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The GoldMine® Advisor

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In This Issue

GoldSync Problems - A White Paper (Part I)

by

David Lee

Data synchronization is an issue for every CRM program that supports the feature. Some do it better than others, but none do it perfectly. Nevertheless, it is such a valuable feature that all of the major systems continue to try. Even in this day of web access, it is often necessary to have a local copy of your database.

This 3-part series is a discussion of problems that you might encounter with GoldMine synchronization, and how you might correct them. It is not a discussion of how to use all of the features of GoldSync.

The first installment discusses how GoldMine synchronization works, its advantages and disadvantages, and how you know if you might have a problem.

The second installment discusses the ways in which sync problems occur. You will see that many "synchronization" problems are really database or data problems which are manifested by the synchronization process.

The third installment discusses how to correct your GoldMine synchronization problems.

How does GoldMine sync work compared to other systems?

The major CRM systems have each found its own way to synchronize data. ***None of them are perfect, and all of them will lose data in some situations.*** Despite this, the value of being able to synchronize remote systems and work offline is so great that virtually every major CRM system provides this option (including web-based ASP systems). You would like to find a system that loses data rarely, that allows you to find out whether or not you have lost data, and that gives you a good way to recover the data.

Some systems, such as SalesLogix, dynamically build transfer sets as you enter data. This is an effective approach when you have a very small number of synchers. However it is very slow if you have large numbers or if there are problems which require you to re-build your transfer sets.

Other systems, such as Microsoft CRM, track changes and force an update when you dock and undock from the system. This gives you little or no ability to correct sync errors or re-set your sync. In Microsoft's case, it also lacks sophisticated conflict resolution rules (what do you do if two people updated the same field, and then you Sync the systems?

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Legalese

Editor: **DJ Hunt**

Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is accurate. Should you use anything from this newsletter, you do so at your own risk. All information contained herein is not intended as specific advice, but as a general point of discussion.

All articles are freely contributed from their author. In many cases the authors have had a technical expert, in the area of the document, prereview the document for content and accuracy.

All major article contributors will have a business card displayed on the last page of this document. You are encouraged to clip the business card and save it. Do not contact the author directly unless, at the end of their article, they have made a declaration of sorts that states that you may contact them personally.

All questions, and future articles should be submitted to:

DJ.Hunt@DJ-Hunt.com

If you are including screenshots, they should be no wider than 3.57" US. Their Print resolution should be 300 dpi, and they should be in jpg format.

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

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

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GoldMine builds the transfer sets when you ask for them or it pre-builds them on a schedule. The building process is resource-intensive, but it can support a very large number of users without degrading system performance. GoldMine also has a sophisticated conflict resolution capability (the most recent change "wins" with proper adjustments made for users in different time zones) In addition, GoldMine creates transaction logs (Tlogs) to track who made changes, when they were made, what was changed, and when the change was synchronized.

This ability to create transfer sets at any time gives GoldMine great flexibility and scalability compared to other systems. It also creates many vulnerabilities as discussed in this white paper.

Why is it better? Why is it worse?

- **Advantages of GoldSync**
  - Scalable to large numbers of users
  - Supports many topologies and methodologies
  - Very flexible in determining what will and will not sync
  - 1-button sync feature reduces users' ability to introduce errors
  - Easy (compared to other systems) to run a "catch up" sync when there are problems
  - Good conflict resolution algorithm
  - Supports territory realignment
  - Allows single record synchronization (for example, you can synch a single record to quickly transfer an account to another person)
  - Allows lateral synchronization (synchronization between users as well as synchronization with a master database): This adds great flexibility and power
- **Disadvantages of GoldSync**
  - Difficult to set up
  - Users can introduce errors
  - Difficult to diagnose errors (this is common to most synchronization algorithms, not just GoldMine)

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- Transaction logs add significant complexity to resolving certain classes of problems.
- Conflict resolution is not perfect. There is no ability to configure a rule, for example, that a manager's changes will override a sales rep's changes.
- Does not have the concept of "inherited rights," in which a manager can elect to receive any data that his subordinate can receive during sync.
- Allows lateral synchronization (synchronization between users as well as synchronization with a master database): This provides additional opportunities for user errors

How do I detect sync problems?

