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Are You DETAIL - Oriented?

by

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I wasn't, not at first. Truth be told, I was initially terrified of **Details** in **GoldMine**. Back then they were called **Profiles**, and they functioned more as user-defined fields than anything else. Anyway, there was no rational explanation as to why I had this phobia about them. I'm a software developer, and writing an add-on requires the mind of a detective. But I was hung up on Profiles/Details. Much later, doctors diagnosed me with Rectype Dysfunctia, and that was a relief. At least it wasn't my fault. And they had medicine for me (DETAIL-Phobic Interferon, in TABLET form).

If you haven't yet explored GoldMine's Details Tab, any time (preferably now) is fine to start. They are one of the saving graces in our favorite CRM system. Details are user-defined records. **User-defined**, which means you get to be the boss as to categorizing them, labeling them and defining their usage. Limits? Very few. You can create as many Detail types as needed, such as Insurance Policy, Equipment Type, Product Profile, Training Class, Medical Prescription (which is perfect for tracking how often a pharmacy dispenses DETAIL-Phobic Interferon).

If you click the Details Tab, you may see some, even if you've never setup any. These would typically be the Detail Types **E-mail Address** and **Web Site**.

Hints/Information on using Details:

If you are using a ton of grouped standard user-defined fields on the Main Contact record – that can indicate that you are tracking many-to-one data in the wrong area. Details are usually the best place for this data tracking scenario.

Editorial Note:

More commonly known as a **one-to-many** relationship as there is one Contact Record where there are many related Detail Records.

For Instance:

Dave Petonic has one record, but he is taking many different drugs that we must be aware of, hence, **One David-to-many drugs**.

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Legalese

Editor: **DJ Hunt**



Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is 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 from their author. In many cases the authors have had a technical expert, in the area of the document, prereview 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 3.5" 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:

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Are You **DETAIL** - Oriented?

Name the 30-character Detail Type carefully. This categorizes Details – it's what customizes their usage within each category.

Always store the most important value of a Detail record in the Reference field. I have seen GoldMine systems where the Reference field is deliberately left blank, because it does not show on the Info tab with the other 8 extended fields. Don't do that. The 35-character Reference field is indexed – those other 8 fields are not. The indexed Reference is going to allow very fast searches.

Finally, instead of taking medicine yourself, you can inject it directly into GoldMine's Details. You can have Details on Steroids. There are at least two commercial add-ons that unleash hidden power within GoldMine Detail records:

Detail E-x-p-a-n-d-e-r

<http://www.redstonesoftbase.com>

Details Plus

<http://www.solica.com>

CRM Implementation

by

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The creation and implementation of a CRM (Customer Relationship Management) program is tantamount to the creation and implementation of a strategic marketing plan. As with any strategic marketing plan, a CRM program needs to include not only the rationale for implementation, but also a clear set of objectives along with the sales and marketing and software considerations needed for success.

The reasons for implementing a CRM program in any industry have become obvious and don't require much space here. In a nutshell, CRM is a strategy to learn more about customer needs and behaviors to be able to develop stronger relationships in order to enhance both new customer development and current customer penetration and retention.

(Continued on page 3)

Creation and implementation needs to begin with a realistic time frame. Some programs can be fully implemented in as short a time as three months, but for some one year or more is a realistic time frame. A logical starting point for a company should be centered on what it wants to achieve – a clear set of objectives. Once objectives are set, a company must examine its customer centric processes currently in place and decide what's working and what isn't and what needs to be changed. A company also needs to look at what customer information needs to be stored and processed, what levels of customer contact are needed, and how is the contact to be monitored.

The planning portion of a successful program needs to involve the company personnel that will be directly involved in the program. This usually includes sales, customer service and sales and marketing management. However, all other customer-facing personnel need to be considered, such as those in accounting and in the warehouse. Sales and customer service, especially, are the personnel "in the trenches" with customers on a day-to-day basis and have a real sensitivity to customer needs as well as what's working and not working in customer interactions. And above all, they know what most likely needs to be changed in order to enhance customer relationships, customer contact and overall customer problem solving. Historically companies that involve their personnel in the planning process have a much higher rate of program success. Involvement results in far less "fighting" of the changes that programs such as CRM bring to a company. Sales people, especially, resist change most, but are always key players in a CRM program.

Once objectives and processes are in place, software, technology infrastructure and training considerations need to be thoroughly evaluated and decided on. Let's look at each piece:

Software:

The key considerations for a company in choosing a CRM software package are:

- Does the software have the features and functionality to implement and drive the processes and overall program objectives?
- Is the software easy to learn or will the learning curve be long and perhaps lead to discouragement with less computer literate personnel?
- Does the software vendor have adequate support after installation and training?

