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The GoldMine® Advisor

Editor

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Articles In This Issue

Tips, Tricks & Things

How to Increase the Usage of User-Defined Fields in GoldMine

or

How to Copy GoldMine Data to an External Table using SQL

by

David Brydson & Tom Daly

Many GoldMine users and administrators have encountered limitations inherent in user-defined fields when trying to store more information than the screen layout of fields can accommodate. Most often, that information relates to a recurring process. It might appear that adding more user defined fields is the answer; but adding more fields will slow down your system and may confuse the users.

Some additional flexibility can be had by using the extended details functionality on the Details tab. But, a maximum of 8 (12 for GoldMine Premium 8.5.0) fields can be used when employing the Detail record functionality to store information. If you must manage and display more information than that, the methodology shown in this article will be a rescue mission for anyone with their backs against the data wall. It also lends itself well to easier report creation, displaying the information in a GM-View/ GM-Browser screen, using GoldMine data in another application, or providing the information to a 3rd party for use (like mailing or email services).

In brief, these methods use the user-defined fields as temporary storage and management repositories that can be re-used without limit (if you follow the rules), while the true data is stored in an External table in the SQL database. Read on.

In this article, we are going to show you how to copy the data from a Contact record, (Contact2 fields) into an external table for use in analysis or some other action. We will go through several processes first, including the creation of the **Table** that you want to use, the **Stored Procedure** creation process, and then the creation of the **Trigger** to make the process work.

The use of this method requires some planning, and knowledge of SQL, on your part. We will not address SQL skills in this article. We assume that you either have the knowledge, or can access it, and that you will expend some effort in planning. The more planning, the faster and more successful your efforts will be.

The most important part of this task is determining which data you want to copy, and the location of that data in the GoldMine system. You might find it helpful to create a spreadsheet as an easy reference guide for the information to be stored. It does not have to be a complex spreadsheet. It might look something like:

GM Field Name	GM Field Type	GM Field Size	GM Field Description	Alias (for Declare)	SQL Field Name	SQL Type	SQL Size
ACCOUNTNO	Character	35	GM Account Number	@Accountno	ACCOUNTNO	VarChar	50
COMPANY	Character	35	Company Name	@Company	COMPANY	VarChar	50
UDATAHOLD1	Character	50	My Data Field 1	@udatahold1	UDATAHOLD1	VarChar	50
UDATAHOLD2	Character	30	My Data Field 2	@udatahold2	UDATAHOLD2	VarChar	30
UDATAHOLD3	Character	50	My Data Field 3	@udatahold3	UDATAHOLD3	VarChar	50
UDATEHOLD1	Date	8	My Date Field 1	@udatehold1	UDATEHOLD1	DateTime	N/A
UDATEHOLD2	Date	8	My Date Field 2	@udatehold2	UDATEHOLD2	VarChar	50
UNUMHOLD01	Numeric	10	My Number Field 1	@unumhold01	UNUMHOLD01	Money	N/A
UNUMHOLD01	Numeric	12	My Number Field 2	@unumhold02	UNUMHOLD02	VarChar	50

Table 1

(Continued on Page 3)

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 information contained in 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. Should you find an error, it would be nice if you e-mailed me so that I may print the exception in the next issue of this newsletter.

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All questions, and future articles should be submitted to:

DJ@DJHunt.US

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 a png format or jpg 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 in a png or jpg 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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Commentary

GoldMine Premium 8.5.0.98 Released

by

DJ Hunt

Actually, as I write this, and possibly by the time that you read this, I am hearing rumors that GoldMine Premium 8.5.1 may be released. So here we have GoldMine Premium 8.5.0.98 being released in April 2009, and already a possible Hot Fix in June. Now every one that was waiting on the sidelines for a second edition to be released, need wait no longer. Woo Hoo!

As you know, I have been very excited about GoldMine Premium 8.5.0.xx since I began Beta testing it many moons ago. FrontRange took the time to incorporate many user requested features.

Relational F2 Lookup Lists

You have been asking for these as far back as 1989, and 20 years later we have them. The important part of that statement is that we have them.

Now you can have the F2 Lookup List for the Contact1.Key1 (Account Manager) display only those items that are appropriate for this field based on the information contained in, oh let's say, the Contact1.Country field. So, if the Country field were populated with Canada, then the F2 Lookup List for the Account Manager field might list: Kevin Smith, Rob Hartwell & Barbara Goodall. On the other hand, if the Country field were populated with USA, then the F2 Lookup List for the Account Manager field might list: DJ Hunt, Bob Jefferson & Waldo Emerson.

