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Standard Edition](#)[Vista](#)[...and More](#)**A Standard No More**

by

**Dave Petonic**

At least it didn't happen on April Fools Day. It actually occurred the day after.

That is, the announcement by FrontRange that GoldMine Standard Edition – more affectionately known as the dBase version – was to be discontinued. No more sales after the end of April, 2007. Technical Support for just another year hence. A portal to the past is to be the dBase version's destiny. Like an old grand house perched on the edge of the palisades bordering a Malibu beach, the advancing tide of technology finally hollowed out a critical portion of its supporting cliff. A cave-in, then down comes the house, to be dashed into pieces upon the shifting sands below. Finally carried off, piece by piece, and set adrift, swallowed up, in the blue nowhere of an endless sea of change.

Of course it was inevitable, and I doubt many of us were shocked or even mournful. But a part of me was. Because it recalled that Sunday in July, fifteen years ago, that embarked me upon a course through which I am still navigating. And if I'd have blinked my eyes or lost my place then, I might have missed it entirely. That thing in the paper. That tiny ad in the Sunday Los Angeles Times, stating: Clipper programmer (213)123-4567. Can't remember the exact number now, but I broke a finger dialing it then. Which rang a phone in the bedroom of a Southern California home. Answered by the guy who would eventually hire me a few weeks later. The guy who developed the GoldMine product on a Clipper / dBase file format.

dBase had legs then, and still does – because it is anti-TMC. No, it hasn't an irrational hatred for The Movie Channel. I mean that dBase is anti "too many choices". Simple and elegant. Just what you need. Some of us have gone into SQL's table designer to add a new field, and then are paralyzed with indecision by the length of the field-type dropdown list. In classic dBase and Clipper, you had just five choices. Character, Numeric, Date, True/False and Memo/Notes. How cool is it that GoldMine managed to provide all of its astounding functionality from that field palette? Actually it's cooler, because GoldMine never even used the True/False field type. So perhaps, it never was the size of the palette. Maybe, the deftness and dexterity of an artist's hand brought us the masterpiece that was GoldMine Standard Edition.

GoldMine in Clipper / dBase encapsulates the lion's share of when the product attained its prominence. It's what I like to call GoldMine's "magic time". That period in the mid to late 1990s, when GoldMine muscled ahead of all its competition. When it broke new ground in the areas of workgroup-based contact management, data synchronization, flexible customization, open architecture, and vertical market application templates. It's when the company was doubling sales every year, and more. When VAR Conferences attracted 1,200 resellers, and 80 add-on developers. When you walked down a red carpet at a conference mixer, and were handed too-cool sunglasses by GoldMine employees decked out in their best Hollywood garb. The product and company called GoldMine was a fast-moving mag-lev express train, riding effortlessly upon a cushion of air. Your feet never touched the ground.

Those heady times of explosive software development, and highly innovative products jostling for dominance in an untamed marketplace are also portals to the past. I miss them a lot, especially one particular item that time period spawned. The remarkable product called GoldMine Standard Edition.

**Editorial Note:**

All of us that have been with GoldMine since 1988 can certainly empathize with you Dave.

# 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.

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## Customer Intelligence ( Part II )



by

**Mike Meyer**

### How Businesses Can Boost Revenue, and Margin Using Data They Already Own

#### Which Specific Advantages Result?

Our main objective is to enable vendors of complex technical products to realize the potential turnover, and the margin boost available from add-on products and services including accessories and maintenance contracts.

As already stated, the principle also applies to suppliers of technical or professional services. Suppliers of technical or professional services often have a successful business with just one geographical branch of their client base or in just one service speciality from a wider portfolio. Improved customer intelligence can identify cross-selling opportunities, and help manage their progress.

Our approach can deliver to the sales and marketing team a wide range of information about the customer centralized within a single operational system. The operational system they carry with them at all times is the CRM system. What's more, they are already familiar with it, and because the data is stored homogeneously they only need to learn one way of extracting or analyzing it.

Therefore they can:

- Identify individual customers or groups that offer cross-selling opportunities
- Make timely and appropriate cross-selling offers using their contact management or CRM application
- Offer highest level of service that matches requirements of contracted customers
- Automate and record membership of marketing campaigns such as e-mail shots or telemarketing.