Let's look at each software consideration:

Software features and functionality should include the capability to automate sales and marketing processes. This

aspect is referred to as Sales Force Automation (SFA). As an example, if within a customer penetration or prospecting process a series of events such as faxes, emails and scheduled calls can be automated a company gains a high degree of sales and marketing efficiency and process refinement. Another key consideration is, can the software be connected to the company's backend office products system, or to an external sales intelligence software program, and what is the ease in doing it. Lastly, the software must have a strong reporting system allowing a company the capability of monitoring customer and prospect contact.

CRM software that is easy to learn should include commands that are in "people language" and not technology terms. Also, the information must be easily accessible and contain as few screens as possible. If sales and marketing efficiency and productivity are (and should be) key program objectives, then having to spend time jumping around for information will be counter productive.

Quality and quick software support after installation and training is paramount. It is important that a company choose a software vendor that not only has a team of support personnel, but a quick turnaround time for issue resolution. This is critical immediately after training. As with all software training programs, trainees can be brought to a good baseline level of knowledge but issues and problems afterwards are inevitable. It's important to choose a software vendor that provides quick resolution to issues and problems. This helps to sustain the confidence in the software and helps to continue to drive a successful CRM program.

Technology Infrastructure:

This is a critical piece of a CRM implementation. Since almost all CRM software installations are in a network environment, a company either needs to have technology personnel very competent at the network level, or contract with a reliable outside network company. It's also essential that the technology personnel can work well with the software vendor's technical support people. In a typical installation many software packages need to work together, including the office products backend software. This requires technology personnel who have an understanding of how different software packages interact in a network environment.

Training:

A major consideration here is deciding whether training should be done by a company's own personnel, outside consultants, or both. A combination of the two seems to work best. Since a company understands their own processes best but may lack the necessary teaching skills, working with consultants to "bring the message" is usually more effective. And since CRM creates many changes around process, the changes are usually tantamount to paradigm shifts, especially for sales people in working with
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CRM Implementation

customers and prospects. Teaming with outside consultants can help bring more objectivity and credibility to the training environment.

Another key training factor to consider is the number of personnel being trained. In large companies, large classes could result in fragmented training; in this case it is recommended that a pilot group representing a valid cross section of the sales force be formed and train-the-trainer sessions conducted. Subsequent training can then follow to smaller groups and results in better trainee retention and faster effective usage of the software. Almost always on-site training at a company location is more effective than Internet or CD – based training. On-site training creates an environment where trainers can experience intangibles such as company culture and are better able to address individual learning differences.

The topics presented here address the key considerations in the planning and implementation of a successful CRM program. A key point to think about is the “marketing plan” analogy at the beginning of the article. A CRM plan, like a marketing plan, assesses the situation and the need for a new strategic focus and works with all necessary factors for a successful implementation.

Reprinted From:
The Firebird Committee

Angel Alexander Magaña
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GoldMine Chooses Firebird

The following email was sent to the Firebird Committee, in the interests of general users of Firebird.

Hello,

I want to take a few moments to thank you for your work. In addition, I'd like to introduce myself, my team and product to the foundation.

My name is Angel Magaña. I am the product manager for a CRM solution called “GoldMine”, which has been available to the US market for the last 15 years.

I have had the pleasure of seeing this product mature from a little known Clipper based DOS application to one that is a leader in its market. It has been equally exciting to see us adopt a variety of emerging technologies, in some cases, years ahead of their time, and in others, they continue to be unique to our product.

The GoldMine team feels we are once again about to reach another similarly exciting time and would like to formally establish relationships with the foundation.

4 The GoldMine Advisor- June 2005

Within the next few months, we will be releasing the 7.0 version of our product. Amongst the various options we will include with this release, there is one of special significance which brings me to this message. With this release we will be moving all of our non MS-SQL users to FireBird.

By default, our retail product will ship with the FireBird database and MS-SQL users will have the option of using it as well. We believe we are the first application within our market space to provide such outright support for Open Source and are more than happy to contribute whatever assistance we can provide to make Open Source more prevalent.

(In fact, there are other Open Source projects we also use, e.g. Xerces, and plan on supplying an integration piece to OpenOffice soon.)

We believe this will generate a large amount of attention for FireBird, especially since we are one of Microsoft's largest resellers. It is our hope that we would be able to collectively work on promoting FireBird and Open Source by leveraging GoldMine's brand name.

Please feel free to contact me at your convenience so we may discuss options the foundation would feel are worthy of further exploration. I look forward to hearing from you.

