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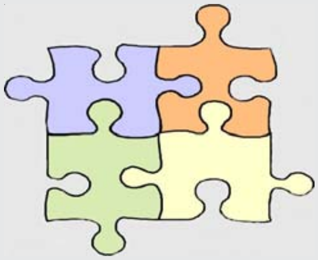
Ease of Use is Not the Answer



Part 1: If not Ease of Use, then what?

by

David Lee

Customer Relationship Management (CRM) systems too often fail to meet their objectives. They are unused, or under-used, and are not well loved by the sales and support staffs.

We, in the industry, have decided that the problem is that CRM systems are too hard to use. If only they were easier, then they would be well-used, and much loved.

So we set about making our systems easier to use.

Microsoft boasts that the new Microsoft CRM 3.1 system requires half the mouse clicks to navigate compared to the old 1.2 version. Salesforce.com waxes poetic about the small number of clicks needed to navigate its system. And even the venerable GoldMine system extols its ability to compress complex series of clicks into one-click macros.

There is no doubt about it: CRM systems are getting easier to use. But implementations still fail at an alarming rate. What's going on?

Maybe the CRM solutions are aiming at the wrong target.

Maybe it doesn't matter that much whether it takes one click or two clicks to do a task. Maybe ease of use is not the holy grail of CRM.

Imagine a CRM system where half the screen is occupied with 500 tiny icons. Each icon will perform a complex, and important CRM task with a single click. Data fields would be automatically updated from other systems. Automated business process engines would launch whole series of events whenever pre-defined conditions were detected.

It would be the pinnacle of ease of use. It would also be a failure.

Nobody would ever remember what all of those icons meant or where the one that they needed was located. People would not understand why fields got updated, and would stop trusting their data. People would avoid touching the system for fear of launching some mysterious process. They would go to plan B: A pen, and a day timer.

So what went wrong? The systems were easy to use. But they were hard to learn.

Ease of learning, and ease of understanding are far more important than ease of use. Sure, we should streamline systems where we can. But it is far more important that people understand what is going on, and what they should do.

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 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 by their author. 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.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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We probably should have figured this out a long, long time ago.

The typical CRM implementation plan includes an initial training phase. Everyone is trained, and sent forth to conquer the world (or at least their territory).

If they are lucky, they received good training with lots of hands-on exercises. If they are very lucky, they even get good technical support when things go wrong. And if they are draw-to-an-inside-straight lucky they might even get a well-designed CRM system that actually fits their business processes.

Even then, it is not enough.

In the typical sales force it takes 10 hires to get one or two "keepers." That means there is always new staff coming on board. So there are always people at every stage of the learning curve. When the new rep comes on board, the formal training phase is done. He is pretty much on his own trying to learn the system[1].

As staff turns over, more and more people are at various stages of their learning curve, and those who attended formal training represent a decreasing percentage of the user population. Some people stop using the system (or never really start), and others use it less than 100% of the time. Without full participation, much of the value of the system is lost. You cannot rely on finding all the information you need in the system. Reporting is less accurate so managers stop using the system as well. A downward spiral begins.

This is not the Indy 500. It is LeMans. Acceleration (learning time) is much more important than top speed (ease of use). To win the CRM race, we need to shift our design focus from ease of use to ease of learning, and ease of understanding.

Many CRM vendors have started to focus on making their systems more intuitive, and easy to learn. They should be commended. But the focus on ease of use has diluted their efforts.

Sage CRM, and Microsoft CRM have embedded their systems inside of Outlook. Since many people are already familiar with Outlook, they feel that this makes the systems more intuitive. There is some truth to this. But once you click on the CRM systems, your Outlook knowledge does not help you very much. The main advantage is that you cannot send an email without at least seeing the CRM system so it is at least more ubiquitous.

[1] Some vendors, such as Salesforce.com and Microsoft CRM, have online training for free or at a reasonable cost. This is a good step, but it does not solve the problem. The training is for the "generic" system, and not for the system as modified and configured for the individual firm.

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To really address the issue of ease of learning, we must first ask "easy for whom?" There are distinct constituencies within the CRM user community.

