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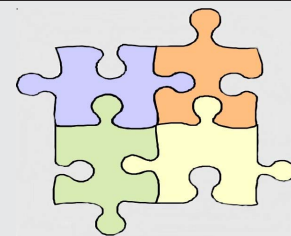
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Using GoldBox for WebImports

by

Bob Taylor & Trevor Riessen

GoldMine has long offered Web Import capability that involves one or more web forms; ASP or Perl scripts to convert the form data to specifically-formatted E-mails; and the activation of GoldMine's internal programming to accept and process the E-mail sent by the scripts. GoldMine has enhanced these capabilities over the years; today some sophisticated requirements can be met.

So you may wonder why anyone would choose to forego the use of GoldMine's programming, and use GoldBox for web imports instead. GoldBox's overall approach (and my own) have always been that - if GoldMine has a capability and does it well - it's best not to develop or promote GoldBox as an alternative for that particular capability.

But in the case of web imports, clients have come to me requesting an alternative to GoldMine's offering. There have been a variety of reasons cited; but probably the most important involved capabilities that exist within GoldBox Imports and that are lacking with GoldMine's Web Import.

For example, Trevor called me recently. In his words: "We use a web form to allow customers to request their choice of catalog and how many they would like. In the past, our web forms were setup to send an email to a mailbox of ours, where someone would have to then check and take the information from the email and manually enter it into GoldMine, also adding a track so that our AP could send them a thank you email, print an address label to go on the catalogs, set up follow up calls, etc... This could at times consume several hours a day."

At the time he contacted me, Trevor was new to AccuCut, and new to GoldMine. Obviously, GoldMine's Web Import programming wasn't properly set up; but rather than try to repair it, Trevor wanted to replace it with something simpler, if possible. Also, it's vitally important to be able to **accurately** match up web entries to their corresponding GoldMine records. Because of other work I'd done for AccuCut, Trevor knew that GoldBox was capable of making such matches exceptionally well.

But, given that GoldBox has no specially-designed Web Import feature, **how is web form data processed?**

Trevor: "We now have changed our web form to output to an ASCII text file, creating the file and adding the headers if the file does not exist; or appending to it if it's already there.

"Because our web server is not on our network, I have to periodically ftp the file to our local GoldBox directory. I then simply delete the file from the server and let the web form recreate the text file. This is the only manual step and takes less than a minute to do. I typically do this once a day." **Note:** that if the web server is available to GoldBox via the network, there are **NO** manual steps at all.

"Then at night, the Q-file runs, importing the information from the text file into Goldmine, and automatically adding the track so that our AP will pick it up.

"Another nice thing about this is that it also gives us an easy way of quality checking because once GoldBox grabs the text file, it then archives it to another folder, so if we wish to go back and look at the files and match them up to Goldmine to assure customers are getting their catalogs, we can."

(Continued on Page 2)

Legalese

Editor: **DJ Hunt**



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All questions, and future articles should be submitted to:

DJ@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 or png format.

Major contributors are also asked to submit a 1" US wide portrait photo. The print resolution should be 300 dpi, and the format should also be a jpg or png format.

We accept all articles, however, the editor reserves the right to determine which articles are included, and into which issues they are to be included.

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More details and advantages: with GoldBox, you can choose from **3 completely different kinds of record matching**, for the best possible accuracy in finding and updating existing GoldMine records (GoldMine offers only one).

Custom Matching is most popular, because it offers GoldBox's two "Smooth" functions that act as fully-configurable (table-based) "fuzzy" matching options; along with a custom index that can be up to 100 characters long. Also available are **SQL Query Matching**, and **matching via GoldMine's standard Indexes**.

Additionally, GoldBox can process Source data more intensely (including the use of **multiple passes, each with a different matching option**, if needed). Also, GoldBox offers **field-level update options** not available with GoldMine. These enable custom, conditional processing of each field, for matched records.

Other GoldBox features include the **Plug-In Tab record options** that can be processed differently for new records vs. existing GoldMine records. Also, because GoldBox uses a dBase file as its source, it's possible to **write back the Accountno** of each GoldMine record (new or existing) to the Source table. This not only provides an unparalleled audit trail (the archiving that Trevor mentioned), but also assists when multiple passes are required because previously-matched records can be filtered out based on Accountno.

