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The GoldMine® Advisor

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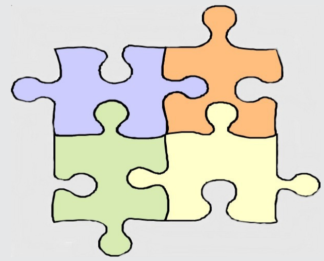
Finding the Treasures in GoldMine



by

Rob Machalek

MasterMine is a GoldMine extension that allows you to build on-the-fly reports and analysis of GoldMine data. Since 1999, over 5000 users have mastered their GoldMine activity through the use of MasterMine's "dynamic" reporting and data management.

Over a million people around the world use GoldMine to keep track of their customers and prospects, and to manage their daily activities. Most of us agree that GoldMine is essential to running our business. Because of GoldMine, we know who our best customers and prospects are, what our "sales pipeline" looks like, who our most effective sales representatives are, and why. We know each prospect is scheduled for an appropriate next contact . . . **or do we?**

The final piece that turns GoldMine into "gold" is still missing for many of us: Getting useful information quickly and easily, in a way that is specific to our needs at the moment. If we could do that, we would know what is really happening in our business from a top-down perspective. Finally, we could **use** the information, we so carefully collect in GoldMine, to consistently make better business decisions.

We Don't Need Reports, We Need Answers

Don't assume the solution to the information problem is "reports". As any experienced GoldMine user can attest, GoldMine's native reports are not easy to use or tweak, and Crystal Reports or any other "report-writing" engine is a painfully slow, small step in the right direction. To succeed, you need to concentrate as much on skillfully extracting information as you do collecting data in the first place.

Even getting a few reports can be a costly and time-consuming effort – and ultimately, it rarely satisfies your long-term information needs. Here's why: Any functioning business changes constantly. Decision makers need current reports and analyses they can open, tweak, and even build from scratch on a moment's notice – without being technical gurus or relying on others. So how could a few static reports ever be enough to manage your business? A traditional approach to reporting simply can't keep up.

Compounding this problem is that every different job and management function requires different variations on the same information. How many reports can you realistically generate the old-fashioned way? And how much worse is it if your "report guy (or gal)" is a technical or administrative support person who doesn't know what information is truly needed?

The best solution is: "Ask" for the data yourself, and get timely, dynamic reports you can shift around so you can ask further probing questions. This is not difficult; in fact, it's easy and it is a liberating, empowering experience for most managers. More importantly, asking questions as they come up, and getting timely answers is the key to effective management.

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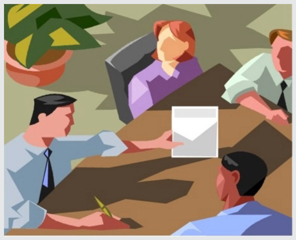
In This Issue

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 by the 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.

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Three Key Questions

Though every business is unique, three key questions repeatedly come up in our work with clients. These key questions are open-ended, and are not susceptible to being answered by any single, static report or group of reports. But they do get to the heart of your business. They require thought, "dialog" with your data, and action. The good news is: With the right tools, you are perfectly capable of answering these questions and getting the true value out of GoldMine.

1. Are we truly serving our customers?

2. Who are our best, most profitable customers?

3. Are we targeting our prospects effectively, and efficiently?

If you cannot answer these questions, you cannot manage your business effectively.

Now, consider the multitude of additional questions that underlie each:

1. Are we truly serving our customers?

The answer to this question changes from day to day, yet it is a true measure of our success, and tells us what we need to do in the future. Among the many secondary questions are:

- How many customers do we have – new, old, and recently won or lost?
- How are our customers and prospects distributed among sales reps?
- Are we in regular contact with our first-tier and second-tier customers?
- Can our reports help us isolate "neglected" opportunities?
- What products have they purchased, and when?
- Where are they geographically?
- Do we have customers without a scheduled (Pending) activity?
- Are our customers on annual contracts? Are they current?
- Which products work best with different segments of our customer base?
- Do best prospects receive our newsletter? Have they opted in, or out?