One of the problems with synchronization is that it is often difficult to detect problems. How do you know that you did not receive a particular transaction or update? You may want to run a monthly report (using a reporting tool, a SQL query, or other method) to compare summary data from all GoldMine systems. If the totals do not balance, this might indicate sync problems.

- Use the GoldMine Statistical Analysis to compare summary data between different GoldMine databases.
- SQL queries, sync logs (if activated), and email alerting tools can help determine if there are potential problems. For example, you can develop a series of SQL queries to let you compare summary data between GoldMine databases.
- Also, Sync Spy (Tools|Sync Spy) can tell you when and by whom records were last modified right down to the FIELD level.
- Observation: Users report missing or inconsistent data. In practice, this is by far the most common way that sync problems are discovered.

About the author

David Lee is a recognized expert in CRM data synchronization, and has configured synchronization for hundreds of GoldMine (and other) CRM solutions.

His company, VMI, has worked in over 1,000 CRM implementations since 1985. Almost half of these use the synchronization feature. VMI has actually hosted synchronization for more than 2,000 users over the last 5 years. These clients synchronize data directly to VMI servers. VMI also supports synchronization for many others through remote access to their own servers. In addition, VMI has used synchronization internally since 1993. This gives them more real-world synchronization experience than any other organization (including FrontRange itself).

Mr. Lee has designed dozens of tools and processes to analyze and correct synchronization problems, including **SyncRx** (whose logic was later incorporated into the GoldMine system itself).

Editorial Note:

This ends Part I of this 3 part series. Be sure to continue on with Part II in the next issue of **The GoldMine Advisor**, and I hope to have an article on Davids new product, **GoldNet**.

Isolating the Problem is Half the Solution

by

Mrs. DJ

CA (**C**omputer **A**ddicts)

There are many symptoms of a computer addict, but these are the most common:

1. You leave a party, and you want to find your partner, you have to look at the back of their head to recognize them.
2. When dinner is at 6:00pm, and you wake up in the dark with your face in the peas, and the other plate hasn't been touched.
3. You are startled at 3:00am because they jump up and yell, "I just figured it out", and run to the computer.
4. When you are going to work, and they haven't gone to bed yet.
5. When you have to tell them you are going out Monday evening, so you will have half a chance of making your Tuesday evening appointment. I think they are clock challenged.
6. They are so engrossed in work, they give the grandchildren $20.00 each to stop pestering them, and then blame you for taking money out of their wallet.
7. They get tears in their eyes when they get a lightning storm.

For those spouses that have seen all these symptoms, there is help. Don't waste 1 more minute. Go to Barnes & Noble and get **--------->**

GoldMine MAPI Made Possible!

by

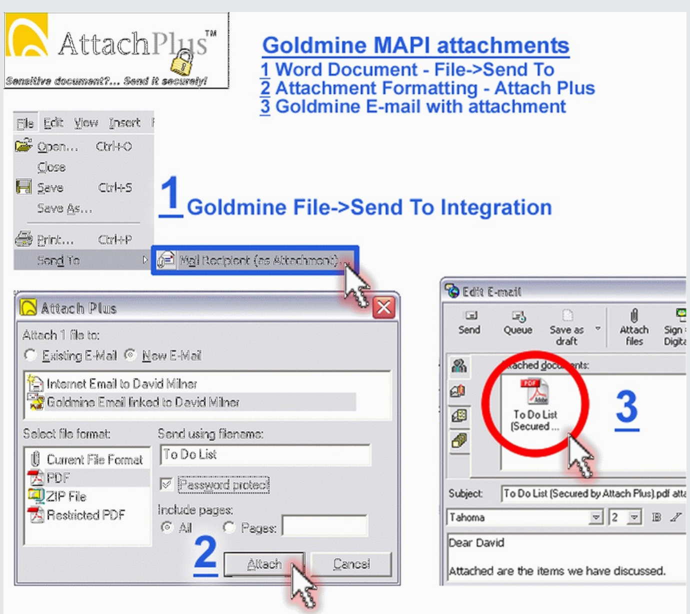
Kevin Basso

Attach Plus enables Goldmine users to simplify the process to create, secure and manage files sent as e-mail attachments.