These include,

- Outside sales
- Inside sales
- Customer support
- Marketing
- "Power users"
- Sales managers
- Executive management
- System administrators
- Receptionist and support staff
- IT and technical support
- Value Added Reseller or Outside CRM consultant

Ease of learning means different things to each group. The relative importance of ease of learning versus ease of use, versus features, and power is different for each. We must define ease of learning for each of these constituencies, and design our systems accordingly. **One size does not fit all.**

Three Dog Night sang "it's easy to be hard." But in CRM, it's hard to be easy.

Editorial Note:

Part II should be published in the December issue of **The GoldMine Advisor**. I look forward to reading that article, and possibly FrontRange will be waiting for it as well. With the interface changes due in version 8 of GoldMine, this article could very well be a guiding light to FrontRange.

Thank you again David for your continuing support of **GoldMine**, and the readers of **The GoldMine Advisor**.

Very Smart Lookups

by

Bob Taylor

It has probably occurred to you... wouldn't it be great if GoldMine's Lookup Lists were "smarter"? Like:

- If they could be **shared**, instead of having to be duplicated?
- If they could be **conditional**, based on Record Typing. So the Lookup for say, UserDef01, could be one Lookup List for one Record Type, but a completely different Lookup List for a different Record Type?

You can't get those things from GoldMine, but they've been part of **GoldBox Views** for years. This article is about a newer—and ***really*** smart—Lookup List offering that was recently added to GoldBox Views: **OTF (On-the-Fly) Lookup Lists**. Here's an example of how they work, using Microsoft's Northwind sample database to illustrate.

Figure 1

Figure 1 is part of a basic GoldBox View that could be used as an aid when phoning a Group of customers who made a recent purchase. For illustration, we'll assume that your sales information is stored in an outside, ODBC-accessible (Northwind) database.

Common values exist between a field in GoldMine, and the CustomerID field in the Northwind database. That link is all that we need to **query Northwind** for sales data related to the currently-active GM Contact record, using GoldBox's ability to **acquire the field values** of the current GM record.

What's so remarkable about an OTF Lookup is this: **it's capable of running such queries, and using the results to populate itself!**

The next two figures are Lookup Lists that were generated exactly that way, just by clicking on the button for the Lookup.

Figure 2

The above list is comprised of **all the products that have ever been purchased by the currently-active GoldMine Contact** (the data drawn directly from the Northwind database). The List in Figure 3 contains all the products in Northwind that have **NEVER** been purchased by the same Contact.

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Figure 3

You would use these Lists as "smart prompts" for conversation, of course. But because these are Lookup Lists, making a selection from either one can also feed into an automation regime, to send product-specific letters or E-mails. Add **Date**, and **Time** fields to the View, and you could also use the View to schedule an **Appointment** for the appropriate GM User (printing a letter for that, too).

And that's not all:

- OTF Lookups can run **multiple** queries, so you can use their Order By clauses to determine Ascending or Descending sort order for **each** query.
- You can include comments; drop in static lists; insert field data from GoldMine, including the Tab records.
- List values can result from field concatenation in the query, so a List like the one below (Accountnos) is possible. It enables creation of Groups, and Referrals based on Lookup List selection. (This screenshot is from an example that is not included in this article).

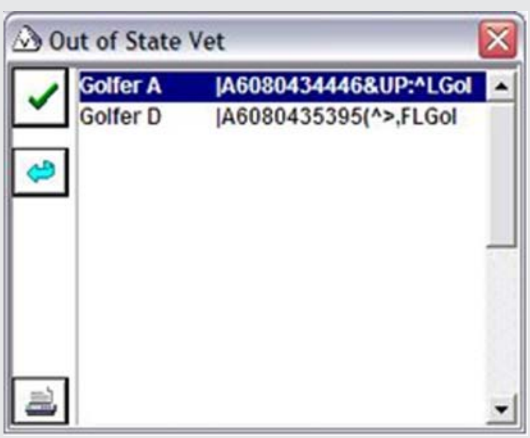

Figure 4

- Because these Lookups can be used as mini-reports, there's a Print button for the Lookup List.

