June 2011

The

GoldMine®

Advisor

GoldMine® Premium v9.0.2.x Reaches Beta

by

DJ Hunt

First off, let me state that we barely received enough articles to produce this months issue of The GoldMine Advisor. In order to keep this newsletter alive, we rely on article submissions from you. Without them we cease to be able to publish the newsletter. Please submit any articles that you may have to DJ@DJHunt.US by August 1, 2011 for insertion into the September issue of The GoldMine Advisor.

FrontRange is pushing a rather aggressive development schedule for GoldMine Premium. They recently released 9.0.1.49, and right on its tail the hotfix 9.0.1.76 which is currently the latest publically available build of GoldMine Premium. I excited to say that FrontRange has already passed 9.0.2.x through Alpha, and has moved it on to Beta.

Don't expect any major enhancements when it is finally released, but do expect many issue fixes and refinements. I know that the Beta Team is working diligently to make this as stable a GoldMine Premium release as we can by testing all funcitonality. Computerese Incorporated has taken it upon itself to actually break the Beta rules, so to speak, and we have actually put 9.0.2.x into production in our offices. This way we are assured to utilize/ test more features of GoldMine Premium then we may have encountered on a virtual implementation.

Jamal Ahmad deserves a round of applause for keeping GoldMine Premium development on such a tight release schedule. Barring any unforeseen issues, I could predict a release GoldMine Premium 9.0.2.x by possibly July 1, 2011. You'll want to make sure that your Maintenance and Support at FrontRange Solutions are current.

IntelliSend for GoldMine Release... May 2011

by

Pamela Pearl

Business Automation Solutions, Inc., (BAS) the developer of the IntelliClick eMarketing solution designed for Goldmine, has developed another great add-on solution for GoldMine called IntelliSend.

We are proud to report in **The GoldMine Advisor**, where our Partner Community and valued GoldMine Users can see it first!

IntelliSend, an advanced email sending solution, is directly integrated with Goldmine. It can also be used as a standalone sending solution for any emailing list. IntelliSend, ideal for high volume emailers, offers tight integration with GoldMine by allowing the user to select from GoldMine Groups and Templates to be used. It recognizes Primary and Additional Contacts as well as email merge codes. IntelliSend records the sent email both to Goldmine History and on an extended Details tab, called the **ClickTrack** tab. A log is instantly generated after the send that provides specific details of successful and failed sends.

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 articles are freely contributed by their author, and no compensation is given for any article published in this newsletter. 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@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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GoldMine is a registered trademark of FrontRange Solutions.

Major advantages of using the IntelliSend add-on for emailing include optimizing system resources by using computer CPU memory to process email efficiently. Users can send large emailing blasts from any workstation or server without impacting GoldMine resources or licenses.

IntelliSend allows flexibility to send mass email on behalf of multiple people at the same time using the same or different email message templates. It also recognizes SQL queries in GoldMine to allow further segmentation of the target audience.
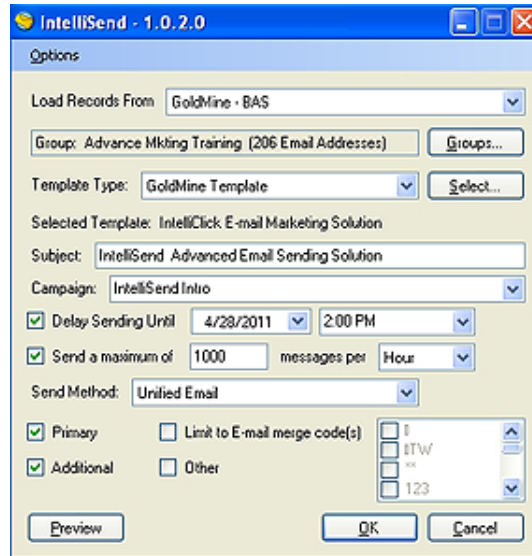
Importantly, IntelliSend helps high volume emailers avoid spam issues. It allows for quantity control on the send rate, date and time. Alternative SMTP relay servers are offered for enhanced deliverability as well as bounce management. For those seeking a full service eMarketing solution for GoldMine, IntelliClick directly integrates with IntelliSend so that users can take advantage of automated unsubscribe requests, message previewing and send testing, as well as many unique intelligent hyperlink tracking options.