As a quick snapshot, Attach Plus is an add-on application that allows users to work with Goldmine e-mail attachments in a natural, and highly effective manner. It also works with six different e-mail clients including Outlook, but we'll focus on Goldmine here. Read on for the details!

Ever been frustrated with training users on the workflow of properly attaching documents to Goldmine e-mail messages? Four years ago, Kevin Day, a partner at Trumpet, Inc. and founder of Attach Plus, hit his limit. "I had just finished a 15 minute session reminding a user that they need to copy their attachment to a place on the network before attaching it to a Goldmine e-mail - I realized that I had already trained this particular user three times on the process, and that there had to be a better way."

About that same time, Day's firm began working with a document management system that required a MAPI compatible e-mail application in order to send documents. "That, coupled with the additional frustration of trying to train users to encrypt their e-mail attachments (our clients work with documents that contain social security numbers, account numbers and other personal information) was really the genesis of Attach Plus." Day realized that these three frustrations were actually a unique opportunity to develop an application that could significantly improve his clients' workflow.



Goldmine goes MAPI with Attach Plus

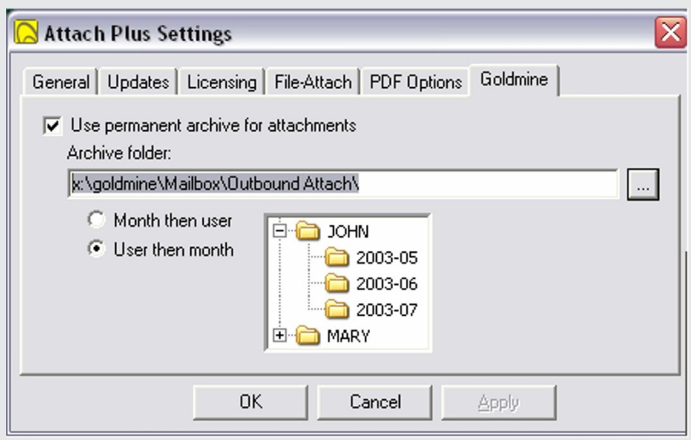
Attach Plus enables Goldmine users to leverage the File->Send To (MAPI) command within Microsoft Office and other commonly used applications, plus adds a number of outstanding security and efficiency features never before offered for Goldmine.

Messaging **A**pplication **P**rogramming **I**nterface (**MAPI**) is a system built into Microsoft Windows and other MAPI compliant applications that enables software applications such as Microsoft Word to communicate with users' default e-mail program. When MAPI is enabled, users can quickly send files from within the software application to their e-mail application using the File->"Send To" feature from the main menu. *See the three-step diagram.*

Attach Plus also enables users to convert files to PDF or ZIP files **and** add password protection to sensitive files they attach – ***anyone can follow this easy-to-use workflow process!***

Attach Plus saves Goldmine outbound e-mail attachments

Attach Plus also provides Goldmine users the proper archiving of outbound e-mail attachments by automatically



creating an outbound e-mail folder from the \goldmine \mailbox directory. Now you can reference your Goldmine "Sent" e-mail attachments without worrying they have been discarded.

Robust password protection for sensitive documents sent via e-mail

Attach Plus gives users the option to password protect files each time they attach files to e-mails. This makes securing sensitive attachments sent via e-mail part of a company wide effort to protect client privacy on the Internet. Attach Plus encrypts and attaches eight times faster than the full version of Adobe Acrobat. Attach Plus secures your Goldmine e-mail attachments using 128-bit encrypted PDF or ZIP files as a secure container.

