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FixCal
A Free Utility to...
Fix the Cal/Mailbox Tables

by
Paul Redstone

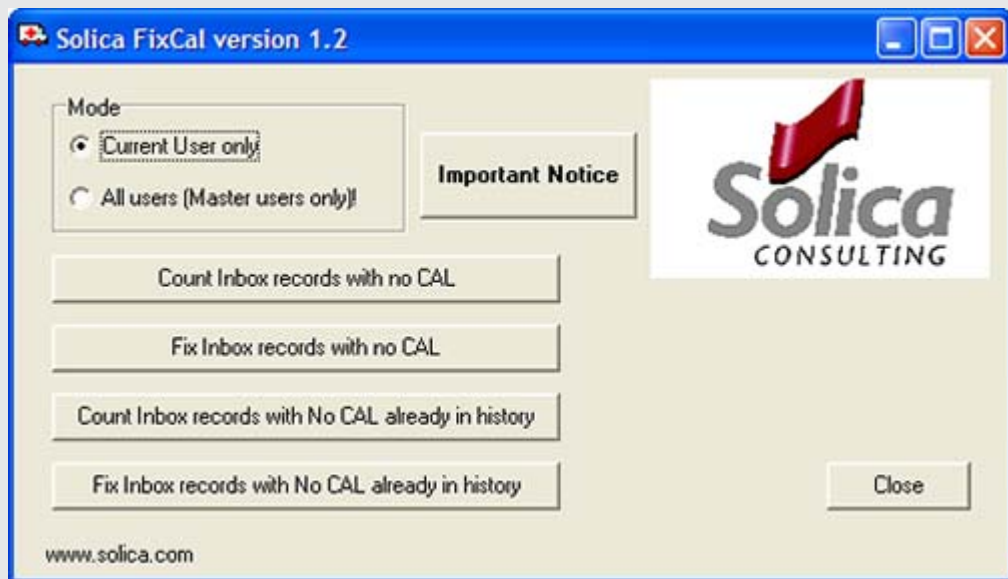


Most people using GoldMine for E-mail get the occasional message **Cal Record Missing** or similar when trying to view their E-mails. I don't know why this happens, perhaps database errors or perhaps an underlying intermittent bug (for example a combination of circumstances), but it certainly does happen.

This prevents users opening such messages even though they can be seen in their MailBox. As the message implies, the message exists in the MailBox table Inbox, however not in the corresponding Cal table as seen on a Contacts Pending tab, or in the Activity list.

So Solica is pleased to provide a **free** utility to fix this to the GoldMine community. We may not have links to it yet on our web site but the direct link to it is www.solica.com/utilities/fixcal.zip. This file contains the program (there is no installer), and short documentation.

So what does it do? When you run it, it connects to the current GoldMine (which must be GoldMine 6.7 or later as it uses the newer COM interface), and shows the following screen:



The first function counts records which are in the Inbox that do not have a corresponding Calendar (Cal table) record or that does not already have a History (ContHist table) record. (The latter can occur when, perhaps due to a database error, the record has been Filed to History,

Editorial Note:
 For you programmers among our readers, there must be a relational link between each Mailbox record and the Cal record (if the E-mail is still in the Inbox r Outbox), or to the ConHist record (if the E-mail has been Filed or Sent).

(Continued on Page 2)

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 png or 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.

I am your editor:

DJ Hunt

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(Continued from Page 1)

FixCal - Continued

but the Inbox record has not being altered to move it to the Filed section).

The second function fixes these by creating a Cal record then amending the MailBox record to point to this. It extracts details of the sender from the MailBox record and content. Once fixed, you should be able to open your Inbox record.

The third function counts Inbox records which are not in Cal, but are in History. These are the half filed ones.

The fourth function fixes these by amending the MailBox record to point to the corresponding History record, and to move it to the appropriate filed folder. These latter two functions were suggested by DJ when reviewing an early release – thanks DJ!

