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Articles In This Issue

DJ Retiring from the GoldMine Partner Program, but Not from Life

GoldMine® Mobile Edition 9.0

GoldMine Mobile vrs wMobile

Top Technology Questions Every Penny Pincher Should Ask

CRM Data Facilities Mergers, Splits and Reorganizations

Making the History tab readable, and how MMUpdater makes this work much better

Tips, Tricks & Things

Tip Correction for GoldMine Premium Functionality

Using dBase Expressions in F2 Picklist

From the GoldMine Premium v9.0.2.36 Readme

More...



DJ Retiring from the GoldMine Partner Program, but Not from Life

by

DJ Hunt



For those of you who have read the back cover of my latest book, GoldMine Premium - The Definitive Guide, this comes as no surprise to you. After 23 Years, 11 GoldMine Books, and countless Newsletters, I have decided to hang up my hat as they say. That hat will actually be hung on the rack April 1st, 2012 when my official GoldMine Partnership period is over with FrontRange Solutions.

I could give you a hundred reasons, but suffice it to say that my loving wife is demanding that I spend my attention on her, and not on my customer base as I have tended to in the past. Customers always came first whether we were driving to Maine on the weekends, flying to Florida on vacation, whatever you, my customer needing attention, would always distract my attention from my wife. The proverbial bell has tolled.

Beginning January 2012, I will be disbursing my existing GoldMine Premium Clients between RJ Consulting Service ( aka Bob Jefferson ), and True Clarity Co ( aka James McCracken ) based on their prior work experience with the Computerese Inc clientele. Some of you will still have credit for GoldMine Support with Computerese Inc which at the time of purchase, you were told would stay on your records until fully utilized, or until I retired. At this writing both Bob and James have agreed to honor any balances remaining on my clientele records at the time of transfer. Come January 2012, I will be dispersing my client database, and my GoldMine clients will receive a Partner of Record Change Request associated with the consultant with whom you had the most experience. You should be aware that you do not have to forward the PoRs to FrontRange, but failing to do so will revert your account to the custody of FrontRange Solutions.

Does this mean that I'm disappearing totally from the GoldMine Community, not at all. After April 1st, 2012 when the entire system is expected to be converted to Bob & James, I will not be available for scheduled activities as a GoldMine Partner. I will still receive E-mails at DJ@DJHunt.US, and you may still contact me on a Catch-As-Catch-Can basis at (978)342-3333. I may even sell a little GoldMine Premium here and there with my purchases being made through Bob, James or any number of other resources that I have at my beckon call. I don't think that I'd know what to do if I didn't continue to dabble a bit in the CRM Solutions Market, but there will be no further commitments, no more books, and no more newsletters.

The two key dates that you should pen onto your calendars are:

January 1st, 2012 - Computerese Inc GoldMine Premium clientele will be disbursed to either Bob Jefferson or James McCracken for continuing and uninterrupted sales and support. On or shortly after that date, Bob & James will have their own mechanisms in place which will permit you to schedule support sessions with them directly instead of passing through DJ here at Computerese Inc. I anticipate that everything will go smoothly during this transition.

April 1st, 2012 - DJ will complete the retirement process from FrontRange Solutions. www.DJHunt.US will become an information only site with continued sales of GoldMine Premium, Books, and Add-On products. You may still send E-mails to DJ@DJHunt.US, and you may still Call (978)342-3333, however, DJ makes no commitment as to when the E-mails will be answered, or when the telephone calls will be returned.

Thank you all for the 23 good years that you have afforded me in the CRM world.

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.

I am your editor:

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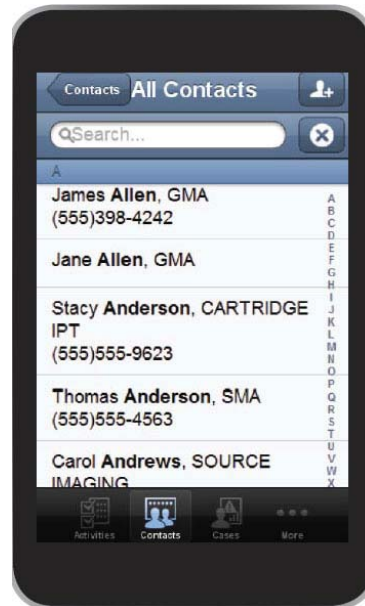
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Reprinted from:

<http://www.frontrange.com/software/crm/goldmine/mobile/>



GoldMine® Mobile Edition 9.0 provides mobile users with critical, real-time customer relationship management (CRM) information via their smartphones and tablets. GoldMine Mobile Edition gives you instant access to the latest customer information ensuring you never miss a sales activity or customer service engagement.