OTF Lookups are **item 10** of "Options for Lookup Coding" in GoldBox's Help file. If you haven't checked out the other nine options, maybe you should!

If you'd like a paper explaining in detail how to produce the View and Lookups in this article, drop me an E-mail: BobTaylor279@bellsouth.net, Subject: "**OTF Lookups**".

Getting Employee "Buy In" means make or break for your GoldMine project

by

Ian Mudie

Editorial Note:

I thought that this article would compliment David Lees **Ease of Use is Not the Answer** article from page 1 very well.

Ok you have seen the value of GoldMine, however, there is still an underlying fear that the team will not accept using GoldMine fully to get the return on investment, and increase outcomes that you have discussed.

The temptation is always there to simply get GoldMine in, and going. So often we see presentations to management, and then a signoff. Great for the GoldMines Partners business, but not good for the client. The client's team have no idea what is happening, and an instant suspicion, and mistrust is created.

We have all heard the stats that over 84% of prospects fail to get followed up correctly etc.The big news is that this will still occur if people don't use Goldmine correctly.

So what are some of the common steps that you can take.

1. Run an introduction workshop – give the team time to input their ideas.
2. Find out what the team want, and how they can get there.
3. Get a small Focus Group to keep meeting, and asking questions.
4. Set some honest, and realistic expectations in place.
5. Make sure to prioritise for some quick wins, and recognition for the team.
6. Ensure the message is 'This is to make your day easier, and to not big brother watching over you.".

If you don't have good business processes. and measurable KPI.'s all you do is make the same mistakes faster.

Outcome you must be able to guarantee to the team.

1. The CRM will be very easy to use.
2. It will save your time

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3. Management is 100% committed to helping you.

4. If you are away anyone else could take over based on the information that you have entered.

Changing Behaviour

Change Management can be one of the biggest challenges, and is not for the faint hearted. The person running the induction needs to remain in control at all times. The CRM introduction is going to have a significant impact on the team, in terms of business process, methodology, comfort zone, and free time.

The Psychology of Change is up to 80% of the project with software and Technical 20%

Every single person has different personality, different learning style, and different level of current knowledge, skill sets, and a different level of acceptance an openness to change. The culture, and commitment of the organisation will also affect the outcomes (I can recall taking a CEO to the mirror, and indicating to him I think we have found the problem).

Change Management is not for the faint hearted get a professional!

Change management is not for the faint hearted, nor can it be done quickly. You need to understand the culture, and build team trust before they will open up to you. (Kick the boss out, and find out the truth of what is really happening in the culture, and the organisation).

Remember, *Team members will generally use every excuse not to change*. It is particularly so if they are being disempowered through efficiencies. If there is a sign of weakness in commitment by management the old habits will quickly return, and the project **will fail**.

You must have excellent Business and Sales Processes.

Finally the successful CRM project must have foundation of excellent business processes. If there is no structure, process or KPI's to be measured then all you will be able to do is the same non productive work faster.

If your team couldn't sell before CRM, don't expect it to change now.

One of the most forgotten aspects is that that if your team doesn't have a great sales process to follow, or simply can't sell, then Goldmine will not change this other than highlighting the activity, and lack of performance. You might like to check on a few of these in your company.

Gaining Commitment - 62% of salespeople fail to earn the right to ask for a commitment.

Questioning Skills - 86% of salespeople ask the wrong questions and miss opportunities.

Sales Process - 82% of salespeople fail to differentiate themselves from competitors.

Sales Call Planning - 99% of salespeople do not set the right objective for sales calls.

Presentation Skills - 95% of salespeople talk too much and listen too little.

Editorial Note:

Ian Mudie from IJM & Associates Pty Ltd is based in Sydney Australia. Ian has been consulting globally to businesses in CRM, Business Sales Processes, and Change Management for over 26 years. He provides support for business owners, and managers to ensure the investment made in Goldmine, and other CRMs. Ian provides the promised return on investment.

Document Management for GoldMine (Part I)

by

David Brydson

There have been many discussions, and viewpoints discussed over the years about how to do document management inside of GoldMine. Some of these conversations have led to good advice for users, however, most have not.

