

Editor

DJ Hunt

Contributors

Andrea Dominguez

Tom Daly &
David Brydson

David Evans

Gene Marks

Articles In This Issue

Using SQL Views in
Crystal Reports

Business Automation Series

CRM Integration Projects
Part I

Tips, Tricks & Things

Automatically Formatting
User Defined Fields

Reassigning and Updating
Groups of Contacts.

Customizing a Lookup List

Creating an E-mail
Template

Sending an E-mail Template to a Contact or a Group of Contacts

Using SQL Views in Crystal Reports

by

Andrea Dominguez



I have spent the past year working on a single report. Freaky but true. This report is a report based on Pending and Closed Sales, and some other complex stuff, but that is a company secret. I have been often asked about including more than one table in a report such as a summary of entire contact record or, as in this case, it requires some math between two tables.

You may have noticed in your own efforts of inserting Cal and ContHist on the same form, the results can come out terrible. For reports that the 2 tables do not have to interact with each other directly, sub reports are generally a good way to go.

However, for reports that require interaction, you could do a series of shared number-var formulas between the subreports, but I find that to tax resources at runtime. If you have several formulas the results are not always stable if you are not running locally. As a solution, I have found that using a SQL view does very well. Not only does it gather the data in the format I need in order to do math, but it speeds up the end processing for the users, which is great, especially if your database is 'mature'. Now you need some knowledge of SQL in order to understand how and why the data pulls in the way that it does such as a LEFT JOIN in a view would mean the criteria in the first section of the view is met before pulling from the second section or a RIGHT JOIN which is just the opposite. For the report I just created, I selected a UNION statement because there would be no match on either side. I am pulling sales information so I need all of it. Now there are a couple of things you need to think about before writing your SQL view regardless of activity you are looking at.

1. Date Range. Chances are you are typically only concerned about the current years activities, but you need to think on this now. If you have a mature and well loved database, you need to at least pick a start date and, possibly, an end date.
2. For our example of UNION JOIN (and my opinion it's weakness), you need to think about what data is being pulled from both tables. If you are going after 6 items in Cal, you must have 6 to match from ContHist. You don't have to worry too much if the field type doesn't exactly match (meaning that the LastUser in ContHist is a varchar type and you want to match it to the Duration in Cal which isn't a varchar type) at run time the SQL view can convert it for you so it matches.
3. Database Connection. If you have many users that will access your report or it is against a very large Cal or ContHist table such that there will be many rows in the view, consider utilizing a separate ODBC connection than from the one you use for your other reports.
4. Which activities are you looking for – exactly which ones. For our example, we will go after Sales both Pending and Closed for the product line 'Weezels', and we need to know the Result Code in ContHist table.

Now that you have answers for all of those, open up Query Analyzer (of course I am assuming you have a rock solid backup before doing anything), and attach to the Gold-

Legalese

Editor: **DJ Hunt**

Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is 100% accurate. Should you use anything information contained in this newsletter, you do so at your own risk. All information contained herein is not intended as specific advice, but as a general point of discussion. Should you find an error, it would be nice if you e-mailed me so that I may print the exception in the next issue of this newsletter.

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:

DJ Hunt
Computerese
152 Pratt Road
Fitchburg, MA 01420
USA

(978)342-3333

DJ@DJHunt.US
www.DJ-Hunt.com

GoldMine is a registered trademark of FrontRange Solutions.

Editors Note

The long awaited patch to GoldMine 7.5 (7.5.1.80827) should be available by the time that you read this. The patch was released to the Partners on September 5th, and is supposed to go public around September 12th.