The functions can work for the current user, which anyone can run, or for all users which can only be run by a Master user.

So please try this out, and use it. As with all global editing programs, take a backup first, and as it is free, we accept no liability at Solica! Please also note that this does not fix a corrupted MailBox, Cal or History table – just inconsistent tables. If on GoldMine 6.7 on dBase tables I'd always ensure you have re-indexed or rebuilt these tables first – after a backup of course.

We are planning to release a second free utility called PackDBF which is specifically intended for rebuilding dBase tables such as MailBox, and which does not suffer from database size limits or the 4G wrap around problem.

If you have a problem with FixCal we'd like to know, but we make no guarantees of support – just send an E-mail to Support@Solica.com.

Mining GoldMine

by

Bob Gannett



GoldMine, when properly used, can provide a tremendous amount of very valuable information. The question is, however, how do we get that information out of GoldMine? The following are some suggestions that may help.

Would you like to know how much activity (Calls, Sales, Scheduled and Completed activities) has taken place with a specific contact? Go to that contact's History tab. Place your cursor in the area of the **History tab**, right mouse button, click on **Options**, then click on **Analyze**. This will provide a wealth of information about that contact.

Would you like an indication as to which users are doing an outstanding job with respect to managing their activities in GoldMine? In GoldMine 7 or below, go to **View** (at the top of GoldMine's screen), then **Analysis**, then **Statistical Analysis**. In Premium Edition (GoldMine 8) click on **Go To** then **Analysis**, then **Statistical Analysis**.

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Mining GoldMine - Continued

Want to improve the accuracy of the statistics?

1. Let the users know that Management is checking.
2. Tell your people that if it is not in GoldMine, you must assume that they are not doing it.
3. I have had several very effective Sales Managers tell their people that if a sales is not in GoldMine, they are not getting paid for it.

Here are some SQL Queries that will help you improve the effectiveness of follow-up activities, and help identify the deadwood that is in your database. You can build upon, and modify these queries as needed.

1. Contacts with no completed activities.

```
select AccountNo,
       Company
from Contact1
where AccountNo not in
      (select distinct AccountNo
       from ContHist)
order by Company
```

2. Contacts with no completed appointments

```
select AccountNo,
       Company
from Contact1
where AccountNo not in
      (select distinct AccountNo
       from ContHist
       where RecType = 'A')
order by Company
```

3. Contacts with no scheduled activity within a date range (Note that in dbase, you have to insert the path to CAL since it is not in the same location as the other files.)

```
select AccountNo,
       Company,
       Contact,
       Phone1 as Telephone
from Contact1
where AccountNo not in
      (select distinct AccountNo
       from Cal
       where OnDate between '1/1/2007' and '8/1/2007')
order by Company,
       Contact
```

4. Contacts with no completed activity in date range

```
select AccountNo,
       Company,
       Contact,
       Phone1 as Telephone
from Contact1
where AccountNo not in
      (select distinct AccountNo
       from ContHist
       where OnDate between '1/1/2007' and '8/1/2007')
order by Company,
       Contact
```

5. Completed Activities by user by date range.

```
select ContHist.UserID,
       ContHist.OnDate,
       ContHist.Ref as Subject,
       ContHist.RecType,
       Contact1.Company
from ContHist,
     Contact1
where ContHist.AccountNo = Contact1.AccountNo
      and ContHist.OnDate between '1/1/2007' and '8/1/2007'
order by ContHist.UserID,
       ContHist.OnDate,
       Contact1.Company
```

6. Here is a fantastic query that will help you identify those contacts that need follow-up actions. This query will give you a list of all contacts that have completed activities. This is a tremendous memory jogger to help you follow up in a timely manner.

```
select Contact1.Contact,
       ContHist.OnDate,
       ContHist.UserID,
       ContHist.AccountNo
from Contact1,
     ContHist
where Contact1.AccountNo = ContHist.AccountNo
      and ContHist.RecID in
      (select max(RecID)
       from ContHist
       where ResultCode = 'COM'
       group by AccountNo)
      and ContHist.sRecType in ('A', 'C', 'T')
order by ContHist.OnDate desc,
       Contact1.Contact
```

Editorial Note:

I have taken the liberty of modifying some of these queries for Performance and Readability. On a Copy & Paste from this document, all have performed as expected against my GoldMine Premium Edition, and at a very admirable speed.