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- Do we know when and how and why they would like to be contacted? Are we meeting those needs?

You probably have another 10 or more related questions of your own. And these are unlikely to be the same questions you have tomorrow. Can you really get the answers easily from GoldMine?

You can: Use MasterMine to drill into your GoldMine data, break out your database any way you can imagine and, most importantly, use your observations to immediately change the way you organize the data so you see trends, overviews, and (using graphs) easily illustrate what you've learned. There is no reason to continue operating in the dark.

A simplified example might start out like this:

How many contacts do we have, broken out by Account Type and Year Acquired? (This took 1 minute to produce from scratch in MasterMine.)

5	Product	(All)
6	Status	(All)
7	Account Rep	(All)
8	Source	(All)

10	GM Contacts	Yea							
11	Acct Type	2000	2001	2002	2003	2004	2005	2006	Grand Total
12	Competitor		4						4
13	Consultant	5	3	7	8	9	12	2	46
14	Customer	43	28	21	29	32	22	4	179
15	Distributor	108	197	78	122	139	48	1	693
16	Employee		4			9	5		18
17	GM Reseller			406	29	23	2		460
18	Media	1	1				3		5
19	Other					1	5		6
20	Personal	30	9	8	17	16	10	1	91
21	Prospects	146	389	478	468	744	836	58	3,119
22	(blank)							4	4
23	Grand Total	333	635	998	673	973	943	70	4,625

Query 1

To simplify our overview, eliminate all but Prospects, Customers and Distributors; re-order them; and show only those added since 2003 (5 seconds).

We simply drag fields, click and "hide" items, uncheck boxes in dropdowns. In the meantime, we even drill down to the four "blank" Account Type records to quickly clean up data errors in GoldMine.

Product	(All)
Status	(All)
Acct Rep	(All)
Source	(All)

GM Contacts	Years				
Acct Type	2003	2004	2005	2006	Grand Total
Customer	29	32	22	4	87
Prospect	464	743	835	58	2,100
Distributor	122	139	48	1	310
Grand Total	615	914	905	63	2,497

Query 2

2. Who are our best, most profitable customers?

When we know our best customers, we can target our investment to bring in more of those customers. Going after "best" customers costs less since we already know what they need and want. Among the questions we ask to learn who are our best customers are:

- What is our average revenue per customer, broken out by product line, geography, size, industry?
- Which are the ten best, and the ten worst? (Should some customers be "fired"?)
- What is the demographic profile of our most profitable customers?
- What is the cost of obtaining a new customer versus reviving an old one?
- Which regions are we strongest in? Should we invest more in those regions or increase our marketing in new regions to bring in new similar clients?
- Which products bring us the most revenue, and who buys them?
- Are distributor sales more profitable than direct sales?
- What marketing campaigns have worked best?
- What are the primary industries and vertical markets that purchase our products?
- How can we leverage our relationships with our best clients to increase their satisfaction, and/our profit?

Home in further: Move Acct Type to columns, take Years out, show Acct Reps in rows, and group them to distinguish Current reps from former ones. (10 seconds)

In doing so, we expose a customer still assigned to former rep Peter, drilldown to GoldMine, and reassign them.

Product	(All)
Status	(All)
Years	(All)
Source	(All)

GM Contacts		Acct Type			
Acct Rep2	Acct Rep	Customer	Prospect	Distributor	Grand Total
Current Reps	Dan	14	365	216	595
	Nancy	4	963	81	1,048
	Phil	26	116	10	152
	Ralph	42	36	1	79
Inactive Reps	Charles		13	1	14
	Laurie		140		140
	Oscar		337	1	338
	Peter	1	58		59
	Steve		72		72
Grand Total		87	2,100	310	2,497

Query 3

(Continued on Page 4)

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Chart Current Reps' Distribution of Customers and Prospects (less than 1 second):