For those interested in finding out more information about the IntelliSend & IntelliClick eMarketing solutions for GoldMine, please join us for weekly live webinars.

 You can register at http://www.intelliclicksoftware.com/webinars.htm Companies seeking more information can visit us IntelliClick Software at http://www.intelliclicksoftware.com.

North American Inquiries, please contact 888-827-5628 x. 204; European/UK Inquiries, please contact 44 01454 334430.

Tips, Tricks & Things

Creating E-Mail Templates

by

Alberto Diaz

Of all the "under-utilized" features found in GoldMine, **E-Mail Templates** are one of the easiest to set up and use. Though used more often over the last couple of years for signature files, too many customers do not appear to be taking advantage of this tool.

Benefits of using **E-Mail Templates**:

* **SAVE TIME!** - No need to retype things over and over again.

* **STANDARDIZE!** - Everyone in the company conveys the same information, the same way every time.

* **COMPANY IMAGE!** - Name and Brand recognition are valuable business assets, ALL should present it right!

* **KNOWLEDGE-SHARE** - Even the least technical or product-aware staff member can pass on valuable info.

* **MARKETING!** - Quickly and easily get the word out to all your customers and prospects.
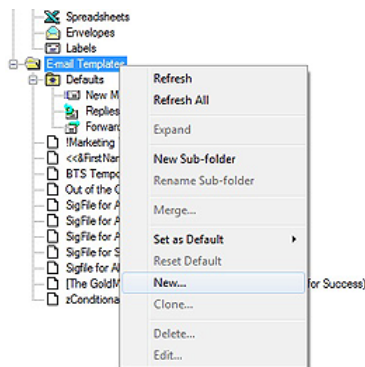
* **AND MANY MORE!!**

So how do we set them up? Glad you asked.

1. Open the **Document Management Center**

   In PE: **Go To** | **Document Templates**
   In CE/SE: **View** | **Document Management Center...**

2. You will see a root folder called **Document Templates**. The next root folder is called **E-mail Templates**.

3. Right-Click the **E-mail Templates** folder and click **New...**

A new, blank template will open

4. If you intend to use different fonts, colors, images, etc, put a check-mark next to **Rich text (HTML)**.

We will talk more about HTML templates in a future blog post regarding "logo insertions" and "high-impact graphics".
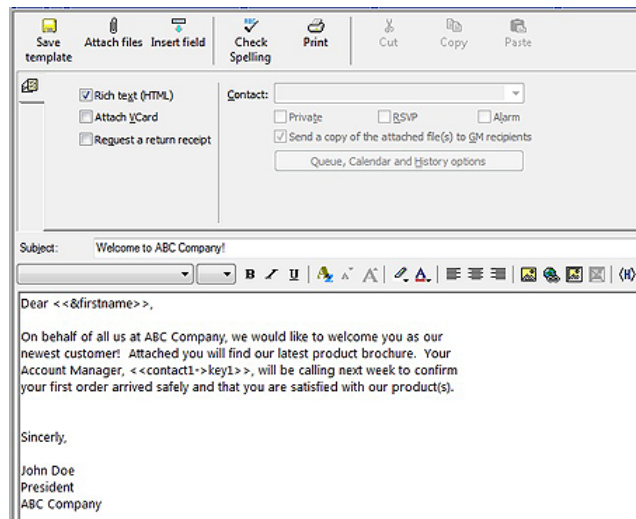
5. Type in a **Subject**.