In an effort to shed some light on the topic of Best Practices, we have come across in our many years as a GoldMine Solution Provider, I have created this document. Many clients have paid us lots of money to clean up their management (or lack of) of Linked Documents because they either didn't know, or would use the following information.

1) GoldMine can manage linked documents for you, if you plan, and use a good strategy.

2) You need to manage your documents or they will consume large amounts of disk space, and time.

3) You need a strategy!

With that said, there are some basic factors, and strategies for Document Management that you need to know and use. There are several key factors that you will need to consider before creating a storage plan, and using that plan. They are:

A. Where are your company's documents currently stored in your system or, if a new system is being setup, where would you like them stored?

B. How are documents to be named: Existing and Future? Is there a consistent method for this in place or does one need to be created?

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C. How do your users manage them in the GoldMine interfaces?

D. What training does your user need to use the created plan?

Now that we have the basics to begin planning the strategy, let's break this down to each component, and address them individually.

Strategy

In order to begin crafting a good document management system, you will need to decide where your documents are going to be stored. This includes the physical location, and the folders structure of that location. It also includes the various portions of GoldMine, and the documents used in those portions. Each of these will require some thought, and certainly planning.

The portions I refer to are:

- Templates
- Info Center
- Email Attachments
- Merged Forms, and Communications

We'll start with the easiest one Templates.

Templates are created in Word or Excel, and contain fields from GM in them for personalized communication with your contacts. We are not going to discuss the creation of these forms as there are many documents out already that provide this information. We are only focusing on the storage of these once created.

The best place to store these Templates is in the "Templates" folder under the root path of GoldMine. As a matter of fact, if you have remote users that synchronize, and the Templates are listed in the "Document Management Center" of GoldMine; the sync process will place them in this folder by default. You can't control or modify this, so just use the default. It will do this even if you have them stored elsewhere.

You can, however, store them in any folder under the directory, but this structure needs to be **exactly** the same on every remote that synchronizes to the server. This can become an administrative nightmare if you change or add new ones frequently.

Best Practice: Create the same folder names that are in your Document Management Center, inside of GoldMine, in the "Templates" folder. This means that if you have a structure like: Prospecting, Proposals, Sales Letters, Customer Service, Accounting, etc...; then create the same folder names to store the actual documents in. This makes it much easier to find, and manage them for both the Administrator, and the users.

NOTE: At no time should any "Template" used in GoldMine, be stored on any individual workstation. They should always be stored on the server. This applies, even in single user situations. If security of the document is an issue, then you can use the permissions of the Network Operating System to control access, and use. A good practice here is to use groups of users (from the OS) to manage access as this makes it easier to control.

Info Center

GoldMine allows for the attachment of files to various sections in the Info Center. Any file, which exists in electronic format, can be attached to any listing or record in the Info Center. Many of our clients use this area of GoldMine to place Product Literature, Employee Manuals, Policies, and Procedures, etc. We recommend that you use a similar structure for the storage of these files as that outlined in the Templates section.

That being:

1) Create a folder under the root of GoldMine, called "Info Center".

2) Under this would be a folder for each "Book" in the Info Center.

3) Create sub-folders under each book for the various "Chapters" it contains

4) Then, your linked attachments can be stored under them.

The above strategy makes them easy to manage, and maintain. It also makes them accessible to all users of the network; whether they are GoldMine users or not.

NOTE: The same issues with Remote users, and Synchronization apply here as it did in the Templates section. If you want an excellent tool to assist with keeping the consistent folder structures used in GoldMine; we use, and recommend SyncFoldersPlus from Solica Consulting. (http://www.ladara.com/index.php?pr=syncfoldersplus for more details)

Email Attachments

While the first two sections are pretty straight forward; this section is the number two problem for managing the Document of GoldMine. Not as big as the merge forms, but almost.

First Some Basic Strategies

By default, GoldMine, places all inbound attachments in the "Mailbox Attachments" folder under the GoldMine root directory. The more current copies of GoldMine include the ability to add additional folders under attachments

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sorted by “Receiving User” or by “Received Year/Month” (look under **Preferences** for the individual user, then under **Internet** then under **Retrieval**).