Regards,

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Optimize the Customer Experience

Fun with the Lookup.ini

by

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Create yourself a few user defined fields:

UserDef02, C, 30
UserDef03, C, 30
uNNCL, C, 20
uNNMA, C, 20

Plus we have our standards:

LastName
Department
(Continued on page 5)



(Continued from page 4)
Fun with the Lookup.ini

Contact
Dear
Secr

When creating a New Record, I will ask you to enter:

Dr & Mrs David and Mary Smith Jr.

This **Lookup.ini**, if working correctly, should enter the following information into each of the fields:

Contact: **David and Mary Smith Jr.**
LastName: **Smith**
Department: **Dr & Mrs**
Dear: **David & Mary**
Secr: **Nothing** (**Married** if began with Mr & Mrs)
UserDef01: **David Smith**
UserDef02: **Mary Smith**
uNNCL: **David**
uNNMA: **Mary**

This is a portion of the Lookup.ini that I am writing for a new **Finance Template** (don't hold your breath). This is the Lookup.ini for this portion, but you must remember that the column width here will not support the lengths of lines required and will wrap. Remember, each statement must be on its own line in your Lookup.ini (**wrapped portions are indicated in blue**):

```
[AutoUpdate]
  NewRecord = LastName, Department, Contact, Dear,
  Secr, UserDef02, UserDef03, uNNCL, uNNMA
  Contact = LastName, Department, Contact, Dear, Secr,
  UserDef02, UserDef03, uNNCL, uNNMA
```

```
[CONTACT]
  Lookup1 = iif(upper(left(&Contact, 10)) == [MR. & MRS.],
  [A], [Z])
  Lookup2 = iif(upper(left(&Contact, 8)) == [MR & MRS],
  [C], [Z])
  Lookup3 = iif(upper(left(&Contact, 4)) == [MRS.], [D],
  [Z])
  Lookup4 = iif((upper(left(&Contact, 3)) == [MR.] .or.
  upper(left(&Contact, 3)) == [MRS] .or. upper(left(&Contact, 3)) == [MS.]), [E], [Z])
  Lookup5 = iif((upper(left(&Contact, 2)) == [MR] .or.
  upper(left(&Contact, 2)) == [MS]), [F], [Z])
  Lookup6 = iif(upper(left(&Contact, 10)) == [DR. & MRS.],
  [A], [Z])
  Lookup7 = iif(upper(left(&Contact, 8)) == [DR & MRS],
  [C], [Z])
  Lookup8 = iif(upper(left(&Contact, 3)) == [DR.], [E],
  [Z])
  Lookup9 = iif(upper(left(&Contact, 2)) == [DR], [F], [Z])
```

A = &substr(&Contact, 12, 40)
B = &substr(&Contact, 14, 40)
C = &substr(&Contact, 10, 40)
D = &substr(&Contact, 6, 40)

E = &substr(&Contact, 5, 40)
F = &substr(&Contact, 4, 40)
Otherwise = &&Contact

Overwrite = 1

```
[DEAR]
  Lookup1 = iif([ AND ] $ upper(&Contact), [A], [Z])
  Lookup2 = iif([ & ] $ upper(&Contact), [B], [Z])
```

```
  A = &&FirstName+[ & ]+left(strtran(&Contact,
  &FirstName+[ and ], []), at([ ], strtran(&Contact,
  &FirstName+[ and ], [])))
  B = &&FirstName+[ & ]+left(strtran(&Contact,
  &FirstName+[ & ], []), at([ ], strtran(&Contact,
  &FirstName+[ & ], [])))
  Otherwise = &&FirstName
```

Overwrite = 1

```
[DEPARTMENT]
  Lookup1 = iif(upper(left(&Contact, 10)) == [MR. & MRS.],
  [A], [Z])
  Lookup2 = iif(upper(left(&Contact, 8)) == [MR & MRS],
  [C], [Z])
  Lookup3 = iif(upper(left(&Contact, 4)) == [MRS.], [D],
  [Z])
  Lookup4 = iif((upper(left(&Contact, 3)) == [MR.] .or.
  upper(left(&Contact, 3)) == [MRS] .or. upper(left(&Contact, 3)) == [MS.]), [E], [Z])
  Lookup5 = iif((upper(left(&Contact, 2)) == [MR] .or.
  upper(left(&Contact, 2)) == [MS]), [F], [Z])
  Lookup6 = iif(upper(left(&Contact, 10)) == [DR. & MRS.],
  [A], [Z])
  Lookup7 = iif(upper(left(&Contact, 8)) == [DR & MRS],
  [C], [Z])
  Lookup8 = iif(upper(left(&Contact, 3)) == [DR.], [E],
  [Z])
  Lookup9 = iif(upper(left(&Contact, 2)) == [DR], [F], [Z])
```