All this is achieved without any risk or interruption to the operational systems running in the company today, and without a single stroke of additional data entry.

#### Client Example

One of our clients, which provides complex electro-mechanical products, offers a 60 month preventative maintenance contract when the equipment is first commissioned. Initially the customer benefits from enhancements to the basic warranty, and then receives pre-scheduled quarterly or half-yearly inspections that minimize production breakdowns and disruptions. The frequency and agenda of these visits is highly customized to recognize the local conditions, for example, water quality and operator qualifications. Not all customers are able or willing to sign for 5 or even two years but if they can, our client sees very considerable and varied advantages:

( Continued on Page 3 )

( Continued from Page 2 )

### Financial Advantages

- The initial revenue potential is raised by around 50% ( maybe not all recognizable at the start ).
- The margin potential is raised by around 80% ( since services are more profitable ).
- Engineer and service desk staff overtime is cut as breakdowns drop.
- Engineer drive times and fuel use are reduced since all routes are planned.

### Operational Advantages

- It is much more convenient, and less disruptive for our clients' employees to make itinerized inspection visits.
- Employees know which customers have paid for priority service, and make sure they get it.
- The installed equipment base is maintained in better condition
- Factory upgrades and revisions can be installed during the regular calls.
- Customer satisfaction and loyalty are higher.
- Changes in use, ownership, and location of the equipment are known.
- Competitors are less likely to get a foothold.
- Engineers offer tips to users, and bring back useful feedback.

### Who Can Deliver Customer Intelligence?

Having decided to embark on a *Customer Intelligence* project, few businesses will have the skills, experience or time to complete it alone, and will need to select a consulting partner.

Most businesses already have some IT policy or framework possibly dictated by an earlier investment, and they need to choose a partner that is flexible and willing to accommodate their policies and preferences.

Few business application vendors ( for example, vendors of invoicing applications ) provide underlying data schemas or maps. That means that businesses that are regularly entering data into those applications may not know where that important data is stored. Therefore these businesses must look for a consulting partner that can understand the source/destination ( target ) databases, and explore, analyze and extract the correct data.

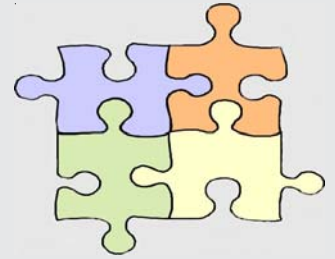
The source and target applications might have been acquired from different vendors, and may rely on different underlying database management systems. So the consulting partner may have to use a 'neutral' database reporting and analysis tool to map the relevant tables.

Usually a data migration tool is required to extract ( copy ) the data from the source, match, and 'force' it into the target database. Therefore businesses should choose a consulting partner that already has experience of data migration tools. There are several such tools, and the ideal consulting partner will have experience of more than one.

In the later stages of the *Customer Intelligence* project clients will need to inform their user teams about the new opportunities they'll enjoy, and to train them to use the new information. This is the only sure way to get the investment in the *Customer Intelligence* project to deliver real value. So clients should choose a consulting partner that can write, and deliver effective training materials.

Clients will need their consulting partner to provide simple but complete documentation of the *Customer Intelligence* project. This will ensure that future partners, and members of the client organization's IT team, can understand and update what's been done. This is vital to conserve the investment.

## GoldMine Reports Can Do Cannot Do



by

**Andrea Dominguez**

I have been watching the forums lately, and I have decided to write this issue's report article on a few things that you can and cannot get out of GoldMine just by using GoldMine, at least report-wise.

A lot of assumptions get made about the GoldMine report writer. One assumption is that you cannot create reports from scratch, and that is just plain untrue. Another is that if the report doesn't run then the problem must be with the report itself. One of my favorite assumptions is that report lists can only come from the report writer.

As I have said numerous times in the past, GoldMine report writer's greatest strength is its ability to pass current user logged in credentials as well as information for the currently active contact record. If you were to use a third party tool such as Crystal, you would need an extra dll ( either one you write or one you buy ) added that would pass the information via the GoldMine API. Something like that costs you both time and cash. For this reason alone, I have always encouraged people, if they wanted to run a report for just the opened contact record or not allow users to change user information that is returned on activity reports, to utilize GoldMine Reports.