This is user friendliness to the maximum, and helps again with data integrity as well.

Right-Clicking Follows Windows Standards

This one will trip up all of the old time GoldMine users. Eight months later, and I am still right-clicking in the fields to bring up the F2 Lookup List. Well, that just ain't going to happen any more.

FrontRange has decided to follow the Windows Standard, and a right-click in a field will now bring up a Local Menu with the Windows Standards of Copy, Cut, Paste, Delete, etcetera. I guarantee that this one will trip you up for many months to come.

You say that you want to see the F2 Lookup List, well then, you'll have to click on the F2 key after the field is placed in the Edit mode, or you'll have to click the right arrow at the end of the field after the field has been placed in the Edit mode. Either way does not incure any more steps to raise the F2 Lookup List, however, it is a change. More importantly, it is a change that is going to be tripping me up for months to come.

(Continued from Page 1 - How to Increase the Usage of User-Defined Fields in GoldMine)

A description of Table 1 would be as follows:

GM Field Name = the actual field name within the GoldMine database. This may, or may not, be the Label you see on the screen of your GoldMine system. If you are using the user-defined fields in GoldMine, then it will look something like **Uxxxxxxxxx**. It will always begin with a **U**, and it could be up to 10 digits in length.

GM Field Type = the type of field you are using. There are only three types of fields that GoldMine uses for the database. These are: **Character**, **Numeric**, or **Date**. Each type will have a corresponding type in SQL. In the examples shown later, we use only the types listed here. In the same order as above, the SQL types are **VarChar**, **Money** or **Integer** (depending on whether the Numeric field is used for decimal or whole numbers), and **DateTime**.

GM Field Size = the number, or size, of the information you are using in the field you chose. This (size) information is displayed in the **Field Properties** inside GoldMine's **Custom Field Details**.

- The size of the **Character** type will be whatever size you setup when you created the field; as required by the data which you are storing.
- The size of the **Numeric** type is generally less than ten (10) characters, for most fields, but needs to accommodate the decimal places you have set for its use.
- The **Date** type, in GoldMine, is always eight (8) characters in length. This cannot be changed in the GoldMine system.

GM Field Description = this is not required information, but will assist you in understanding for what the field is used. This is especially true if your field names are cryptic or not obviously clear. We find it a good practice to include them in the SQL portion (as Comments), so that later either you or someone else can decipher what you intended, and which fields contain what data.

Alias (for Declare) = this is the term we are going to use in our Stored Procedure in the SQL portion of this exercise. While in the beginning it might not be apparent what this value should be; it will become clear as you build the SQL statements.

SQL Field Name = this is the name of the field into which we will place our data, in the external table being created. For sake of simplicity, we recommend that you use the same field name as you are using in the GoldMine database. While this is not a requirement (as you can use any field name you want) it does make the whole process simpler to follow and understand when being reviewed by someone at a later date.

Now we have a planned use. What's next?

We need to create the external SQL table that will hold the data we want to copy. It does not really matter which database you use for the table, it only matters that we create it. I prefer to use the GoldMine database, but you may choose any one you have. It is important the database exist somewhere in SQL and that you can access it.

We will use the script below, but here we break it into sections to help your understanding of what is happening. The entire script, without commentary will be included at the end of this article. The portions in Black are our explanations, whereas, the script is in Navy, Bold, 7 pt.

Open **SQL Management Studio** (for SQL 2005/2008) or the **Enterprises Manager** (for SQL 2000), and login with the **Administrator** level user name and password. It does not matter which user you use as long as it has permissions to make structural changes to the database you are going to use.

Make sure you are using the correct database by checking it in the dropdown box. Open a new query window and paste the code to **CREATE TABLE** into it. Then click on the **Execute** (**!**) button to run the SQL code. If you have done this successfully, then it should display a **Command completed successfully** message. If not, you will need to check your code. Any error messages, which may show up, will take you right to where the error is, if it is double clicked in the message box (fast way to find it).

Create the External Table:

Begin Script (below line):

```
*************************************************************************
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
SET ANSI_PADDING ON
GO
```

(Continued on Page 4)

(Continued from Page 3 - How to Increase the Usage of User-Defined Fields in GoldMine)

I suggest that one always turn **ON** both the **QUOTED_IDENTIFIERS** and **ANSI_NULLS** session settings. Not only do these settings provide ANSI-standard behavior, these must be turned on in order to use features like indexed views, indexes on computed columns as well as query notifications. It is tricky to ensure the settings are as desired, though, because the default session settings are different depending on the tools you use.