Give your sales agents access to their most important sales and service information while they are out of the office traveling on business. GoldMine Mobile Edition 9.0 works with GoldMine® Premium 9.0.3 and runs on the ever popular Apple iOS mobile devices.

GoldMine Mobile Edition 9.0 is a mobile CRM application that allows mobile users to access their critical customer and contact information, forecasted sales, case details, and daily calendaring activities while they are disconnected from the office environment. The easy to use and easy to install mobile application allows mobile agents to continue their customer engagement efforts that help drive better customer relationships and increase customer satisfaction.

Find out more about GoldMine Mobile Edition by downloading the GoldMine Mobile Edition 9.0 product brochure.

### Features and Functionality of GoldMine Mobile Edition 9.0

- **Real-Time Access Anywhere**  
GoldMine Mobile Edition 9.0 allows instant, wireless access to mobile users using the widely popular Apple iOS mobile device platform.
- **Rich user interface**  
GoldMine Mobile Edition 9.0 user interface is designed with the look and feel of a native smartphone application. This UI makes the application easier to learn and use by the mobile users and supports standard touch-screen gestures.

(Continued on Page 3, Column 1)

- **Log contacts and track activities**  
Attach time-stamped notes of phone conversations, meetings and ideas, as well as view histories and activities for any contact.
- **Manage revenue-related activities**  
Help manage and identify forecasted sales, increase sales productivity and drive additional revenue through available mobile sales functionality.
- **Perform service engagements**  
Provide service technicians and other field service workers with instant access to customer, case and service activities for them to perform their field based problem to resolution processes.
- **Manage mobile activities**  
See all of your calls, meetings and to-do entries in the activities list available on the mobile device. In real-time update the activity record and associated CRM data so no information is lost and all teams are kept up to date on any activity performed in the field. SMS reminders ensure no activity is missed while you're on the road.

#### Minimum System Requirements

- GoldMine® Premium Edition 9.0.3
- Apple® iPhone® or iPad®
- Microsoft® Windows Server® 2008 R2, Windows Server® 2008, or Windows Server® 2003 R2

#### GoldMine Mobile vrs wMobile

by

#### DJ Hunt



**GoldMine Mobile**, now where have we heard that name before? That's right there was a product called GoldMine Mobile that was pulled out of the market place in the past that was tied to the Blackberry devices. Well, shortly after the release of GoldMine Mobile ( 1st release ), W-Systems Inc took it upon themselves to develop **wMobile** which is a browser based solution for mobile connectivity to your premise GoldMine Premium. Have you picked up on the key difference here? GoldMine Mobile only functions against the Blackberry devices, and wMobile functions on any smartphone regardless of the OS.

That is a significant difference. 1 OS vrs any OS. In the intervening time span between then and now, FrontRange has re-released GoldMine Mobile that is tied to the iOS this time with promises of other OS's in the future. During that same time span W-Systems has enhanced wMobile, and has included in the same bundle, a Desktop version of wMobile. So what do we see as the difference this time: 1 OS ( iOS ) vrs any browser capable device on any OS.

Yes GoldMine Mobile is a totally new rewrite of the code and has gone through the Alpha & Beta testing cycles on the one hand, but on the other hand it is a version 1 product. wMobile is a time tested application that has been available for many years and is well tested by actual end users.

What about cost, you may very well ask. At this writing I cannot find any difference in their cost as both products list for **\$295.00**. Both products require an annual Maintenance fee, and GoldMine Mobile is listing for **\$65.00**, and for wMobile is listing at **\$59.00** for the annual Maintenance fee.

GoldMine Mobile is currently handling **Cases**, but not **Opportunities**. wMobile is currently handling **Opportunities**, but not **Cases**. Here we have a wash, and the one that you might pick would depend on your use of premise GoldMine Premium. If you are one of the few that utilizes **Opportunities** and **Cases** then neither of these products will fully meet your needs.

Lastly, I like what Alberto Diaz tossed to me as a comparison: FrontRange Solutions direct vrs a 3rd party solution. Well, I would give you that not every GoldMine Partner can know everything about every GoldMine product that they sell to end users, and when it comes to 3rd party applications, I find that the 3rd party developer is far more capable of supporting their product than I.