The GoldMine report writer's biggest drawback, in my opinion, is that it is very limited on math functionality. Calculating percentages of subtotals at runtime, while easy for Crystal to do, with the GoldMine report writer it just isn't an option. Also, within the report writer, you cannot control the data sort display results. It is fixed at ascending.

### For the curious:

If you wanted a report of a single contact record displaying the history descending rather than ascending without spending the cash for the extra dll to pass current accountno then this a possibility of what to do:

Write the report in crystal using the Contact1, ContHist tables linking via accountno in that order. Then place a group based on ContHist.OnDate, and go into the group's properties and change the display order to descending. Next create a parameter for

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company name ( like "da\_joint" ), and in the record select create a formula for Contact1.Company, {Contact1.Company}={@da\_joint}. Now, at runtime, you will have to type in the company name, but it will return the results you are after. Now if you have a database that has several records with the same exact Company, change the select to Contact or if these records are made by several users, CreateBy could be an additional condition to be met. You must be capable of finding something that is unique about the GoldMine record.

Another thing that the GoldMine report writer can do is filtering. Almost unlimited filtering if you put the thought in the proper frame of mind. However it can be rather clumsy. If you have users whom you wonder about if they are capable of tying their own shoes ( and we all do ), then external filtering can pose a challenge. The report writer can filter in two places, the sorts tab ( which also effects the graphical display of the report ), and from within the report layout itself. While Crystal can use SQL Queries, the GoldMine Report Writer cannot. You can only use dBase expressions, and it is pretty much limited to the functions that are displayed in the insert formula choice list. There will be one or two different expressions that you can get to work that are not on the list, but personally I have not seen anything past two.

#### Editorial Note:

Most dBase expressions will work in GoldMine Reports if, and only if, they are added to the report via the **Insert | Data Field F2** option, and you enter the expression in the **Expression** field at the bottom of the **Select a Field** dialog form.

#### To help with the more 'challenged' users:

You can build your internal filtering off of dialogs that the end users would enter values at runtime. By utilizing report dialogs, the users stay away from the Sorts tab. It is generally a good rule of thumb that if your report is going to be used by more than one user to not have them need to change the Sorts tab.

Such as if you wanted them to only to see records from one state like IL, make a dialog called Enter\_ST, and point your Sorts1 to State, and then in the filter properties of Sort1 enter:

**Contact1->State>=dlg->Enter\_ST**

Someone had recently posted about date ranges appearing on the report. While the options tab is great, you cannot get that to appear on the report. However, you can create a couple of dialog fields, and insert the dialog fields as labels in the report. Create 2 dialog fields, and call them Start\_Date and End\_Date. Insert those where you want to see the date range on your report, like the report header, then in the report filter enter:

**ContHist->OnDate>=dlg->Start\_Date.and.ContHist->OnDate<=dlg->End\_Date**

At this point, the options tab is no longer necessary. When the report runs it will prompt the user for a date range.

Sometimes I see people go over all sorts of hurdles, jump thru hoops, and all for a simple list of contact records. I have always thought that the contact search center is one of the most under utilized functions in the program. Change the columns in the search center to what you want to see, and then enter the search

value. This is great for users who just want a print out of their records in a particular town or something along those lines.

Another option for lists is using the SQL Query tab. I asked a user once for a simple list, why not use the Query tab, and the response that came back was 'I can't remember what Key1 means after I print the list out'. When you write your SQL Query instead of just typing Key1, type Key1 as "whatever"

#### Example:

```
select Company,
Contact,
Key1 as 'Industry'
from Contact1
where City = 'Chicago'
order by Company
```

\*\* the 'order by' is the sort order of the SQL Query list.

#### Editorial Note:

I concur with these to methods of gathering information, however, Andrea neglects to state that you could send the results to the Clipboard, Excel or Word. Right-click on the results, and select **Output To ->** from the resulting local menu. Very neat.