The **QUOTED_IDENTIFIERS** setting controls how string literals and identifiers can be delimited. When **QUOTED_IDENTIFIERS** is **ON**, string literals must be enclosed in single quotes and identifiers can optionally be enclosed in double quotes or square brackets. With **QUOTED_IDENTIFIERS OFF**, string literals can be enclosed in both single or double quotes and identifiers can optionally be enclosed in square brackets only.

The **ANSI_NULLS** setting controls the result of NULL comparisons. With **ANSI_NULLS ON**, a comparison against a NULL value (e.g. WHERE MyColumn = NULL) results in UNKNOWN instead of True or False, so one must use IS NULL to test for NULL values.

```
CREATE TABLE [dbo].[MYTABLENAME](
```

The above command **Create Table** tells SQL to create a table named **MYTABLENAME** that is owned by **[dbo]** (default **d**ata**b**ase **o**wner). The name of the table is up to you, but it should reflect a name that will tell you what is in the table schema. This will be useful later on when either you or another person must understand code and database operation.

The next two (2) fields are included in my example as the minimum that I would use to help identify the records in GoldMine. You can add more fields if you desire, by including them in the script. The presence of the **AccountNo** field of the GoldMine record gives a way to get the data connect for use in a **GM-View**, Crystal Report, or other uses. It is the one common (and essential) identifier in every GoldMine table.

The characters contained between the first **[ ]** brackets is the name of the field in SQL. The field name must be one continuous word, without containing spaces. You may use the **-** (dash) or **_** (underscore) characters as part of the field name. We recommend all UPPER CASE names, with no spaces or other characters, except the two noted here.

```
[ACCOUNTNO] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NOT NULL,
[COMPANY] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
```

The set of information in the next **[ ]** brackets define the type of data the field will contain. Remember the spreadsheet we created earlier? It becomes useful here. Take the SQL field type information about each field, and insert it here.

The number in the **( )** portion, is the size of the field that you want created. Our recommendation is to provide a large enough field to accommodate the size of data you might want it to be in the future, not just what you need right now. Requirements change, they always do, so give yourself some room to grow. The remaining information is related to the language of the SQL system and the ability to create the fields being able to either have **NULL** values or not.

```
        [UDATAHOLD1] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UDATAHOLD2] [varchar](30) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UDATAHOLD3] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UDATEHOLD1] [datetime] NOT NULL,
        [UDATEHOLD2] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UNUMHOLD01] [money] NULL,
        [UNUMHOLD02] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
 CONSTRAINT [PK_ MYTABLENAME] PRIMARY KEY CLUSTERED
(       [ACCOUNTNO] ASC,
        [UDATEHOLD1] ASC
) ON [PRIMARY]
) ON [PRIMARY]
```

The **Constraint** section above tells SQL to create **Primary Key** indexing on two (2) fields; **ACCOUNTNO** and **UDATEHOLD1**, in a clustered constraint. There are a couple of reasons we do this on a combination of fields. They are:

1. The **Primary Key** has to be a unique item in the table. If we create this **Primary Key** index on just the **ACCOUNTNO** field then there can only be a single instance of this ACCOUNTNO in the table. This would be okay if the data will only be populated once. But, if you are going to be updating this table and retaining the data that is already in there, then the ACCOUNTNO would no longer be unique.

   By having the index on two fields, ACCOUNTNO and UDATEHOLD1, then this combination of information would be unique. The date field can be used as the means of updating the field. Then when the data is updated, it would retain the same ACCOUNTNO (many listings of the same information), but the date would be different and therefore considered a unique **Key**.

   The UDATEHOLD1 field would not be unique by itself, for the same reason as above.

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(Continued from Page 4 - How to Increase the Usage of User-Defined Fields in GoldMine)

2. You can use other fields in the system to accomplish the stated objective as long as the combination of those fields would result in a unique identifier for all records in the system for all time. You can also use just one field if the data in that field would always provide the same uniqueness.

```
GO
SET ANSI_PADDING OFF
```

The line above tells SQL to **GO**, or run the process and create the table.

```
**********************************************************************
```

End Script (above line):

Now we have a table created into which we can enter our data. Because we have created the same field structure as our GoldMine system; we are able to identify the fields, and data, that need to put in our next script. These fields, with the correct data, will Trigger the update of the table with a copy of our data.