I have to say, as of this writing, that wMobile is the hands down winner in this mobile application war.

#### Top Technology Questions Every Penny Pincher Should Ask



a whitepaper by

#### Gene Marks

You don't have a lot of technology resources inside your company. In fact, just getting your office printer to work all the time seems like a monumental challenge. Investing in technology, whether it's new software or hardware means dealing with a lot of stuff that just may not work like you expected. But it's the 21st century and the days of index cards, one-write systems and 2 martini lunches are long gone. You need technology to get things done. So before investing in the latest-and-greatest-whiz-bang-gotta-have gadget that promises to turn your entire business into a financial powerhouse, here's a few things to keep in mind.

#### 1. Who makes it?

If your business is going to significantly rely on a new inventory management system then you better find out everything you can about who made the system. Where are they located? How long have they been around? Are they financially strong? Will they be around next year? Great technology has great companies behind them. You're going to find yourself with a new partner, and like any new partner you'll want to make sure to do as much research about them as possible.

#### 2. Who supports it?

You know by now that something WILL go wrong. Something that worked fine yesterday will, for no reason at all, stop working today. And right in the middle of trying to get something out the door too! Who will you call? The vendor? A Partner? Ghostbusters? Make sure you know who's going to help you with all the inevitable problems before they occur. Find out how quickly they provide their service. Even if they promise a "24/7 response" give them a buzz at 7PM one evening before you buy just to see if anyone answers the phone. All technology needs support. This stuff just doesn't work all the time.

( Continued on Page 4, Column 1 )

### 3. What are ALL the costs?

That new order entry application may only cost a few thousand dollars. But what about the annual maintenance and support? How about training, customization, technical questions, installation? Don't be surprised if all of this stuff is extra. Get all the costs upfront, including what you'll be required to spend on an annual basis.

### 4. What other technology is required to make it work?

If you're buying software what hardware is required? If you're buying hardware what software is required? Microsoft's new customer relationship management software application requires so much additional Microsoft software (i.e. Windows, SQL Server, etc.) that you may spend more on the additional software than the actual product! Know it all before you buy.

### 5. What services are required to make it work?

Wouldn't it be great to just plug it in like a TV? Or click on setup.exe and everything installs itself? Dream on! How else can technology consultants like ourselves justify our existence without convoluted and overly complex tools that requires black box knowledge and other specialized expertise that only a "certified partner" can bring? Find out how much time will be needed by outsiders to get your application or equipment running the right way. Sure, you can do it yourself. But you still haven't finished painting the kids playroom yet so how are you going to finish this?

### 6. How long has it been around?

You want something on the leading edge, not the bleeding edge. You definitely don't want to buy a first release of anything. Let some other poor guy discover those hidden bugs. Windows Vista? Wait for the first service pack. That new line of laptops from Dell? Hang back a while. In technology, new and reliable are rarely used in the same sentence.

### 7. Who else is using it?

Never buy technology in a vacuum. Get references. Do site visits. Call other users. Check newsgroups and forums. Google the vendor. Buying a new service management system? Consider going to the vendors offices for training before you buy. That way you can beat up on the instructor and talk to other users. Does the vendor host conferences or shows? Visit, ask questions, get comfortable.

### 8. How will it generate profits for my company?

If a piece of technology isn't going to help you increase revenues or decrease costs then why bother? Your current system may not be pretty, but if it ain't broke why fix it? Buying software or hardware should be a quantitative decision. You should be able to mathematically calculate how much estimated profits will result, with certain assumptions, from this investment. Do the ROI and see what shakes out.

### 9. Can I take a test drive?

Never buy just on a vendor demo. Get the software or hardware and test it yourself. If a software company doesn't let you

drive their product, then don't buy it. If a hardware company can't give you a test piece, then reconsider. Once you make that decision and fork over the cash those eager and super-friendly salespeople will be on to the next deal and you'll be yesterday's news. Do your due diligence beforehand.

### 10. Will it speak to my other systems?

Are you adding another repository of duplicate data? Are you creating additional tasks? When buying new technology make sure it's open to others. Proprietary systems are becoming more and more a thing of the past. Make sure that you can tie it to other systems. Even if there's no out of the box connection you want to still have the option of hiring someone to write the integration. Keep those options open so you don't paint yourself into a corner.