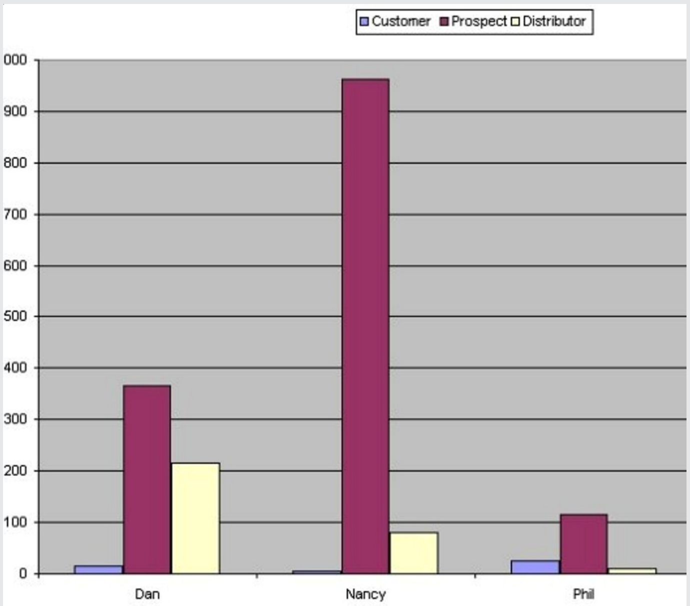

Chart 1

3. Are we targeting our prospects effectively and efficiently?

Marketing dollars are a resource that we want to spend as wisely as possible. Yet a frightening proportion of those dollars may be spent in vain if we don't monitor results, and follow up on leads generated. Knowing the answers to these questions helps us pinpoint the most effective marketing strategies, and be sure we aren't wasting our marketing efforts:

- Who are our current prospects, and where do they come from?
- Did they contact us, and did we respond in a timely manner?
- Do we have prospects that have not been contacted?
- When was the last time they were contacted, how, and how well?
- If contacted prospects should always have a pending activity until they have become clients, do we have prospects without any pending activities?
- How does our sales pipeline break down by stages?

Editorial Note:

You can learn more about **MasterMine for GoldMine** at www.MasterMinesw.com. Download a free 14-day trial, and even get a **free** ½ hour consultation analyzing your database through online screen-sharing. Call MasterMine at (877) 877-7212 and mention **The GoldMine Advisor.**

MasterMine's GoldMine-friendly interface makes it easy to pick out the GoldMine data you want to analyze or report on.

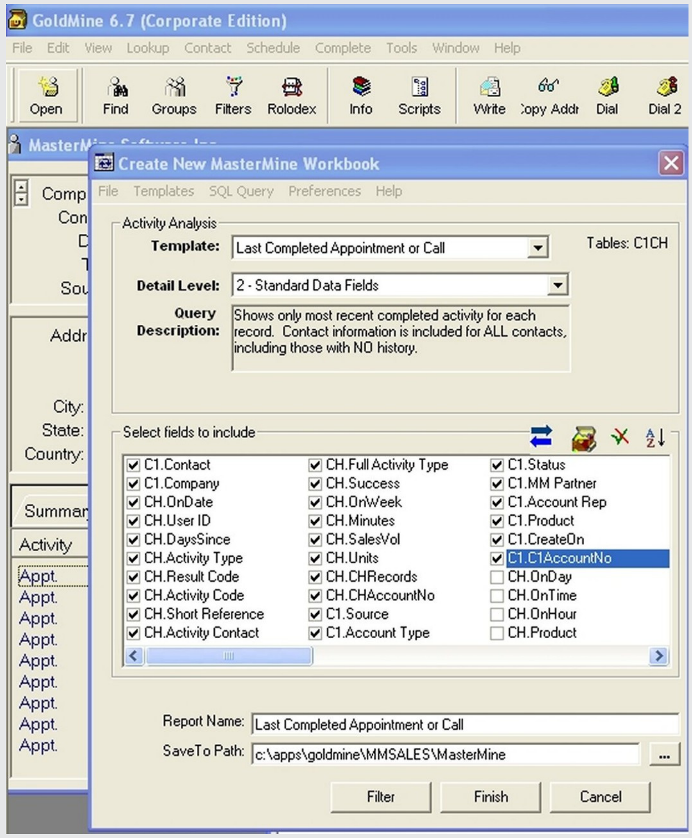

Figure 1

Isolating only Customers, we show year, and quarter last contacted – exposing seven customers not contacted in over two years!