As promised here is the uncommented script.

```
Begin Create the External Table Script: ( below line )
*************************************************************************************************************
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
SET ANSI_PADDING ON
GO

CREATE TABLE [dbo].[MYTABLENAME](
        [ACCOUNTNO] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NOT NULL,
        [COMPANY] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UDATAHOLD1] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UDATAHOLD2] [varchar](30) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UDATAHOLD3] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UDATEHOLD1] [datetime] NOT NULL,
        [UDATEHOLD2] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
        [UNUMHOLD01] [money] NULL,
        [UNUMHOLD02] [varchar](50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
 CONSTRAINT [PK_ MYTABLENAME] PRIMARY KEY CLUSTERED
(       [ACCOUNTNO] ASC,
        [UDATEHOLD1] ASC
) ON [PRIMARY]
) ON [PRIMARY]
GO
SET ANSI_PADDING OFF
*************************************************************************************************************
Begin Create the External Table Script: ( below line )
```

Editors Note

Quite frankly, I did know how to create a SQL Trigger, and, as this has been suggested so many times as a solution to an issue raised in the forums, I asked David & Tom if they could come up with an article that would teach me and our readers how to achieve this goal.

This is the first part of the article in which they describe how to create an External table into which the information is to be placed.

The second part of this article will appear in the August issue of The GoldMine Advisor, and it will cover creating the actual SQL Trigger to perform the task assigned.

Okay, I know, some of you can't wait until August for Part II, hence, David & Tom have agreed to release the article, as written, in its entirety to those that e-mail them a request for it.

As always, the by line bCards are printed at the end of this newsletter, and contain all of the contact information for everyone that submits an article to The GoldMine Advisor.

Telemarketing Script with Automated Processes in GoldMine Premium Edition

by

Narelle Carey

Those features you know are in GoldMine, but haven't used as yet…

When you first begin researching CRM it can be overwhelming with all the different features of each product. Which ones will you implement immediately? Which ones will you wait a little while to implement until your hands-on knowledge increases? Telemarketing Scripts and Automated Processes, more often than not, fall into the latter category. While Automated Processes are probably one of the primary features that sold you on GoldMine, so often they never get implemented due to lack of consistent and structured internal processes.

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(Continued from Page 5 - Telemarketing Script with Automated Processes)

Now is a great time to get those procedures streamlined and utilize some of the untapped features in your GoldMine system. Work smarter with your system, not harder.

Telemarketing Scripts

Telemarketing is a bit of a dirty word these days. It now comes with the reputation of being that phone call that always comes at dinner time. It's both annoying and imposing.

Telemarketing Scripts however, or to those on GoldMine Premium Edition, Scripts, are extremely useful tools not just for telemarketing but for any process where guiding questions and answer prompts are required.

Take for example an initial sales call. If you have 10 representatives on your team how do you know that they are asking the right qualifying questions when speaking to prospects? Is it via watching them or finding out when things go wrong? Where does the information that has been collected during an initial call get entered? Can Sales and Marketing utilize any of this information to increase lead generation and enable them to target your market more accurately?

By using Scripts in conjunction with Automated Processes you can both aid your sales people, and give marketing additional information.

What are the benefits of using Scripts?

1. Give your employees guidance for important information that needs to be collected.
2. The answers can be populated directly into fields. This data in turn can be massaged by your marketing team to further target the market.
3. Integrating with Automated Processes gives you the full circle of follow up and ensures correct procedures are being used.

How does it work?

1. A Script is created which contains a series of questions and, where necessary, prompts for an answer.
2. Fields within the contact record are updated with the answers to the questions.
3. Automated Processes listen, and when an entry is placed into a particular field an action is triggered.

Before you begin

First of all, have your processes documented. Any type of flow chart will assist in ensuring that these procedures will be setup correctly.