When reports do not print the way you expect them to in the report writer, there is a checklist of things to work thru to isolate the problem, and this should be done in order:

1. Verify the sorts tab has the proper settings.
2. Do you have access to the data? This means can you open the contact record that the information is located on?
3. Has the database been successfully maintained? If you don't know what that means, more than likely the answer is no. If you use dBase, go thru the maintenance wizard. If you use SQL start the Maintenance Plan ( of course for any flavor of GoldMine, have all users exit first, and back your stuff up )
4. Does this problem happen for all users? If no, then rename your UserID.ini. If yes, then go to the next step.
5. What printer do you use? If this is happening to all users, and it is a networked printer you use, then install a fake printer locally on your machine, and try the report.
6. If you have tried all above, and it is still not working, replace the GMW6/7.exe or GMW.exe for GoldMine Premium.
7. If that is not working, then your indexing needs to be looked at for damage. If you are not a Database Administrator then go find one.

#### Editorial Note:

Andrea has been a contributor to **The GoldMine Advisor** since its inception way back when. It is articles, such as these, that keep this newsletter alive. We are always looking for articles from you that we can publish. Please contribute your articles today for our future issues.

# Implementing Customer Intelligence

by

David Evans



Many executives believe they could get more from their CRM systems, even where these are operating efficiently. In particular, many are now focused on Customer Intelligence as a means of ensuring they have the information to make better, more informed, and more rapid business decisions.

Mike Meyers' articles ( Customer Intelligence, The GoldMine Advisor, April/June issues ) have discussed the need for, and benefits of, accurate customer intelligence. This article looks at one of the most difficult issues associated with **implementing** Customer Intelligence – linking data between different applications.

Linking data across disparate databases is key to achieving the '360 degree view' of the client that underpins Customer Intelligence. Such integration, however, is complicated by a variety of factors, not least of which is different data formats. As a result, a clean, accurate and up-to-date client view can be difficult to obtain.

A typical scenario requiring data linking would be a company which has a CRM system ( such as GoldMine ), and an external accounting system. There are often significant benefits associated with bringing some of the accounting information into the CRM environment ( for instance, invoice details ), and if each contact in GoldMine is already tagged with the unique account id from the accounting system, this process is straightforward, and can be handled by several products.

More typically, however, the GoldMine contacts would not have the same id as corresponding contacts in the accounting database. It then becomes necessary to establish some sort of link between the contacts in GoldMine, and the contacts in the accounting system. This process of establishing links is normally called matching, and the process can range from being straightforward to very complex.

## Editorial Note:

In my opinion this process is **never** straightforward, hence, the requirement for an article such as this one from David.

It is rarely straightforward, and even a fairly simple requirement can be a challenge. A closer look at our accounting example shows why.

Let's say the company "InaPlex" is represented in the accounting system as "InaPlex LLC". In GoldMine, although there may be a record identified as "InaPlex LLC", there may also be related records such as "Inaplex", "inaplex inc", and "Innerplex". Additionally, there may be an InaPlex in California, and another in New York. Here the challenge is not to simply link two different ids, but to link multiple, similar ids, as well as identify which are possible matches. If you consider that this problem exists for a large number of contacts in the CRM system, and may be duplicated across several different systems, the scale of the complexity starts to emerge.

Inaport has always been a strong solution for data integration, and the most recent Inaport release ( May 2007 ) has extended the power and breadth of its matching capabilities to strengthen

its role as part of the customer intelligence solution. In this article I show how Inaport can be used to address complex matching issues that are a regular part of the typical CRM implementation.

## A Linking Example

This section shows an approach to linking the accounting and GoldMine contact, when there may be significant differences in how the company name is held between the two systems. Once the link has been established, it is straightforward to set up integrations between the systems to regularly move data back and forth, ensuring that sales personnel have up to date information about their clients.

## Background

Inaport provides several techniques for matching incoming records to GoldMine:

1. **Standard Matching** is very flexible and powerful. It allows use of any field or combination of fields in both the incoming data and GoldMine to generate match criteria.

In the example, we will use it to combine the company name and the state.

2. **SQL Matching** is more complex than standard matching, and not quite as flexible. However, its advantage is performance on large data sets; there are companies using SQL matching to update databases with 10,000,000+ records.