A = &left(&Contact, 10)
B = &left(&Contact, 12)
C = &left(&Contact, 8)
D = &left(&Contact, 4)
E = &left(&Contact, 3)
F = &left(&Contact, 2)
Otherwise = &&Dept

Overwrite = 1

```
[LASTNAME]
  Lookup1 = iif(" " $ Contact, "A", "Z")
  Lookup2 = iif((upper(trim(LastName)) == "JR" .or.
  upper(trim(LastName)) == "JR."), "B", "Z")
  Lookup3 = iif((upper(trim(LastName)) == "SR" .or.
  upper(trim(LastName)) == "SR."), "B", "Z")
  Lookup4 = iif((upper(trim(LastName)) == "II" .or.
  upper(trim(LastName)) == "III"), "B", "Z")
  Lookup5 = iif((upper(trim(LastName)) == "ESQ" .or.
  upper(trim(LastName)) == "ESQ."), "B", "Z")
```

(Continued on page 6)

(Continued from page 5)
Fun with the Lookup.ini

```
Lookup6 = iif((upper(trim(LastName)) == "MD" .or.  
upper(trim(LastName)) == "MD."), "B", "Z")  
Lookup7 = iif((upper(trim(LastName)) == "PHD" .or.  
upper(trim(LastName)) == "PHD."), "B", "Z")
```

```
A = &alltrim(substr(&Contact, rat(" ", substr(&Contact,  
1, rat(" ", trim(&Contact))-1))+1, rat(" ", trim(&Contact))  
- rat(" ", substr(&Contact, 1, rat(" ", trim(&Contact))))-1))  
B = &alltrim(substr(&Contact, rat(" ", substr(&Contact,  
1, rat(" ", trim(&Contact))-1))+1, rat(" ", trim(&Contact))  
- rat(" ", substr(&Contact, 1, rat(" ", trim(&Contact))-1))))  
Otherwise = &LastName
```

```
Overwrite = 1
```

[SECR]

```
Lookup1 = iif((upper(trim(Contact1->Department)) ==  
[MR. & MRS.] .or. upper(trim(Contact1->Department)) ==  
[MR & MRS]), [A], [Z])
```

```
Lookup2 = iif((upper(trim(Contact1->Department)) ==  
[MR. AND MRS.] .or. upper(trim(Contact1->Department))  
== [MR AND MRS]), [A], [Z])
```

```
A = Married  
Otherwise = &Contact1->Secr
```

```
Overwrite = 1
```

[uNNCL]

```
Otherwise = &&FirstName
```

```
Overwrite = 1
```

[uNNMA]

```
Lookup1 = iif([ AND ] $ upper(&Dear), [A], [Z])  
Lookup2 = iif([ & ] $ upper(&Dear), [B], [Z])
```

```
A = &strtran(&Dear, &FirstName+[ and ], [ ])  
B = &strtran(&Dear, &FirstName+[ & ], [ ])
```

```
Overwrite = 1
```

[USERDEF02]

```
Lookup1 = iif((([ AND ] $ upper(&Dear) .or. [ & ] $  
upper(&Dear)), [A], [Z])
```

```
A = &&FirstName+[ ]+Contact1.LastName  
Otherwise = &&Contact
```

```
Overwrite = 1
```

[USERDEF03]

```
Lookup1 = iif([ AND ] $ upper(&Dear), [A], [Z])  
Lookup2 = iif([ & ] $ upper(&Dear), [B], [Z])
```

```
A = &strtran(&Dear, &FirstName+[ and ], [ ])+  
+&LastName  
B = &strtran(&Dear, &FirstName+[ & ], [ ])+  
+&LastName  
Otherwise = &space(0)
```

```
Overwrite = 1
```

Reprinted From:
FrontRange E-mail

Kari Kessell
FrontRange Solutions USA Inc.
www.fronrange.com



GoldMine UPP Promotion

GoldMine 7.0 standard's license manager has been revised to accept networks of 10 or less licenses. All clients that have installations of 11 or more licenses that are interested in upgrading to the newest release will need to upgrade to GoldMine Corporate Edition program. New prospects with interest in 11 or more licenses will be directed to the GoldMine Corporate Edition program.

In recognition of their UPP patronage, FrontRange is offering all GoldMine standard customers, 5 users and above, a special promotion of \$299.00 per license upgrade. In addition, their un-used UPP will be pro-rated to the GoldMine Corporate Edition maintenance and support. Hence, if a client purchased UPP in January for \$79.00 per license, they would have technically only used 4 months of their UPP purchase. We will offer the remaining 8 months as credit towards the \$99.00 maintenance and support purchase for GoldMine Corporate Edition.