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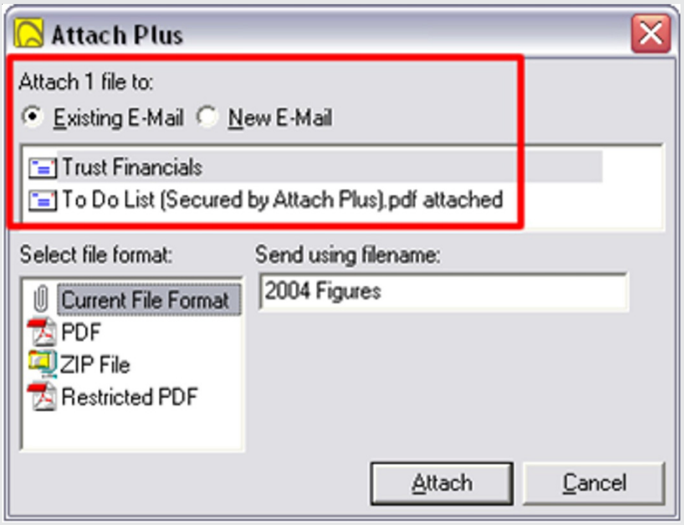

Attach Plus improves Goldmine e-mail workflow

Attach Plus provides options to attach files to any e-mail in progress or a new e-mail you create on the fly.

Create a document, then choose "File >Send To" to attach the document to an e-mail without being required to save the file first.

Attach Plus is a privately held company located in Tempe, AZ. For more information, please visit www.attachplus.com

GoldMine MAPI Made Possible!

Fun with the Lookup.ini

by

DJ Hunt

Someone in the newsgroup asked for a mask for a Social Security Number. I had developed a similar mask many years ago using the Lookup.ini. I thought that I would revisit it here for everyone to use.

Let's start with a user defined field **uSSN**, **C**, **11**, and we will assume that some endusers will enter the Social Security Number properly, while the lazier ones will just enter the number. By the way, a properly formated Social Security Number would look something like this: **025-23-1234**.

Our goal then would be to have the Social Security Number look like the one here, regardless of how the enduser entered it into the field. Just incorporating this into a Lookup.ini, it would look something like this:

```
;Note
;Lines may wrap to fit the column here, however, I have
;highlighted those wrapped lines that must be entered as
;one continuous line in your Lookup.ini.

[AutoUpdate]
   uSSN = uSSN

[uSSN]
   Otherwise = &left(strtran(strtran(Contact2->uSSN, [-],
      []), [ ], []), 3)+[-]+substr(strtran(strtran(Contact2
      ->uSSN, [-], []), [ ], []), 4, 2)+[-]+right(trim(strtran(
      strtran(Contact2->uSSN, [-], []), [ ], [])), 4)

   Overwrite = 1
```

So GoldMine is watching the uSSN field for a change, and, if a change occurs, GoldMine is to process the instruction set for uSSN. The instruction set for uSSN then begins to parse out the Social Security Number not from the value in the field, but from the field value after any dashes and spaces entered into the value have been removed. That is represented by: strtran(strtran(Contact2->uSSN, [-], []), [ ], []).

Another way of handling this could have been to only parse the value if there was no dash in the field, however, that would have expossed us to a possible typo: 025-23 1234 which would have been formatted wrong.

Article Helps Adjust FrontRanges Thinking

by

DJ Hunt

In the last issue I wrote about the new FrontRange policy that was planned to be deployed on August 1st, and how it would have sent a message to the Mom & Pop organizations that FrontRange was abandoning them. Since that article appeared in the August issue and the uproar ensued, FrontRange has decided to reconsider its positioning.

Rumors are just that:

Hence, what I am writing about today may or may not be true when the final mandate is handed down. The current word of mouth is that there will be **no** GoldMine Standard upgrade to GoldMine 7.0, and that only the GoldMine Corporate Edition users will be allowed to upgrade to GoldMine 7 with its new ADO bridge to the tables. The GoldMine Standard Edition users will be permitted to upgrade to GoldMine 6.8 which will continue to use the BDE bridge to the dBase tables.