(Continued from Page 1 - Using SQL Views in Crystal Reports)

Mine database. If you installed GoldMine Premium yourself since the conversion process can be a bit tricky, make sure that all of the GoldMine tables are in a single SQL database first. If they are not, stop reading this article, and call a FrontRange Partner about helping you rehost your data. That aside, we are now going to create our view:

```
Create view dbo.vwBigTest
AS
SELECT Cal.UserID,
       Cal.OnDate,
       Cal.RecType,
       Cal.Ref,
       Cal.Number2,
       Cal.ActvCode,
       Cal.AccountNo,
       CAST(Cal.Duration AS Varchar (8)) AS Duration
FROM Cal
WHERE Cal.OnDate >='8/1/2008'
       and Cal.RecType like 'S%'
       and Cal.Ref like 'weezels%'
UNION
SELECT ContHist.UserID,
       ContHist.OnDate,
       ContHist.RecType,
       ContHist.Ref,
       ContHist.Units,
       ContHist.ResultCode,
       ContHist.AccountNo,
       ContHist.LastUser
FROM ContHist
WHERE ContHist.OnDate >='8/1/2008'
       and ContHist.RecType like 'S%'
       and ContHist.Ref like 'weezels%'
```

So what all this means, very basically, is give me all the Weezels sales that have occurred since 8/1/2008.

You will notice that the item count called on both tables match as this is important for a successful UNION. The exceptions are Duration and Number2 in Cal, and LastUser and Ref in ContHist. Duration in Cal is not varchar, and I needed a varchar value so the SQL command CAST was used. It does not convert the raw data itself, just manipulates what gets copied to the view. The (8) defines how many characters I wanted the end result to be, and it has to match the corresponding field length from the ContHist table. Lastuser is a varchar, 8 characters in length – see?

Now that the view has been created, you can see it in Views table in your SQL GoldMine database. In order to use that in your report, just use your ODBC connection to the GM database, and the view will be a database table option. Now some of you may be wondering where is the company name and contact info, I want these items in my report as well. Take a look at your new view a bit closer, and you will see we included AccountNo. You should be able to effortlessly add Contact1 and/or Contact2 to the report, and link via AccountNo.

Now the next thing to tackle is what if the report needs to display Pending and Completed Weezel sales separately? Easiest thing to do is to create 2 separate formulas. The Pending one would be {vwBigTest.ref} = 'Weezel' the Completed Weezel sale would be {vwBigTest.ref} startswith 'Weezels (oc:'. Pending activities under the hood show the Ref WYSIWYG, however Completed Activities add the contact name after the reference you entered.

Business Automation Series

by

Tom Daly & David Brydson



Business Processes and Business Automation

Once a business owner acknowledges the need to automate their business, they will need tools to document their current processes, if the business owner is to retain the 'magic' which makes their business special. Since the real processes for a small business are often performed by, and in the minds of, employees, the research must include them. Failure to capture this information can cause the automation effort to fail dismally, usually to the delight of employees who view automation as an attempt to replace them.

Once everyone agrees to definitions of the words which come to mind, the business owners and their employees must describe the process they use in as much detail as they can manage, in order to reveal the business rules they already use. We will discuss the business rules portion in detail in the next installment of the series.

As the owners and employees describe their business process, more words will surface for inclusion in the growing glossary. The moderator (normally, the VAR) must be alert to inconsistencies of usage, since people frequently use the same word in a different way. Allowing lax usage can make developing the glossary more difficult. The target is a glossary on which all the participants agree.

Rules of Grammar Increase Word Count

Business rules must follow this syntax: subject verb object. Modifiers and qualifiers will also be applied to subject and ob-

ject. So, the glossary will grow to accommodate them. Try to refrain from creating your own unique language. If you do so, the level of difficulty will rapidly increase.

Word Types and Some Examples

To help development of the glossary, we suggest word types and examples, but the VAR and client must decide what they should use in their description of business rules and processes.

term	noun concept definition (e.g. order)
Name	proper noun (explicitly defined, e.g. Nebraska)
Verb	verb or preposition (e.g. fills in)
Keyword	modifier, quantifier, or qualifier (e.g. exactly)