Very nice and informative queries Bob.

Are You The Next Nostradamus?

by

Anonymous



Can you predict the future?

FrontRange has already sent GoldMine Standard Edition into the Sunset, but not before coming out with one final build that made it compatible with Internet Explorer 7.

The FrontRange developers must maintain three completely different sets of code, GoldMine Corporate Edition, GoldMine Premium Edition & GoldMine Enterprise Edition. This is something that had not been done before when they had more developers.

(Continued on Page 5)

A Couple of Exceptionally Useful GoldBox Views



by

Bob Taylor

GoldBox Views are part of the GoldBox program, and can be applied to multiple Users with the addition of inexpensive **SEAT** licenses. Here are two View sets that I furnish at very low cost to my clients...

Data Cleaner

The validity of your data (i.e. whether or not a field value is in the field's Lookup List) affects the value of your data. Weeding out invalid values can be a troublesome process, unless you have a tool like the View set below. Here's how it works:

1. Open the pink View below (via a Taskbar button), and right click into the "Current..." field you want to work. That opens a special **Lookup List of invalid entries** that exist within the database. Choose a value.
2. Assuming that you want to change that value to the same **valid** value everywhere it is found, click into the

corresponding "New..." field in the right column. Make a selection (the Lookup List here is the standard GoldMine Lookup List for the field). Then click the **Display RESULT** button.

3. The blue View will open, showing **all the records that have the invalid value**, you chose in the pink View. The left column is existing data, for reference. The right column has the one value you chose in step 2 above, for each record in the View (the records are listed in the grid at the bottom of the View). Click the **Pencil button** in the blue View, and confirm that you want to Post your changes. The Views will close, and the changes will be made to all the records that were listed in the blue View.

With each reopening of the pink View, the "Current..." Lookup List will get shorter and shorter until it's eventually empty. Then, just go on to the next field you want to clean. This is not only the easy way to clean your data, but it's also convenient. It takes about a minute to clean each invalid entry (depending on the size of your database), and each operation is independent. So, you can spend whatever available moments you have cleaning data, without concern about interruptions. The fields shown below are the most commonly-cleaned Contact1 fields, but Contact2 fields can be included. In fact, it's even possible to clean Tab records this way!

(Continued on Page 5)

Current	New
Current Key1 Prospect	New Key1
Current Key2 Communication	New Key2 Networking
Current Key3 Van, Truck	New Key3
Current Key4 J. Smith	New Key4
Current Key5	New Key5
Current Department	New Department
Current Title	New Title
Current City Moonachie	New City
Current State NJ	New State
Current Country	New Country
Current Source Business SW Times 01	New Source

NEW KEY1	NEW KEY2	NEW KEY3	NEW KEY4
	Networking		
	Networking		

Current	New
Current Key1	New Key1
Current Key2 Communication	New Key2 Networking
Current Key3	New Key3
Current Key4	New Key4
Current Key5	New Key5
Current Department	New Department
Current Title	New Title
Current City	New City
Current State	New State
Current Country	New Country
Current Source	New Source

(Continued from Page 3)

Are You The Next Nostradamus - Continued

The developers are currently working on GoldMine CE 7.5 to make it compatible with Vista.

FrontRange has announced that the cost of upgrading to either, yes either, GoldMine Corporate or GoldMine Premium is \$449.00.

FrontRange has reduced the cost of upgrading from GoldMine Corporate Edition to GoldMine Premium Edition from \$450.00 during the month of August to \$350.00 as of the month of September.