6. Enter the text of the e-mail.

7. Use the **Insert field** button to add contact information to the template.

8. Use the **Attach files** button to include attachments in the template.

9. Use the **Check Spelling** button!!

10. Click the **Save template** button when done.

11. Now its ready to use for mass E-Mail merging or simple "one-off" e-mails!

HTML Images in E-Mail Templates

by

Alberto Diaz

Imbedding images/graphics, as attachments, into your E-Mail templates can make each and every e-mail you send larger than it needs to be, and can fill your recipients server with needless attachments. Let's be frank, who really wants a copy of your logo every time they exchange an e-mail with you... no one.

That said, GoldMine gives you a way to display that logo or image without sending the dreaded file attachments each time. If you look carefully at the e-mail most of you received announcing this new post, none of the 5 images were directly attached to the e-mail. They all had embedded instructions telling your e-mail client where to go to display those files. In our case, a folder in our website. Let's get to showing you how to do that with GoldMine.

1. Make sure you have a copy of the image that had been professionally adjusted to just the right size. Forcing the image smaller or larger will distort it and make it look amaturish.

2. Have your web or IT person upload the file somewhere on your website and provide you with the path to the image.

3. Create your e-mail template in a normal manner. You may want to Clone a previous version (right-click | **Clone...**)

GoldMine Customers using v6.0 or greater

While editing the template, you have **Rich text (HTML)** on, you will see a button near the end of the toolbar for **Insert Picture** (circled in image below).
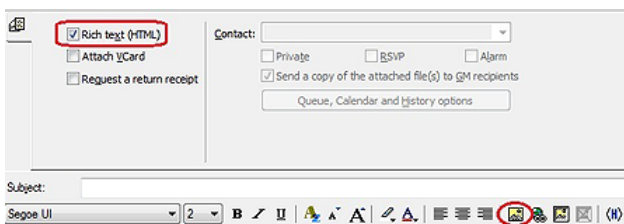
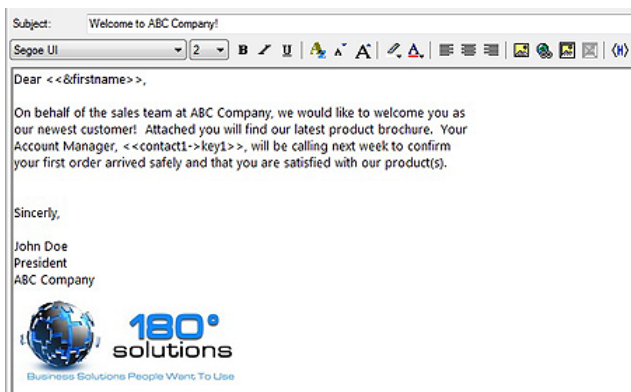4. Place the cursor in the location you want the image to reside, and click the Insert Picture button.
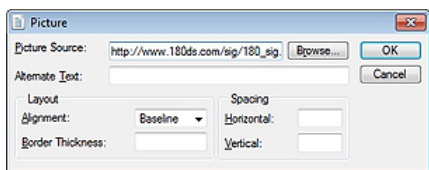
5. In the Picture Source field enter the image location as:

www.yourwebsite.com/yourimage.jpg

Our logo is simply:

www.180ds.com/sig/180_sig.jpg

And click OK.

Your image should now appear in the template.

GoldMine Customers using versions older than v6.0

While editing the template, if you have **Rich text (HTML)** on, you should see a button at the end of the toolbar that looks like an **H** in brackets, **<H>**.

4. Click the **<H>**, and you will now see all the HTML code that goes into creating such a simple template. If you look in the middle of all the code, you should recognize your text.
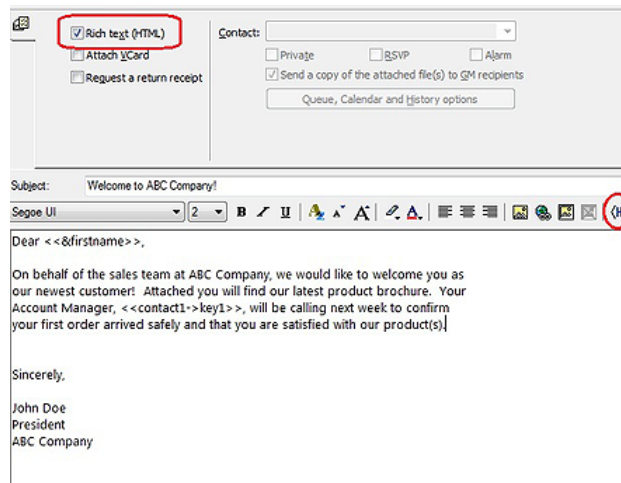
5. Place your cursor in the location where you want your image to reside. If you want it at the very bottom make sure it goes in front of the