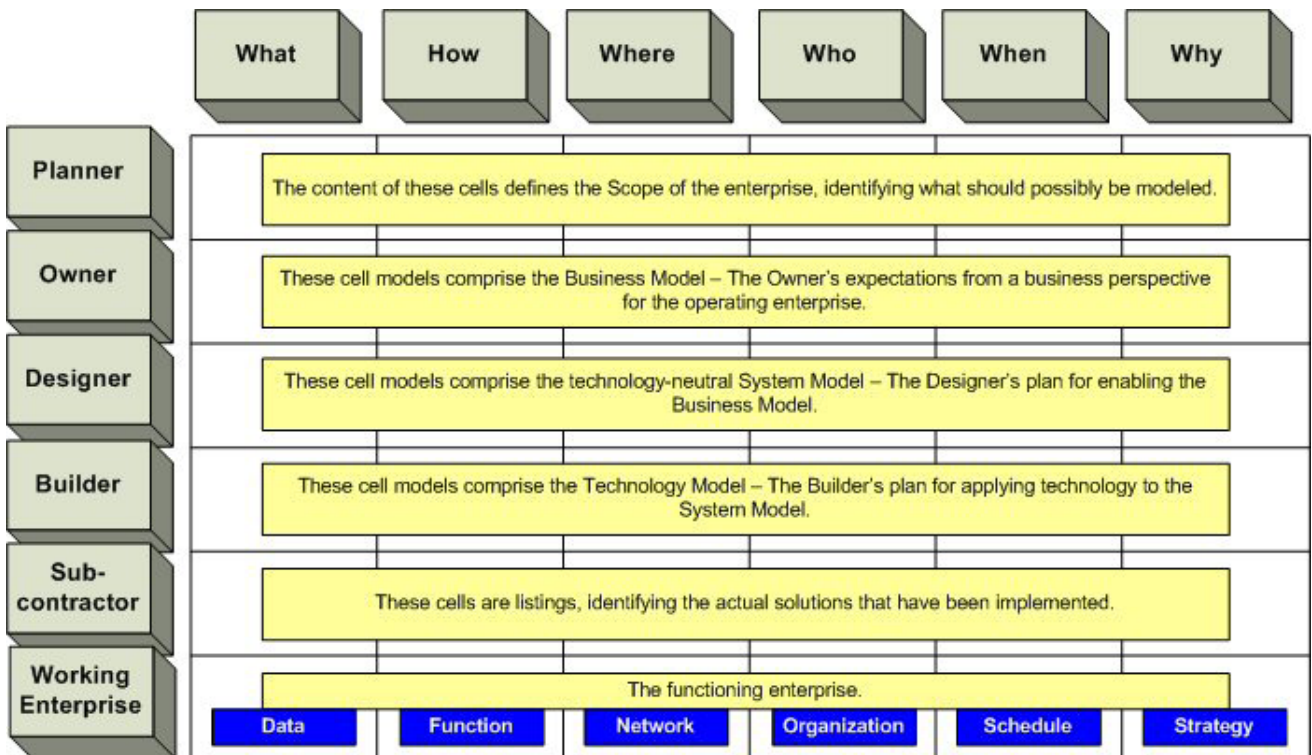
Useful Keywords and Expressions

We suggest some Keywords and Expressions that should help in defining rules and conditions. In the list below, the letter 'n' or 'm' represents a whole number, and the letter 'p' or 'q' represents a preposition. They could be adopted directly into the glossary.

each	it is prohibited that p	p if and only if q
some	it is necessary that p	not both p and q
at least one	it is impossible that p	neither p nor q
at least n	it is possible that p	p whether or not q
at most one	it is permitted that p	must
at most n	it is not the case that p	must not
exactly one	p and q	always
exactly n	p or q	never
at least n and at most m	p or q but not both	may
more than one	if p then q	
it is obligatory that p	q if p	

When assembling the list of current business processes, referring to the keywords above may help you to separate conditions that at first appear the same. It will also suggest programmatic statements which will be needed in the development of automation.

(Continued on Page 4)



Making Sense Out of the Information Gathered

When you and your client reach this point, you will have accomplished a great deal, though it may not seem like it. You will need a tool to determine if you have all the information you need, and to organize that information into a useful format. Originally developed by John Zachman at IBM in the 1980's, it has become accepted as an integrated framework for managing change in enterprises and the systems that support them. It is appropriately called the 'Zachman Model,' and it can be used for enterprises or small companies, and projects - large or small (Figure Page 3).