What are your predictions for the future of GoldMine Corporate Edition?

Will FrontRange be abandoning their GoldMine Corporate Edition users as they had done with their GoldMine Standard Edition users?

Could GoldMine 7.50 be the final build of GoldMine Corporate Edition?

(Continued from Page 4)

A Couple of Exceptionally Useful GoldBox Views - Continued

"Make-Up" Groups

There is no graphic for this one, because the View set operates automatically, and nearly invisibly, once it is started from a Taskbar button. Here's what the utility will do:

- A GoldBox View opens by running a query that determines the number of "cold call" Activities (of a specific type, as determined by Reference, Code, User, etc.) that are scheduled for the day, for the User who clicked the Taskbar button.
- A second View opens automatically, and reads the number found by the first View. It then deducts that number from a Goal number, and retrieves a number of Contacts equal to the **difference** between the Goal, and the number found by the first View. These Contacts can be further qualified in practically any imaginable way.
- The Contacts retrieved by the second View are sent to a GoldBox Group Builder, and turned into a Group for the User who started the process by clicking the Taskbar button.

This gives the User a Group which, when Activated, can be used by GoldMine to schedule the correct "make-up" number of Activities, so that the **TOTAL** number of "cold call" Activities scheduled for that day, for that User, will be equal to the predetermined Goal for the User.

Using this simple, automatic routine keeps Users from building up big backlogs of scheduled cold calls. Such backlogs can sometimes cause important callbacks to get "lost" among the calls scheduled for the day, and thus result in lost business. Also, holding the backlog to a minimum helps reduce "alarm overload", which can reduce the effectiveness of alarms to virtually nil.

These are two of the Views sets described on the **Ensemble** page of my web site, <http://www.goldboxbob.com/ensemble.html>. Check them out!

Unleash the Power of GoldMine



by

Gene Marks

10 Kick-Butt Ways to Unleash the Power of GoldMine

Many of our 500+ GoldMine clients are using only 20% of what this great Contact and Customer Relationship Management software can do. What a shame! Our most prolific clients are really maximizing their marketing, sales and service opportunities by utilizing some of the powerful advanced features of this great tool.

So how can you take it to the next level? We've got lots of ideas. This article contains only a few..., but they're good ones. Here are 10 kick-butt ways you can unleash the power of your GoldMine:

1. Use the keyboard! Did you know that when you schedule an appointment, and you type 1M in the date field the date will automatically forward one month? Did you know that using the CTRL and ALT key in combination with other keys throughout GoldMine will automatically launch windows or go to certain fields? Save time and be more productive by leaving the mouse alone, and using your keyboard more.
2. Create macros! Right click on your toolbar (GoldMine Custom Toolbar in GoldMine Premium), and create a new macro. Now you can complete an activity, send an email, print out a letter, and update a field...all with one mouse click!
3. Set up Automated Processes! When you import a new list of leads let GoldMine, automatically assign these leads to your salespeople by zip code, schedule a call and update a field. How about getting an e-mail whenever a customer hasn't been contacted in more than three months? Or automatically scheduling a call when a salesperson finishes an appointment? These can all be configured using GoldMine's Automated Processes.
4. Consider adding on to GoldMine! There are lots of great add-ons to integrate GoldMine with Outlook and Exchange. And there are really good products made by other companies to generate easy reports, sync GoldMine with Blackberries/PDA's, generate quotes and setup automatic alerts.
5. Use the GM+View! That new tab, available since version 6.0, allows you to view any data from any data source (including the internet). Imagine going to a contact and automatically seeing their open invoices live from your accounting system. Or driving directions from Mapquest, Google or Yahoo. Or credit information from Dun & Bradstreet. The GM+View tab or GM+Browser is a web page built into GoldMine. It'll refresh with new data every time you go to a new contact record.