Source	(All)					
Acct Type	Customer					
Acct Rep2	Current R...s					
Last Contact		Acct Rep				
OnYear	Last Cont	Dan	Nancy	Phil	Ralph	Grand Total
2002	Qtr3				1	1
2003	Qtr2				1	1
	Qtr3			1		1
	Qtr4		1			1
2004	Qtr2				2	2
	Qtr3	1				1
2005	Qtr1	4		9	5	18
	Qtr2	5		7	9	21
	Qtr3	3	1	6	12	22
	Qtr4			2	11	13
2006	Qtr1	1			1	2
	Qtr2			1		1
	Qtr3		2			2
Grand Total		14	4	26	42	86

Query 4

In just a few minutes, we have created valuable understanding of our overall market, our sales reps' effectiveness, and even uncovered, and fixed some "untended" customers.

What is the potential value of this analysis like this to our business?

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GoldMine for Sales Managers

by

David Lee

What is the biggest complaint about GoldMine (or any CRM system, for that matter)? The answer, by a large margin, is that people do not use the system.

There are many reasons for this, including problems with design, training, support, and installation. Today, we will focus on management.

Most sales managers rely on a combination of management tools including forecasts, top-10 reports, sales meetings, and one-on-one sales meetings (sometimes called "huddles"). The good news is that every one of these can be improved upon using GoldMine.

Wait – there's even better news: by applying GoldMine to these management processes, you can help ensure that your people will be using GoldMine. This is awesome news for The Big Guys in your company because it means achieving the firm's original objectives for implementing the system.

So read on, and I'll tell you how you can apply GoldMine to things like sales forecasts, top-10 reports and sales meetings.

Sales Forecasts

This one is easy. Instruct your sales reps to forecast within GoldMine, using the standard forecasting tool. Stop using any other forecasting tool for purposes of sales management. If you need to use other tools for other reasons, you can export GoldMine data to that tool. Don't require your representatives to use different tools.

Tip:

Build a **F2 Lookup** list of products for the **Sales Forecast Product** list using the **//** (Comment) feature like this:

Red Widget //1,234
Blue Widget //1,456
Senior Consultant //200
Engineer //150

This will put the unit price or hourly rate into the **Amount** field. Enter the number, and the total price is automatically placed in the forecast.

Try it. It makes forecasting in GoldMine even easier then it is currently.

Editorial Note:

As nice as this undocumented feature is, the feature was not carried over into GoldMine 7.00. Hence, this tip is only applicable to GoldMine 6.70.50123 users and prior.

Now capture the forecast so that you can have a record of forecasts for each week/month/quarter. This will let you see how the forecast changes for each account over time. Some options include:

- Use the GoldMine Excel export (from the Activity List, right click, select options, and select a user, then right click again, and select Output to, and select Excel). You will be able to run trend analysis, and other analysis if you save the spreadsheets.
- Use a GoldMine forecast report, and save the printed copy.
- Use MasterMine to export Pivot tables of the forecasts.

You can also get a summary forecast using the:

View
Analysis
Forecast Analysis...

option on the GoldMine menu (you can print this if you like to a GoldMine report).

If you are willing to take the time to enter quotas into GoldMine, you can also use:

View
Analysis
Quota Analysis...

The next important step, in getting your staff to use GoldMine, is to lead by example (or practice what you preach). When you actually meet with your representatives, do not use these printed reports. Instead, look at his/her forecast from within GoldMine. *It is important that they see you using the tool.* This will help to ensure that they uses it themselves.

Here's the added benefit of using GoldMine yourself: If he or she wants to discuss the accounts in detail, you not only have the reports you made but you have the entire account history available. This way, you can easily find the line item, or activity, and open the associated record. While we don't wish people to have issues, this is a good way to keep the meeting on track, and a way of tracking any issues the salesperson may have since it's all right there, in the records.