The Zachman Model is descriptive in nature, and depends on no particular technology. In using the model for the first time, you may discover that your client's technology is paper, pencil, and filing cabinets. In that case you hope to use more current technology to automate your client's process, but the discussion with the client takes a new direction when you first capture ALL the elements of their process before discussing a technology.

There are numerous books written describing the merits and drawbacks to using the Zachman Model, but our purpose here is to give you a basic tool to use with your client to insure that you do no wasted work because of missing information at the Business Model or System Model levels for any Scope of work.

If you do nothing else with this model than ask your client the questions: what, how, where, when, who, and why for both their Business processes and System processes, you will have cleared up the majority of misunderstandings that develop between the VAR and the client.

For Free downloads of a Zachman Model Example, and a Zachman Worksheet, visit our website, <http://www.BestFit-BusinessMgr.com>. While you are there, explore the features of our flexible automation software, which can be configured to your client's needs, BestFit Business MGR. You may contact us (503) 206-0333 or email us at Sales Information <Sales@BestFitSolutions.com> to discuss how we can help you.

*In the last installment of the **Business Automation Series**, "Two Methods for Implementing Business Automation," we will continue working with the Zachman Model at the Builder and Sub-contractor's levels to select the technologies appropriate for the client and implement the installation. If we have done a good job of capturing all of the elements of a client's Business Model, and System Model, all should function well. Following that, we will then look at adapting a Best-In-Class solution to the client's business process by using the information gathered with the Zachman Model.*

Editors Note

We do realize that this article may not be totally relevant to your GoldMine use, however, it does represent a valid business process that is applicable to all businesses.

We suggest that you visit <http://www.BestFitBusinessMgr.com>, and look at some of their other offerings.

CRM Integration Projects Part I

Managing Costs, Increasing Revenues

by

David Evans ([Happy to be Contacted](#))

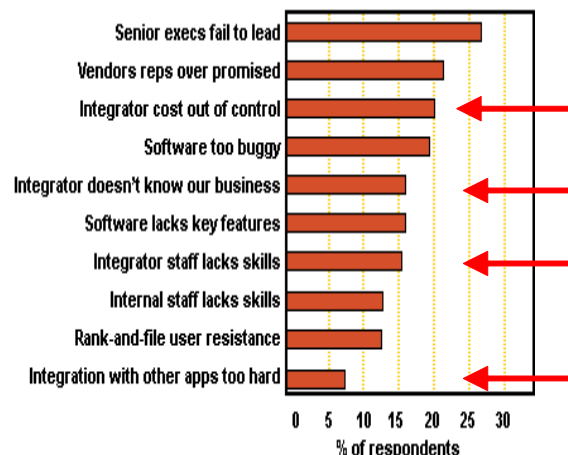
Background to CRM Integration Projects

It is almost a commonplace that CRM projects are problematic, with a high failure rates, and quite often low levels of end user satisfaction and poor adoption.

To some extent, this observation is a historical phenomenon – CRM products these days are much more capable and fitted to purpose than they were a few years ago, and CRM practitioners have become much more experienced at implementing CRM systems. Through best practices such as:

- careful expectation management;
- business process analysis and customization of the CRM system to that process; and
- thorough training of the end users and management implementers have dramatically improved the success rate of projects.

However, issues still abound. A recognized comparable research study focused on why projects fail was performed by Peerstone Research (www.Peerstone.com). This study focused on projects that involve application software implementations, and external professional services. The study results point to senior executives failing to lead as the number one factor contributing to implementation failure. Breaking down the details provided a more interesting picture:



As you can see, four of the top ten failure issues (highlighted) relate to integration: costs out of control, shortage of skills, not understanding the business, integration with other applications too hard.

Integration of the CRM system with external applications can be vital to overall CRM project success. In this article, we will try to understand where the risks are with integration, how



they can be controlled, and how we can turn integration into a revenue stream.