</FONT><BODY><HTML>

6. The code you will be adding is:

<DIV><IMG   src="http://www.yourwebsite.com/ yourimage.jpg"></DIV>

Our logo is simply:

<DIV><IMG src="http://www.180ds.com/sig/180_ sig.jpg"></DIV>

7. Click the **<H>** again, and your logo should appear where you added the code.

Viola!

Setting Up Different E-mail Templates for New, Replies, and Forwarded Messages

by

Alberto Diaz

E-Mail templates are a great solution for automating the closing section of your e-mails. In previous blog posts, we showed you how to create e-mail templates, e-mail templates with html logos, and e-mail templates with merge codes. Here they are again as a refresher:

Creating E-Mail Templates:
http://goldminecompass.com/2010/07/02/using-email-templates.aspx

HTML Images in E-Mail Templates:
http://goldminecompass.com/2010/08/07/html-images-in-email-templates. aspx

Typically, we teach our clients to create 2-3 templates for their signature files. One for New messages, one for Replies, and optionally one for Forwards.. though the reply template can be used for forwards as well. We subscribe to the philosophy
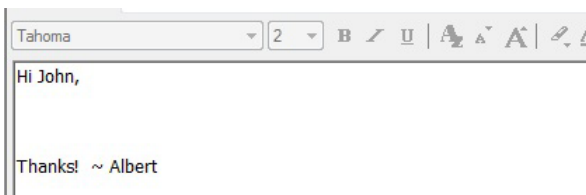
Tips, Tricks & Things

that as you are exchanging e-mails, your recipients really don't need ALL your contact info, logo, quotes, icons, etc... EACH AND EVERY TIME. So your New e-mail templates have all the cool info.


However, your reply template can be nice and simple.

If you and your contact are quoting each previous text with each back and forth, you will both appreciate the reduced clutter. So will your database and your printer.

Once you create both templates, you can set them as defaults for your various message types. Right from within the Document Management Center, right-click the desired template, click Set as Default, and choose which default you want to set (New, Reply, or Forward).
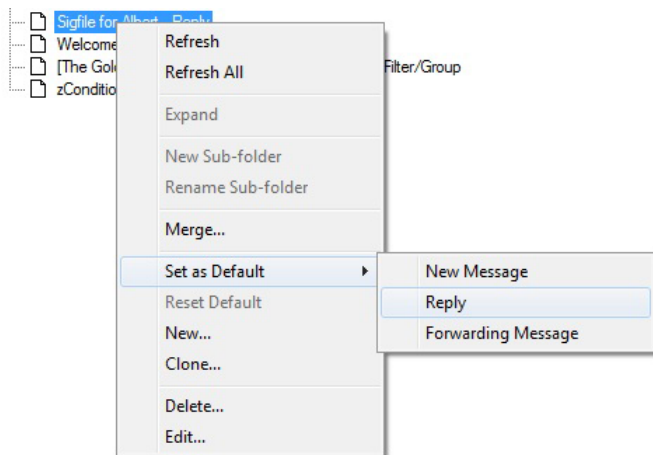
That's all there is to it. **Happy GoldMining!**

Viewing Two Records at Once

by

Gene Marks

The new **Tabbed** interface of GoldMine Premium makes for a much **cleaner** workspace, however; it sometimes makes users forget that they can look at more than one record at once.