As discussed, the above promotion is available only for UPP clients. Please call me if you have any questions on how pro-rating the UPP is calculated. Please call Customer Care for the exact date the client purchased UPP and/or how many licenses the client purchased UPP for.

The promotion is available through **April 29, 2005**. Naturally, we want to give personalized attention to all our GoldMine Standard clients that will need to upgrade.

Editorial Note:

GoldMine 7.0 is not even projected to be available until late June at best. The **GUI** is expected to change very little, however, the back-end will be moving away from dBase to Firebird (see previous article). There are expected to be a few minor changes to the GUI, however, the FrontRange concentration appears to be on making GoldMine 7 work well with other SQL backends.

FrontRange has yet to state what they will do with those that refuse to switch to **Microsoft SQL** better known as **GoldMine Corporate Edition**. It appears that they may be left behind at whatever version they are currently using, hence, you are advised to upgrade as soon as possible to the latest GoldMine version that you are allowed to upgrade to via your EULA or current UPP agreement.

More on this subject is expected as FrontRange reveals more of its plans for the future. In this editor's opinion, FrontRange is saying, to hell with the mom and pop organizations, we don't care or want their business anymore. We only want the corporate business as that is where the money is to be made.

Contact your local GoldMine reseller to discuss the many ways of approaching this potential problem.

Intermediate Corner

Report Writing for GoldMine

Part One: Creating the Proper Environment

by

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The purpose of this article is to show how to use the **GoldMine Report Writer**. But before we get to that, we must first discuss what is available on the market and when do you use what. Every reporting product out there has a limit on what it can do and you must first learn what those limits are before you start writing reports.

When you design a report, it is best to use a checklist first in order to select the appropriate report writer and then a second list that is answered so the report design is correct.

The first checklist consists of:

Where will the report be used?

"Are you on a network and your database lives on a server vs. your local hard drive? Or is everything installed directly on your machine?"

"Does this report need to be accessed from the Internet or do you need to run it over a VPN?"

By answering these questions the initial performance of the report can be assessed as this will factor in the report's runtime speed. For example, if writing a report that uses a database stored on the server and the network is an older network or the network has monitoring servers, the runtime speed will be much longer than running it locally. Also, running this report over a VPN, the GoldMine Report Writer is not adequate. Use Crystal and create an ODBC link to the database on the server. As Internet access is a bit different, if using terminal services, you can use the GoldMine Report Writer. If this report needs to be seen on a web page, then use a program such as Crystal Enterprise or Web Magic and a decent asp programmer.

How complex is the report going to be?

Is this just a simple list of contact records or does it analyze sales data?

Take the database size into consideration. If the database is huge (like the history table) and the report is going to run over a network, consider using something different from the GoldMine built-in Report Writer. The GoldMine Report Writer is a simple report writer. In fact, it has not

changed much since 1995. But what is in there is as stable as a mountain.

Will this report need to read data from different databases at the same time?

If the report will be consolidating a simple list of contacts from different databases, then GoldMine cannot be used. Crystal Reports would be a preferred program.

Does this report need to have a pie chart or dynamically loading graphics?

This does not mean static images such as a logo. This refers to images being displayed based on the data read at runtime. For Images such as pie charts there are several options. One is **Stonefield Query** and the other is **Mastermine**. These allow exporting the data to Excel and then creating a chart. Crystal Reports can not only create these charts without using Excel, but can also dynamically load images based on the data read. The GoldMine writer can only display images such as a logo. It cannot create pie charts or load images based on the data read at runtime.

Does this report need to read the record that is currently active?

In my opinion, the greatest strength of the built-in writer is that it can read the current active record (the record on the screen). In order for Crystal to see this record, An extra system file called a .dll (dynamic link library) must be purchased. This passes the account number of the open GoldMine record to the report.

Not all report writers are equal. I know that this appears to be quite overwhelming, but by answering these basic questions will eliminate a lot of frustration later on.

One last thing, bit of advice about the GoldMine Report Writer. If you have GoldMine 5. anything and an SQL database, do not use the built-in writer. FrontRange says that they fixed these reports in the newest version of GoldMine but proceed with caution. Typically in a SQL environment, Crystal is the best way to go. The data processes faster and is easily exported to any format. The strength of Stonefield and Mastermine is their export capability to Excel. With GoldMine's built-in writer there are 3 choices: print it, save it as a proprietary format that can be read only in GoldMine, or as an .rtf that can be read in Word. A word to the wise: with the .rtf format, it can get really big if you are not careful. There have been instances that the .rtf was too large to be emailed.