Why Integration Projects are Tough

Defining the project

Consider a very simple project: import some names and addresses from a trade show, so that they can be used for lead follow up. Some immediate issues that any experienced implementer will want to cover include:

- How clean is the data? Does it need reformatting (split first and last name, check titles)
- Do we need to check for duplicates? If so, what is the best match criteria – name, name + zip, company. Do we need to use fuzzy match techniques?
- Do to contacts need to be classified on the way in (company size, territory, products)
- Is this a one time only, or is there going to be ongoing data feeds?

A very simple project can generate a range of issues that need careful consideration. A large project can (and should) consume many man days in analysis.

Messy, complex data

Frequently, the process of developing an integration will expose significant problems in the source data, which may not have been recognised by the organization. The data owners may indeed resist strongly any attempts to outline problems with the data.

DataBlueprint (www.DataBlueprint.com), a data management consultancy that InaPlex has worked with outlines a number of causes of dirty data:

Practice-oriented causes

- stem from a failure to rigor when capturing and manipulating data such as:
 - o edit masking
 - o range checking of input data
 - o CRC-checking of transmitted data

Structure-oriented causes

- occur because of data and metadata that has been arranged imperfectly. For example:
 - o when the data is in the system, but we just can't access it;
 - o when a correct data value is provided as the wrong response to a query; or
 - o when data is not provided because it is unavailable or inaccessible to the customer
- developer focus within system boundaries instead of within organization boundaries.

When developing an integration, the developer may have to tackle all of these issues, or simply live with the data as it is and ensure that the problems are not propagated to the CRM system.

Requirements change

Even if the project does not uncover major problems with the source data, the process of specification and implementation can reveal new ways of using the existing data, or suggest new business processes.

This leads to the dreaded "scope creep" – a process of changing the specifications of the project one small step at a time. Alternatively, the end user may simply have not understood the original specifications – "When I said X, I meant Y".

On a more positive note, this can lead to a better overall result for the project if the process is controlled carefully.

Technology Mixture

There are a range of technologies that may be involved in the development of a typical integration:

- o SQL Scripting, DTS,
- o Programming – Visual Basic, scripting, .NET technologies
- o Web services APIs

Every new technology introduced into a project introduces new complexities – learning curve, maintenance, version control, documentation, testing. Multiple technologies make it much harder to cope with requirements changes, and harder for new personnel to understand and update the project months or years later.

The following table shows the results of a survey of developers into what caused their projects to over run:

Issue	Votes	%
Specification		
Changing specifications	276	28.66
A lack of understanding as to the scale of the work involved	110	11.42
Incomplete or missing specifications	93	9.66
Section Sub-Total		49.74
Planning		
The project was interrupted by other work or demands	148	14.33
The deadline was decided by Marketing rather than R & D	128	13.29
The project was interrupted by other work or demands	148	14.33
Section Sub-Total		38.21
Other		
The developers involved were not asked how long it would take	71	7.37
Insufficient budget or resources	20	2.08
Section Sub-Total		9.45
Total	963	100%

This survey was on development projects generally, not specifically integration projects so it does not cover the effects of bad data. It does, however, highlight the importance of project planning and specification, with 50% of project over runs being attributable to problems with the specification process.

Editors Note

Article to Be Continued

Watch for the conclusion of Davids article in the December issue of The GoldMine Advisor.

Tips, Tricks & Things

Automatically Format User-Defined Fields

Reprint from Tech Tip

FrontRange



You can automatically format a user-defined field, such as a phone number, in GoldMine. Simply enter the word, "phone", immediately after the "U" when naming your user-defined field.

Uphone1
UphoneHome
UphoneWhatever
Uphone_blahh

Any variation as long as the word "phone" comes right after the "U".

Reassigning and Updating Groups of Contact

by

Gene Marks



A client asks: How can I reassign or update groups of contacts or activities from one user to another?

The Territory Realignment Wizard enables you to:

Assign a set of existing contacts to users based on a Filter or Group.

Reassign Activities from one user to another user.

Globally update fields relevant to a territory realignment.

Set up synchronization to update the databases of remote users affected by the realignment.

