there.

b. Clear All will clear all organization trees, that were created by this wizard.

The Wizard page, shown in **Step 2 - Filtering**, can be used to filter, or limit, the contacts that will be organized.

1) This control allows you to pick fields from the contact table. User defined labels are shown in this drop down.

2) This control allows you to select operators (equal to, not equal to,...)

3) This control allows you to enter or select values to match against.

4) This is the main display area and shows you a graphic view of your filter. In addition the context menu (right click) allows you to add new expressions and groups to your filter.

5) This area displays a text version of your filter.

## Step 3 - Defining Your Tree & Preview

This page allows you to define the levels of your organization table, and preview the results before generating the job file.

1) If you selected multiple trees on page 1 this control is enabled. This allows you to choose when to create a new tree.

2) The level breaks define when a new section/subsection is created by the wizard.

## Step 4 - Review

( Continued on page 7 )

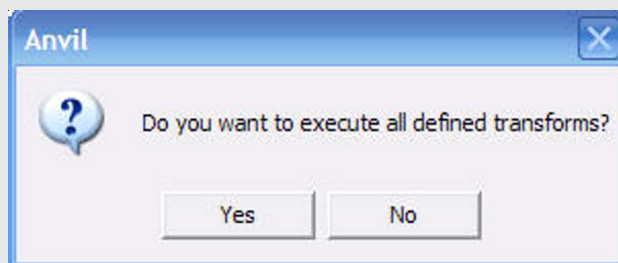
( Continued from Page 6 )

3) After pressing the Preview button, this tree is populated. When you select multiple trees on page one each top level node represents a complete organization tree in GoldMine. If single tree was selected on page 1 then this tree represents exactly what will be generated for GoldMine.

Image 4, shown as **Step 4 - Review** on page 6, gives you a chance to review your settings before you generate the job file. Press Back to change your settings, and press Finish to generate the job file.

### Final Steps

You should save the generated job file with a meaningful name. You can press the execute button from within the designer or you can right click on the file in a windows explorer, and pick "Execute Interactively" from the context menu. When pressing the execute button from within the designer, you will be asked if you want to execute all transforms. Select yes from the dialog.



This dialog is to allow you to decide if you want to execute the entire job file, which can contain an unlimited number of transforms, or just the one transform that you are currently viewing. If you have Anvil Enterprise you can load the job file into the control center to allow for scheduled execution.

## 10th Anniversary Celebration

by

**Terry Porter**

**December 15th, 2006**



This party was held to celebrate 10 years of Plustar use of GoldMine software, a significant milestone for our company. We started on version 3.2 of GoldMine on December 17th, 1996.

The theme for the party was "**Mining for Gold**". Banana Nut, Blueberry Muffins, and Orange Juice were provided for breakfast. There was a balloon bouquet at the door with 10 golden helium-filled balloons.

The night before, I had hidden around the premises of our company in plain sight 10 gold envelopes. Each envelope contained a number from 1 – 10. A prize table was set up with numbers from 1 - 10 with a prize next to each number.

At 8:00 AM all employees were called to the lobby to begin a game. They were given a flyer with a gold envelope attached to it. The flyer said if they found a similar envelope, they were to bring it to me to redeem it for a prize. Prize values ranged from \$10-100 each, and all of the prizes were gold in color. One prize per person was the only rule. I told them to go, and our 21

employees started running around the company searching. Within 5 minutes all of the envelopes had been found. The winners opened the envelope, and got the matching prize to the number in the envelope.

### Winners:

1. Weights - Sam
2. Coasters - Aurelio
3. Bath Products - Valyndra
4. Knife Set - Connie
5. Candle - David
6. Laser Level - Byron
7. Starbucks Card - Nidia
8. Honey Mustard & Bowl Set- Joel
9. Texas Rangers Calendar - Daryl
10. Football - Perry

## 5 Laws for CRM Success

by

**Gene Marks**



*Purchasing a Customer Relationship Management (CRM) System? Here's some bad news: you'll probably fail. It may very well be a disappointment. You could be wasting your money. At best, you may only have a glorified rolodex.*

*My company services over 500 small and medium sized clients that use the CRM applications we support ( GoldMine and Microsoft CRM ). We've had lot of successes but also a good share of disasters too. I got sick of the bad projects, and one day I sat down to try and figure out why our great projects were so great. Here's what I found.*

### 1. One individual stepped up to the plate.

Every project needs an internal champion. The projects that succeeded had one. I'm not talking about a Microsoft-Trained-Dungeons-And-Dragons-IT-Propeller-Head either. They're only good for backups, and security. I'm talking about a really good administrative person. Someone who has a brain, and isn't afraid to use it. Or a baseball bat too if necessary. The champion is not afraid to make mistakes or even yell and scream if necessary. The champion is authorized by management to get the job done...and evaluated on its success. The champion should know everything about the system. He/She should get all the advanced training they need. The champion is responsible for the accuracy of the CRM database. The outside consultants are used to back up the champion. If you don't have someone like this in place then you will fail, fail, fail!