## CRM Data Facilities Mergers, Splits and Reorganizations

by



**Mike Meyer**

Change is not confined to customers, your own organization is dynamic too. Managers need expert resources that can quickly transform CRM systems to match their own company's mergers, splits and reorganizations. It's not just a technical fix that's needed, but a cross-functional expertise that understands how businesses work and how CRM data is stored.

### Your own organization is changing

Businesses are being forced to transform themselves in order to optimize sales returns while rationalizing or combining resources. Replicating such transformations in a CRM system means reassigning territories, sales histories, forecasting roll-ups, current opportunities and other data objects.

Reassignments can be very sensitive especially where they involve distributor-led or agent-led sales operations where security of data is an issue. Even if all sales are direct for many organizations facing big changes their own lack of clear sales processes and poor customer or product data definitions cause data incompatibilities and organizational conflicts.

### Corporate mergers

Many successful mergers involve organizations with common customers and related products or services. They can typically achieve higher margins through cross-selling and a lower-cost sales structure. The success and speed of realignment depends on combining the two or more source legacy CRM systems to provide the required information base to the sales and services teams and continuity of forecasting to managers and owners.

It's unlikely that the legacy systems are compatible or set up similarly. And it's even less likely that the common customers and products will be named identically or that data for both legacy systems will be up-to-date. During the stress of mergers even organizations that have the skills and experience to combine their data may not have the resources available and may want to avoid using an internal, hence partisan, team.

## Corporate splits

Sometimes organizations split or float off parts of themselves to achieve higher efficiency or more focus. Perhaps their products or people become less compatible or their geographical range loses synergy. When they split they need also to divide their history and plans quickly to ensure everyone is equipped to move forward yet is not burdened with the baggage of the past.

CRM systems are not designed for easy data migration and in our experience even in amicable business splits the exact reassignment by customer is not always clear. Perhaps a customer previously served by a single highly experienced executive who knew the business history by heart will in future see two sales teams that don't communicate and have never visited the site. In this situation the correct reassignment of data can determine the outcome of the business transformation.

## Reorganizations

In addition to corporate mergers and splits, many comparable internal reorganizations occur that must be mirrored in CRM systems. For example, in a growing geography or expanding product group territories are often split.

If in a single geography two sales people, working for different divisions, offer unrelated products to the same customer then forecasting and roll-ups become very complex. Global divisional managers want to follow their product groups while geographical managers insist on seeing a different roll-up.

This type of matrix territory management enables all the business managers to retain focus and responsibility. But it's not easy to achieve in CRM systems and the set up must be strictly maintained in the face of frequent minor reorganizations and new hires.

## Your GoldMine Partners role

GoldMine Partners have propelled several organizations of different sizes and in different markets through complex and urgent data reassignments. They can often work in the background in advance of a business transformation announcement so retaining confidentiality while equipping the new organization or company to hit their new objectives fast.

GoldMine Partners have worked on numerous CRM software brands and platforms, both local and web-based, using a range of data migration tools. In addition to standard data types they have also migrated less easily accessible objects like Attached Documents from a legacy to a new system.

With their combined CRM data management experience they've already taken many of the risks and committed to many of the unknowns that your internal team faces today.

In addition to direct action your GoldMine Partner can provide advance consultancy about how your prospective corporate or organizational change can be accelerated through correct management of your CRM data.

## Making the History tab readable ...and how MMUpdater makes this work better



by

### Stephanie LaHaye

If you send marketing e-mails using the GoldMine e-mail client (as opposed to an external service), you've probably learned how to filter out e-mails when viewing your history tab. That crude method can cause you to miss important information. Here's a great way, using MasterMine and MMUpdater, to more subtly make History tab filtering better at showing you what you need while hiding what you don't.