Top-10 Reports

In addition to the forecast, you might also want to review the top accounts. There may be any number, Top-10 is only a name.

Know how to flag those accounts? Easy. Just define a field to flag these special accounts, and build a GoldMine filter for each rep. Using a filter over a group lets the filter

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automatically capture accounts as they are added to your database.

Once the filter is activated, you can go through the list simply by paging up, and down. This gives you an easy way to review each account individually, and as a group. Prepare for the meeting by reviewing each top-10 account. If there you know of good references that would help him to close the deal, link them to the account using the Organization Tree. If there are actions that you think he should take on the account, enter them in as Next Actions. The meeting will be faster, more productive, and your representatives will appreciate it.

During the meeting you will hear things from the reps that are not in GoldMine. Tell them that, *"if it is not in GoldMine, it did not happen"*. Go through the actions, referrals, etc. that you have added to the record. They will see that they do not have to take as many notes for the meeting since you have already put your thoughts into the record.

Sales Meetings and Huddles

Since GoldMine has so many features, you can easily prepare for, and conduct your sales meetings. I've given some examples here.

Print the overall forecast summary for the team and the individual forecast summary for each representative:

View
 Analysis
  Forecast Analysis...

and hand them out in the meeting.

Get a projector, and show GoldMine during every meeting. There are some graphs that you could use:

View
 Analysis
  Graphical Analysis...

(click Comparison, and select the appropriate users). You can select different activities (All, Appointments, Calls, etc.). This shows who is using GoldMine, and who isn't to everyone in the meeting.

People will bring up individual accounts during the meeting. Whenever you hear the name of an account, immediately find that in GoldMine, and show it on the screen. Let the staff see that you use GoldMine to see the status of each account.

Tip:

Double-click on the label (usually the **Company** or **Contact** label), and enter the first few letters to quickly bring up an account being discussed.

If there are new product announcements, put them into the InfoCenter, and let the staff see the announcement on the screen by opening the InfoCenter. Not only will they see the information, but they will see how to easily look it up whenever they need it.

Always make sure that marketing has some new email template, announcement, brochure, or other item for each meeting. Make sure that they incorporate it into GoldMine. During the meeting, show the staff the new thing. For example, you might show them the new email "*Can't reach you*" template. This is used after 3 voice mail messages, and is a final attempt to reach a prospect. Instead of trying to figure out how to word such an email, just use the drafting created by the marketing department in a pre-defined email template.

Finally, make GoldMine the <u>only</u> communication tool for calendaring, and leads. If they do not use GoldMine, they will not know what is going on.

If you manage to this standard, you will gain many advantages:

- Your meetings will be faster, and more effective.
- You will have a much deeper, and more accurate understanding of your true pipeline.
- You will be better able to coach, and help your sales staff before it is too late to make quota.
- Your sales staff will use GoldMine, and your firm will realize the benefits originally intended for the GoldMine system.

I hope that some of this is useful. Basically, it is leading by example, and if you do it, you should see your GoldMine utilization improve.

Improvements in sales, and profitability will soon follow.

Time for a New Perspective on Sales Training

by

Neil Saviano

Since most conventional industry sales training focuses heavily on new customer acquisition, it's not surprising that a key measure of success, both for new and experienced dealer sales people, is generally how many accounts they can open in a set period of time.

Unfortunately, the traditional emphasis on customer acquisition usually means that customer penetration—"harvesting" existing customers to their full sales potential, and driving higher margin business—typically gets less attention, even though most sales and marketing experts agree that it requires five times more effort to open a new customer than it does to sell more to existing customers.

Since most industry sales compensation plans are based on margin, it would seem to make sense for most sales training—both for in-house programs, and for those offered externally by wholesalers or buying groups—to place a stronger emphasis on customer development. A training shift, however, needs to come from companies themselves for that to happen.