### 2. There were black and white deliverables.

Don't try to "get more sales" or "service our customers better." That's a joke. You buy a piece of equipment to cut metal. You purchase a truck to deliver your product. What's the specific thing that your CRM system should be doing? How about 2-3 needed reports that you're not getting? How about replacing 2 databases with one combined system? Come up with an exact deliverable, and have your CRM consultant tell you just how much it will cost to deliver it. Justify this investment by how much more sales or less expenses will result. Pay them when you see

( Continued on Page 8 )



it, and it's working. My best clients go into their implementations with a clear, measurable goal in mind.

### 3. Management were not "girly-men".

Schwarzenegger doesn't like them, and neither do I. This is not a "win-win" situation. You're not trying to make people happy. You're putting in a system to help you generate more sales from existing, and new customers. Your competitors are doing it. Don't listen to those whining salespeople who don't want to use this system – CRM applications are standard stuff nowadays. The strongest managers I know look at CRM as just a tool to use to get them the information they need so they can manage their sales, and service groups effectively. People don't like change. Everyone's got their own system. Well, it's not about them, is it? It's about the company. If you're a girly-man with your direct reports, then avoid putting in a CRM system. Take your people to the opera instead.

### 4. They took small steps at a reasonable pace.

No one turned the place upside down. Our successful clients took the attitude that their CRM implementation would take place over a long period of time, and broke the project down into chunks. Many figured out early that a "test group" of users ( especially users with the right attitude ) is the right place to start. This way they could get their feet wet, and work out the kinks. And, assuming success, the test group of users could help spread the gospel – train other employees, and help with issues. Each phase would be about 30 days or so. And of course these phases were part of an overall plan. By doing it this way, management could make sure things were going according to plan, and give themselves the opportunity to cut their losses if things weren't really happening they way they hoped.

### 5. They weren't afraid to fail.

Look, some really great, and successful companies just don't embrace CRM. Their culture isn't right for it. They've succeeded without it. Some of our clients' CRM failures really weren't failures at all. Management knew that CRM was a new concept for their company, and were willing to take a chance ( remember about taking those small steps ) on it. CRM systems fail all the time, and for many reasons beyond management's control. Don't be afraid to walk away from something that's just not a good fit. If it was an affordable learning exercise, then it really wasn't a failure at all.

#### Editorial Note:

Gene and I are definitely in the same ball park on this one. In addition, I would like to add that you don't let your employees manage your managers.

When you implement a CRM solution, any CRM solution, you use the tools of the system. Where am I going with this you might ask. GoldMine is a CRM solution, and it contains a well implemented E-mail solution as part of its toolset. You do not let your employees dictate to you that they will to continue using Outlook for their e-mails, and that they will not utilize the integrate E-mail solution within GoldMine. Don't give in even part way. "You can use Outlook for your personal e-mails, and GoldMine for your business e-mails."

As the old adage goes: If you give them an inch, they'll take a mile. Remember that it is your company, and that you control your managers. Further, that your managers control their staff to the benefit of the company.

# Tips, Tricks & Things

## Changing Your Calendar Display



by

**Pam Mannell**

From the main menu select:

- Edit**
- Preferences**
- Calendar**
- More Options**

Alternatively, on the Calendar display right click, and, from the local menu, select:

- Options**
- Preferences**

If/When prompted to import a list of pre-defined holidays select:

**No**

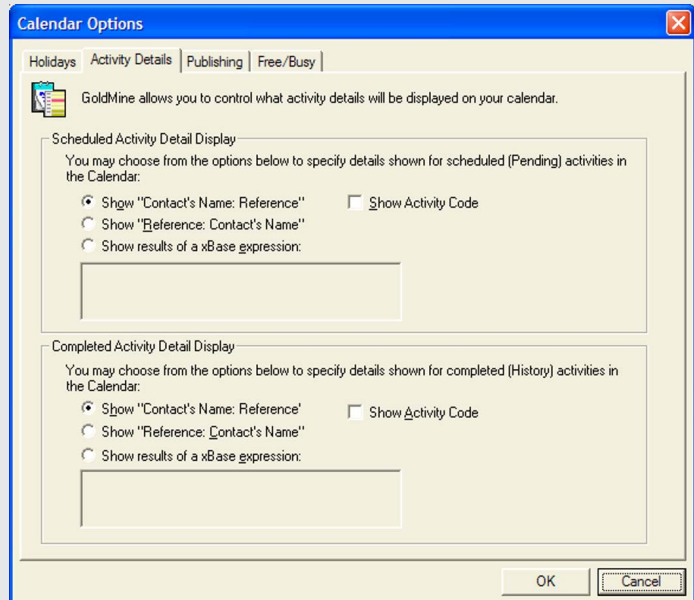


Figure 1

Select **Show results of a xBase expression**

Any valid dbase expression can be entered here to display different information in the calendar, for example:

Company, Contact & Phone:

**Contact1->Company+Contact1->Contact+Contact1->Phone1**

( leave spaces for display by entering [ ] – see next example )

Company & Activity Reference:

**Contact1->Company+[ ]+Cal->Ref**



# Tips, Tricks & Things

( Continued from Page 8 )

You can also use the trim() function to remove redundant spaces, for that matter, you can use any legal dBase function.

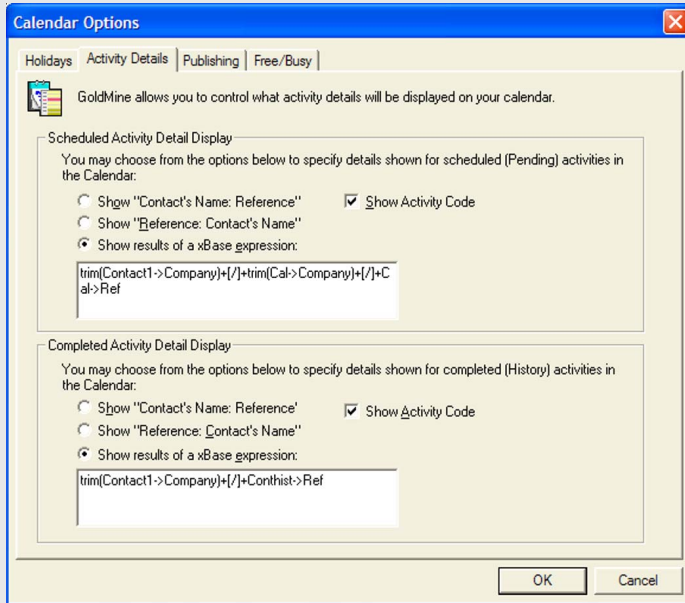


Figure 2

## Recommended Settings

Scheduled Activities:

**trim(Contact1->Company)+[/]+trim(Cal->Company)+[/]+Cal->Ref**

Completed Activities:

**trim(Contact1->Company)+[/]+Conthist->Ref**

This would then display in the Calendar as:

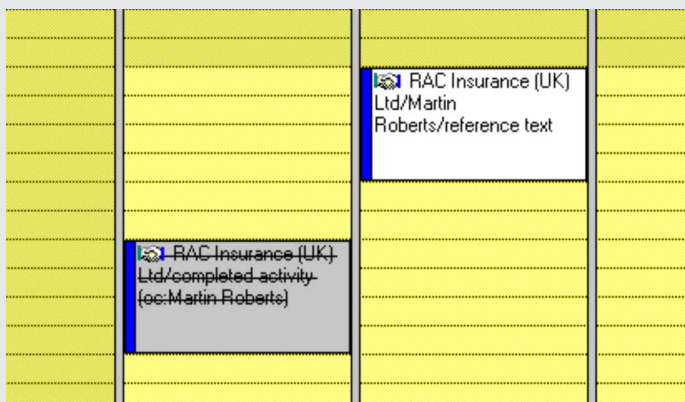


Figure 3

### Editorial Note:

**GoldMine 7.00.61201** ( aka 7.0.4 ) was released on January 11, 2007.

**GoldMine 6.70.61102** ( aka the build that works with Internet Explorer 7 ) is scheduled for release around January 17, 2007.