The next segment of this article will review the GoldMine Report Writer menus and setup, as well as filters, since a basic knowledge of this is required to run reports. The example that will be shown is how to write a completed activity report with totals (how many apt.'s, calls, etc..). Also, how to create a sales forecast report and contact listing report.

Programmers Corner

Retiring DDE: Adopting GoldMine's New User-Interface Automation

Part One:

by

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With the release of GoldMine 6.7, FrontRange released a new way to automate the GoldMine User Interface. From the early days of GoldMine, the only way to interact with a running instance of GoldMine was to communicate with it via DDE (Dynamic Data Exchange). While the DDE integration was useful, it does pose some limitations, and even more pressing is the fact that DDE support is disappearing (from Microsoft and FrontRange).

In order to stay current with technology, and offer GoldMine users a broader range of functionality in automating the user-interface, FrontRange Solutions has added COM Server functionality into GoldMine. This new COM Server (also referred to as UIAPI later in this article) has the ability to perform all of the legacy DDE commands (so porting your older integrations to the new functionality will not be as painful), in addition to the ability to receive notifications of GoldMine windows coming up or down, changing the state and values of most controls on dialogs, the ability to launch GoldMine menu commands, and even vetoing a GoldMine dialog in order to launch your own screen. Future releases of GoldMine promise to add even more functionality, so adopting the technology now will ensure the ability to take full advantage of the enhanced features to come.

Ramping Up

The UIAPI takes its commands in the form of XML. So if you are not yet familiar with XML, it would be worthwhile to get an understanding of the technology.

In addition, an XML parser, like **Xerces** or **MSXML**, should create the XML Documents sent to the UI API in order to correctly form the XML and handle situations where GoldMine data contains XML entities.

This introductory article to GoldMine's XML API's will attempt to give you a general idea of XML and how it applies to GoldMine. Future articles will go into further depth of the particulars of the GoldMine COM Server.

XML stands for Extensible Markup Language. It is a means for describing and representing data in a way that makes sense for that data. Consider a CSV text file containing a set of records. This file will probably have a header row containing the names of the fields, then rows of data for each record. What if you could also describe the type of each field? Or, what if you had a field storing some dollar amount and you also wanted to indicate that the currency format was "USD"? Going further, what if you wanted to nest the data? For example, you are an insurance agent and the CSV file contains information about your contact records, and you wanted to also store information about all of the policies that client has with you. Using a normal flat CSV does not give you these abilities. But XML does.

An XML document always has a root element. Then it can contain any number of child elements. Each element can also have attributes that describe the element. An example XML document might look like:

```
<Automobiles manufacturer="Ford">
  <vehicle type="car">
    <name>Focus</name>
    <Numdoors>2</Numdoors>
    <MSRP>15000</MSRP>
  </vehicle>
  <vehicle type="SUV">
    <name>Explorer</name>
    <Numdoors>5</Numdoors>
    <MSRP>21000</MSRP>
  </vehicle>
</Automobiles>
```

As a GoldMine Integrator, you now create an XML document that describes the commands you want to send to the GoldMine API, along with all of the parameters. Sometimes, a parameter sent to the GoldMine API has nested information that XML handles nicely.

The GoldMine API expects a certain schema. The root element is <GMAPI />. The root element has one attribute, "call", when using the COM Server API (there is an additional attribute of "sessionid" if using the gmxmlapi.dll). All of the elements contained in the GMAPI document are called "data". The data elements have an attribute indicating the name of the parameter. The text value of the element contains the value of the parameter. An example GoldMine API XML document looks like the following:

(Continued on page 9)

(Continued from page 8)

```
<GMAPI call="WriteContact">  
  <data name="Contact">Levi Corazza</data>  
  <data name="Company">Levi's Levi Shoppe</data>  
  <data name="Phone1">3601235555</data>  
</GMAPI>
```

If you are familiar with using GoldMine's high-level business logic functions in the gm6s32.dll, then compare this method with the name/value pair containers currently used. The XML document is the name/value container. The data elements are a name/value pair, where the name attribute equals the name in the pair, and the text of the data element equates to the value part of the pair.