To Use the Territory Realignment Wizard:

- Select Tools>Data Management>Territory Realignment. The Territory Realignment Wizard appears.
- Click Next. The Filter selection dialog box appears.
- Select the Filter or Group in the drop-down list. To select from Filters or Groups of a different user, select <Filters of: . The Select a User dialog box appears. Select the user in the drop-down list, and click OK to return to the Filters and Groups drop-down list.
- Select the Filter or Group, and click Next. The Replace dialog box appears. You can replace the data in up to two fields, and change the owner in the third. In the first Replace drop-down list select the field you are replacing.

In the following With text box, type or select the value to appear in that field. In the third Replace field, select Owner in the drop-down list. In the following With text box, select the new user or user group to whom you are assigning ownership of the contacts. Click Next.

- To reassign the activities a particular user, select the user's name in the Reassign the activities of this user drop-down list. In the To this user drop-down list, select the new user who will be responsible for the activities.
- In the Activities ranging from date text box, type or select the starting date from the F2 graphical calendar. In the To date text box, type or select the ending date from the F2 graphical calendar.
- In the Please select the activity types to reassign to the new user area, specify the activities to be reassigned.

Call Backs: Scheduled, outgoing telephone calls to be made sometime in the future.

Messages: Scheduled E-mail messages.

Next Actions: Scheduled manual tasks, such as sending literature, delivering samples, shipping products, etc.

Appointments: Scheduled, date-specific meetings with contacts. Appointments can also be used to schedule conference calls.

Literature Requests: Scheduled fulfillment and shipping of brochures, price lists, and other types of mass-printed documentation to one or more contacts.

Forecasted Sales: Scheduled activities indicating the anticipated close date of a pending sale with one of your contacts. GoldMine has special features for managing forecasted sales.

Other Actions: Miscellaneous activities falling outside the other activity categories defined in GoldMine.

To-Do: Priority-ranked activities that do not have an activity date, and appear on a separate To-do list, rather than the date-based Scheduled Activities windows.

Note: By default, GoldMine does not link To-Do activities. Each To-Do activity is forwarded daily.

Event: Date-specific activities scheduled for one or more days, such as conferences and conventions.

- Select Reassign unlinked activities to include the user's scheduled activities that are not linked to a particular contact record.
- Click Next.
- Click Finish, and the Process Monitor displays the status of the process.

Note: We strongly recommend that you back up data before performing a Territory Realignment.

Tips, Tricks & Things

Customizing a Lookup List

by



Gene Marks

A client asks: I've customized my Lookup Lists, but I can't easily keep track of what all the codes and initials mean. Help!

Within a lookup list, a double forward slash (//) will separate your actual data from comments you want in the lookup list. Nothing that appears to the right of the slashes is actually put into the data field.

Pull up the Lookup List you want to add comments to, choose the field entry to modify, and click Edit. After the data in the **Enter the F2 Value** box, add a space, a //, and another space, and then whatever clarifying comment you want to make regarding the data. It might look something like this:

IEM // Internet Email Function

Click OK to save. In the example above, while the comment 'Internet Email Function' would show when the user brings up the Lookup List, only the field data 'IEM' would go into the actual field on the contact record.

More About Lookup Lists

If you need to have more than one entry from a Lookup List in a single data field, just follow these steps:

Normally, when you select a choice from a Lookup List, your choice overwrites whatever was already in the data field. The semicolon (;) allows you to append your selection to the already existing data without removing the original data.

Pull up the Lookup List you want to modify, choose the field entry to modify, and click Edit. After the data in the **Enter the F2 Value** box, add a semicolon (;). Click OK to save.

That choice in your lookup will now go into the data field immediately after the data that is already there, separated by a comma and a space. Using this technique, you can have multiple selections in your data fields.

Tip: When using multiple selections, be aware that you can sometimes run out of space in the data field. Comma and spaces count toward field length along with the actual number of characters. Know your data field length, and edit accordingly.

Also, using semicolons will not work if you are using the **Force Valid Input** option in the F2 Field Setup box. If you want to use semicolons, pull up the Lookup List you want to use them with and go to **Setup**; then uncheck the **Force Valid Input** box and hit **OK**.