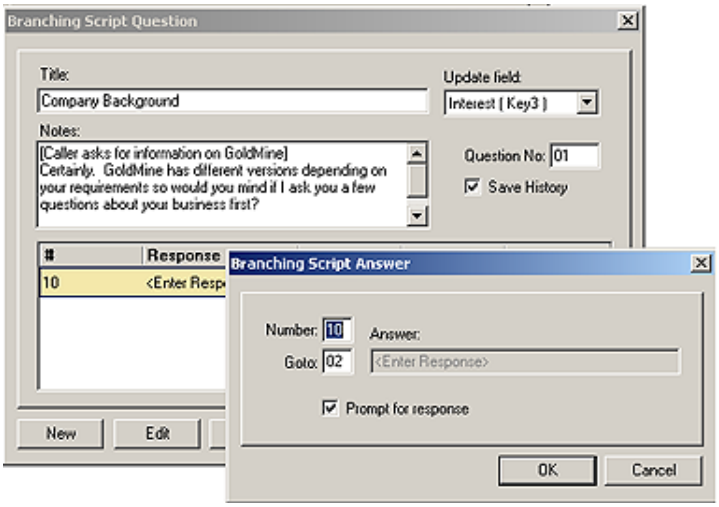
Scripts and Automated Processes are not the type of tasks that should be undertaken by anyone without prior GoldMine Administrator training.

Before creating your new Script, any fields that require to be updated with information need to have been created before you begin the setup of the Script. You will also want to have the drop down lists for each field established.

Know what fields you want updated with entries from a list as opposed to fields where the interviewer will be able to free-form text.

How to create a new script for your sales team

1. Go to Scripts.
2. Click on Maintain Scripts.
3. Click New.
4. Give the Script a name such as "Qualifying call".
5. Click on New to create the script questions.
6. In the question field, you can either enter your question if it's short, or enter a description of what is going to be asked and use the notes for placing further detail.
7. Next to Question Number, if this is the first question in the Script, enter 01.
8. If you wish to have a field updated with the response, select the field from the Update Field list.
9. Now that you have the question and the field to be updated, you need to provide the possible responses and where the response will branch to, i.e.: What question will be asked next. Click New to create your first possible response. Where a response may be ambiguous, do not check "Prompt for response". This will enable you to enter free-from text or an answer that is not part of a drop down list.
10. Click Save History to include the answer to this particular question in a History entry against this record.
11. Continue to create the Script questions and responses
12. If you select [Prompt for response] and you have selected to update a field (as shown below) when the script is run you will be presented with the options from that field's drop down list. I.e.: If you select the Country field, when prompted with a response you will see the list of countries already existing in the Country field in your database.



13. The "Go To" option dictates which question the interviewer will be taken to next. This ensures that irrelevant questions are not being asked of the potential customer and only questions relating to their answers continue. It is easier to go back into a Script after you have setup the questions and responses and then add the "Go To" numbers to create the question flow of the Script. See Figure, Top Column 1, Page 7.

14. Once your script is set up run through a few scenarios to make sure each question is linked to the correct branch.

Each time a script is run it creates a History activity. The History activity shows who ran the script, what questions were asked, what the answers were and how long the interview took.

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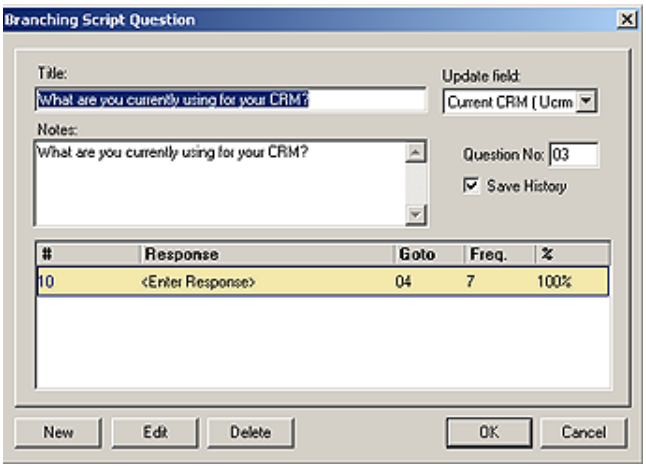
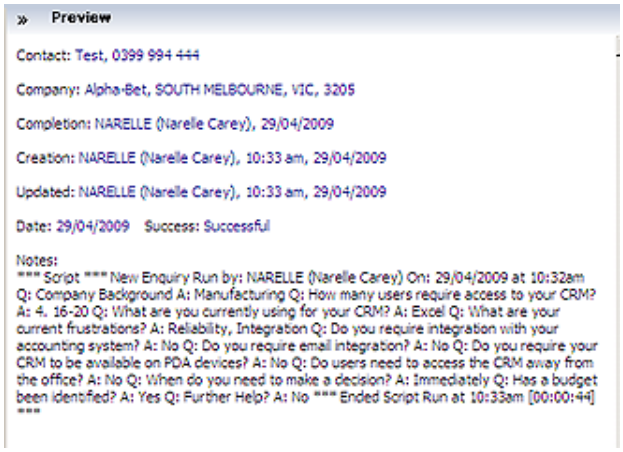
(Continued from Page 5 - Telemarketing Script with Automated Processes)





While it is easy to schedule a follow up call manually, that's if the Prospect has been asked to be followed up shortly due to their need to purchase soon, using Automated Processes ensures that each and every time the correct action is taken.