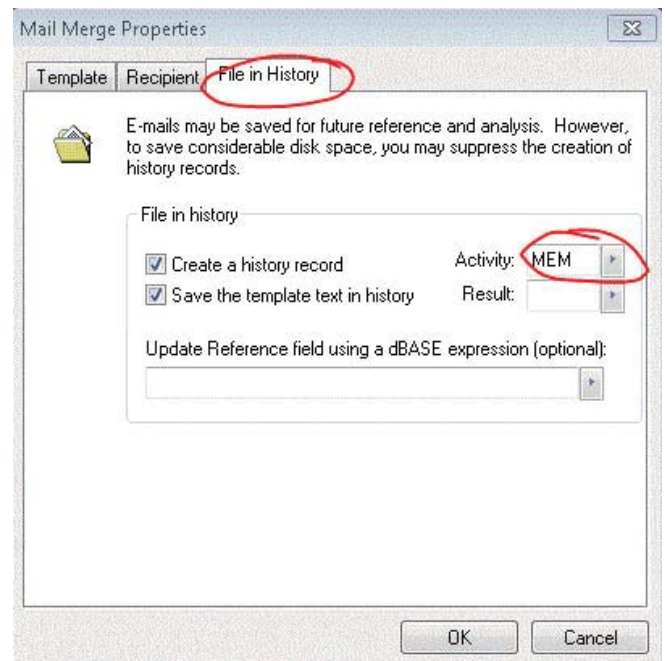
In summary, the process is:

- 1) Use "Activity Code" (and Result Code) to indicate types of e-mails you want to hide
- 2) Use a MasterMine History (E-mail) report to quickly group past e-mails by subject, so you know exactly when marketing e-mails were sent, how many, and whether they are properly "Activity Coded."
- 3) Use MMUpdater to manage those thousands of uncoded or wrongly coded e-mails that are already out there.

### 1) Coding E-mails

At MasterMine, we do a lot of e-mail marketing. We try to reach GoldMine dealers and users with targeted messages on a regular basis. As a result, we wind up with a lot of sent e-mails in the History tab of GoldMine. Here's a trick that makes it easy to hide the mass-e-mails, while still showing 1-off e-mails that you still want to pay attention to.

- 1) While merging e-mails, set Activity Code to "MEM", like this:



(Continued from Page 5 - Making the History tab readable...)

2) Then filter out "MEM" records when viewing the history tab.

The screenshot shows the GoldMine History tab with a list of email records. The 'Activity Code' column is highlighted with a red circle. A 'Custom AutoFilter' dialog box is open, showing the filter criteria: 'Code does not equal MEM'. The dialog box has 'And' selected and 'MEM' entered in the text field.

And the result is a history tab that excludes your mass e-mail rows (MEM).

The screenshot shows the GoldMine History tab with a filtered list of email records. The 'Activity Code' column is now empty for all records, indicating that the MEM records have been filtered out.

This is great, but what about the e-mails you've sent in the past? What if in the future you forget to apply the activity code and suddenly have thousands of non-coded e-mails in history? How can you fix these without going to each e-mail record and manually updating the Activity Code?

## 2) Run MasterMine History to identify target history records

Create a MasterMine history report that shows all completed "E-mails". Sort the Reference field (Subject line) descending by the number of occurrences.

The screenshot shows a Microsoft Excel spreadsheet with a PivotTable. The PivotTable has columns for 'OnYear', 'User ID', and 'Activity Code'. The 'Activity Code' column is filtered to show only 'MEM' records. The PivotTable also includes columns for 'MEM', 'DEM', 'SLS', 'Cmp', and 'Grand Total'.

## 3) MMUpdater makes the rest easy.

Now you've isolated the history records that need to have their Activity Codes changed to MEM – the ones in column B. Simply double-click on any of the numbers in the data area to list out all records that need to have Activity Code changed to "MEM". Copy "MEM" down the whole "Activity Code" column on the drilldown spreadsheet. Then invoke MMUpdater to push the change to GoldMine.

In seconds, you've cleaned up a mess that prevents your sales reps from quickly and clearly seeing each prospect's significant history at a glance!

## Tips, Tricks & Things

### Tip Correction for GoldMine Premium Functionality



by

Alex Timofeyev

```
SELECT c.AccountNo,
c.Contact,
c.Company,
c.City,
g1.Ref
FROM Contact1 c,
ContGrps g1
INNER JOIN ContGrps g2
ON g1.UserID = g2.RecID
AND UPPER(g2.Ref) LIKE '%GROUPNAME%'
WHERE c.AccountNo = g1.accountno
AND c.AccountNo NOT IN
(
SELECT AccountNo
FROM ContSupp
WHERE Contact = 'E-mail Address'
)
```

## Proverb

Fool me once - Shame on you.  
Fool me twice - Shame on me.

## Tips, Tricks & Things

### Using dBase Expressions in F2 Picklists



by

#### Gene Marks

Did you know that you can use an xBase expression as a picklist item?