Once in place, **each Source file is processed by GoldBox, using a Q-file script**. If multiple web forms are involved, multiple Q-files are used (all controlled by a "master Q-file"). GoldBox has all the programming commands necessary to convert each ASCII file to dBase; to match each dBase file with the proper GoldBox Import/Update Setup(s); and to rename and archive each ASCII and dBase Source file once processing is completed.

The **actual automation of the web import is accomplished via Windows Task Scheduler**, which runs the master Q-file. The web form data can be processed nightly; or, if necessary, multiple times during the work day.

So there you have it. Quite simple, actually. If you are happy with your current application of GoldMine's Web Import feature, continue with it. But if you want the ultimate in accurate record matching and the additional options that are available with GoldBox, now you know you can get it for web import!

Because there was a co-author on this article, I have included the bCard here for the co-author instead of in its normal position at the end of this newsletter:

Using GoldBox for WebImports

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PocketMine

by

David Ribera



The marriage between cell phones and PDA's is leaving a Diaspora of children, every time more powerful and faster.

Actually, phones with Windows Mobile have acquired the capacity to manage database engines like SQL Server, and each time with more capacity of storage.

Taking advantage of this new situation, SAI has developed a program for Windows Mobile, called PocketMine, which pretends to be the offline satellite of GoldMine in your pocket. Functionalities are oriented to provide a system for your road warriors (Sales Representatives) that need to manage the GoldMine database by keeping updated their agendas, completing their appointments, informing of the results and sending all this info back to the central office.

You can say: OK, that's not new. I've seen other programs that transfer the GoldMine info to my PDA...

Yes, that is right, but none of these works in the same way GoldMine does.

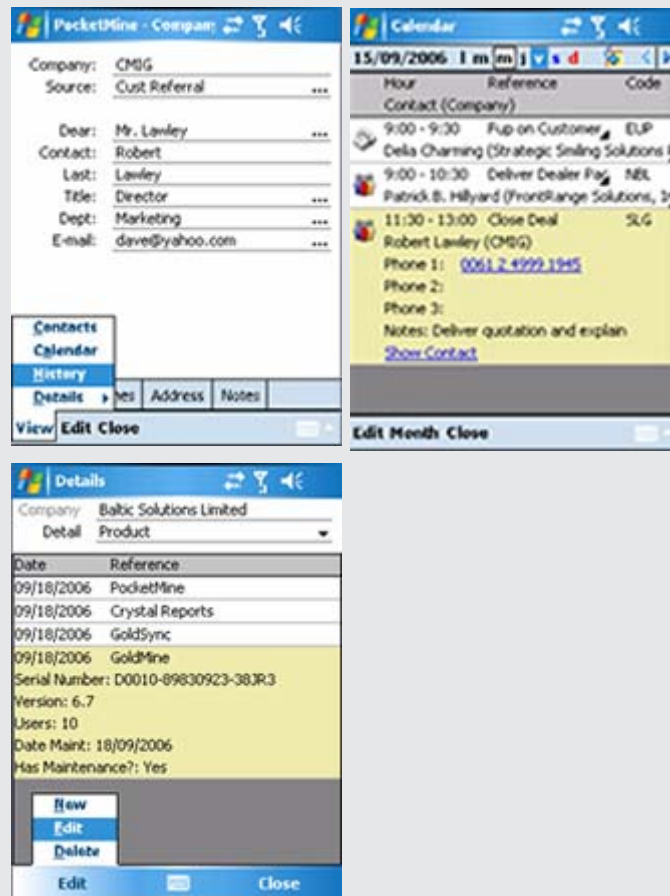
Let me tell you the differences that make PocketMine stand out in the crowd:

1. PocketMine uses the latest technologies in database engine, which is Microsoft SQL Pocket 2005. This offers capability to manage huge databases, like the one needed to run GoldMine fully loaded of data and with many history and email records.
2. One of the beauties in GoldMine is the ability for linking the scheduled activities to the contact record, and passing it to the history tab once the activity is completed. PocketMine does the same thing. Activities are linked to contacts, and then completed. All appointments reported in PocketMine and completed will pass seamlessly to the GoldMine history tab with all the notes taken.
3. PocketMine is Sync Aware which means that all changes made in GoldMine will go to PocketMine and vice-versa as well as synchronizing out to any Remote GoldMine users. The Server-side can read and write the GoldMine logs, only transferring the changes for each sync.
4. All the F2 lookups are synced as well. Allowing the use of the same selection of codes, and therefore maintaining the integrity of your database.
5. Data can be filtered for each Sales Representative, so nobody has to be messing with unwanted data. Filters work in the same way as in GoldMine.
6. PocketMine not only transfers Primary Contacts, but also Additional Contacts plus Calendar. You can download to your PDA all Detail and Extended Detail tabs, plus all E-mail stored in the Contact History.
7. PocketMine can sync from your Windows Mobile Device to your remote GoldMine using TCP/IP, that makes the system suitable to be used by your sales team on the road in order to

report their activities in the GoldMine system without the need to open a laptop.

As you see, there are many reasons to consider PocketMine a good option to keep your sales network synced from the road.

Some images of PocketMine Client:



And these are images of PocketMine Server:



Price: **\$180.00**/User

Contact Information and Trial Download: www.pocketmine.com

Business Automation Series



by

David Brydson

Whether they recognize it or not, most CRM VARs are prime movers in the automation of business. Every small business can benefit from business automation in some fashion, and enough tools now exist that custom programming isn't necessary. Business Automation need not be mysterious and unattainable. In four articles, we cover fundamental aspects of business automation.

1. Cutting the Cost of Business Automation (and Increasing the Value)

Bridging the Front and Back Offices

For a small business, the most important business automation has to be connecting the Front Office (GoldMine) to the Back Office (Accounting Software). In our example we will use QuickBooks. Consider the contacts and related information which would not have to be re-keyed with the programs linked. Well, at least for our example, the solution exists. It's called GoldMine Plus Accounting from FrontRange.

If you didn't know about it from past promotional activities, you'd probably have a hard time finding information about it. Don't believe me? Try this test: Go to the FrontRange site, and find GoldMine Plus Accounting. If you don't already know where it is on the website, you won't find it. Yet the concept embodied in the software is very appealing! Why isn't it marketed more?

One of the possible drawbacks to the Plus Accounting solution is its cost - or perhaps more precisely, the perceived value. We have to keep in mind that most clients cling to cost, as an important purchasing criterion. So, it must be addressed. What would an installation cost in a 5 seat or less environment? Here are some figures we have collected:

Cost Components	Pro	Premium	Enterprise
Additional QuickBooks Seat	\$187	\$399	\$600
Additional GoldMine Seat	\$595	\$695	\$995
GM Seat Annual Fee	\$129	\$139	\$?
GM Plus Accounting Seat	\$399	\$399	\$399
GM Plus Acctg Annual Fee	<u>\$109</u>	<u>\$109</u>	<u>\$109</u>
Actual Cost:	\$1419	\$1741	\$2103

The additional seats are actually for GM Plus Accounting Software, and required for dedicated use by the software. We have assumed in the figures above that the total number of seats, of QuickBooks does not exceed 5.

If the client breaks the 5 seat QuickBooks barrier the costs increase dramatically, since seats of QuickBooks are sold in 5 seat blocks. The client would be required to upgrade to QB Enterprise Edition once the 5 seat barrier is broken. So, the cost progression would be \$3000 for 5 seats, \$5000 for 10 seats, in addition to the figures above. If the client can be convinced that they are saving more than that amount by using GoldMine Plus Accounting, or that they can increase sales, or . . . then they will buy. But the challenge is that clients seem to see it just as additional cost.

The value of ANY business automation must be more than its perceived cost, and that cost is not only seat cost, but fully installed

cost. Otherwise, clients will resist automation. It is the VAR's and OEM's responsibility to see that there is sufficient value in the eyes of the purchasers.

What If The Accounting Bridge Were Free?