From the Newsgroups by Jason Wienert:

Further to yesterday. It is our understanding from Paul Petersen that what DJ has stated will be the case.

1. **No** firebird for standard edition.
2. However he indicated that all the other improvements will be included.

Personally, I feel that this is a much more palatable solution for the Mom & Pop organizations, although I believe that FrontRange should now discontinue the numbering system. Possibly, instead of GoldMine 7, they could just use **GoldMine Corporate Edition**, and, instead of GoldMine 6.8, they could just use **GoldMine Standard Edition**. Eventually the two numbering systems will conflict if they continue down this route unabated.

Yes, this does make the maintenance for the developers more difficult. However, in that light, and to ease the maintenance issue, the developers could switch easily to the ADO bridge. After all, one of the reasons for the switch was to allow other backends to be added to GoldMine. dBase via ADO is no different then MSSQL, Firebird, VFP and others. If FrontRange develops a nice generic bridge between the GUI and the Database, it shouldn't matter what the database type is.

All in all, I am glad to see that the consumer has been heard by FrontRange, and that they are trying to come up with a solution that is beneficial to both the consumer and to FrontRange alike.

Intermediate Corner

Report Writing for GoldMine

Part Three: Creating Summary Formulas for Reports

by

Andrea Dominguez

In our last article, we started our report by deciding how it would be sorted. For this example, we will keep our sorting on userid (for the assumption that multiple users can be accessed), and we will create parameters for the dates to be entered at runtime, instead of putting them into the options tab.

So let's open the report layout and create our date range parameter. The fastest way for me is to simply right-click on the report and left-click on **Layout** from the local menu.

Before you enter in the dates, you need to think about if you wanted a range of dates, meaning that the end date is not necessarily today or today will be the end date no matter the start date.

Figure 1

We will be creating a start date and using today and the end date. Place your cursor in the section of Sort Header 1 and right-click. Then select Dialog Fields Table / Create. A window will appear asking for a name of the new dialog (a.k.a. parameter). See Figure 1. When creating a name, you must make it appear to be one word. So if you wanted your dialog to say "**START DATE**" it needs to be entered as **START_DATE**. Then select what type of dialog (parameter) that it needs to be. When you push the **OK** button, it will look like nothing happened.

You must insert the filter to look at the dialog.

To enter the filter, push the button for report filter, icon shown left, and a window will appear. Push the filter button and type your filter to look for the date entered in the dialog. We must tell the report to say that the **ContHist.OnDate** shown, needs to be the **START_DATE** and greater. So for this, we want to select a data field, an operator and the dialog field.

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So the expression entered should look like this:

Conthist->Ondate>=DLG->START_DATE

(*note – you can modify the dialog once you save it to change the prompting text by right clicking on the report and going to dialog / modify.)

Push the **OK** button to save this filter.

Now we are ready to create our formulas to count activities. For summary counts, you do not want to place your formulas in the details section of the report, you want to place them in either the sort header or insert a sort footer and place them in there. If you wanted to have a grand total of all calls made by all users, then insert a report footer and place your calculation field in there. To insert additional sections, place your cursor anywhere on your report and right-click to display the local menu. A menu will appear and then go to **Insert** | **Section**. The available items for insertion will vary depending on how you set up your sorting. Sometimes there will be many choices, and sometimes only a few choices. Only a **Sort 1 Footer** will be necessary for this type of report.

To create a counting formula is fairly simple. We will be using ContHist.SRecType field to count activities. The reason for this is that the SRecType is only 1 character. There is no mistaking the activity.

Here is a breakdown of activities as contained in ContHist.SRecType:

A = **A**ppointment
C = **C**all (outgoing, incoming, plain 'ol call)
O = **O**ther Action
M = E**m**ail Sent
L = **L**etter (merge form)
T = Nex**t** Action
D = To-**d**o

Let's create a formula field. Remember that when you create a name for the field, it must be technically one word just like the dialog.