## Vacation Time

by

**Jim Hansen**



I'd like to offer this addition to Gene Mark's excellent tip in the August 2006 edition of The GoldMine Advisor on blocking out vacation time ( or any other time commitment for that matter ). If you standardized on specific colors for certain tasks, the "Planner" view in the View/Calendar display becomes a fast visual way to scan for open time blocks or see overall staff loading for the week or month. Figure 1 shows my personal calendar where you can quickly see that I have some fully committed appointments ( red ), a number of flexibly scheduled calls/emails ( blue ), two fully committed vacation days ( green ), and three tentative scheduled days for something ( yellow ).

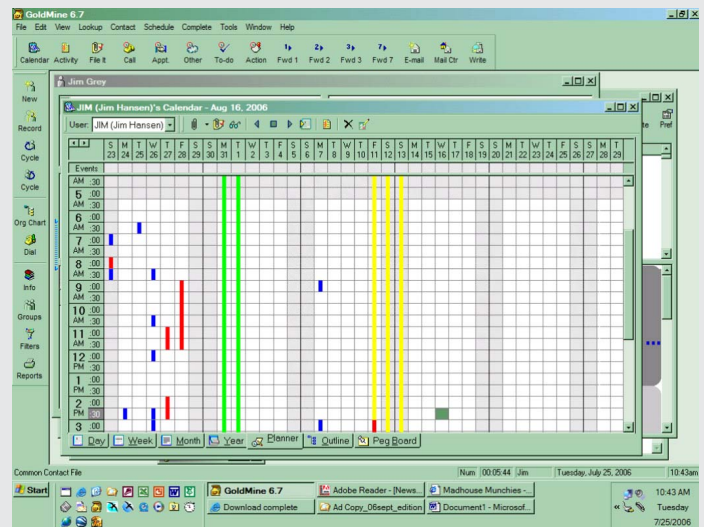


Figure 1

Notice the red bar on top of the yellow bar in the bottom left side of Figure 1. If the tentative day-long items ( yellow ) become firm then there is a potential conflict with the firm scheduled item at 3pm. Since these three yellow days are on the weekend, I know these items are planned vacation time, and taking time out Friday afternoon for an important item won't actually be a conflict.

When laying out your color code system, keep these GoldMine color display rules in mine:

1. There is no hierarchy of the colors themselves used to figure out which color is displayed when two items overlap
2. If two items are scheduled with the same start time/date, GoldMine will display the color of the item with the earliest real-time of data entry into GoldMine on top of the color of the 2<sup>nd</sup> item entered. This can be problematic if the item entered 2<sup>nd</sup> into GoldMine has a shorter duration than the first item. The second item will be buried beneath the first.
3. Ironically, the condition in 2 above is not true if the second item has a later start time, and a shorter duration.

( Continued on Page 10 )

# Tips, Tricks & Things

(Continued from Page 9)

In this case, Goldmine is smart enough to not bury the 2<sup>nd</sup> item so it's color gets displayed on top of the first item.

Figure 2 shows how you might deploy a planned color code system to tentatively schedule competing items. For example at the beginning of the year you may tentatively schedule trade shows you may exhibit at ( black ), trade shows you want to attend as an attendee ( purple ), and vacations . If you standardize on an exclusive "start time" to use for each type of item your scheduling, you ease the item-burly problem. Schedule items starting at 12:00am, and offset in time increments equal to the largest time-block set in user preferences for displaying calendar events. In Figure 2 on July 31<sup>st</sup>, you can see three competing events.

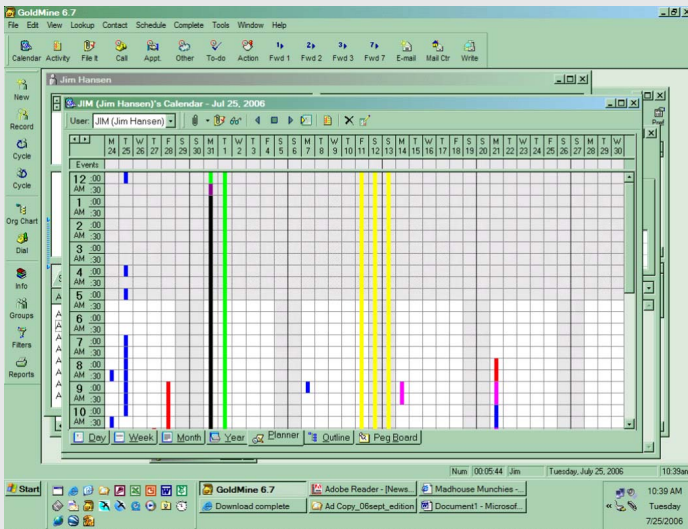


Figure 2

If your in a multi-user environment, and select a group of users as the "user" to display on the calendar, all users are shown on one calendar. However, each user's calendar items are shown in a single color on this group calendar, regardless of the different colors assigned for viewing on the personal calendar. Figure 3 shows a group of users displayed on the calendar.