If enough value (for the client) is contained in a program that additionally bridges QuickBooks and GoldMine, then the bridge is free. There is such a program, but we will let you (and ultimately, the client) decide if the value is high enough to call the bridge free. The program:

- Manages as many as 13 different types of marketing campaigns
- Tracks marketing campaigns all the way to the order
- Has a sophisticated pricing engine
- Generates one page quotes, and complex proposals in a few clicks
- Converts quotes/proposals to orders with a few mouse-clicks
- Can convert orders to projects, and manage the projects
- Generates service/work order tickets, and compiles billable hours
- Identifies employees, vendors, or contractors for certain types of work

Oh, and it also connects GoldMine CE to QuickBooks, or MAS 90/200, bringing viewer-only information to users desktops, while passing orders and service work to the accounting side.

Is it possible that you, or a client, might think this would be worth \$795, and consider the bridge free?

If you did find the features above interesting, then go to www.BestfitBusinessMgr.com for more information.

Business Automation is a complex topic, but it has become clear that improving a client's revenue and profit via technology is worthwhile in many situations. Explaining how this makes sense, and proving the business case is the challenge. Clients know much more than we do about what works in their business. We (VARs and OEMs) know much more about automating functions.

Editorial Note:

This was the first in a multipart article in the **Business Automation Series** that David has promised to write for **The GoldMine Advisor**. I'm sure that you will be looking forward to the next article as David outlines the sections here.

We must be able to show clients how they can benefit by automating their business' magic.

In the next article, we will address Simplifying Business Automation. Here is a brief preview.

2. Simplifying Business Automation

Mention Business Automation to a small business owner, and you will most likely get a blank stare. Yet the small business owner needs to automate as urgently as his bigger siblings if he

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is to survive. This article gives the VAR a plain English explanation of Business Automation that they can use with prospective clients, and a simple method to identify those areas of the client's business which most need to be automated.

In future issues of The GoldMine Advisor David will continue his article with the two sections.

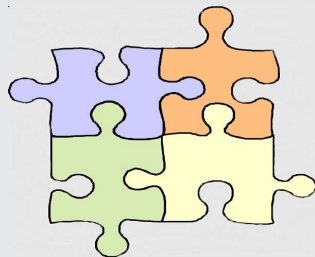
3. Business Processes and Business Automation

Once a business owner acknowledges the need to automate their business, they will need tools to document their current processes, if the business owner is to retain the 'magic' which makes their business special. Since the real processes for a small business are often performed by, and in the minds of, employees, the research must include them. Failure to capture this information can cause the automation effort to fail dismally, usually to the delight of employees who view automation as an attempt to replace them.

4. Two Methods for Implementing Business Automation

The first method follows the previous article's methodology, detailing the business processes and converting them to automated methods. The second method is more unconventional and somewhat frightening, because it begins with abandonment of all previous processes and adopting processes known to work in similar businesses. The new processes are then 'tweaked' until they embody all that was good about the client's previous system. From there it is a 'Measure and Adjust' until a final automated system emerges.

Enhancing the Cases Tab in GoldMine Premium



by

Richard Cluley

This article summarizes the work I am doing on an enhancement to the Cases Tab in GMPE. **GMSupport** is designed to:

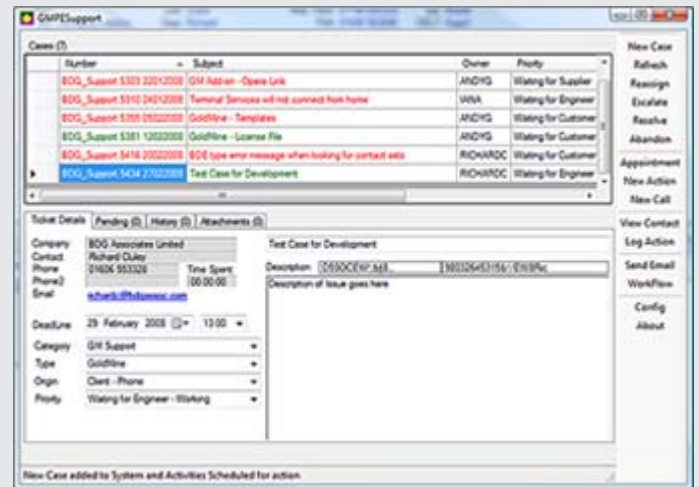
1. Improve the customization of CASES – It allows you to re-label the drop downs in the applet so that you can use your own words for Cases, Category, Origin, Type and Priority.
2. Display Open Tickets/Cases colour coded with Red being past deadline, black within the support window, and green for the rest. The setting 'Support Window' is a figure in Hours that is used to calculate the position of the Ticket in relation to the Support Window, and is a Global Setting on the system.
3. Emails related to cases are formatted with the Case number in the Subject line, and user definable Body text and Signature file.
4. Add Time to the deadline monitoring – it manages deadlines to the hour/half-hour rather than just the day.
5. Improve the User Interface offering a number of additional features.