Figure 2

Then add:

.if.(conthist->srectype="A").then.1.else.0

Basically, what this means is that if the srectype is an "A" then count it as value of 1, if it is anything else, then count it as zero. If you have not guessed yet, for phone calls, you would change the "A" to "C" and so on.

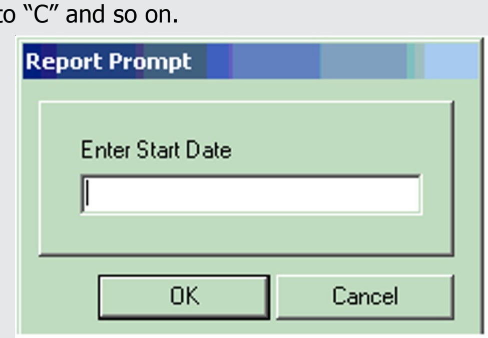


Figure 3

When you run your report, you will get prompted to enter your date:

Remember to use switches when entering the date (meaning '/'. So September 1, 2005 would be entered 9/1/2005 or 09/01/2005)

And, if you didn't pay close attention to the article, you would be wondering why your test report says **START_DATE** and mine says '**Enter Start Date**'. To change the prompting text, place your cursor on the report in layout and go to **Dialog** | **Modify**. From there you can select your dialog (parameter) and change the text.

This is how my example turned out:

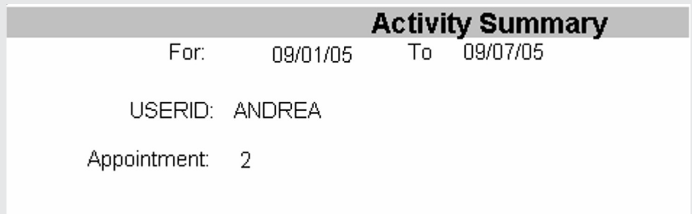


Figure 4

I added labels for **USERID**, **Appointment**, **For**, **To**, and changed the Page Header label by double clicking on it. To display the start and end date, I inserted the Dialog START_DATE and just copied the print date in the lower left corner and pasted it where I wanted it and then changed the font by double clicking on it.

The Toolbar from the report designer, items listed left to right:


Figure 5

INSERT FIELD: Insert field from database. Macros will have combos of items, such as full address.
LABEL: Text labels that can be altered by double clicking on them after inserted into the report. (USERID, Appointment, For, To)
NEW SECTION: Insert a section (Sort1, Sort2, Footers)
INSERT PICTURE: Means to insert a picture – Bitmap only.
INSERT LINE: Draw a line on the report
INSERT FORMULA: Create calculation formulas such as counts.
SYSTEM FIELD: Insert Date, Time, page breaks
DIALOG FIELD: Insert a Dialog field into the report to display (such as START_DATE)

One last thing to keep in mind with creating reports that run from the GoldMine Report menu is placement. The reason for this is how the different tables are accessed. A report that looks at history, such as this one should be placed in the group **Contact Reports**. Also, keep in mind as mentioned in part 1 of this article, have some patience when the report runs. Reports created in this writer read every single record before it starts to print and hardware environment plays a big part on speed.

With that said, happy reporting!

Editorial Note:

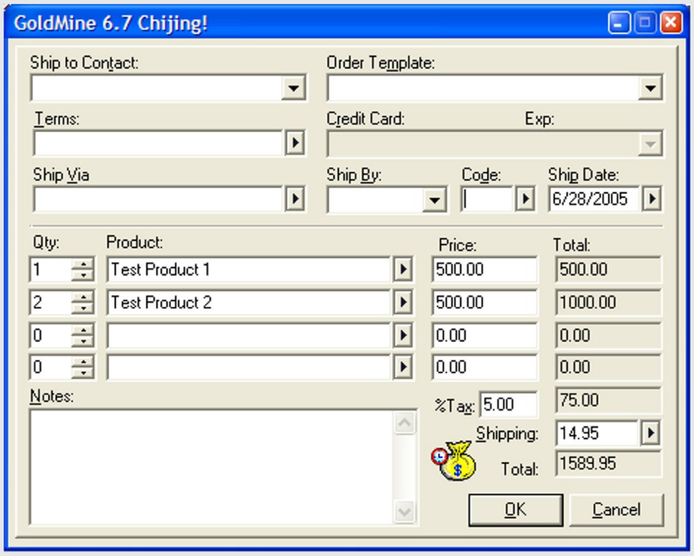
Andrea is probably best known for her **Crystal Reports** development, however, she has worked many years with the **GoldMine Reporting Tools**.

Tips, Tricks & Things

Where am I?

by

Daniel K. Martin



This dialog form exists within GoldMine today, but how can it be displayed/used?

Daniel asked this question in our August issue, and although we had many people who wanted to know the answer before the October issue was release, none knew the answer to the question.

I have to admit that I did release the information to many users who just couldn't wait. One of them being Stewart Spratt, who, when told the answer, developed a little application that could be installed on each workstation, and run from the Lookup.ini.

So just what is the answer? GoldMine had developed this Sales Order dialog form way back when, but never gave the GoldMine user the ability to change the Cal.RecType to "**I**" which exposes this dialog form. If you create a Forecast Sale and save it. Then change the RecType from "**S**" to "**I**", and then edit the activity, this is the dialog form that will be displayed. In fact, under the **Pending** tab the Activity will have changed from **Sale** to **Order**.

Of course we all know that this can't be done within the GoldMine environment, and not everyone has, or knows how to use GoldBox, so Stewart has taken it upon himself to write an application to do it for you. You may download his application from:

http://www.dj-hunt.com/Download.htm

The Login and Password are case sensitive:

Login: **Sales**
Password: **Order**

Click on the Hummingbirds after you log in. You should install this on each workstation that will be using the application. You also want to install the application in a folder under GoldMine on the Server.

Then, to launch the application automatically, you would want to modify your Lookup.ini similar to this:

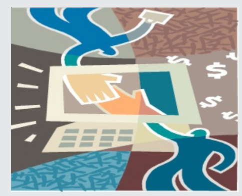
```
[ONNEWRUN]
   Cal-S = Y:\GoldMine\Sales Order\StoI.exe
   DisableFromAP = 1
```

Where **Cal-S =** would be the fully qualified path to **StoI.exe** on your Server.

Let's test it. Start GoldMine, and create a macro to create a new **Forecasted Sale...**, and close it immediately. If your Lookup.ini is working correctly, Stewarts application should ask you: "**Would you like to convert this Sale into and Order?**", and all you have to do is click "**Yes**" to accomplish this.

Now edit the new activity "**Order**". **Chijing!**

Pitfalls in Stacking Multiple Values in a Single Field



by

David Lee

Many GoldMine designers have discovered that they can "stack" multiple values in a field by adding a semi-colon (";") at the end of the text in the lookup window. This changes the logic so that the value is added to the text already in the field instead of replacing the text in the field. (for purists, it adds a comma and space to existing text, then the new text).

Here is a pitfall to avoid. I have seen it so often that I know it is a common mistake:

Do not stack data into indexed fields such as the key1 through key5 fields (lower right quadrant in the top half of the contact screen).

These fields are very valuable because you can quickly find data through an indexed search. If you stack multiple values, then you can no longer depend on an indexed search, but must instead use "contains" logic. This is a slow search and defeats the value of the index.

Instead, use the user defined fields under the Fields tab for stacking multiple values. Stay tuned next time for some tips on how to take advantage of any key fields that you freed up.

Tips, Tricks & Things

Taskbar Icon to Open an E-mail Populated

by

Kevin Day

I figured out a way to add buttons on the taskbar that will open a new email message with content filled in based on a template. Quite handy if you do a lot of the same two or 3 emails.