Effective sales training needs to highlight the tactics and skills required to penetrate customers deeper, and reach marketing plan objectives. One way to identify those skills is by examining the work habits of successful sales people.

Star sales performers are primarily excellent business people. They run their sales job as a business, with a sound business/marketing plan that serves as a microcosm of their company's business plan, and defines a course of action to produce their share of their company's business objectives.

If reaching marketing plan objectives at both the company and individual sales person level is part of a sales training program, another key area must be emphasized. This area is sales intelligence.

Sales intelligence is simply all of the customer sales history that resides in a dealer's back end software system. Using this intelligence strategically provides both companies and their sales people with the information needed to identify opportunities to drive customers to buy a wider range of products, and subsequently increase margins. At the sales person level this process is directly tied to higher compensation.

Sales training programs need to focus on using sales intelligence, and sales intelligence software. New sales intelligence software entering the market transcends the use of customer information provided by traditional back end systems, and gives sales people and companies the ability to track customer buying patterns at unprecedented levels.

In conjunction with using sales intelligence, sales people and companies also need to be taught to place greater emphasis on understanding higher levels of customer needs and behaviors.

This sales intelligence comes from information gathered at the customer level instead of the back end system, for example, gaining a deeper understanding of a customer's office processes, workflow, and special product applications.

This strategic focus goes beyond traditional areas of needs, such as delivery requirements or reduced back orders. Instead, it focuses on identifying opportunities for deeper customer penetration, and higher margins.

As sales people and companies are taught the expanded use of customer intelligence and information, penetration can be greatly enhanced by subsequent sales and marketing campaigns. For example, customer intelligence might reveal a certain group of customers have stopped buying a particular product or product category, suggesting the need for a focused marketing campaign to regain that lost business.

Or, analysis of a customer's business processes may uncover a previously unexploited need for audiovisual products or similar items.

Campaigns are simply strategic sales and marketing actions that evolve from placing customers into categories or classifications. In the customer categories listed above, examples of campaigns could be a planned series of faxes, e-mails, and customer calls or visits.

Conventional sales force automation/customer relationship management (CRM) software packages have functions that can help a dealer not only gather, and store sales intelligence and information, but automate campaigns as well.

Sales training programs need to go beyond teaching traditional sales presentation techniques, and skills that lead to new customer acquisition. New customer acquisition is important, but ongoing customer development that leads to deeper penetration, and higher margins also deserves attention.

This requires more sales intelligence as well as a more holistic view of customer workflow, and business processes. Companies need to make this strategic focus a part of their ongoing sales training, and look for formal training programs that adopt the same focus.

Editorial Note:

I felt, though this article does not directly talk to GoldMine or related products, that the article fits in perfectly with Robs and Davids previous articles. Neil makes some great points.

Advertisement

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KnowledgeSync automatically monitors CRM and related applications for critical, time-sensitive conditions of data and responds to those conditions in a timely and intelligent manner.

What "Activity" Can KnowledgeSync Monitor?

KnowledgeSync monitors and responds to critical, time-sensitive business data in CRM and related applications that can cost your organization lost revenue and lost productivity. KnowledgeSync monitors:

- CRM Data
- Financial Application Data
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- Manufacturing Processes
- Operating System Events

How Does KnowledgeSync Respond to this Activity?

When KnowledgeSync detects the presence of business information that needs to be acted upon, KnowledgeSync can respond by:

- Sending Alert Messages (via e-mail, fax, pager, PDA, cellular phone, and web browser)
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- Creating Actionable Records in CRM
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Using sophisticated data mining to analyze precise conditions of business data, KnowledgeSync enables you create the most intelligent responses possible. This analysis includes the ability to:

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Where Can KnowledgeSync Deliver Data to?

KnowledgeSync can send business data to any device via any means, including e-mail, fax, pager, screen pop, dashboard, PDA, cellular phone, and FTP. And, pioneered by KnowledgeSync, a unique "webcast" delivery method leverages the latest in web browser technology to give clients a "real-time information dashboard".