Creating an E-mail Template

by



Gene Marks

You can easily create an E-mail template in GoldMine by following the steps below:

- * Choose **Edit/Custom Templates** or **GoTo/Document Templates**, depending upon your version of GoldMine
- * The Document Management Center will pop-up
- * Highlight the **E-mail Templates** folder at the bottom
- * Right click, and choose **New...**, and an the **Edit E-mail** dialog screen will open
- * Type in a **Subject**
- * Go to the message body area, and type your body message
- * You can add GoldMine fields to merge into the e-mail by clicking on the **Insert GoldMine Field** icon
- * When you are finished, click on the **Save** template icon, and the template is saved and named with what you entered as the subject

Editors Note

You may add Contact information automatically in the **Subject** statement as well. Here is an example of one that I use in one of my templates:

`<&iif(empty(&Dear), [Guest], &Dear+[ ]+&FirstName)>> this template is for you.`

You can do as many variations of this statement as you would like to make your subject interesting.

Sending an E-mail Template to a Contact or a Group of Contacts

by



Gene Marks

How to send it to a Contact or Group of Contacts:

- * Go to the Document Templates Center
- * Choose the template you wish to e-mail, and highlight it
- * Right-click, and choose **Merge** from the local menu
- * The **Mail Merge Properties** box will pop up
- * You can now choose who the recipient will be - an individual Contact and it's Secondary Contacts or a Filter/Group
- * You also have the choice of sending the e-mail immediately or queuing it for delivery
- * Next go to the **File in History** tab

* You have two options - you can just create a history item that tells you the e-mail was sent, but does not include the body of the e-mail, or you can save the entire Template in history. Depending on the type of database you have (SQL or dBase), the size of the message and contents, i.e., graphics and the number you are sending, you should be careful when choosing this option

* After you choose all your options click on OK and your e-mail template will be sent to the contact(s)

Editors Note

I would like to personally thank Gene Marks for all of his contributions to **The GoldMine Advisor** over these many years. Gene has consistently submitted articles, and, more important-

ly to most of you, he is the major contributor to **Tips, Tricks & Things**.

Without Gene and others this newsletter would have ceased its existence years ago. We are constantly looking for new articles, tips, tricks and things. If you have anything, anything at all to contribute, please do so.

The deadline for each submission is the 1st of the month preceeding the next issue. For Instance: This is the October 2008 issue, and the submission deadline was September 1st, 2008.

The GoldMine Advisor is a bi-monthly newsletter distributed in February, April, June, August, October and December. Please keep this newsletter alive by contributing your articles, your tips, trick and things as soon as you can.

This Issues Major Contributors

Your Publisher/Editor

Computerese

DJ Hunt

GoldMine Technical Support

152 Pratt Road
Fitchburg, Ma 01420
USA

(978)342-3333
DJ@DJHunt.US
<http://www.DJHunt.US>



Business Automation Series

BestFit Solutions

David Brydson Tom Daly

11124 NE Halsey Street, #686
Portland, OR 97220
USA

(503)788-7789 x 112
DBrydson@LaDara.com
<http://www.LaDara.com>



Using SQL Views in Crystal Reports

Andrea Dominguez

632 North Craig Place
Addison, IL 60101 USA

(630)628-1402

AndreaD18@sbcglobal.net



CRM Integration Projects

InaPlex Limited

David Evans

12465 Lewis Street
Suite 204
Garden Grove, CA 92840
USA

(949)784-0708
David@InaPlex.com
<http://www.InaPlex.com>



Tips, Tricks & Things

The Marks Group, P.C.

Gene Marks

45 East City Line Avenue
#342
Bala Cynwyd, PA 19004
USA

(888)224-0649
Gene@MarksGroup.net
<http://www.MarksGroup.net>



Your Article Title Here

Your Company Name Here

Your Name Here

We are always looking for GoldMine articles for future issues of The **GoldMine Advisor**.

Please submit any articles, whitepapers, or stories you have, and wish to have published to:

DJ@DJHunt.US