Here are the keystrokes for recording the macro:

Alt - **S** - **G** (Open new GM email)
Alt+**J** (takes you to the subject line)
Shift+**F4** (causes the template list to drop down)
Type **Spacebar Public: Spacebar** (then enough of your template name to be unique)
Hit **Down Arrow**
Hit **Enter**
Hit **Ctrl**+**Shift**+**End** (to end the macro recording)

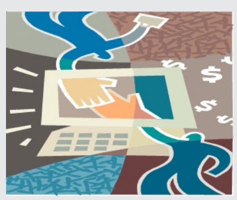
You can then add the resultant macro to a toolbar or the taskbar. The only draw-back to this is that the subject line is fully selected at the end of the macro (b/c GM is silly and actually records and plays back the Ctrl+Shift+End sequence). You could technically tab to get to the message body, but the entire body will get selected by the Ctrl+Shift+End, so...

Editorial Note:

Although I don't often recommend this, to avoid the **Ctrl+Shift+End** pitfall, click the **Stop** macro recording button with the mouse.

As a final FYI, I have successfully edited the macro files with a hex editor and removed the Ctrl+Shift+End keystroke. If you have a macro that's got to end cleanly (without that key combo getting issued), you can do it.

Comment



by

Anonymous

As you may imagine, I'm quite concerned about what's going on at FrontRange right now - have you started evaluating alternative CRM providers? For the money FrontRange is charging for their Corporate Edition, the Microsoft CRM is starting to look like a viable option... I can't stand 'em, but I'll be damned if I'm going to pay a company money for the privelege of integrating with them.

Editorial Note:

Unfortunately a lot of developers agree with this. Why should a developer be required to pay to enhance the GoldMine **product.**

The Drill Down for Filters

by

Gene Marks

What is the Drill Down button used for when creating filters?

The Drill Down button is used to combine filters and potentially save the Drill Down results as new filters. To use the Drill Down feature:

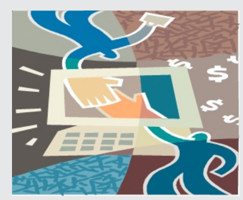
Open **Lookup** > **Filters**
Click **New** and type **Key4 Filter**
Click the **Build** tab
Select **Key4** is **equal to** and choose a value
Click **Insert Condition** and click **OK** to save
Click **New** and type **Zip Filter**
Click the **Build** tab
Select **Zip** is **equal to** and choose a value
Click **Insert Condition** and click **OK** to save

To invoke the Drill Down:

Highlight the **Key4** filter and click the **Preview** tab
Then click the **Search All** button
Go back to the **Filters** tab
Highlight the **Zip** filter and click the **Preview** tab
Then click the **Drill Down** button

The filter results will be combined to show **Key4** contacts that also meet the **Zip** filter criteria. This will create a combined expression that can be saved as a new filter (e.g. Key4/Zip filter) by clicking the **Save** button in the **Preview** tab.

Selecting All Contacts With Pending Calls



by

Gene Marks

How would I select all contacts with pending calls to be added to a group?

Right-click in the **Groups** window
Select **New...**
Give the Group a name such as **Pending Calls**
Next screen, select **Scheduled Calendar Activities**
Click **Next >** and select the **User**, **From/To Date** and **Activity Type** of **Call Backs**
Click **Next >** and select a **Sort field** if desired, leave the **Reference** field as the default
Click **Next >** and the **Finish**

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Contributors Needed

The GoldMine Advisor cannot exist as a one person show. I do not mind publishing the newsletter for the GoldMine community, but I must have articles to publish. Be you an enduser with a tip, or a 3rd party add-on developer who would like to expose their product to the GoldMine community, or a GoldMine dealer with a great article or story, please send in your articles today for the December issue of **The GoldMine Advisor**.

Let's try to keep this newsletter going strong, and this can only be done with your help. Send your articles, stories and tips to:

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