To do this, simply select:

> **Window**
> > **New Contact Window**

Older versions of GoldMine will have this under:

> **View**
> > **New Contact Window**

This will bring up a new Contact Search tab. Simply search for the contact you wish to view. You'll now have two separate tabs, each looking at a different contact record.

Editors Note

Gene is right on with this one, however, you are not really **Viewing Two Records at Once** if in the **Tabbed** mode of GoldMine Premium.

I, on the other hand, still prefer to use the **Windowed** mode, hence, when I follow Genes comments I actually get two separate Windows where I can truly **View Two Records at Once**.

To revert to the **Windowed** mode, look to the the tab row to the very first tab which depicts four squares and is narrower than all the rest of the tabs. Click on that tab, and GoldMine Premium will revert to the **Windowed** mode. Arrange your windows as you desire (larger screens have more real estate).

To revert back into the **Tabbed** mode one simply Double-Clicks on the **Title Bar** of any of the open windows. Oh, and the best part about it is, if you revert again to the **Windowed** mode, GoldMine Premium will remember your window positioning.

Changing Label & Data Colors Conditionally

by

DJ Hunt

As many of you know, at least those that are clients of Computerese Inc, we keep a running tally of the available support contract time remaining for each client in the form of:

Tips, Tricks & Things

You'll notice that this is in your face so that our Technical Support Team can instantly see the status of any of our support clients. Our policy is that we only support those with a positive contract, and we Respectfully Decline to support those with a negative standing. This is actually accomplished automatically, however, that is another article for another time. As our support clients may contact any of our support team directly it is standard operating procedure for the team to look at this area of the Contact record prior to instantiating support. To facilitate their quick response time, the color code looks as shown in the figure on the previous page when the client is in a positive state, and the Label & Data colors change to a bright red when the support contract is in a negative state. With a quick glance our Technical Support Team will know instantly whether they are authorized to support this client or not.

Let me show you the behind the scenes for this particular **Expression** field as shown in the image in the next column:

iif(Contact2.ucContract = [Active], 12615680, iif(Contact2.ucContract = [Expired], 255, -1))

Since Contact2.ucContract is modified via our Lookup.ini, I don't really have to worry about user inconsistency in the field value which simplifies my expression immensely. If you allow user input, your expression might partially look more like:

iif(trim(upper(Contact2.ucContract)) = [ACTIVE]...
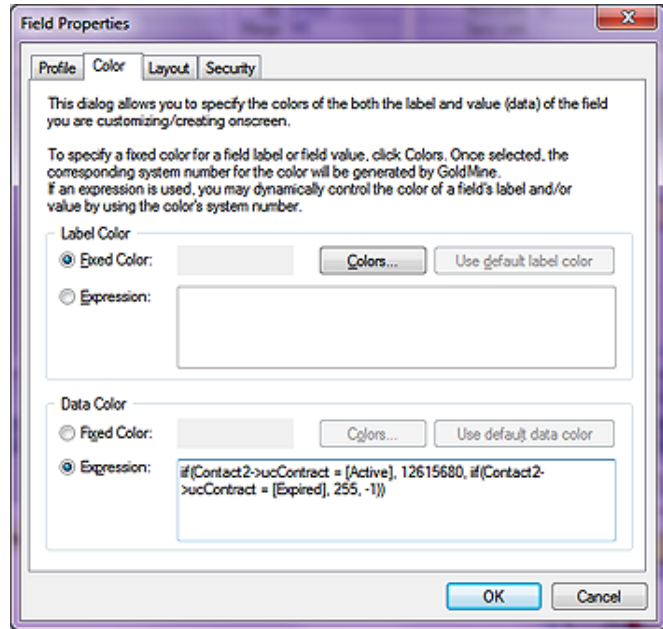
If one want the **Label Color** to change additionally, one would simply repeat the **Data Color Expression:** in the **Label Color Expression:** field.

Assume that your end users are idiots, and compensate for their idiocy as much as humanly possible knowing that you won't win 100% of the time.

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