3. **Fuzzy Matching** is used when the data may be "dirty" or inconsistent such that there are inexact matches. For example, although "InaPlex" and "Innerplex" would not be matched using conventional techniques, fuzzy matching would automatically compare the two, and produce a score between 0.0 ( no match ) and 1.0 ( exact match ).

The fuzzy matching provided by Inaport has two other advantages:

- a. **User Review Screen** - users can review possible matches, so that ( if necessary ) a human can decide which match is correct.
- b. **Data Context** - customizable links to associated tables, so that when reviewing the possible matches, the user can see ( for example ) the history of the contact.

A combination of techniques can be used to achieve the best results in the most efficient manner.

## Approach

Three steps would be involved with using Inaport to integrate data in this example.

1. Run a bulk import using Standard Matching, but log all records that do not match to a log table ( created in the GoldMine database for ease ).
2. Use the log table to do another import run, but this time use Fuzzy Matching with User Review. This allows us to address the complex cases that cannot be handled easily using standard matching.
3. Use GoldMine as a data source, and build a group of all contacts that still do not have an AccountID value in Key5, and then.....?

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In the discussion that follows, we assume the source data is in a table that looks like this:

PrimaryKey	Company	State	AccountID
1	InaPlex Limited	CA	A1
2	Inplex Limited	NY	A2
3	InnerPlex	CA	A3

### Matching

The objective of the first pass is to match as many accounts as possible automatically. To do this, set up a match based on the company name, and the state field. The company name is normalized using the **normcomp()** function, which will:

- Trim and lower case
- Remove all "noise" words, such as "the", "llc", "partnership", "corporation"
- Replace all multiple spaces with a single space

For example, normcomp("InaPlex Limited") would become "inaplex". The text below shows how the full match expression is set up. The screenshot below shows how the full match expression is set up.

And/Or	Source Expr	Target Expr	No
	normcomp(#Company) & #State	normcomp(#COMPANY) & #STATE	

### Logging

In addition to matching, we set up the run to log the records that do not match. The records are logged to a log table that has been created in the GoldMine database. Inaport allows you to specify the mapping from the source to the log table, so it can be used for all imports. It also allows you to record the reason the record was excluded: match fail, data error, etc.

The screenshot below shows the logging setup. Note the virtual fields to record error code and reason.

### Results

After the run, InaPlex CA and InaPlex NY have been updated in GoldMine.

The record "Innerplex" was excluded, and was logged to the log table.

Flow No	Reason	AccountID	Company	pk	State
3	Match error No matches on table _Contact1	3:0	Innerplex	N2	A333

### Step 2 - Fuzzy Matching

The first pass has processed the straight forward records with minimal effort. With luck, up to 90% of the accounts have already been processed, but now we need to handle the more complex accounts.

We will actually use the log table as the source of the second pass, and use fuzzy matching on the company name.

### Matching

The screenshot below shows how the fuzzy matching is set up. Fuzzy matching produces a score of between 0.0 (no match) and 1.0 (perfect match) for each record compared. Inaport allows you to specify how to handle the score: what the boundaries are for match / no match, and when to do user review.

User review means that as each source record is matched, a screen will pop up and show the source record and all matching GoldMine records. In addition, it is possible to configure associated tables – for example, show the history table for each matched contact. This allows the user to view the full context of the contact before deciding on a match or not.

### User Review

When the import is run, the user review dialogue pops up, and shows the incoming record ("innerplex"), and both the possible matching records in GoldMine. In addition, for each GoldMine record it shows the linked record from History, so that the user can decide which (if any) of the contacts is the best match.

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## Results

The user decided that "Innerplex" was not, in fact, a match for any of the records in GoldMine so a new record was created.

### Step 3 - Making GoldMine Groups

In the third pass, GoldMine is scanned for any contacts that still do not have an AccountID associated with them, and a group created. Inaport is able to create/update/delete groups during an import operation.

## Results

A clean GoldMine group is created with those contacts that do not have an AccountID. These can then be manually reviewed, and a decision taken for each contact as to whether it should be linked to the accounting system or not. This process may well lead to accounts being created in the accounting system.