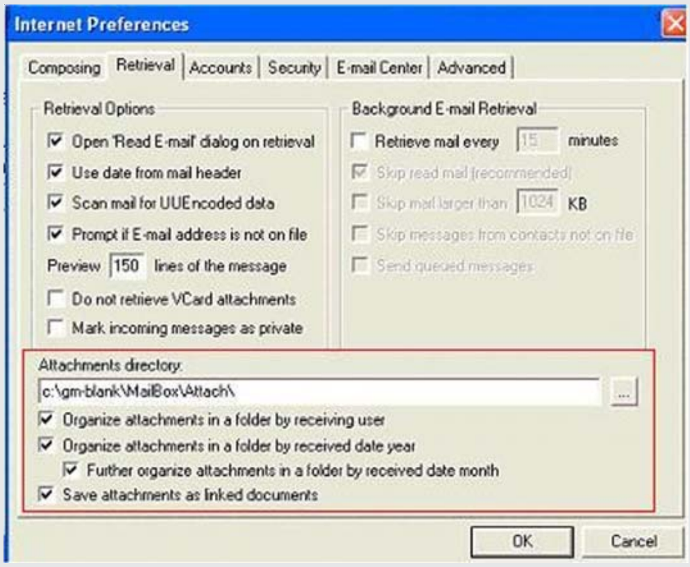

Figure 1

We recommend all of these be used, as it places a “User Name” folder under the attachments folder, and then a “year” folder, and finally a “month” (01,02,03, etc) folder. This makes it very easy to see what is within, and how old it is.

Editorial Note:

When synchronization is involved, and depending on your users **Preference** settings, it is important that the Montly folders only be create in one location, either **Remote-side** or **Server-side**. To create them on both sides will cause duplicate folders to appear in the E-mail Center after the user has synchronized at the beginning of each month.

At a minimum, we recommend **User Name** folders. This way you can use the network operation system permissions to control access, by user or group, and still maintain a standardized installation in GoldMine. If you have an older or more mature system, you will need to create this structure manually, and use a tool like LinkMagic to correct the current links information in GoldMine, see www.LinkMagic.net for more details.

This should not be the final resting place for all attachments, but is a good default standard. We will address the final resting place issue later in the document. (refer to: Email with Attachments)

Merge Forms

This is the number one issue we come across with users of GoldMine. The issues are many, because a strategy for management was not thought though or implemented. If this is your system, don’t worry, there are tools to help correct this, but more on those in a moment.

Figure 2

The first decision that needs to be addressed in any good Document Management solution is where, and how the documents are stored. First the where. We recommend that you create a folder under the GoldMine root directory called “Docs”. We recommend this because it is already accessible to everyone, and is on the shared network drive. It does not have to be under the GoldMine directory, but it does need to be accessible by everyone so it can be used. We use this setup because a daily backup of the data is easy to accomplish from a single location.

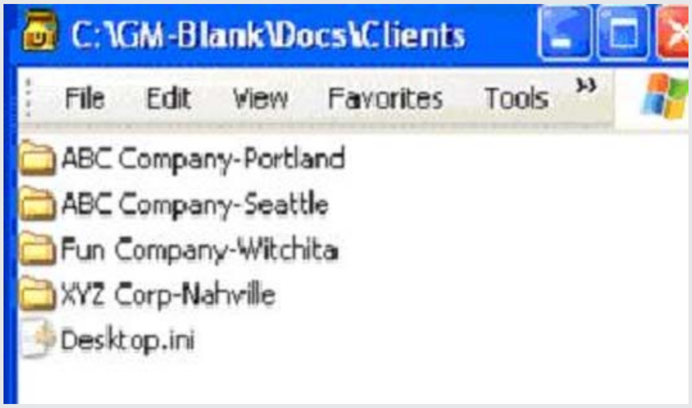

Figure 3

Next you need to decide on a storage structure for the documents. The decision is either a **Company/Contact** centric style or a **Type** style for storage. Let me explain the differences:

Company / Contact Centric

In a company or contact style, all documents related to that company or contact would be stored under the folder for them. So, all documents for **ABC Supply** would be under the **ABC Supply** folder; those for **XYZ Manufacturing** would be under **XYZ Manufacturing** folder. Even if all your contacts in GoldMine are individual, the documents can be stored in a combined folder for that company, and still maintain links to the individual contact records.