(Continued on Page 6)

10 Kick-Butt Ways to Unleash the Power of GoldMine - Continued

6. Make better use of Microsoft Office, and reporting tools! Do you like Excel? Then right click, and export your activities to a spreadsheet. Or connect right to GoldMine's database, and create your own pivot tables. Use Microsoft Word for faxing, and for templates. Create custom reports out of GoldMine using Microsoft Access. GoldMine's open database allows data to flow very easy to Microsoft Office applications.
7. Use GoldMine's Application Programming Interface! With programming knowledge you can create custom screens or grab data from GoldMine, and write it into another system or visa versa. Add more functionality to GoldMine using this interface that allows you to call on all of GoldMine's tasks, and write to GoldMine in a Sync Aware manner.
8. Use the Newsgroups/Forums! A newsgroup/forum is an electronic bulletin accessed either through your browser or a newsgroup reader (like Outlook Express). GoldMine's newsgroups have hundreds of subscribers from all over the world, posting issues, tips and tricks. This is a place to go for answers. You can find GoldMine's forum at Forums.FrontRange.com once they fix it.
9. Get Data Automatically From The Web. Paying someone to enter in leads that come from your website? **Stop!** By deploying GoldMine's built in WebImport functionality your web visitors can fill out a form on your site, and that data will come immediately into GoldMine. Build a few Automated Processes to execute immediately on creation, and you've got a heavy duty system going.
10. Stop Synchronizing! Set up Windows Terminal Server (it's free with Windows 2000+), and you can have full access to GoldMine over the web from any computer around. Connect using your wireless card from places like Starbucks or Borders. Don't worry about the security of your remote data. Get everything into GoldMine in real time.

Less Articles = Fewer Pages

The expression tells no lies. Of late the articles from contributors has been few, and far apart. If I don't have articles, I just can't publish this newsletter. You may have noticed that the last issue was only 10 pages, while a couple of issues back we were at 12 pages, and today this issue is only 8 pages long.

I will publish any of your articles that have to do with GoldMine or CRM in general. Have you developed a 3rd party application, and want exposure to over 3,000 readers, submit your article to DJ@DJ-Hunt.com. If you include any pictures in your article, send along a jpg or png file of the picture along with the article.

Are you a reseller, or have written a White Paper? Send it along, and I'll publish it. Have you learned something interesting that you would like to pass on to our readers, submit it to me. Without your articles this newsletter will cease to exist.

**You are the sole resource for our articles.
Please Help!**

Tips, Tricks & Things

Creating Shortcut Keys for Custom Screens



by

Gene Marks

A client asks: Can shortcut keys be created for custom screens that I create in GoldMine?

Yes, you can create a shortcut key for custom screens. You must have Master Rights to do this however.

- Right click on the GoldMine Screen, and choose Screens Setup. The Custom Screen Setup box will appear.
- Choose the screen you want to create the shortcut for, and click on Properties.
- In the name of the field, add an **&** in front of the letter you want to use as the shortcut key. For example, the screen is names **Products**, and you want to use Ctrl-D as the shortcut (you can only use letters that are not currently used in GoldMine as a shortcut). You would enter the name as **Pro&ducts**, and when you hit Ctrl-D you would be taken directly to this screen.

Editing/Deleting Record-level Alerts



Reprint from

July 2007 - FrontRange Newsletter

Here's how to edit or delete record-level alerts:

- Go to **View | InfoCenter** or, GoldMine Premium users, **GoTo | Knowledge Base**
- Under the Knowledge Base branch, in the System book, find the Contact Alerts folder. This allows Contact Alerts to be Viewed, Edited and Deleted.

They cannot be modified or deleted from the same place they are created. You must have a Record Alert in the system for the System book to appear in the Knowledge Base.

Remote Backup



by

Bob Gannett

The data in your computer is much more valuable than the hardware itself. Studies have shown that 50% of small businesses that experience a major data failure will go under. LogMeIn, a leader in Remote Access software, has developed a backup process that will allow computers to be backed up over the Internet to off-site locations. Go to www.LogMeIn.com to check it out or call (781)897-1341 to arrange for a demonstration.