All of these methods are included in KnowledgeSync at no extra cost. And KnowledgeSync includes an award-winning, wizard-driven Event Manager that lets each organization tailor their messages to contain the precise data they require.

If your database could talk, *what would it say?*

"A client's credit status has been changed!"

"A quote is about to expire!"

"You have a visit for a client with open support tickets!"

"A support rep has more than 3 open critical calls!"

"You've received 6 support questions via e-mail!"

"One of your salesreps hasn't sync'd in over 3 days!"

"You have 10 activities overdue for completion!"

"These clients haven't been contacted in 7 days!"

"These items must be shipped within 3 days!"

"Quote #101 has an unapproved discount!"

"One of your regular clients hasn't ordered in 30 days!"

"An opportunity is falling behind schedule!

"You have a pending sale for a client on credit hold!"

"Client 'Spenser' is a good prospect for product 'y'!"

Vineyardsoft Corporation Phone: 508-696-6495 info@vineyardsoft.com www.vineyardsoft.com

Tips, Tricks & Things

Recording the Skipping of Activities

by

Terry Porter

Sometimes, the days that I have scheduled activities for in Goldmine aren't conducive for me actually completing the activity on that day. This is especially true for things scheduled on a monthly or quarterly basis. I may have several meetings now that weren't originally scheduled for that day when I booked the activity. If I am going to skip doing an activity, and reschedule it for another day, I want a record of that. So, I add a number into the body of the activity. 1 if it is the first time I have moved it, change it to 2 if it is the second time, and so on. Most of the activities I skip aren't date critical. For example, a quarterly activity needs to be done once every 3 months, but not necessarily exactly 3 months out from when it was previously accomplished. If I see the number in the notes for the activity, and know I have skipped it several times, I am more likely to go ahead and complete it in order to move it along in the calendar.

Using GoldMine Alerts

by

Gene Marks

A client asks: "How can I notify GoldMine users about special conditions involving a customer?"

One method is to use contact-based **Alerts**. These are pop-up messages that are displayed when a user selects the contact in question, and alerts them of some special condition. These alerts are user-defined, so you can define them, and enable them for whatever you want (No Service, Credit Card First, etc).

To setup one or more alerts for a contact:

* Open the contact for whom you want an Alert
* Select **Edit** | **Record Properties >** | **Related Settings...**
* Click the **Alerts** tab
* If the Alert is not present, click **New Alert**
* Enter a three character code, a description, and a message
* Select the **Enable Alerts** option
* Select one or more alerts for this contact

The Alert will display when anyone selects this contact. Note: you can have a History item saved for each Alert, however, this also can build a lot of history if the contact is opened often, and this is not recommended.

Maximum Users Logging into GISMO

by

Gene Marks

Some clients report that if they launch Outlook while in GoldMine, they get the message "Maximum number of users are logged into GoldMine Integration Services for Outlook".

How can you resolve this?

This is usually caused by a corrupt exflags.dat file. To resolve this, you can do the following:

* Rename the exflags.dat file found in the GoldMine root directory

* Close GoldMine, and Outlook

* Reopen GoldMine, and then Outlook.

You should stop receiving this error message

Editorial Note:

I have seen this question asked many times in the forums, and I thought that this would be an excellent tip for our readers.

Thanks again Gene.

Linking to Folders under the Links Tab

by

Gene Marks

Can you link to folders within the Links tab instead of just single documents?

Yes, you can use the 'drag and drop method' of linking to create a link to files, folders or network shares.

* Open the folder that contains the document that you want to add

* Drag the document or file into the Links tab of the GoldMine record.

* This will open up the dialog box allowing you to give the document a name.

* To link an entire folder or network share, click on the folder and drag it to the Links tab

* GoldMine will create a link to the folder

Tips, Tricks & Things

GoldMine 6.8/7.0 News

by

Anonymous

1. Patch 7.0.3 will be released at the end of this week, (May 12, 2006) This will address most, if not all of the problems that had been previously identified. It has not been readily available for the general public except on special request. I think they are saying that it will now become the release version, i.e., available for the general public.