You simply need to add the expression to the picklist, prefixed by a tilde ( ~ ), like this:

**~Contact1.Contact**

Try it yourself; let us imagine we have a value in KEY1 that we'd like to easily copy to the Activity Code of a new history item.

1. Select **Complete | Unscheduled Call | Outgoing Call**.
2. Bring up the Picklist for the **Code** box by clicking into it, and hitting F2.
3. Click **New**
4. Paste in the following text as the new picklist item :

**~Contact1.Key1**

Now when an end user selects that item from the picklist, it will copy in the value from the KEY1 field. Any Contact1 or Contact2 field is allowable.

Have fun!

## Editors Note

In Genes original text he used the older aliasing convention:

**~Contact1->Contact**

Where as I prefer the newer aliasing convention:

**~Contact1.Contact**

Oh well, each to their own I suppose.

### From the GoldMine Premium v9.0.2.36 Readme



by

#### Chris Dohmen

**55.** If the preview panes in **Pending** and **History** tabs have never been viewed from a Windows account with local administrator permission, a non-administrator Windows user will not be able to view the preview panes. As a one-time setup process, a Windows account with local administrator permission must be used to launch GoldMine and view a preview pane in one of these tabs

### Relinking a History Item to a different Contact



by

#### Gene Marks

Did you know you can actually relink an existing history to a different contact? ( Doing this will **move** the History to the new contact )

1. Find the History item you wish to re-link ( every activity excepting e-mails is allowed ).
2. Right click on the History Item, and select **Properties ( Edit... in GoldMine Premium 9.0.2.36 )**.
3. Click on the little black arrow button to the right of the **Contact Name**, near the top of the History dialog window.
4. The **Search Center** will now prompt you to search for the appropriate **Contact**, do so normally, then double-click on it.

The History is now linked to the Contact you just searched for, and this change should be reflected in the associated History tab.

### Taking a Phone Message



by

#### Gene Marks

For those of us who still have a receptionist or like to take messages in "person" over the phone, GoldMine can help organize this process.

Imagine I am calling into your organization, and you need to take a phone message for a different sales representative to call me.

1. The first thing you do is navigate to the **Justin Hill** Contact record. This is important, as virtually everything you do in GoldMine affects the **Current Contact Record**.
2. Select **Message** from the GoldMine toolbar, or select **Actions | Message** from the top level menu ( GoldMine Premium 9.0.2.36 | Click the **Message** button ).
3. You now see the **Take a Phone Message** dialog window. You'll notice this item is already attached to the Justin Hill contact record. All you need do now is:
4. Specify the GoldMine **To User**: that should get this message from the top right drop down list.
5. Type in a simple message in the **Message**: box. If more room is needed for notes, simply use the **Notes**: area below. You may also choose to use the checkboxes which indicate the purpose of the call.
6. Be sure to **Alarm** the message for the other User.

The assigned user will see this call on their GoldMine Calendar along side other Calls, Appointments and Actions.

# Tips, Tricks & Things

## Adding Columns to the Search Center



by

### Gene Marks

Did you know that you can change the columns seen in the Search Center?

1. Open up your **Search Center** by clicking on **Search** from the GoldMine toolbar.
2. Click on the **Columns** button within the "top strip" of the Search Center.
3. Click on the **Column Selection** tab.
4. To add columns to the Search Center, you must move the appropriate fieldname from the **Available Columns** to the **Selected Columns** list.

Do so by singly selecting an item on the left, then clicking the forward arrow button. Reverse the procedure to remove columns from the Search Center view.

**Pro Tip:** This is a nice way to build columns for a list, as you can right-click within the Search Center and then select the **Output To... | Excel** option from the local menu.

## Simple Duplicate Record Queries

by



### Gene Marks

Here is an easy way to determine how many potential **Duplicate Records** you might have in your database.

Open the SQL Query window by selecting **Tools | SQL Query** from the top level menu.

If you want to see duplicates based on, for example, **Contact** and **Phone1**, paste in the following Query text and run it:

```
select count(*), Contact, Phone1
from Contact1
group by Contact, Phone1
having count(*) > 1
```

If you'd like to include the **Company** field in the query as a duplicate check, use this:

```
select count(*), Contact, Phone1, Company
from Contact1
group by Contact, Phone1, Company
having count(*) > 1
```

Try it! You might be surprised at how many duplicates there might be in your database.

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