If you have a question in your Script which places a time frame for purchase into a field, have an Automated Process watching that field. If the answer is "Immediately" then the Automated Process can automatically schedule a follow up call for the Sales Manager to call that Prospect.

This is just one possible outcome to running a Script. Don't forget that from an answer in a Script you can schedule a literature request, print a document, send an e-mail, schedule an appointment.

When setting up a script, use fields within a contact record to record what product a prospect is currently using, how they found out about you, why they are looking at moving products to aid your marketing team in targeting their efforts.

Each Script comes with its own statistics which will show you how many times it has been run, what percentage of total possible answers a particular answer is. When used in conjunction you have a very reliable and efficient sales tool at work within your organization.

Tips, Tricks & Things

Records With No History

by

Gene Marks

Sometimes you may find a record with no history associated for a particular timeframe. They either move them into an archive database or they delete the records. You can find these records by running the following SQL Query.

Open the SQL Query dialog form within GoldMine. Copy and paste the following into the SQL Query Box:

```
select *
from Contact1
where AccountNo not in (select Accountno from ContHist
where OnDate >= '1/1/2006'
  and OnDate <= '2/15/2008')
```

Click on **Save**, name the query, and save it.
Click on **Query**, and the results will be returned.

You can now create a group from the SQL Query results, and either move the records into another database or delete them.

You can use this query over again and just change the date range.

E-Mail Templates

by

Gene Marks

In GoldMine you can easily set up an E-mail Template with your signature line, and use this for all of your E-mails.

* Go to the Document Center
* Right click on E-mail Templates, and choose New
* A blank E-mail Template will open
* In the Subject line type in what you want the template to be named, i.e., "Genes signature"
* In the body of the E-mail enter two or three lines and type in your E-mail signature, i.e.

```
<<QuoteText>>
<<Cursor>>

Gene Marks
The Marks Group
gene@marksgroup.net
www.marksgroup.net
```

* Click on Save template
* If your alerts are on a alert box will pop up, click OK
* The Mail Merge Property Box will pop up. Click on Cancel as you will not be merging this template
* Right click on the template itself , choose Set as Default, and then choose New Message
* Repeat the process for Reply and Forwarding Message
* Close the Document Center.

Each e-mail you create will now have your signature on the bottom.

Using Filters To Find Lost Contacts

by

Gene Marks

Have you ever wondered which contacts in your GoldMine database have not been contacted in the past 6 months or more? Did you know that you can create a filter that will tell you just that? Here's how:

Go to the Filters dialog form in GoldMine.

Select the **New** button to open the **New Filter** dialog box, containing 3 tabs - **Properties**, **Build** and **Optimize**.

In the **Properties** tab enter the **Filter Name** (for example, Not Contacted in 6 months).

Click the **Build** tab, and in it, select the **Field Name** as **LastContOn**, the **Operator** as **Lesser or Equal** and enter the **Value** as **"07/01/2007"** (the Value is the date from which you would like to count the number of untouched contacts).

Select the **Insert Condition** button, and click **OK**.

The new filter created will be displayed in the Filters and Groups dialog box. Right mouse click on the new filter, and select **Count** to find out how many contacts were untouched from 07/01/2007.

Spring Cleaning with Merge/Purge

by

Gene Marks

A merge/purge combines two duplicate records into one. Information on the Contacts, Details, Referrals, History, Links, Opportunity, and Project tabs will be combined into a single record.

For fields like Contact, Company, etc., the record tagged first will be the record into which the second record will combine. If the first record tagged is missing information, say a fax number, but the second tagged record isn't, the fax number will be populated in the surviving record. This is our favorite method for removing duplicate records from GoldMine!

First, we need to **Tag** two records. This is done in the **Contact Search Center** by clicking the check boxes to the two duplicates. After tagging two records you'll notice the title bar of your contact record will tell you that you have two tagged records.

There is no undo after a merge/purge so be sure you have the correct two records tagged, and tagged in the proper order.

Now go to **Tools** >> **Data Management** >> **Merge/Purge Records** >> **Merge Tagged Records**.

GoldMine will ask if you're sure. Click **Yes** to complete the Merge/Purge process for these two records.

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