2. On June 5th, they will begin a major marketing campaign to get people to take advantage of the features offered by GoldMine 7 Corporate Edition. This indicates that they are getting fairly comfortable with the quality of GM 7. The timing of this release is also driven by sales conference scheduled for next week in Orlando, FL.

3. On June 1st, the price of GoldSync, for the GoldMine Standard Edition, will increase from $225 to $395/seat. The first order must be for a minimum of 5 licenses.

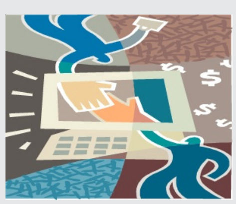
4. The promo of "**Upgrade 5 from GMSE to GMCE and Get One Free**" (pay for maintenance on the free one) will continue in June.

5. Concerning 6.8 Vs 7.0 for GoldMine Standard Edition. There has been a lot of in-house discussion as to which way they should go. The final decision was made on or about May 3rd. The technical side of the house wanted to release 6.8 because that would immediately bring a lot of fixes to the users. The marketing and economic people won so now GoldMine Standard Edition users will have to wait until 7.0, and then wait some more.

Bottom Line: FRS is more interested in GoldMine Corporate Edition, and the forthcoming GoldMine Enterprise Edition. It appears that they really do not give a damn about the little GoldMine Standard Edition user except to attempt to force them up to GoldMine Corporate Edition.

Oh well, life goes on (sort of).

Working with the Manual Recipients List



by

Gene Marks

My Manual Recipient list has a lot of old entries. How do I remove an entry from the Manual Recipient list in the Email Center?

The Manual Recipient list is written to the UserID.ini, and is contained in the [Last E-mail Addresses] section. It is formatted as follows:

[Last E-Mail Addresses]
0=sample@sample.com

To remove the Manual Recipient email addressees:

* Locate your UserID.ini file located under your GoldMine folder

* Copy, and paste the ini file as a backup

* Open the ini file using Notepad

* Locate the category [Last E-Mail Addresses]

* Delete the unwanted email addresses

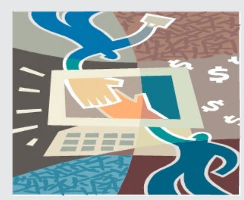
* Select File > Save

Log back into GoldMine, and the manual email addresses should be gone.

Editorial Note:

Users of GoldMine 6.70.50123, and earlier, may wish to use a Graphical User Interface (GUI) to accomplish this task. If so, you should try **Beyond Gold** which is a **Free** download from www.DJ-Hunt.com. This GUI has a nice little applet for handling all of the UserID.inis that are under your network GoldMine folder.

Group Updating/ Deletion



by

Gene Marks

How can I update or delete a group of activities rather than just one at a time?

Added to the **Activity List**, and the **Pending** tab local menus is a menu option for **Auto-Updating**. You can update a group of phone messages, and GoldMine E-mail messages as completed, or you can delete them all at the same time.

Right click in the relevant tabs, and select

Options >
Auto-Update...

You can also perform mass completion, and deletion of Resource Activites by selecting the Auto-Update button on the Resource Activity List.

(Continued from Page 4 - **Finding the Treasures in GoldMine**)

No static reporting solution can anticipate your way of doing business, all the various questions to which you'll need answers. So the only real answer is to use a dynamic, refreshable, analysis-based reporting solution that easily molds to your needs – even as your needs change.

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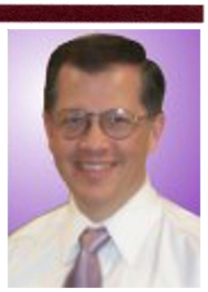

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Tips, Tips and more Tips

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Editorial Note:

Let me put your card here. All that you have to do is to contribute an article, and your card will grace this gallery as well.

The deadline for the August issue of **The GoldMine Adviosr** is July 1st, 2006. That is when the issue goes into production, and I need articles to make it happen.

It's simple: **No Articles, No Issue**.

Please contribute your articles as early as possible.

Thank you.