The format of the returned XML document is slightly different. It contains a "status" element that contains a code attribute. This code attribute indicates the return code of the command. Finally, the text of the status element gives a textual description of the status of the call. For example, when you are closing an open work area, the result of your Close command would be:

```
<GMAPI call="Close">  
  <status code="1">Success</status>  
</GMAPI>
```

As mentioned above, all GoldMine XML documents should be created using an XML Parser. This ensures that any GoldMine data that conflicts with an XML entity will be represented using an entity reference, in addition to the ensuring the XML document is well formed. Below is some sample code showing the creation of a contact using the GoldMine.GoldMineData class, Visual Basic 6.0, and MSXML:

```
Dim objGMDData as New GoldMine.GoldMineData  
Dim doc As DOMDocument40  
Dim elRoot As IXMLDOMElement  
Dim xmlIn As String  
Dim xmlOut as String
```

```
xmlIn = "<GMAPI/>"
```

```
Set doc = New DOMDocument40  
doc.loadXML xmlIn
```

```
Set elRoot = doc.documentElement  
elRoot.setAttribute "call", "WriteContact"
```

```
Dim tempEL As IXMLDOMElement
```

```
Set tempEL = doc.createElement("data")  
tempEL.setAttribute "name", "Contact"  
tempEL.Text = "Levi Corazza"  
elRoot.appendChild tempEL
```

```
Set tempEL = doc.createElement("data")  
tempEL.setAttribute "name", "Company"  
tempEL.Text = "Levi's Levi Shoppe"  
elRoot.appendChild tempEL
```

```
Set tempEL = doc.createElement("data")  
tempEL.setAttribute "name", "Phone1"  
tempEL.Text = "3601235555"  
elRoot.appendChild tempEL  
Set tempEL = Nothing
```

```
XmlOut = objGMDData.ExecuteCommand(doc.xml)
```

The following resources may prove helpful in furthering your knowledge of XML and MSXML in preparation of utilizing the new GoldMine XML API's:

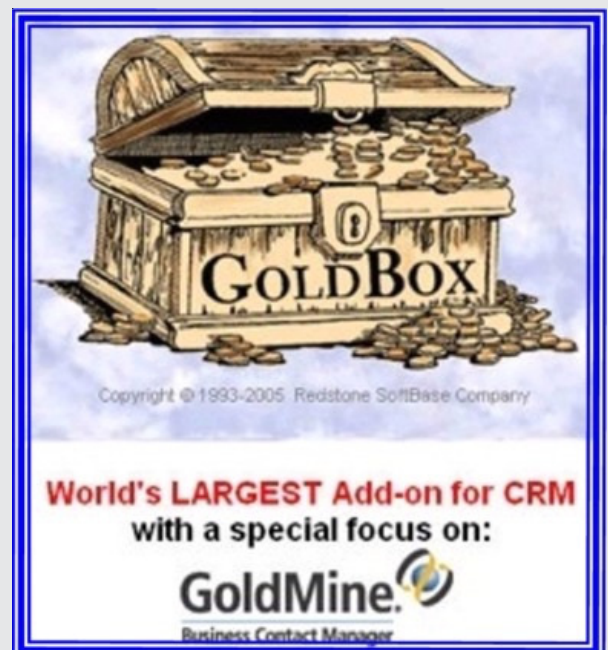
Microsoft's XML Developer Center
<http://msdn.microsoft.com/xml/default.aspx>

O'Reilly XML.COM "XML From the Inside Out"
<http://www.xml.com/>

In the next installment of this column, we will go into further depth of the actual commands offered by the COM Server for automating the GoldMine user interface.



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billable time
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seamlessly
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GOLD BOX
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World's **LARGEST** Add-on for CRM
with a special focus on:
GoldMine
Business Contact Manager

Tips, Tricks & Things

40 Characters is too Short for the Company, Title Fields

by

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Many of our customers, especially those dealing with government agencies, would like to have more space for the company name and for the title.

It is possible to simply increase the field width at the SQL (or dBase) level. This works fine, except that when you rebuild the database or sometimes even when you upgrade your system, the fields can revert to their original size and you lose the data in the expanded area.

Here is a workaround that we have used:

1. Increase the field sizes as needed.

These instructions assume that the operator is an experienced technical support personal.

SQL:

Open SQL Query analyzer and run the following query:

```
Use Goldmine  
GO  
alter table Contact1  
alter column Company VarChar (60)  
GO
```

Where Goldmine is your SQL Goldmine database, Contact1 is the table which contains the column (Company) which you will modify.

WARNING: Backup is PRUDENT!

dBase:

IMPORTANT LIMITATION: If you expand the Contact1 fields in a dBase system, you will not be able to pack the

Contact1 file using a GoldMine **Rebuild**. You will need to do that outside of GoldMine. If you need to expand Contact1 fields, it is much easier to be on a SQL system.