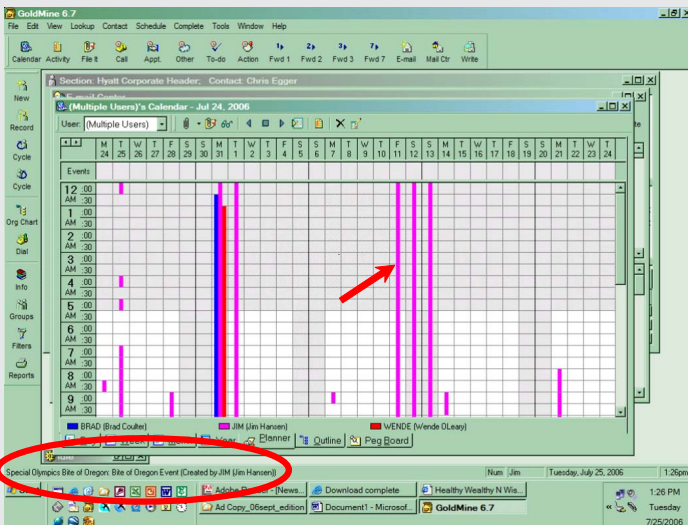


Figure 3

Notice how all the yellow, red, and blue items on my personal calendar in Figure 2 are all shown in purple in Figure 3. Point the cursor at each item to display the text description.

## Beta Testers Wanted

by

Bob Gannett  
Byte-Size™



Lost profits plague the service industry because it is taking too long for the results of the on-site service call to get to the main office ( if it gets there at all ). Picture this scenario. A service person finishes a job, pulls out his PDA, fills in the data, prints a work order for his customer to sign, and transmits the job's information wirelessly to his home office. The data goes into their server for immediate processing/invoicing.

A good friend of mine is working with a company that has spent over a year developing this money-saving system. They are looking for Beta testers. Qualified testers will receive, **free of charge**, the software, PDA's, full support, and if needed small servers for the trial period. The only requirement is that the BETA tester must provide a detailed evaluation at the end of the testing period. Upon completion of the evaluation, the tester will have the option of either purchasing the system or returning it with no obligations. This is ideal for GoldMine, and IT support people as well as almost anyone else in a service industry. I am using the system, and love it. Interested parties should contact me for more information.

Bob Gannett  
GoldSupport@HarborNet.com

## Dangers of Duplicate Contact2 Records

by

Bob Gannett  
Byte-Size™



When a contact is added to GM, the basic information ( name, address, phone numbers, etc. ) is stored in the Contact1 ( C1 ) table. Every time GM creates a C1 record, it also creates a Contact2 ( C2 ) record to hold the User Defined fields ( UDFs ). Sometimes GM creates duplicate C2 records particularly with copies of GoldMine that have been upgraded from earlier versions and/or installations where synchronization is involved. These duplicate C2 records can have a devastating effect on synchronization, and merge/purge operations. During Merge/Purge, contacts with duplicate C2 records can be completely deleted from the system. You should take three actions before doing a merge/purge of contacts:

1. Run the following SQL Query to determine if there are any duplicate C2 records.

```
select count(*), AccountNo  
from Contact2  
group by AccountNo  
having Count(*) > 1
```

(Continued on Page 11)

# Tips, Tricks & Things

( Continued from Page 10 )

2. Backup your data.
3. Remove the duplicate C2 records.

Contact your GoldMine Partner for suggestions on how to remove of duplicate C2 records if you are unsure.

## Finding that One E-mail Message

by

**Gene Marks**

You know that e-mail with information, but you're not sure where to find it! Is there an easy way to look for this e-mail rather than searching through History, etc?