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PRO's

The benefit to this structure is that all documents for a given company or contact record are in one location. You can have any number of sub-folders under the main one to organize the information there. You may have many records for a company. I know of 1, ABC Supply company, that has 280 locations in 45 states, so we added some additional information to the folder name. You can use ABC Supply-

(City Name) or"ABC-(zip code) to provide some distinction in the folders.

You can use the LinkMagic tool to create these folders for you programmatically, based on GoldMine fields and/or only for certain records based on filtered criteria you specify. Then, you can move the files to these folders, and recreate the links in GoldMine. Refer to www.LinkMagic.net for more details.

CON's

You will have as many folders as you have contacts (or there about). You can minimize this by only creating folders for contacts that actually have linked documents. But this means you or your users will be creating more folders over time.

Editorial Note:

It is precisely for this reason, as well as reducing the requirement on 3rd party applications, that we recommend that all documents be contained in a single folder under the GoldMine folder called **Docs**. Now you can use GoldMine as your Documnet Management tool, and do not have to worry about documents synchronizing properly as long as the Remote-side has a matching **Docs** folder.

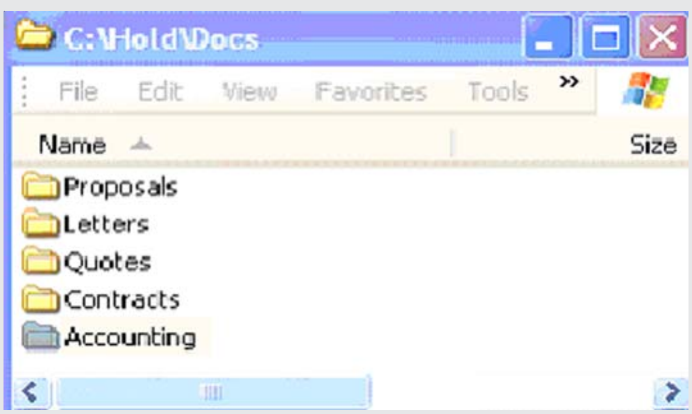

Figure 4

NOTE: If you have remote users, then this structure needs to be exactly the same on the remote system (except for the drive letter). This is the same issue with remote users, and synchronization as in the Templates section. If you want an excellent tool to assist with keeping the consistent folder structures used in GoldMine, we use, and recommend **SyncFoldersPlus** from Solica Consulting. (http://www.ladara.com/index.php?pr=syncfoldersplus)

Folder by Type

This is a method by which the documents are stored by the type. They are: Proposals, Quotes, Contracts, Follow up, etc. This method has the advantage of all documents of similar type are stored in a central place. You would still need to create a central place on a network accessible drive to create to folders. We still recommend **Docs** under the GoldMine root directory, but it can be anywhere everyone can get to it.

PRO's

- All similar types of documents are together in one folder.
- You know where to find a particular type of file.

CON's

- Much harder to manage as the naming convention has to be strictly enforced. (Remember there is an 80 character limit on the total length of the path/file name)
- Harder to find a document for a particular contact.
- All users must know, and use the same naming convention.

Some have suggested using a hybrid of these two styles, where you have a Company/Contact folder structure, and then a type structure under each of these folders. That is acceptable in some situations, but I believe the style in option 1 blended with good naming conventions is a better solution.

Mainly because the hybrid solution quickly runs into the 80 character limit issue, and then the link paths show up a blank in the links tab, causing users to think they are invalid.

The challenge with using the Hybrid method is that the average user is not going to create the same structure (if it does not already exist) when they do a one off merge. You can't be assured of consistency in that creation method unless you create the structure for every contact record in advance, and keep doing this as new records are added to the database. This results in many folders that will be empty, as not every contact will have linked documents.