## Conclusion

Linking different data sources in the organization has clear benefit, such as:

- Improved understanding of the customer
- Better ability to satisfy customer requests, and requirements immediately, leading to better relationships
- Better analysis of sales data, leading to improvements in performance

Linking can be very difficult, as data is stored in different ways in different data repositories

The approach taken shows how Inaport can be used to automate the bulk of a complex process, then provide real assistance to handling the difficult cases.

While this example focussed on linking accounting and CRM, the approach and tools are completely general, and can be used for many different types of data source. The same approach would be used with more difficult requirements.

As Mike Meyers notes in his article: "Customer Intelligence is an approach, not a product". This is undoubtedly true, but the approach must be implemented – the "rubber has to meet the road". The best ideas can flounder in the difficult business of linking disparate data – Inaport provides a safe, effective, and powerful suite of tools and techniques for achieving nirvana.

# Tips, Tricks & Things

## Driving Directions via GoldMine

by

**Stewart Spratt**



Wouldn't it be nice if you could get driving directions to any of the contacts in your GoldMine database? Well you can. For years GoldMine has provided this feature right out of the box. From the main menu, select **Lookup | Internet Search...** Among the selections you will see **Mapquest Driving Directions**. Double-click and you will be taken to Mapquest's web site where you can enter your starting point. Your destination is already filled in for you from GoldMine's contact record. But

wait... you say your starting point is almost always the same place? Your home? Or your office? Well you can modify the code that GoldMine is using so that your starting point is passed in along with the destination from the contact record.

In your GoldMine root folder look for a file named ISEARCH.INI. Open the file with Notepad or other text editor. Look for the following section of text:

```
[Section: Local Search: <<trim(City)+" "+trim(State)>>]
Icon= 3
```

Now add the following below that section:

```
[MapQuest Driving Directions from Work]
URL1=http://www.mapquest.com/directions/main.adp
Data=?go=1&do=nw&ct=NA&1y=US&1a=Your Street
Address&1p=&1c=Your City&1s=Your State&1z=Your Zip Code
&1ah=&2y=US&2a=<<&Address1>>&2p=&2c=<<&City>>
&2s=<<&State>>&2z=<<&Zip>>&2ah=&lr=2&x=75&y=13
Icon= 7
```

### Editorial Note:

The **Data=** instruction, in both of these examples, should be one continuous line with no Carriage Returns & no Line Feeds. It is only wrapped here for presentation purposes.

Please note that I am unable to find this feature in GoldMine Premium. It may still exist, but I have yet to locate it. I hate change.

Modify accordingly to include your address, city, state and zip.

Don't like Mapquest? You can also do this with Google Maps. Add the following in the same manner as above:

```
[Google Maps Directions from TSI Tech]
URL1=http://maps.google.com/maps?f=q&hl=en
Data=&q=1434 Mishawaka Ave South Bend, IN 46615 to
<<trim(Address1)+" "+trim(City)+" "+trim(State)+"
"+trim(Zip)>>
Icon = 7
```

The address information has been left in place to illustrate formatting. Modify accordingly.

Add both sections to ISEARCH.INI if you'd like. A similar thing can be done with GM+View, but that's another day.

## Adding the GM Checkbox to Outlook Folders

by

**Gail Darling**



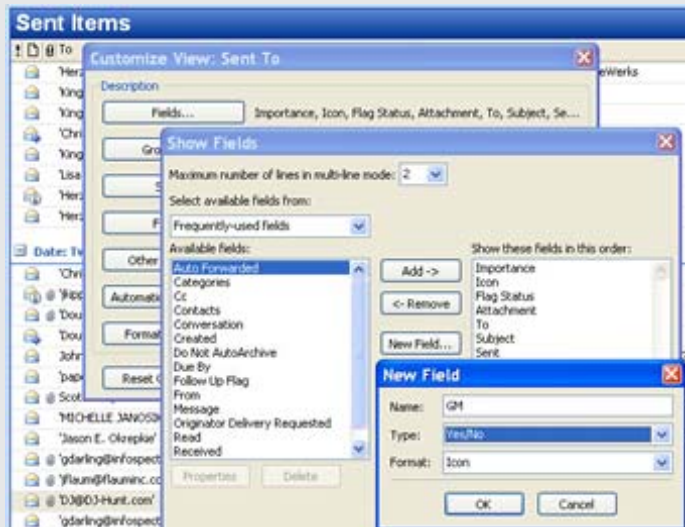
Did you know that you can add the **GM** check box to any Outlook folder, not just the Inbox? For Outlook 2003 SP2, do the following:

1. Go to the Sent Items folders, right click in the grey column heading area, and choose **Customize Current View**.

# Tips, Tricks & Things

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2. In the Customize View window, select the **Fields** button.
3. In the Show Fields window, select the **New Field** button.
4. Set Name=**GM**, and Type=**Yes/No**.



If you're showing the Reading Pane on the right, you may not see the new field. If that happens, you can move the new GM column further to the left so you can see it.

## Timed E-mail Merges

by

Gene Marks



Can you create an e-mail merge that can be sent at a future date and time?

Yes, just follow the steps below:

- \* Make sure you create the filter you want the e-mail sent to first
- \* Click on Contact/Create E-mail/Message to Contact or click on the Mail Center Button, and choose New E-mail
- \* To the left of the From & To boxes are 4 small buttons. Click on the last button
- \* Check the box next to Merge this E-mail to a group of contacts, and choose from the options below who you want to send the e-mail to
- \* You can either type in your Subject Line or choose from a Template from the drop-down menu
- \* Next, click on the 3rd small box on the left of the From & To
- \* Click on the Queue, Calendar and History Options button
- \* Enter the time, date, and complete the additional options
- \* Click on the Queue button, and the e-mail will be saved and sent at the time & date that you set

## Sunsetting the GoldMine Standard Edition



by

Bob Gannett

FrontRange has announced that they have stopped selling the Standard, dBase version of GoldMine as of April 30, 2007. They will continue to support GoldMine Standard Edition until April 30, 2008. We expect this version to be in use for years to come. We will continue to support it for the foreseeable future. The important consideration is that it will not be updated, and users will not be able to update from the older version to the great 6.7; nor will they be able to purchase additional licenses.

### Editorial Note:

Users will be able to purchase new GoldMine Standard Edition licenses until Partner supplies are extinguished. I believe that FrontRange will allow you to upgrade any version of GoldMine to GoldMine 6.70.70226 Standard Edition at the rate of \$79.00/license.

You can find some good buys on eBay or from your local GoldMine Partner who may have some licenses still in stock. I am finding street prices at \$159.00/license, but you may expect that price to continue rising as supplies diminish.

### Decision Time for GMSE users

1. Do you want to stay with your standard version for a while longer?
2. Do you want to upgrade to the more powerful, modern Corporate Edition? If you do so now, you can take advantage of some special promotions that are available.
3. If you're on lower versions of GoldMine ( 6.5 & below ), you should seriously consider upgrading to 6.7.
4. If you will need additional licenses, they must be purchased before the supply is exhausted.

### Actions Required

1. If you decide to stay with the Standard Version for a while, and if you are on an older version of GoldMine ( 6.5 or below ), we highly recommend that you upgrade to version 6.7 ( probably the best, most reliable release of GMSE ever ). This upgrade must be accomplished as soon as possible.
2. If you need more licenses, these must be purchased before the available stock is exhausted.
3. If you are considering upgrading to the Corporate Edition ( a good move for most users ), there are some special promotions available each month that will ease the burden on the wallet.
4. Contact your GoldMine Partner immediately to discuss the various options are available to you.

# Tips, Tricks & Things

## Vista & GoldMine

by

**Bob Gannett**



GoldMine Standard/Corporate Editions cannot be installed directly onto a Vista system. Vista workstations can run GoldMine. If GoldMine needs to be installed on a Vista system, the trick is to install it someplace else, and then to copy that installation to the Vista system. GoldMine's macros do not run, and cannot be created on a Vista system. Also, there are reports that many versions of the Word Link will not run in the Vista environment. The GoldMine Corporate Edition 7.0.5, expected out soon, will be Vista compatible. The GoldMine Premium Edition is Vista compatible.