6. Add work flow management to the management of Cases and their associated activities. It allows the setting of Work Flow actions for any of the Drop down values - e.g. any ticket categorised as a BDG Software "bug" creates an action for me!
7. Facilitates the scheduling of all of the these actions to GoldMine on the pressing of 1 button and/or the creation of the Ticket/Case via the Web.
8. The app may be run as a standalone (i.e. fully floating window) or as a GM Plug-In – or both!

Scheduled for development:

1. User specific customization of the Ticket display (filtering).
2. "pretty" icons for the buttons – they are just text at the moment - Is there any one out there good at designing icons like this?
3. Adding GoldMine Groups to the Work Flow Schedule definition.
4. Email Ticket parsing – for the logging of New Tickets via email.

The application can be used as a stand-alone or a Plug-In. We each have our own ideas on which of these solutions are the "best"! The basic window looks like this:



Most of the functions in this window will speak for themselves (more are being added as people use it), but the most significant ones are:

Email handling

When you send an email to the client it automatically has the ticket details in the Subject line, and your own support pre-amble in the Body. We have a SQL trigger set on the CONTHIST table that means any reply with the relevant text in the subject line gets attached to the Ticket automatically.

Work Flow

Actions may be automatically scheduled in GoldMine for the ticket either when the Ticket is created or by any user at any stage of the Ticket's life through the clicking on the Work Flow button.

Work Flow actions are defined for the system (above), and stored in specially created zone within the InfoCenter.

Auto Refresh

The list of Open Tickets is refreshed automatically at an interval set by the user.

Web Ticket Logging

Included with the package is a Web page that can be used to automatically create Tickets allowing customers to log Tickets when you are not available. These Tickets automatically trigger the workflow actions appropriate to them so that actions can be triggered as soon as the Ticket is logged if required.

Timescale

The product is available now, a testing process has been started and a number of components are incomplete, but some people want use it as it is! If that includes the reader then please do not hesitate to contact me, obviously those who use it early on have a greater say in its continued development, though the may earn that through the pain they put up with!

Tips, Tricks & Things

SQL Query for Records with No E-mail Address



by

Gene Marks

Most clients try to have e-mail addresses for all their contact records. Below is a query you can run which will return contact information for records with no e-mail address. You can then create a group from the SQL query and merge to a letter in word to request the client call you or you will call them to obtain their e-mail address to update your records!

- Go to Tools/Filters and Groups, and click on the SQL Query Tab (in Standard and Corporate Editions of GoldMine go to Lookup/SQL Queries)

Tips, Tricks & Things

- Copy and paste the following into the SQL Query box:

```
SELECT C1.CONTACT,
C1.COMPANY,
C1.ADDRESS1,
C1.ADDRESS2,
C1.CITY,
C1.STATE,
C1.ZIP,
C1.PHONE1,
C1.PHONE2,
C1.PHONE3
FROM CONTACT1 AS C1
WHERE C1.ACCOUNTNO NOT IN
(SELECT DISTINCT ACCOUNTNO
FROM CONTSUPP
WHERE (CONTSUPP.RECTYPE = 'P'
AND CONTSUPP.CONTACT = 'E-MAIL ADDRESS'))
ORDER BY C1.CONTACT
```

- Click on the Query button, and it will return the Contact and Company name, Address and Phone information for contact records that do not have an e-mail address.