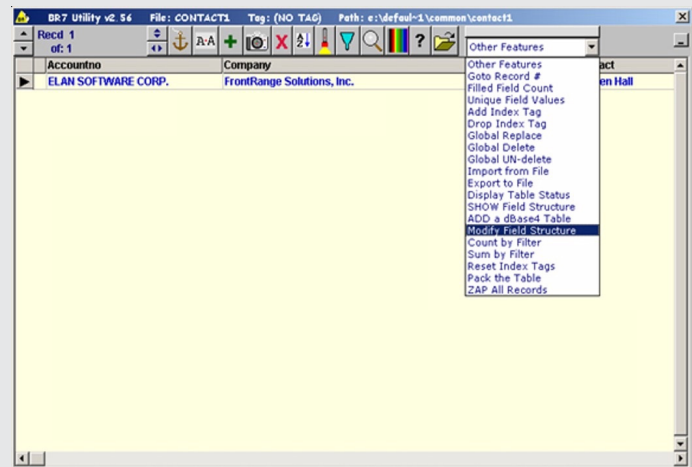
You will need to use a dbase database browser such as BR7; a free version (BR7SETUP.EXE) can be located at the following URL:

http://www.redstonesoftbase.com/index_00000a.htm

Install the application and then run it by clicking on the file br7.exe.

Open the dbf file in question, for example **Contact1.dbf**

Select **Modify Field Structure** from the drop down list as shown below:



2. Create additional user-defined fields with the same size as the redefined primary fields (I call them "shadow fields")

3. Use the lookup.ini feature to automatically update the shadow fields every time the primary field is updated (be sure to set the "overwrite=1" option)

This will not prevent the fields from reverting to their original size, but you can easily restore the SQL definition and repopulate the fields with a **Global Replace** process.

It is an inconvenience, but you get the advantage of expanded fields while retaining the indexed fields and retaining the GoldMine macros (which would be lost if you replaced the fields with user-defined fields). You might need to create custom labels to accommodate the larger field sizes. Also, be aware that this approach is not supported by FrontRange.

David Lee has kindly consented to allow you to contact him directly if you have any questions about this article, or if you just need clarification. Davids Business Card is on Page 12, cut it out and keep it for your reference.

Tips, Tricks & Things

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Changing Time: to Priority:

by

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Actually, I can't take credit for this one, a client showed this to me. Take a close look at the figure below:

The screenshot shows the 'Schedule an Other Action' dialog box. It has tabs for 'Detail', 'Users', 'Resources', 'Free/Busy', 'Recurring', and 'Filter/Group'. The 'Contact' field is set to 'DJ Hunt'. The 'Primary User' is 'DJ (DJ Hunt)'. The 'Time' section shows 'Date: 4/17/2005', 'Priority: A', 'Duration: 0 Min', and 'Alarm: On'. The 'Options' section includes 'Activity: Other', 'Code: (blank)', 'Opportunity / Project: (none)', 'Color: (blue)', 'Mark as Private: unchecked', and 'Link to selected contact: checked'. There are 'Schedule' and 'Cancel' buttons at the bottom.

When one enters a letter into the **Time:** field for an activity, the label **Time:** changes to **Priority:**, and the activity, in this case **Other Action**, is stored under the GoldMine graphical calendar **Task** listing. Additionally, it appears in this list prioritized by the alpha character entered. You must use a letter, otherwise GoldMine assumes that you are entering a timed activity, and will place the activity on the timed portion of the **Day Calendar**.

Who says you can't teach an old dog new tricks?

Copying Contact Information

by

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If you ever need to copy all the contact info (Name, Address, Phone Number, etc.) for one of your contacts to be included in a document or e-mail...

Click: **Edit | Copy Contact Details**. Select the contact data items you want to copy and the data will be copied to your clipboard so you can easily paste it into your destination document.

Alternatively, create an e-mail template with the desired data fields (Company, contact, address, phone, email, etc.), go to the contact whose info you want to send, initiate an e-mail to the contact, then select the "Address Information" template from the subject pull down menu. Redirect it to the proper contact and you're done!

No more painful, line by line, cutting and pasting.

E-mails with Style

by

Pat O'Brien

Those of you who came from Outlook are probably still missing that bullets icon at the top of the "compose e-mail" window. This capability and more is available in Goldmine by highlighting the text, right-clicking and selecting "style" from the menu. You can select bullets or lots of other formats. Below you will see the ones I think are useful:

▪ This is the Bullet format

1. This is the Numbered format

▪ **This is the Heading 1 format**

▪ **This is the Heading 3 format**

▪ **This is the Heading 5 format**

Editorial Note:

Many options are available when creating/editing an e-mail, however, you **must** be creating your e-mails in **Rich Text Format (HTML)**. Highlight your text and right-click to reveal a wealth of possibilities.

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Are Your DETAIL - Oriented

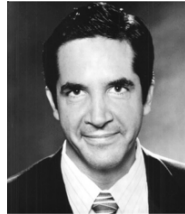
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