Tips, Tricks & Things

Linking History to Another Contact Record



by

Gene Marks

Did you know you can link a history record to another contact?

Just follow the steps below:

- Open the record with the history item you want to relink
- Right click on the history item, and click on Edit
- The link-to-box will be greyed out at the bottom of the window
- Leave the edit window open, and go to the new record that you want to link the history item to
- Go back to the edit history window, and the link-to-box will no longer be greyed out
- Check the box and click on okay to relink the history item to the new record

Editors Note:

Genes Tip, albeit a great one, is only applicable to older versions of GoldMine, and is not valid for GoldMine Premium for instance.

You may still do this in GoldMine Premium, however, you must do it through the Activity List. While using the Activity List **Right-Click** on the appropriate History activity, and then select **Options | Link...** from the local menu that presents itself.

To be more specific:

- Open the Activity List
- Select the History activity to be moved
- Change to the recipient Contact record
- Go back to the Activity List, and Right-Click on the Activity
- Select **Options** from the local menu
- Select **Link...** from the submenu
- You will be asked a question to make certain that you have the correct record to which you want to relink this activity to, and you must answer **OK** for the relinking to occur.

Come on now, even the best of us makes mistakes. Gene has supplied a great tip that many users don't know about.

How about you supplying one for the next issue?

SQL Query from The Hacker's Guide to GoldMine Premium



by

DJ Hunt

Selecting all Contacts, and Additional Contacts along with their Addressing information & E-mail Address.

```
select AccountNo,
       Company,
       Contact,
       Address1,
       Address2,
       City,
       State,
       Zip,
       Phone1,
       (select top 1 ContSupRef+Address1
        from ContSupp as CS
        where CS.AccountNo = C1.AccountNo
        and Contact = 'E-MAIL ADDRESS'
        and Zip like '_1%'
        ) as Email
from Contact1 as C1
Union select ContSupp.AccountNo,
            ContSupp.Contact as Company,
            ContSupp.Contact,
            ContSupp.Address1,
            ContSupp.Address2,
            ContSupp.City,
            ContSupp.State,
            ContSupp.Zip,
            ContSupp.Phone,
            CS2.ContSupRef+CS2.Address1 AS Email
FROM Contact1, ContSupp, ContSupp CS2
WHERE Contact1.AccountNo=ContSupp.Accountno
and ContSupp.ReclD = CS2.LinkAcct
AND ContSupp.RecType='C'
order by Company
```

Caveat: This is a Union query, hence, it is not a valid dBase query.

Prioritizing Scheduled Activities



by

Gene Marks

You can prioritize your activities:

- Go to Schedule, and choose the activity you want to schedule.
- Complete as usual, but in the Time box enter a letter "A", "B", "C", etc. You will see the label name change to Priority.
- Click okay, and the activity will now be in your task list in a prioritized order.

Tips, Tricks & Things

Adding Members to a Group



by

Gene Marks

- Open the Contact Search Center
- Display the Filters, Groups, SQL Queries Bar on the left side of the search center
- Choose the contact or contacts from the search center you want to add to the Group

- Left-click your mouse, and drag to the Saved Search pane, highlighting the group to which you are adding the contacts.
- Release the mouse button on the selected Group. The Add Members to Group dialog box appears.
- In the Reference text box, type a value or select one from the F2 Lookup list.
- If you do not want to specify the Reference for the remainder of your current GoldMine session, select Do not show me again this message during this session (the above fields will be blank by default).
- Click OK. The contacts are added to the Group.

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This Slot Could Be Yours

Send Your Articles To

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and this slot could have your business information in it.

Our next deadline is November 1st for the December issue of The GoldMine Advisor.

Rush your articles along immediately.
Don't Delay