Yes, there is a search function in the Mail Center. Here's what to do:

- \* Open the E-mail Center
- \* Click on the Find button ( Binoculars icon )
- \* An E-mail Message Search box will appear
- \* You then can fill in the information you want to search for based on where it is filed, who it was from, recipient, information in the body of the e-mail, etc.
- \* Click on the Search button and any e-mails that contain the information you specified will be returned.

## How Many New Contacts Today

by

**Gene Marks**

A client asks: I would like to know how many Contact records have been created today. Can I get this information easily from GoldMine?

Yes you can by running the following SQL Query against your SQL backed database within GoldMine:

```
select Count(*)  
from Contact1  
where CreateOn >= getdate()
```

This query statement may be copied from here, and just pasted into your SQL Query box within GoldMine. Click on the Query button, and you should see your count. dBase users will need to add today's date as '1/15/2007' in place of the getdate() function, but the results should be consistent.

You may want to save this query for use in the future. Click on the Save button.

## Re-Linking Scheduled & Completed Activities

by

**Gene Marks**

Say you linked a scheduled or completed activity to the wrong contact, and want to re-link it to the right person. How do you do this?

### For scheduled activities:

- Pull up the contact to be linked/re-linked to an activity
- Open the Activity Listing, and highlight the desired activity
- Right-click for the local menu, and choose Link
- When prompted, choose Yes

### For completed activities:

- Pull up the contact to be linked/re-linked to an activity
- Open the Activity Listing, and highlight the desired activity
- Right-click for the local menu, and choose Properties
- Check the Link to: box in the lower left hand corner of the dialog

### Editorial Note:

This is particularly applicable today where GoldMine 7.00.61201 will no longer permit you to minimize the Completed Activity dialog form, and allow you to relink as you used to be able to do in the past. Gene has given us the only method that functions properly with today's GoldMine

## Finding Contacts Without an E-mail Address

by

**Gene Marks**

How can you find contacts with no e-mail address since you cannot filter from this field?

There are two ways to do this.

First you can enter the following Filter expression by hand:

**empty(&EmailAddress)**

You can use the following SQL query in Lookup | SQL Queries:

( Continued on Page 12 )



# Tips, Tricks & Things

( Continued from Page 11 )

```
select AccountNo, Company
from Contact1
where AccountNo not in (select AccountNo
from ContSupp
where rectype = 'P'
and contact = 'E-mail Address')
```

Remember that after running a SQL query you can create a Group based on the results of the query by doing the following:

- Go to the Groups Tab, and, on the top half of the screen, right click, and choose New

- Name the Group, and choose Next
- The Group Building Wizard will pop-up
- Choose SQL Query Records
- Select the field you would like the Group Sorted on
- You can add a Reference Field, and Filter Expression if you wish ( for this purpose we will not )
- Choose Next, and Finish, and the Group will be built based on the SQL Query.

## This Issues Major Contributors

### Your Publisher/Editor

#### Computerese

##### DJ Hunt

GoldMine Technical Support

152 Pratt Road  
Fitchburg, MA 01420  
USA

(978)342-3333  
DJ.Hunt@DJ-Hunt.com  
<http://www.DJ-Hunt.com>



### Ease of Use is Not an Answer

#### Vertical Marketing, Inc.

##### David Lee

10021 Balls Ford Road  
Second Floor  
Manassas, VA 20109  
USA

(703)367-9571  
DLee@VerMar.com  
<http://www.VerMar.com>



### Telephone Sales & CRM Technology

#### Longbow Consulting Group

##### Neil Saviano

100 Cummings Center  
Suite 207P  
Beverly, MA 01915  
USA

(503)788-7789  
Neil@LongbowCG.com  
<http://www.LongbowCG.com>



### Anvil GoldMine Organization Tree Wizard

#### REM Software Solutions

##### Charles Horan

Lead Developer

28 Bloomfield Trail  
Suite 100  
Richmond Hill, ON L4E 2K2  
Canada

(630)519-3967  
CHoran@REMSoftwareSolutions.com

### 5 Laws of CRM Success

#### The Marks Group PC

##### Gene Marks

45 E. City Avenue  
Suite 342  
Bala Cynwyd, PA 19004  
USA

(888)224-0649  
Gene@MarksGroup.net  
<http://www.MarksGroup.net>



### Changing Calendar Display

#### RD Associates MK Ltd

##### Pam Mannell

Cranfield Innovation Centre  
University Way  
Cranfield, Bed MK43 0BT  
United Kingdom

Pam@RDAssociates.co.uk  
<http://www.DAssociates.co.uk>