To get a tool that can create the structures for you programmatically, check out www.LinkMagic.net. Link Magic v3.75 can create folders based on a selection of fields in GoldMine, and create those folder based on a filtered set of contacts or all contacts, and then move existing linked documents into that newly created folder(s).

Naming Convention

The next part of creating a good strategy is to develop a solid naming convention for your linked documents. A good

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naming convention will tell you what the document is, who it is for, who created it, and when.

Company Centric:

The convention you create will be dictated by the folder structure style you chose in the last section. If you chose to be contact/company centric then your naming convention could look something like this:

Template: (Type_User_Subject_Date.Doc)
Example: (IN_41521_AD_08152006.doc)

Samples: Type of Document

\PR = Proposal
QT = Quote
IN = Invoice
AR = Account Receivable
AP = Account Payable
PO = Purchase Order
PJ = Project Specifications
GW = Good Will / General Communication

Samples: User Initials or Department

DB = Dave Brydson
SB = Sylvia Brown
IH = Ivan Hormann
DR = Don Rogers
AD = Accounting Department
SD = Sales Department
TS = Tech Support
CS = Customer Service

Samples: Date format

MMDDYY	MMYY	MMDDYYYY
020106	0206	02012006

Samples: Subjects

01456 = Proposal #
01734 = Quote #
12345 = Invoice #
Follow up to Appointment
1st Collection Letter
Request for Referrals

You get the idea. You can, of course, use these in any order you want, but it should be the order that is most important to you, and your company. Most clients want the type of Document first as this provides for all related types (Quotes for example) to be listed together. Some want the user name first so that users can find their own documents easily.

It does not matter the order, it only matters that they are consistently applied, and utilized by all users, and that all documents are stored in an accessible area to all users.

Document Type Centric:

This is another method for naming documents. In this model, the documents are stored in a common folder based on the type of document it is. This convention would list all records of the same contact together, but has some limitations if you work with contacts or companies that have similar names. (ie...ABC Supply, ABC Sprinklers, Ruber, Jones & Smith, Robert J. Smith, etc.)

A template for this naming convention would look like, AAAA_BBB_CCC_1-3.doc

Where:

A = First 4 letters of the company name or contact.
B = 3 character code for the proposal, quote, project, etc.
C = 3 character code for the user or department name.
1-3 = the sequential number the revision or document as they are created.

Again, it does not matter the order method of naming your documents, only that it is consistently applied. You should use an order that provides the sorting method you or your company desires the documents to be sorted by when listed in the folders.

This is a more difficult style to train users with, because the naming convention has to be remembered and applied. There will come a time when this style will not work for some contacts and this forces the user to make some choices that will not fit in the "Normal" method.

Editorial Note:

If you don't want to wait until the next issue of **The GoldMine Advisor** to read the rest of this article, you may request the full article from David. See Davids bCard on the last page of this document for contact information.

Tips, Tricks & Things

Wild Card Searching

by

Pam Mannell

Did you know you can use the % character as a wild card when searching for records in the GoldMine CE (SQL) Search Center?

For example, searching for Company **%Inter** would find any company name with International, Internet, etcetera as part of the name.

For full details look on our **Frequently Asked Questions** page http://www.rdassociates.co.uk/FAQ.htm

Tips, Tricks & Things

Display Activity Code in the History Tab

by

Pam Mannell

By default, the History tab shows the **Result Code** of an activity, but it does not show the **Activity code**. If you want to display the Activity Code as well, you need to add the following line to the UserID.ini files. For example, I log in as PAM so I need to add this to the PAM.ini file. It does mean that this change has to be made for each user that requires it.

NOTE: Before making any changes to ini files make sure you have a backup of the files.

[ActvObj] *(this section will probably already exist)*
ShowHistActvCode=1 *(add this line)*

Three Quick Steps to Enhance Data Integrity

by

John Dave Kassar

Reprint:
Real Business Solution from a FrontRange Partner

The integrity of your data is critical to your organization's sales, marketing, customer relations, and continuous improvement. With clean data, you avoid duplicate mailings, confusion over a customer's status, and inaccurate reporting.

"The value of your database is only as good as the data in it," Kassar says. "If you ever want to run effective reports on your marketing, sales, and management, data integrity is imperative."