Installing the Word Link



by

Gene Marks

Many clients ask how to install the link to Word. Below are the instructions, and during the install it will also setup the link to Excel!

- Go to your GoldMine folder, and find the **GMLinkInstaller.exe** file.
- Close GoldMine, Word and Excel (and Outlook if it uses Word as it's e-mail editor).
- Run the installer file (occasionally it will ask where the GoldMine program executable file is located. Just point it back to where your executable file is in your GoldMine folder).
- During the install is will ask you to set a language - English is the default.
- It will also ask you to set preferences. You can check "Auto refresh the fields list", and click on Okay.
- During the install it will also tell you that it is installing the link to Excel, and that the next time you open Excel, you should see the GoldMine menu item across the top.
- When it's finished you will see the GoldMine menu item in Word also.

Since there are various versions of GoldMine, and various versions of Word you may not always have a compatible version. If you

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Tips, Tricks & Things

(Continued from Page 6 - Installing the Word Link)

have any problems contact your GoldMne Partner, and they can help you get the correct installer.

Linking Folders to the Links Tab

by

Gene Kent



We recently published this tip, but think it's worth repeating since this month's focus is mainly on document management. Many clients wish to link to an entire folder of documents on the links tab rather than just the document.

Follow the steps below:

- Go to the Links Tab.
- Right click in an area on the Tab and select New.
- Enter the name of the folder in the Document Name Field.
- Browse out to the folder that you want to link and choose any file in the folder and click okay.
- Edit the file name line to remove the file name, and backslash so the path in the line is only to the folder.
- Click on okay, and now if you click on the link you will be take directly to the folder.

Creating a Word Template

by

Gene Marks



Once you have the Wordlink installed most clients require some assistance in getting started with setting up templates. Below are the steps to follow:

- Make sure GoldMine is open, and open Word.
- Go to the GoldMine menu across the top of Word.
- Begin typing your document, and choose GoldMine > Insert GoldMine Fields when you want to insert a GoldMine field into the document.
- After you complete your document go back to the GoldMine menu in Word, and choose Save as a GoldMine Template.
- Make sure you save it in the GoldMine Templates file in the GoldMine Directory, and make sure the document type is

Template. Change the document type at the bottom of the save window to template first. It will then change the directory to the Windows template directory. Browse to the GoldMine Template folder in your GoldMine folder, and save the template there.

- You have now created a template that you can add to the GoldMine Document Center, and merge to a single contact or a Filter/Group of contacts.

Mail-Merging a Filter/ Group to a Template

by

Gene Marks



Want to do a Mail-Merge from GoldMine? Many clients create Filters or Groups of contacts, and wish to merge all the contacts to a particular template. This can easily be done:

- First activate the Filter or Group that you wish to use to merge with the template.
- In the Document Center highlight the document that you want to use for your merge.
- Click on the printer icon at the top of the page.
- A Mail Merge properties box will pop up.
- There are several choices for the merge - to this contact only, all contacts linked to this contact or all contacts in the following group or filter.
- Choose all contacts in the following group or filter.
- You also have the choice of merging the document to the primary contact or to also include the additional contacts.
- If you have merge codes you can further filter who will receive the document by assigning a merge code.
- Delivery is usually to the Printer, and most often you do it immediately but you do have the option to queue the printing.
- Choose Printer, and click on okay.
- Word will open, and will merge all the contact records into the template.
- You will have the option to send the documents directly to the printer or to view them first.
- Choose to view your documents first, and a history item will be created on each record at this time.
- You can scroll through each document by clicking on the arrow(s) on the tool bar.
- You can then print, and save the document.

Tips, Tricks & Things

F2 Lookups - Adding Additional Information



by

Gene Marks

Many clients want to add multiple entries in fields. This can be accomplished by editing your F2 Lookups.

- * Choose a field where you would like to add multiple entries from the F2 Lookup list.

* Click on the arrow at the end of the field box

* When you add a new item into the list put a ; (semi-colon) at the end of the name, i.e., "Active;"

* You can also edit any existing entries, and add the semi-colon to the end of those

* You can now populate your field with multiple entries, and each will have a comma in between them.

This tip also works in GoldMine Premium Edition.

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