### Editorial Note:

Your editor never recommends installing GoldMine in **C:\Program Files\GoldMine**, and always installing in **C:\GoldMine** instead. This way everything is under the one folder, and, more importantly, does not require Administrative Rights on the Vista system to run from the **C:\GoldMine** folder.

Here is how to "install" GoldMine on a Vista system. This will only work if your GoldMine is installed under a single folder on the old system. If it is installed in **C:\Program Files\GoldMine**, and the data files are dispersed under Documents and Settings, it will be much more difficult to copy across, although, not undoable. Copy the GoldMine folder from the old system to the new Vista system placing it in exactly the same location on the new Vista machine. Also make sure that the Borland engine is located in **...\GoldMine\Setup\BDEShare** ( if you are still using the BDE ). Create a shortcut on your desktop, and start GoldMine.

## Office 2007 & GoldMine

by

**Bob Gannett**



Be careful if you merge documents with Word. The current links do not work with Office 2007, but a new link is expected shortly, and a brand new ( and much faster ) link should be out by the end of May ( not sure what year ). Also, the current GISMO ( links Outlook to GoldMine ) has problems with Outlook 2007. A fix will be released soon.

### Editorial Note:

Bobs' articles were written for the April issue of his Byte newsletter, hence they are a little dated for this issue of The GoldMine Advisor, however, I have tried to edit as appropriate. Hence, the term **soon** may appear in these articles more often than one would like.

You see, as of this writing, May 12th, 2005, these links are still not released for public consumption. Therefore, soon is still the most applicable term to utilize in an article such as this.

## The Need for Change

by

**Bob Gannett**



The basic dBase GoldMine which we now call the Standard Edition ( GMSE ) has been with us in one form or another since the late 1980's. This venerable program, one of the very best in the industry, has served Corporate America very well. But as technology moved on, GoldMine's old architecture ( dBase, Borland Database Engine, etc. ) severely hampered its growth, and modernization. As a result, FrontRange was forced to drop dBase, and the Borland Engine so that they could completely modernize the program. This has brought about the release of GoldMine Corporate Edition v7, and the development of two new programs, The GoldMine Premium Edition ( GMPE ) and the GoldMine Enterprise Edition ( GMEE ).

The first new product, GoldMine Premium, is based on the same architecture as GoldMine Standard Edition, and GoldMine Corporate Edition, yet includes a new user interface, as well as a Customer Service module. There is also new workflow, and features inherent with the new GUI. GoldMine Premium is well suited for existing customers familiar with GoldMine, but is looking to add Customer Service, and new features. GoldMine Premium is also well suited for new customers that require both Sales Automation, and Customer Service capabilities.

The second new product, GoldMine Enterprise Edition, is based on their new architecture, and utilizes .NET technology from Microsoft. It is based on a Service-Oriented architecture, is very flexible allowing you to add, and modify unlimited fields, forms and relationships, and also has the same ease of use, and robust feature set core to the GoldMine philosophy. With advanced workflow, as well as Sales, Marketing and Service capabilities, GoldMine Enterprise is ideal for existing customers seeking an integrated product set as well as new customers with more robust product requirements.

FrontRange has decided to consolidate their offerings to GoldMine Corporate Edition, GoldMine Premium, and GoldMine Enterprise.

## Required Fields

by

**Gene Marks**



Can you require users to enter information into a field?

Yes, follow these steps making sure you have Master Rights:

- \* Right click on your GoldMine screen, and choose Screen Design
- \* Right click on the field you want to require an entry, and choose Properties
- \* Go to the Security tab
- \* Check the box that says "Required Data Entry"
- \* A red box will now appear around that field, and require an entry

# Tips, Tricks & Things

## Scheduling Follow-up Activities



by

Gene Marks

**A client asks:** I always scheduled Follow-up Activities. Is there a way to have the box to schedule a Follow-up Activity checked every time I complete an activity?

You can do this by editing your UserID.ini file:

- \* Go to the GoldMine folder ( sometimes in Program Files )
- \* Open your UserID.ini file
- \* Look for the **[GoldMine]** section, and input the following statement on its own line:

**Followup=1**

- \* Each time you complete your activity the checkbox to **Schedule a Follow-up:** will be automatically checked.

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