Having clean data means minimizing duplicate records for the same contact, and ensuring that every record has consistent, relevant information to support your efforts. Here are a few steps to help enhance the quality of your database.

Mandatory fields

First determine which fields you want filled-in on every contact record. Of course, you'll include name, address, phone, etc. But what other fields are valuable for your efforts? The origin of a lead? The stage of the sales cycle a contact is in? Industry?

To collect this information on every record, you have to make those fields mandatory for users.

Here's how:

Log in as an administrator

Hover your mouse over the field you wish to be mandatory

Right-click on the field to choose Properties

Click on the Security tab

Choose the option for Require Data Entry, and hit OK

You'll notice the field now has a red box around it. Users cannot create a contact record without filling in this information, ensuring all data records are complete. Furthermore, if they are on an existing record that does not have that field completed, your user will be prompted to fill in that field before going to another record.

Standardized drop-down menus

You can also enhance your data with standardized drop-down menus. Follow these steps:

Log in as an administrator

On the data entry part of the field you wish to standardize, click on the arrow and choose Lookup, or right-click in this box for the Lookup menu.

Once at this menu, you can add, delete and edit drop-down menus to be uniform to your naming scheme and requirements. Hit Setup.

Once you have this box up, you can choose to select Force Valid Input Checkbox. This means users can only select an option from the drop-down menu.

Further down in this menu, you can choose the option to prevent users from adding, editing or deleting items by simply unchecking them. This field is available for any field where drop-down items exist.

Log field changes in History

At times, end users will update fields, such as phone numbers or sales stats. However, you may find a need to retrieve the old information. The following step will log the previous field value and the date it was changed in a contact's History record, so you can always access the information:

Right-click on the field you wish to log changes for

Select Properties

Click on the Security tab and check the last box, Log Changes in History

After making this simple change, any changes made to fields with this designation will be logged in History, allowing you to retain the new, and old values. GoldMine also notes the user who changed the information, and with date/time.

Tips, Tricks & Things

Desperation Search

by

Terry Porter

You've searched in Goldmine for some information that you know is there somewhere. You don't know what record it might be on, your SQL query isn't bringing it up. It's time for what I call the "desperation search", also known as a text search.

Choose **Lookup** from the GoldMine menu, then **Text Search**, and then choose **All Fields**.

You'll get this dialog box.

Think carefully about what to search for here. Let's say you are looking for a history activity about a product called 532. If you place 532 in the text box, you will get every record that has 532 in the address, and 532 in the phone number as well. If the product was called 532 tape, then search for that string rather than just the numbers.

Once the search completes, press next to advance through the records that meet the criteria.

Keep this search in mind the next time you are desperate to find a piece of information that you know is inside of your Goldmine!

Editorial Note:

If all else fails, use the tools that were delivered within your **GoldMine** product. You may not have used all of the capabilities that GoldMine contains. Look over the menus.

Hiding Field Content

by

Gene Marks

Can you hide the field label and field value for a Contact1 or Contact2 field based on field contents?

Yes, the following illustrates hiding the Key2 field based on value in the Key1 field:

Right-click on the Key2 field label

Select **Properties**

Under the **Color Tab**, select the **Expression** radio button for the **Label Color**.

Add the following in the Expression window:

iif(contact1->key1="Employee", -2, -1)

Select the **Expression** radio button in the **Data Color** area.

Add the following in the Expression window:

iif(contact1->key1="Employee", -2, -1)

Click **OK** to apply the changes and close the window

When the **Key1** field contains a value of **Employee**, the **Key2** field will disappear.

Customizing the Opportunity Manager

by

Gene Marks

Can you change the labels on the Opportunity Manager user-defined fields that appear in the Other tab?

You can create five user-defined fields in the Opportunity Manager by opening the Opportunity Manager, and clicking the Configure Opportunity icon.

In the Fields tab, click **New**, and enter the field desired

Open an **Opportunity**, and an **Other** tab will appear with the user defined field

To change the label of the user-defined field, select the **Labels** tab

On the far left double-click, type the field label you wish to display

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